Innovation key to Planet Organic success

Organic food and IT automation may not be classic bedfellows but together they are driving efficiencies that have far-reaching effects.

The Customer

Planet Organic founder Renee Elliot is no stranger to firsts. Since launching her first London store to sell the widest range of quality organic food, the business has become the first retailer to sell Soil Association certified fish and meat and the first to bring the organic juice bar and wheatgrass shots to the UK.
But as every great business owner knows, success requires more than great ideas. It's as much about having the right IT processes and procedures in place.
For Planet Organic, this meant finding a better way to manage its accounts payable processes, which were hindered by manual, labour-intensive practices.

Growing challenges

As the Planet Organic business has grown, so has the number of PDF, paper and EDI invoices it receives. In order to process its multi-language, multi-currency invoices across departments and locations more efficiently, Planet Organic sought to make the following changes:

- Reduce manual entry
- Go paperless and end invoice printing
- Store readable versions of EDI invoices
- Become more compliant and transparent
- Reduce associated operational costs
- Create an EDM and workflow platform for future growth.

- **Increasing number of individual suppliers**

- **Up to 6,000 monthly supplier invoices**

- **500 credit notes**

Invoice Management Solution

Planet Organic chose Documation's Invoice Management Solution (IMS) as its 'first choice' to automate and streamline AP processes. Built on the Enable platform, Planet Organic now uses IMS to connect its finance and other teams with the processes and information they need to help the company:

- **Improve productivity**

Planet Organic's IMS uses email management technology to auto-capture electronic invoices and credit notes in PDF and EDI. Paper invoices can also be electronically captured and scanned using photocopiers and multi-function devices. Optical Character Technology (OCR) extracts and validates invoice header and line data and creates an OCR audit report. Duplicate invoices and other exceptions are flagged up, eliminating costly mistakes.

For more information about any of the solutions provided by Documation, please get in touch

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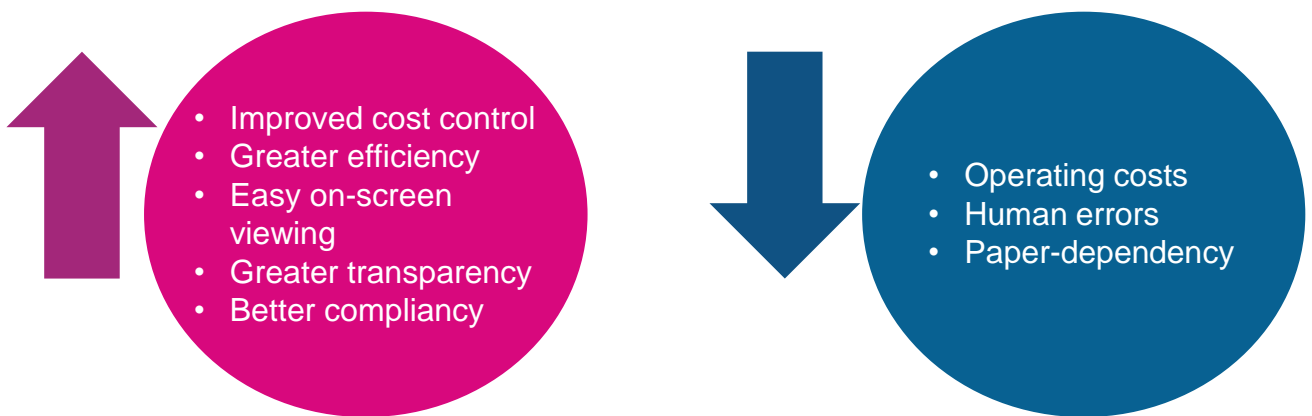# Innovation key to Planet Organic success

- **Gain better control**

IMS enables documents to be accessed 24/7 from anywhere in the business, putting the user in control. Key features include work queue profiles of all work in the system, with priorities labelled according to individual invoice, vendor or group. Captured and stored invoices can be retrieved simply using browser-based technology from IMS or Planet Organic's finance system Sage 200, making it a powerful monitoring, audit and reporting tool.

- **Make cost savings**

IMS has enabled Planet Organic to make significant cost savings while boosting efficiency. Introducing automation means the risk of human error has also been reduced. Other hidden costs such as postage printing and copying have been lowered and AP staff are no longer dealing with queries with IMS allowing business user's self-service of their invoices. Significant cost and time reductions in data entry have been achieved.

The result

65% match rate*

- Improved cost control
- Greater efficiency
- Easy on-screen viewing
- Greater transparency
- Better compliancy

- Operating costs
- Human errors
- Paper-dependency

* header and line data extraction and match exception processing

Looking forward

An Electronic Document Management platform for future growth with the business is planned.