kwiktag
by enChoice

Case Study

KwikTag & OSIS

OSIS

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OSIS is a full-service Health Center Controlled Network and non-profit organization. OSIS provides NextGen® Healthcare technology assistance to Community Health Centers around the country and helps them unlock the potential of technology to positively advance the modern age of community healthcare.

Serves 130+ Community
Health Centers

Locations in
30+ States

The Challenge

Like many companies, OSIS was overwhelmed by manual, paper-based processes and lack of visibility into their invoices. They began their journey to automation in 2016 with the KwikTag AP automation solution for Dynamics GP – KwikPayables. With KwikPayables, they were able to reduce their paper usage by more than 90% and their invoice processing costs by 80%.

After moving to Dynamics 365 Business Central in late 2020, they had to start all over again and address the same visibility and efficiency challenges. This time, they also experienced the added challenges of many members of their team working from home, which meant their process now took place in multiple locations. In addition, they needed an OCR solution they could count on to work accurately to reduce manual data entry, as much as possible.

OSIS AP Automation Goals

Invoice approvals that were seamless and easy-to-manage for the AP team
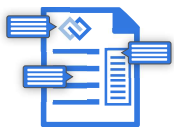
Intelligent OCR that did not require extensive setup or templates

Scalable solution to support their future business growth

Simple, lightweight connection to Business Central

Approach and Implementation

With these goals in mind, OSIS searched for a solution that would work for them. In December of 2020, they began implementation for an invoice workflow with OCR solution that never fully worked for them. In May of 2021, they tried again with another solution, and that project failed as the product did not meet their needs.

Again, in October 2021, they started implementation for a solution they thought was going to work for them. Unfortunately, after just 6 months, they received notice that their solution would be discontinued by the provider.

At this point, the OSIS finance team came back to KwikTag and asked if they had an AP automation solution ready for Business Central. Their timing was perfect.
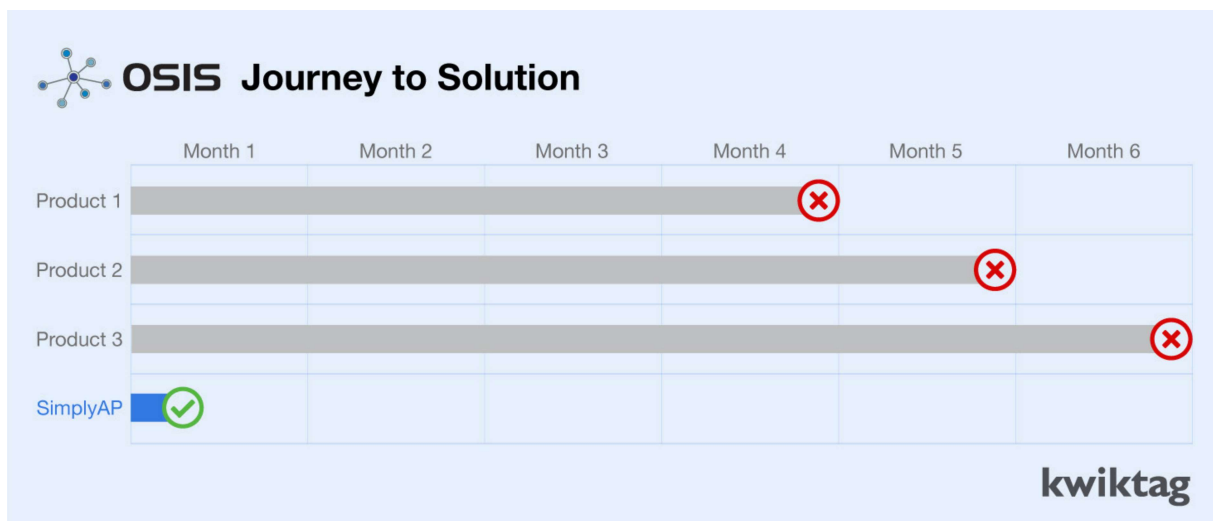
Within just a few weeks of their SimplyAP demo, OSIS started testing invoices.

After the initial test phase, OSIS was live and processing invoices with SimplyAP within a few weeks, and the actual implementation time took just a few hours. They later recounted that they were overjoyed that the implementation was so easy and "everything just worked!"

> *"When we did the test, I uploaded an invoice. SimplyAP sent it to my approver for approval. It was approved. I went into Business Central. The invoice is already there, and every single field was filled out the exact way we wanted it."*
>
> *- Shawn Peterson, Senior Accountant, OSIS*

The Solution

SimplyAP is certified by Microsoft for Business Central and available in the AppSource. It can be set up in three simple steps: create an account online, connect to Business Central, and assign users and their approval limits. Because SimplyAP is so easy to set up and maintain, OSIS was able to add their users, set approval and variance thresholds, and start processing invoices within a couple of hours.

Since implementing SimplyAP, OSIS has saved more than 50% of their time with straight-through invoice processing and automatic transaction creation. Their entire invoice process now only takes a couple of hours instead of days or weeks.

SimplyAP provides a completely touchless invoice process with AI-powered OCR, automatic P.O. matching, and transaction creation in Business Central. It offers complete visibility into invoice status and audit trail with everything in one system, that is just a click away with a link in Business Central.