



Net@Work

BASS ENERGY SERVICES CASE STUDY BUILT ON SAGE 100 AND DOCLINK

BACKGROUND

Bass Energy Services provides customized rental and service solutions for the oil & gas industry. Based in Waskom, TX, they provide a wide variety of heavy rental equipment and services from multiple locations in Texas. Their team spends a great deal of time at their customers' well sites, so it's important for them to have a business management solution that accommodates their mobility needs - any device, anywhere. This requirement includes a paperless document management system that performs well from wherever they are.

THE CHALLENGE

Bass Energy had been working with a paperless document management system that "had its quirks", according to Timothy Crain, Bass Energy CFO. The incumbent system needed to be used by logging into a computer, so access was an issue. Bass team members needed an end-to-end automated business management system to accommodate order processing, invoicing, expense management that would support them while in the field so that they could fulfill customer needs quickly. Their document management system required a great deal of manual entry, which could introduce errors into the system. The alternative was for teammates to wait until they were back behind their desks - sometimes a considerable amount of time which then resulted in delays to fulfilling customer requirements and executing critical business processes. Clearly the system wasn't meeting the needs of the business, so it was time for a change. In addition, Bass had success with their Sage 100 accounting and business management system, so the new paperless management system had to integrate with Sage.

Because of their status as a trusted Sage partner and the flexible integration options that would allow remote access, Bass selected DocLink to fill their needs for paperless document management, implementing DocLink Document Management System (DMS) and DocAlpha Optical Character Recognition (OCR).

Challenges

- Existing document management system wasn't meeting the needs of the business
- Approvals for PO's, invoices, expenses were a bottleneck
- Bass had requirements specific to their industry that were not being met
- Mobility and "work anywhere" requirements were not being met

Solutions

- DocLink Document Management System (DMS) and DocAlpha Optical Character Recognition (OCR)
- Update to Sage 100 for Accounts Payable with substantial process automation
- Complete Notifications/Approvals process for oil field workers to action/approve from remote locations via Mobile app (cell) and fully secured login via internet
- Complete upgrade and migration from the legacy system by Net at Work
- Customized Sage 100 screens for the needs of this Oil & Gas company

Benefits

- Access from an app-based system, and integration with email resulted in better remote access and the ability to both submit and approve orders while remote, accelerating the time to fully execute transactions. Typical speed to approval was reduced from 7 days to 1 day.
- Automation and OCR lessened errors and accelerated the speed of data entry with the reduced need for hand typing
- Enhanced security and full audit control resulted in a more secure overall system
- Automations resulted in much faster transaction execution with less opportunity for human error.
- Customized industry-specific screens reduced workarounds

Bass has been a long-standing Sage customer, so in evaluating their document management solutions, realized they could further streamline their operations by extending the automation of within the Sage 100 system and including customizations specific to the energy industry. Their overall goal was to improve efficiency and ensure transactions were processed more quickly in a secure manner.

Bass subsequently needed a partner to guide them through all these system changes. They selected Net at Work to assist them in their implementation of DocLink in parallel with customizations and an upgrade of their Sage 100 system because of their deep technical expertise with Sage, broad experience base, and scale.

Since Net at Work's technical consulting staff is so robust, Bass was confident they could get the support they needed - and in the time frame they needed it to be accomplished.



MOBILITY AND IMMEDIATE ACCESS ARE CRITICAL TO THE BUSINESS

The nature of Bass' business requires that employees spend a great deal of time at their customers' well sites - often in remote locations, which can translate to poor cellular service. The Bass team were working with an approval process and paperless management system that required a computer with a robust internet connection, not the handheld devices that the Bass team used in the field. The tablets and smartphones that the team relied on every day didn't work well with the systems Bass had in place. As a result, P.O.'s, invoices, and expenses didn't move through the Bass processes as quickly as they needed to. The team needed to be able to enter orders, and sometimes paper copies of purchase orders, into the Sage financial management system in order to get those orders processed.

With the old system, this just wasn't possible without being in the office and logging on to a computer, so time-critical orders often experienced delays, resulting in significant costs to Bass customers. With the new system, orders can be processed from the field, and approvals executed within minutes through email notifications, ensuring that

Bass can quickly fulfill their customers' needs.

SOLVED BY DOCLINK AND SAGE.

The web interface that DocLink offers users is tremendously important to Bass. Because their system allows the user to approve right from the web app, with no more stringent cellular requirements than email retrieval, Bass employees now had a reliable way to approve transactions from the field.

Integration to Bass' Sage 100 system was an important selection criteria. "We've been a Sage customer since 2009. We've always been satisfied with Sage, so we wanted a paperless system that would work with our Sage system," explains Crain. "We use DocLink for the routing of invoices and purchase orders and storing of those items and checks. When we scan our checks in, it links everything together, so that's brought us some efficiencies," Crain elaborates.

The tight integration with Sage 100 has been a real benefit to Bass Energy. Because processes from DocLink and OCR can be tightly coupled to Sage 100, Bass can take advantage of extensive automations built for them. These automations are all customizations of the Sage 100 system and have brought tremendous efficiency to Bass by minimizing the manual steps for their operations.

“ We've been a Sage customer since 2009. We've always been satisfied with Sage, so our solution had to work with Sage. ”

AUTOMATION AND CUSTOMIZATIONS BUILT BY NET AT WORK

Net at Work worked with Bass to implement the automation improvements they needed- all of which have contributed to better system efficiency. These, along with OCR have lessened errors and accelerated the speed of data entry with a reduced need for hand typing. Automation improvements have virtually eliminated the manual data entry previously required, resulting in a considerable time savings for the AP team.

Another customization Net at Work built for Bass in the DocLink system was a process to check for duplicate records. It's not uncommon for suppliers and customers to send multiple copies of either an invoice or purchase order. Problems with duplication arise if all

Improvements Included

- Automated Routing and invoice escalation for Approval
- Automated Invoice integrated directly with Sage 100:
 - Imports invoices into Sage on scheduled timer
 - Automated Batch selector for month-end close
 - Customized Sage 100 screens pertinent to industry
 - Customized DocLINK Distribution Stamp which auto-populates the Sage 100 PO screen
- Auto-population of the tax schedule, class and trigger Invoice Due Date based on Terms for Vendor for documents originating with DocAlpha OCR

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“ Overall it's a better system than the one we had. ”

copies of these records are entered into the system. Net at Work built a process to check for duplicate records within the DocLink system prior to upload into Sage, minimizing the need for error correction and manual intervention.

Underpinning the customization for Bass was an upgrade to the most current version of Sage 100. Net at Work executed the full upgrade and migrated all the documents from the legacy system to the current Bass-Sage 100 implementation.

ENJOYING THE BENEFITS OF A MORE EFFICIENT SYSTEM

Crain and the whole Bass team are satisfied with their new system, and process automation has been a foundational element of that system. Through the automation and the better access capabilities of DocLink, they have been able to reduce their typical speed to approval from 3-7 days down to 1 day or same-day approval. Both automation and the OCR system have reduced errors and accelerated data entry because of the reduced need for hand typing. As well, enhanced security and full audit control have resulted in a more secure overall system.

Tim Crain affirms, "Overall it's a lot better solution than we had before. No doubt." No doubt, indeed!

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