

# Streamlining Mailroom Activities for Efficient Invoice Management

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## Introduction



A leading company sought assistance from Corient Business Solutions to streamline its mailroom operations. The client was facing challenges in handling vendor invoices due to inadequate resources and a lack of proper systems in place. As a result, they were struggling to start new projects on time, which led to delays and inefficiencies in their invoice management process.

## The Problem?

The client lacked skilled resources to effectively manage mailroom activities, particularly handling hard copy vendor invoices. This included tasks such as receiving, scanning, and archiving documents. Additionally, there were no standard operating procedures (SOPs) for managing these activities, which caused further operational issues.

**The best accountants  
are the architects of  
financial legacies.**

– Laura Anderson

## Corient Solution

- Corient deployed a dedicated resource trained in handling the full workflow of vendor invoices, from receipt through scanning to archival.

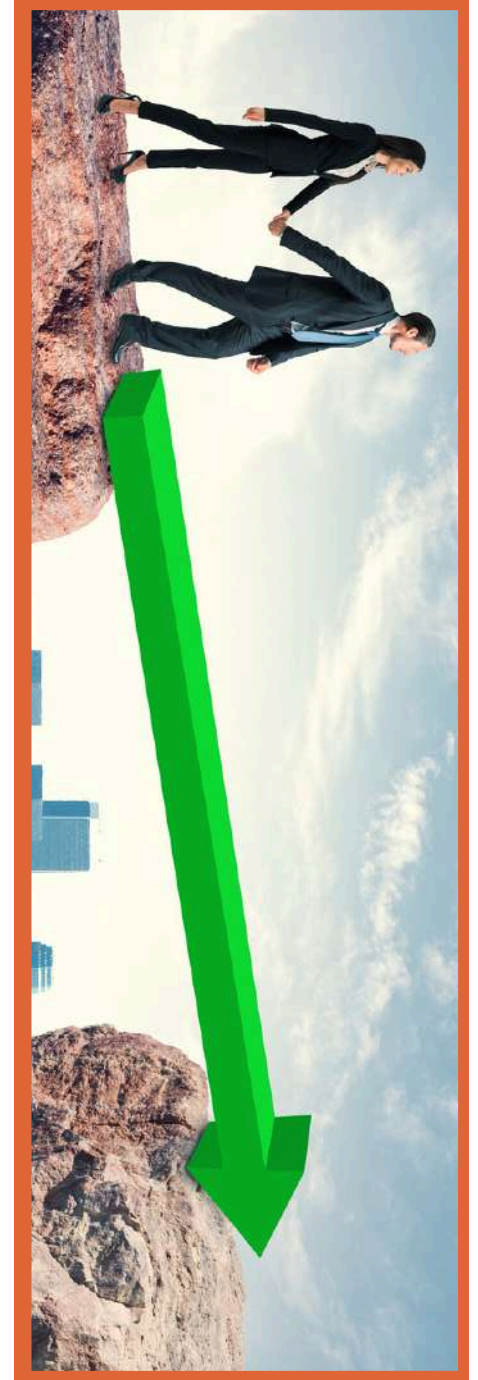
- A clear and structured mailroom workflow was established, with invoices tracked from the point of receipt via courier to their eventual archival for storage.
- A dashboard was prepared to help trace the daily received invoices, ensuring no delays or missing invoices.
- Each invoice was assigned a barcode, allowing for easy tracking within the system.

## Challenges Faced

- The absence of SOPs for invoice handling at the client's end made it difficult to establish a clear process.
- The client's server-based portal for uploading scanned invoices lacked proper vendor and user details, leading to invoices being held in queries and causing delays in processing.

## Overcoming the Challenges

- Corient obtained the SOPs from the client's previous service provider and adapted the workflow to follow these guidelines.
- Discussions with the client's management team resulted in the updating of vendor and user details in the application, which resolved the issues of invoices being stalled in queries.



“  
**Behind every good  
business is a great  
accountant.**

– Anonymous  
”

## Result Achieved



- The mailroom workflow was effectively understood and implemented, leading to the processing of 300 to 350 invoices daily within the agreed timeline.
- The barcode system enabled easy tracking of invoices both within the client's app and the physical hard copies.
- The client was able to maintain better control over their invoice management process and ensure timely payments.



## Conclusion

Corient's solution streamlined the client's mailroom processes, reducing time spent on resolving queries and enabling on-time vendor payments. By implementing a barcode tracking system and following a structured workflow, the client gained greater visibility and efficiency in their invoice management, ultimately enhancing their operational performance.



**The road to success and the road to failure  
are almost exactly the same.**

– Colin R. Davis

