



# How Roofers Mart Transformed AP Workflow—Saving \$70K+ and 720+ Hours Annually

## AT A GLANCE

### CHALLENGES

- Lost invoices & missed payment discounts
- Slow, manual approvals
- Time-consuming three-way matching process.
- Paper overload
- Difficult audits

### BENEFITS

- \$70K+ recovered in early-payment discounts
- 720+ hours saved annually
- Automatic invoice matching & approvals
- Zero paper invoices
- Stronger vendor relationships

## FROM PAPER CHAOS TO SMOOTH AP AUTOMATION

Roofers Mart, a leading supplier of roofing and exterior building materials, was drowning in paper. Their manual AP process was slow, error-prone, and costly, causing headaches for both the AP team and purchasing managers across their eight locations.

- **Invoices arrived via mail and email**, requiring manual printing, scanning, and routing.
- **Lost invoices and missed payment discounts** frustrated vendors and internal teams.
- **Delays in approvals** meant AP clerks were constantly chasing down managers for responses.
- **Filing cabinets and storage rooms overflowed** with documents, making audits and retrievals a nightmare.

Tina Boyd, IT Manager at Roofers Mart, had seen the company grow rapidly. But she also saw how outdated processes were holding them back. Something had to change.



**“We spent more time fixing AP issues than actually improving the department”**

**Tina Boyd**, IT Manager at Roofers Mart

## THE BREAKING POINT: WHEN CREDIT WAS ON THE LINE

For years, the AP team worked around inefficiencies. But when vendors started cutting off Roofers Mart's credit due to late payments, leadership had no choice but to act.

**The financial impact was alarming:**

**\$81,000 lost in missed payment discounts in one year.**

**Vendors threatened to halt shipments, delaying projects and frustrating purchasing managers.**

**Hundreds of wasted hours chasing invoices and fixing errors.**

It was clear: Roofers Mart needed AP automation—fast.



## THE DECISION TO GO DIGITAL WITH WORLDVIEW AP AUTOMATION

Roofers Mart had already been using DMSi Agility as their ERP, so finding an AP solution that integrated smoothly was key. After researching options, they turned to WorldView AP Automation for its deep integration with Agility and ability to digitize and automate the entire AP workflow.

**The new system would:**



### **Eliminate paper**

by processing invoices digitally.



### **Automate approvals**

by routing invoices to the right people without back-and-forth emails.



### **Match invoices automatically**

to POs and receiving records, reducing manual checks.



### **Give auditors instant digital access**

to invoices, cutting down on retrieval time.



### **Ensure on-time payments**

to preserve vendor relationships and maximize discounts.

## IMPLEMENTATION: CLEANING UP & SETTING THE STAGE

Rolling out AP automation wasn't just about flipping a switch—it required cleaning up existing processes and ensuring data accuracy.

### Vendor records were updated

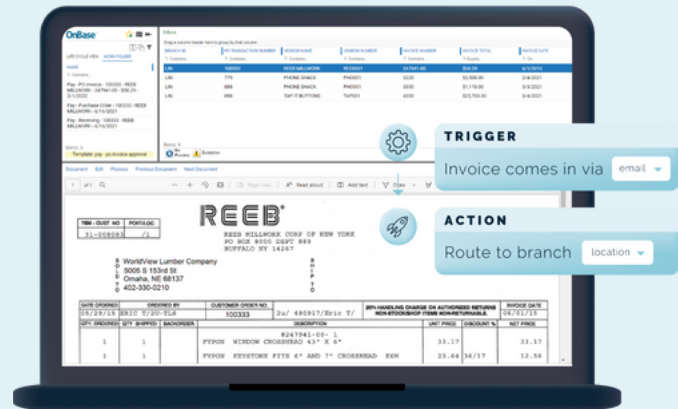
Duplicate records, missing phone numbers, and outdated addresses were corrected.

### Workflows were customized

AP approvals were structured based on invoice type and location.

### Dashboards were configured

Giving AP and purchasing managers real-time visibility into invoice status.



**“There was some upfront work, but it was 100% worth it. Once everything was set, we saw immediate improvements.”**

Tina Boyd, IT Manager at Roofers Mart

## THE ROI: HARD SAVINGS & MASSIVE EFFICIENCY GAINS

In just one year, the impact was undeniable:

### **\$70,000+ Recovered in Early-Payment Discounts— A 90%+ Reduction in Missed Savings**

Before automation, invoices often got lost or delayed in the approval process. As a result, Roofers Mart missed out on thousands in early-payment discounts that vendors offered for on-time payments. With the new system:

- Invoices are **automatically routed** to the right approvers, reducing bottlenecks.
- The system **tracks due dates and discount opportunities**, ensuring payments are scheduled strategically.
- Vendors **no longer have to chase down payments**, strengthening supplier relationships.



**The result? A massive  
\$70K+ boost to the bottom  
line in just one year.**

## 720+ Hours Saved Annually—AP and Purchasing Teams Now Focus on High-Value Work

Before automation, AP clerks and purchasing managers spent hours every day printing, scanning, and manually matching invoices to POs and receiving records. If a discrepancy arose, it triggered a long email chain or a phone call, further delaying approvals.

Now, with AP automation:

- The system **auto-matches invoices to purchase orders and receiving records**, flagging only the exceptions.
- **Approvers get instant notifications**, and approvals happen with a single click.
- **No more hunting for missing paperwork**—every document is stored digitally and accessible in seconds.



**This saved 720+ hours per year—the equivalent of nearly an entire month of work across the AP team!**

## Zero Paper Invoices—Eliminating Storage Costs and Time Wasted Retrieving Documents

Roofers Mart used to store thousands of invoices in filing cabinets and banker boxes. This not only took up valuable office space but also made document retrieval during audits and vendor disputes a slow, painful process. With WorldView AP Automation:

- **Invoices are now 100% digital**, eliminating printing and storage costs.
- **Audits are effortless**—instead of digging through physical files, auditors can access documents instantly with a secure login.
- **Remote access is now possible**—employees can retrieve invoices from anywhere, making work-from-home or multi-location operations easy.



**By going fully digital, Roofers Mart eliminated filing cabinets, freed up space, and cut administrative overhead.**

## AP Reconciliation Became Effortless—Errors and Manual Corrections Dropped Dramatically

Before automation, AP reconciliation was a time-consuming and error-prone process. With multiple employees manually entering invoices, typos, duplicate payments, and mismatched records were common.

Now, thanks to automation:

- **The system pulls invoice data directly from vendor emails**, reducing manual data entry errors.
- **Duplicate payments are automatically flagged**, preventing costly overpayments.
- **End-of-month and year-end closing are faster**—AP clerks can reconcile accounts in a fraction of the time.



**As a result, AP errors have dropped significantly, and reconciliation now happens with minimal manual intervention.**

## Employee Morale Skyrocketed—Less Frustration, More Productivity

Before automation, AP clerks were buried in paperwork, purchasing managers spent hours chasing approvals, and accounting teams dreaded month-end reconciliation.

Now, thanks to automation:

- **AP clerks handle fewer tedious tasks**, focusing on higher-value work.
- **Managers only review exceptions**, cutting approval time dramatically.
- **Fewer errors, less stress, and smoother workflows** make work easier for everyone.



**With frustration gone, employees are happier, more efficient, and free to focus on what really matters.**

**“By the end of month two, the same people who used to complain about invoice approvals were calling me, saying, ‘This is amazing. Why didn’t we do this sooner?’”**

Tina Boyd, IT Manager at Roofers Mart

## BEYOND AP: A FOUNDATION FOR FUTURE AUTOMATION

With AP running smoothly, Roofers Mart **now** has its sights on automating sales order processing.

**“The success of AP automation opened our eyes to what else we can improve. We’re looking at how to automate sales orders next.”**

**Tina Boyd**, IT Manager  
at Roofers Mart

## FINAL TAKEAWAY: IF YOU'RE STUCK IN MANUAL AP, CHANGE IS WORTH IT

For businesses hesitant to switch from manual AP processes, Tina's advice is clear:



### Quantify your costs

know how much time and money you're wasting.



### Talk numbers with leadership

highlight savings on discounts, labor, and storage.



### Don't wait for a crisis

vendors cutting off credit forced Roofers Mart's hand, but it doesn't have to get that bad.

**“Switching to AP automation wasn't just an upgrade—it was a transformation. It's one of the best decisions we've made.”**

**Tina Boyd**, IT Manager at Roofers Mart

**READY TO EXPLORE AP AUTOMATION? LET'S TALK ROI.  
LEARN MORE WITH WORLDVIEW.**



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