

INVOICE SOLUTION  
**metabo**



**Challenge:**

- » Elimination of media disruptions in the processing of incoming invoices
- » Sophisticated authorization concepts and workflows

**Solution:**

- » Invoice verification and approval performed completely in SAP, also for non-SAP users via web portal
- » Process optimizations

**Benefits:**

- » Accelerated approval process through digital workflow depending on the invoice type
- » Facilitated account assignment through system proposals in SAP and the web portal
- » Transparency by uniform status monitoring



## Powerful processing of incoming invoices

»When it matters«: metabo's core thought is just as perceptible in the high-end power tools as it is in the entire workforce. Day after day, metabo products prove their performance: in professional use - under the toughest conditions - worldwide.

In order to work even more proficiently, use time more effectively, optimize processes and gain transparency, metabo decided to automate the processing of incoming invoices.

With AFI Invoice, the financial accounting department is optimally equipped to process more than 50,000 vendor invoices annually in a resource-saving manner »when it matters«.

In order to optimally support and control the business processes of the group of companies, metabo has been using SAP as its central ERP system since the

mid-1990s. In addition, all documents created in the processes with obligation to preserve records are stored in the electronic archive in an audit-proof manner.

### Initial situation

Apart from ERP data, all office documents, and e-mails as well as the CAD data of the engineers from product development, there are also a lot of documents that are not conveniently available in digital form for the archive, but instead cause a massive media disruption as paper.

First and foremost, incoming invoices are such a source of paper, for the processing of which a qualified specialist department must constantly perform time-consuming typing work in order to overcome the aforementioned break between paper and online data.

Imagine a craftsman first having to tap a hole precisely into a board by hand with a hammer and a pointing iron before being able to turn in a screw with a cordless screwdriver. This was, of course, an intolerable state of affairs for metabo.

### Provider differentiation

Peter Schauflinger, Team Leader IT Finance, therefore set out to find a suitable provider for a solution to automate the processing of incoming invoices. The choice was not easy, especially since there are many providers on the market who all have different background knowledge and even more diverse approaches.

In addition to providers of software for text recognition in scanned documents, there are also traditional archive manufacturers, EDI experts and

SAP specialists. After a preliminary screening, the project team narrowed down to the market leaders that could demonstrate many years of experience and credible references and stand up to clear performance criteria.

In addition to deep SAP integration, precise approval workflows and authorization concepts were also required. Based on a functional specification prepared by metabo, the favored providers were already predefined.

## **E**xcellent in the set requirements

In the end, AFI Invoice, a solution from AFI Solutions, stood out as the »best of breed«: no market competitor managed to meet the required performance so well. The recognition solution reads even difficult documents flawlessly and can map the required workflows within SAP using the proven components and also outside of SAP via the web portal. It goes without saying that both harmonize with the archive.



In addition to the technical requirements, AFI's complete overall concept, such as integrated supplier communication or the processing of electronic invoices, was also convincing.

## **I**ncrease in productivity

The expected increase in productivity in the invoice verification process has fully materialized after the familiarization phase. Incoming invoices are now scanned on a daily basis, checked electronically, and put on the approval path fully automatically. If possible, they are also posted immediately and automatically. Where a missing goods receipt prevents posting, an SAP job checks it automatically every day. The quality of the recognized invoice data is high and manual post-processing is minimal.

Approvers and factual verifiers are now linked in the process via the SAP workflow. In addition to financial accounting and purchasing, hundreds of users work with AFI Invoice's web interface.

*„AFI's web portal has proven to be very stable and, at the same time, extremely user-friendly with low operating costs,“* says Peter Schauflinger, explaining its popularity.

## **E**lectronic note: the new »Post-it«

Before the introduction of the software AFI Invoice, attempts were made to reach the contact person in the company by telephone to clarify an issue. Often, handwritten notes that were difficult to decipher were also attached to the paper invoice with a »Post-it«.

Today, an electronic note is created in the workflow, which is firmly linked to the transaction and which securely reaches the recipient. This is because the electronic note cannot be lost, unlike the affixed »Post-it“. All in all, the solution is another important component of an optimally set-up working environment at metabo.

## **T**ransparency and control

In addition to the aspect of optimization, an important project goal for metabo was to transfer the control of the invoice verification process centrally to the financial accounting department.

With the AFI Invoice Monitor, the specialist department is able to determine the current processor of an invoice and to monitor payment deadlines for the first time.





The flexible and easily customizable views in the Monitor make it possible to sort transactions in a targeted manner without any programming effort. This allows the accounting department to focus on special cases. Verifiers that are behind schedule are reminded of their backlog of work with an automatic e-mail.

*„The monitor is an important tool for accounting with high user acceptance for filtering transactions based on status and identifying problems at an early stage,“* summarizes the team leader.

### **C**ompany-specific verification assistant

The sophisticated on-screen display of the AFI Invoice Center, where invoice processing runs, allows users to access all decision-relevant information, such as electronic routing or current order developments. The verification assistant, which is active in the background, informs the user about incomplete entries.

*„The verification assistant, which can be customized to the specific requirements of the company, provides the user with task-related information and thereby prevents incorrect entries or tedious searching,“* emphasizes Mr. Vetter, Head of Financial Accounting.

*„If metabo invoices are to be approved without purchase order reference, the system checks whether the necessary CO account assignment has been entered. This prevents multiple passes of invoices.“*

### **P**rocess support by AFI

After the successful introduction of AFI Invoice, the focus is on analyzing further optimizations. metabo is happy to revert to AFI's experience in this regard. In cooperation, new approaches are developed for even better processes in invoicing. Regardless of whether this involves the increased use of EDI invoices or the best possible handling of scheduling agreements.

*„AFI is always open to requests so that we can provide our users with the best solution - just as metabo always enables its customers to work optimally,“* Peter Schauflinger concludes.

**metabo**

metabo develops and produces power tools for the professional building trade and is one of the world's leading manufacturers. The handheld power tools as well as semi-stationary and stationary wood processing machines stand for power, quality, competence, and reliability. Performance, safety, and durability are always paired with innovative technology and ergonomics.

In 1923, Albrecht Schnizler built the first handheld drilling machine. Today, the traditional company employs nearly 2,000 persons, 1,200 of them in Nürtingen, Germany. 25 subsidiaries and more than 100 agencies ensure that metabo's premium solutions can be found in almost every country.

[www.metabo.com](http://www.metabo.com)

**AFI**  
SOLUTIONS

AFI Solutions GmbH is a leading solution provider for the digitization and optimization of document processes around SAP. The solutions cover the entire purchase-to-pay and order-to-cash process.

AFI is the only software manufacturer on the market that offers everything from a single source: With the RedPaperCenter as a managed service, companies can easily outsource the digitization of a wide variety of paper documents. In process optimization, AFI scores with SAP-integrated software solutions. The cloud-based DocumentHub as software as a service (= SaaS) completes the unique product portfolio.

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