How Envirotech enhanced its billing process efficiency with Unanet

Motivation to Identify a New ERP Solution

Envirotech Engineering & Consulting identified a critical need for an advanced solution that would revolutionize its billing mechanism and expedite its end-of-month close. With a steadfast dedication to fulfilling its clients' expectations, the firm recognized a necessity to streamline after being unhappy with its legacy enterprise resource planning (ERP) solution. This led to the identification of Unanet as a potential catalyst for this much-needed transformation.

Over the previous two years, the firm has grown tremendously, doubling its number of employees. This rapid growth facilitated the need for faster and more efficient accounts payable (AP) and accounts receivable (AR) processes and approvals. With the firm looking to continue delivering high-quality work for its clients while supporting an ever-expanding team, it further underscored the urgency for a robust ERP solution capable of managing the increasing complexity of operations.

The Challenges

As it experienced near 100% growth, Envirotech grappled with some significant but not uncommon business challenges due to its legacy ERP, including:

- **Lengthy validation of expenditures.** According to Linda McCool, Envirotech's office manager for over 10 years, the previous billing workflow involved a much longer process than the firm's current one. "When we billed in the past, the AP journal would appear on the invoice review. We'd have to go in, dig through boxes, and find old invoices." What was initially feasible for Envirotech became harder to manage as the firm expanded. The firm saw a delay in closing its outstanding bills. "We were scanning after the check run," said Jacob Smith, Envirotech's accounting manager. "The AP invoices would never make it in until the entire workflow was complete."

ENVIROTECH ENGINEERING

Located in Enid, Oklahoma, Envirotech Engineering & Consulting, Inc. initially launched in 1992 as a humble two-person partnership. Since then, it has flourished into a comprehensive, full-service firm offering design engineering, environmental consulting, and geotechnical services. The reach of this firm is not limited to northwestern Oklahoma, but extends across the United States, serving both public and private clients. The firm's dedication towards client satisfaction is reflected in the fact that over 90% of the business is generated from repeat clients - a testament to the trust and reliability that Envirotech Engineering & Consulting, Inc. inspires.

- **AP processes marked by time-consuming, paper-based manual tasks and potential for data entry errors.** The majority of Envirotech's AP processes required manual actions, which necessitated the time and attention of a dedicated administrative assistant. Relying on paper-based processes increased the chances of errors occurring. It led to the team members working longer hours and performing less valuable work. Smith said that before going live with Unanet he would have to "enter information manually. I'd have to check all the vendor information to make sure it was correct." This became a significant obstacle as the company grew. It also wasted the valuable time of experts within the company like McCool, who had an extensive accounting background and had higher value work she could be delivering for the firm. "I had more I could be doing beyond simply scanning files for several hours," said McCool. The increased amount of time performing manual tasks hindered cash flow, which increased the firm's risk and made it more difficult to do business.

- **A need for greater controls.** As the company continued its rapid growth trajectory, it needed more controls in place. It required a way to introduce more internal controls to avoid delays and discrepancies that might threaten their operational productivity and financial stability.

The Solution: Unanet ERP AE

To overcome these challenges, Envirotech turned to Unanet's ERP AE for its comprehensive business solutions. Unanet ERP AE enabled them to instill the following:

- **Enhanced AP procedures.** "Previously, we would have had to go in and dig through boxes full of paper invoices," said McCool. "Now that it's attached to the purchase journal, our team see it right there. That saves a lot of back and forth. The more times you handle a piece of paper, the more chance there is it will get lost. So Unanet has helped us clean up our process where we scan on the front end rather than the back end." McCool added that with these readily available, paperless invoices in place, it makes the whole process easier on anyone needing to access invoices. "With the invoice already attached to the purchase journal, people can see it with a click of the button."

- **A more user-friendly ERP system.** Smith cited Unanet as being easier to use and navigate than Envirotech's legacy ERP provider, stating, "Overall, I'm happier with Unanet than I was with the old solution."

- **Streamlined document management.** By identifying a central location for all AP and AR documentation, the firm had an easier time accessing its data.

- **Enriched reporting capabilities, focusing specifically on transforming their billing processes.** After a brief implementation period, the firm's staff found itself able to generate reports with the billing information it needed.

The Approach

Envirotech's implementation involved a couple of critical changes to its workflow that, empowered by Unanet, helped the firm significantly overhaul its billing processes.

- **Scanning invoices at the beginning of the AP transaction and attaching them for approval.** "Now, our process is, when an invoice comes in, I scan it right then when I'm entering the AP transaction," said McCool. "Then I attach it to the transaction. It then goes to our accounting manager for our approval. He doesn't have to search through a stack of papers to ensure the invoice is coded correctly. He has all the documents he needs." This was a major upgrade over Envirotech's previous processes, where transactions were scanned on the back end.

- **Better internal coordination.** This approach involved both project managers and accounting staff in reviewing and approving invoices before they were integrated into the system, ensuring improved accuracy and efficiency.

The Impact

Envirotech's shift to Unanet brought remarkable benefits. The firm experienced a radical transformation in its operations, positioning itself for greater overall success with these observed impacts:

- **Enhanced efficiency and control over AP processes.** Transitioning from mostly paper to mostly digital processes helped streamline the approval process, creating a more efficient billing experience for the company. It helped the firm save time and effort and even helped them streamline its staffing as well. According to Smith, because of the new process aided by Unanet, Envirotech was able to "eliminate our staffing need on the back end." This helped the firm re-posture hours of ad-paper in general has been a huge win for us," said McCool. "We now email 90-95% of our invoices out, so we don't have to deal with paper as much anymore. That played a big role in increasing our efficiency." Additionally, these new capabilities have helped accounting and project teams feel more empowered and in control within their vendor relationships.

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>
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- **Sped up AP processes and approvals.** By not having to rely on outdated, paper-based processes, the firm can get faster approvals and get more time back in their day. It also gives them more visibility into and control over their cash flow.

- **Billing staff no longer had to rifle through papers to find the right documents.** The ability to give its staff billing documentation that was easily accessible and attached to the right projects made the task of finding the right invoices as simple as possible.

- **Substantially reduced time spent on both accounts payable and accounts receivable.** The organization was able to avoid extra administrative work due to the new process, with a 25% increase in overall efficiency for both its AP and AR processes. They spent less time tracking down critical documentation.

- **Accuracy in project-related invoices increased.** Less manual entry meant fewer errors. Automation helped the firm improve how quickly and effectively it could enter accurate information. Envirotech also has backup documentation in place in the event anything happens to its existing data.

Going forward, Envirotech continues to discuss the further automation of its AP and AR processes and incorporating 'pay when paid' processing. Smith also noted that attending Unanet's Champions Conference in 2023 helped him better understand Unanet and derive more value out of it. "Attending Champions was great," said Smith. "That was very educational."

Both Smith and McCool agreed that the ability to streamline business efficiency is a key part supporting Envirotech's ongoing growth. "As we grow, we have to capitalize on these additional opportunities for more efficiency," said Smith. "Unanet helps us save a tremendous amount of time, putting hours back into our days."

Unanet is a leading provider of project-based ERP and CRM solutions purpose-built for government contractors, architecture, engineering, construction, and professional services. More than 3,700 project-driven organizations depend on Unanet to turn their information into actionable insights, drive better decision-making, maintain regulatory compliance, and accelerate business growth. All backed by a people-centered team