

# Nonprofit Streamlines Accounts Payable Processes through Automation to Increase Productivity and Reduce Costs

*Volunteers of America Greater New Orleans harnessed Upland Software's cloud-based workflow automation and document management solution, FileBound, to simplify Accounts Payable processes, eliminate the paper trail, and grant staff more time to help the people they serve.*

## Business Needs

Volunteers of America Greater New Orleans was growing quickly, and the burden on their accounts payable clerk was increasing. Other employees were pitching in to help ease the workload, which meant time and talent lost on everyday tasks. This led them to look for a solution to better manage and streamline their accounts payable processes, as well as eliminate unnecessary paper documents.

## The Solution

Volunteers of America Greater New Orleans implemented FileBound to improve and standardize their accounting practices to ease the burden of labor from existing staff, as well as initiate the move to paperless storage.

Success with Accounts Payable (AP) inspired this nonprofit to apply FileBound solutions to other areas. For Contract Management, FileBound will improve the review and approvals cycle and install renewal reminders. For Human Resources, FileBound will digitize paper processes like employee requisitions, change requests, and terminations. By standardizing and automating these duties, staff can focus on more value-centric work, rather than manual tasks.

## Benefits

- Streamlined AP process, freeing up staff to continue their mission of supporting over 55,000 children, families, seniors, individuals and veterans in south Louisiana.
- Automation eliminated the need to hire additional AP staff (nearly \$40k in savings), freeing up funds to create opportunities for community members.
- AP saw a drastic reduction in invoice processing time, paper trail problems, and costs associated with check filing, as well as physical print and copy materials.
- Yearly audit procedures were greatly simplified, as copies of POs, invoices, and checks were securely stored and easily accessible for auditors.
- Costs regarding filing cabinets and paper storage are now obsolete, and will be phased out as document retention mandates expire.
- The nonprofit continues to uncover additional business processes to automate, including Contract Management and Human Resource initiatives, which helps the organization on its mission to reach more individuals.



Volunteers of America Greater New Orleans helps the most vulnerable and under-served people in southern Louisiana achieve their full potential. Common areas of focus include promoting self-sufficiency for the homeless and for others overcoming personal crises, caring for the elderly and disabled while fostering their independence, and supporting positive development for troubled and at-risk children and youth.

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| <b>INDUSTRY:</b> | Nonprofit                                  |
| <b>LOCATION:</b> | New Orleans, LA                            |
| <b>WEBSITE:</b>  | <a href="http://voagno.org">voagno.org</a> |

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*"FileBound's workflow and document management solutions empowered us to be able to unburden our staff regarding those manual time consuming duties that filled their days. Now, our employees can spend more time on tasks that matter most for the community we serve. After all, we're here to help people — not to focus on paperwork."*

— Germaine Gross, Vice President of Finance & Administrative Services, Volunteers of America Greater New Orleans

## Automation Provides Relief, Savings

For many nonprofits, success depends on a dedicated, modestly sized staff to fulfill daily tasks as well as further the mission of the organization. At Volunteers of America Greater New Orleans, the sole accounts payable clerk was having difficulty adjusting to a growing demand for services.

One overarching issue was the existing accounts payable system was outdated and inefficient. The AP professional was bogged down with manual data entry, often requiring other staff to pitch in as much as 50 percent of their time to help.

With multiple offices, another problem that continued to arise for this small AP department was missing invoices, or invoices being received at the wrong location and routed incorrectly. Thus, they were experiencing recurring late fees, and time was lost tracking down delinquent paperwork through email threads and via phone.

By integrating FileBound into their existing accounting procedures, Volunteers of America Greater New Orleans replaced outdated processes and improved efficiency. Productivity has increased, and costs formerly associated with late fees and staff inefficiencies are now rerouted to funnel back and enhance the lives of the people and community they serve.

*“Sometimes you attend a new software demonstration, but once it's implemented you discover that the demo is nothing like reality. You aren't getting what was sold to you. FileBound has delivered on our high expectations with their product.”*

— **Germaine Gross, Vice President of Finance & Administrative Services, Volunteers of America Greater New Orleans**

### About FileBound

Upland FileBound delivers document and workflow automation applications that improve the operation of any organization by connecting users with the information they need to work more efficiently and effectively. With FileBound, customers can build automated workflow processes and centrally manage documents to improve compliance, collaboration and access to information.

## Security and Ease in the Cloud, and the Move to Paperless

FileBound's cloud-based workflow automation and document management solution also helped Volunteers of America Greater New Orleans during an annual audit, and staff experienced collective relief as they completed the audit with ease, by reducing the time spent tracking down documentation. “We were able to quickly pull all invoices, check copies and other documentation to get everything to auditors in record time,” says Germaine Gross, Vice President of Finance & Administrative Services, Volunteers of American Greater New Orleans. Auditors were also given temporary permissions to access the FileBound clipboard so they could easily access and view documentation, speeding the audit process along greatly.

The benefits of cloud-based services also adhere to the nonprofit's commitment to going paperless, while creating a more automated and secure environment. This strategic move is not only cost effective, but is more ecologically sound, which aligns with their larger community-oriented purpose. At this point, paper storage and file cabinets have become obsolete, which have freed up office space rather than demanding attention, according to Gross.

“FileBound was key for us in moving to a more automated, paperless environment,” remarked Gross. “FileBound is robust and reasonably priced, and they have delivered the results they presented from day one.”

### About Upland

Upland Software (Nasdaq: UPLD) is an enterprise cloud software company that provides award-winning solutions in Project and IT Management, Workflow Automation and Digital Engagement. Our goal is 100% customer success, achieved through a unified operating platform that delivers the performance, scalability and support that over 2,500 Upland customers worldwide demand every day. Learn more at [uplandsoftware.com](http://uplandsoftware.com).