

**INVU:**

# Metrus

## *Automated Accounts Payable*

London based property advisors, Metrus, chose Invu Accounts Payable to help manage their invoice processing. Discover how the benefits of the solution have impacted their business.



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Accounts Payable | Document Management | Workflow | Web Approve



Established over 30 years ago and with combined assets worth over £4 billion, Metrus is one of London's leading property advisors.

## Introduction

Primarily dealing with commercial properties up and down the country, Metrus' Head Office in London's West End employs around 50 people. With the business taking on more properties each year, the amount of documentation needed to be processed inevitably rose.

To maintain the high standards set by the company, Metrus required a solution that would automate and control the increasing amount of documentation entering the business, specifically invoices which the organisation wanted processing quickly and efficiently, moving away from the existing labour intensive process. The chosen solution, primarily used in the Property Management department, was Invu Accounts Payable.

*"From day one the solution worked very well. The people at Invu are very down to earth, there are a lot of people with very good Invu knowledge."*

Martyn Veness  
Head of Accounts

## Solution Summary

- ▶ Greater peace of mind knowing all documents and invoices are securely stored
- ▶ Greater control of invoices and other business documentation
- ▶ Significantly improved the speed of retrieving documents
- ▶ Departments no longer have to manually file and search for documents

Proud to partner with:



## Key criteria

Metrus had previously looked at the Invu solution following an introduction from their photocopying partner, Karlson. At the time Metrus were not in a position to move forward with the solution so continued with their current paper based process. When Martyn Veness, Head of Accounts, joined the business he took the decision to revisit the solution, predominantly due to the continued expansion of the business. Two solutions were reviewed, one of which being the Invu solution. The remaining solution provider was disregarded due to the nature of the system, which required hard copies of invoices to be sent to a PO Box number, which were then physically scanned and sent back to Metrus via a workflow. Martyn explains, *"It was horribly expensive and a solution that simply wouldn't work for us."*

*"You can imagine our level of delight and joy when we no longer needed that method of transport to get invoices around!"*

Before the adoption of the Invu solution, Metrus encountered issues with the handling and processing of invoices entering the business. The current process of pulling invoices out ready for a BACS run to then manually file them away, or having to manually search for end of the year invoices which needed to be collated was both a tiring and disjointed process. Metrus also found that invoices would go astray even though the company was based in a single building, *"You'd put them in someone's in-tray and a week later they would tell you that they'd never seen them."*

Metrus instantly liked the Invu solution they had previously seen, so when the decision was made to revisit the project they only required a brief update on the solutions functionality, *"The ease of use made it a winner!"* says Martyn.

## An uphill struggle

Prior to the implementation of the Invu Accounts Payable solution, Martyn, who has worked at Metrus for over 16 years, would have to take paper copy invoices home with him on the back of his push bike, *"Part of my commute was on a push bike and every evening I would take the invoices home to be sorted and then bring them back each morning."*

With over 18,000 invoices a year, Martyn was taking a substantial number of invoices home each day for around 5 years. *"You can imagine our level of delight and joy when we no longer needed that method of transport to get invoices around!"* The whole process prior to Invu was extremely labour intensive, the invoices that would be brought back in the morning needed to be manually filed into cabinets. Additionally, with most of the commercial properties that Metrus manage having a service charge, the invoices would need to be found and pulled out at the end of the year. *"It's one thing paying the invoices, but at the end of the year we needed to pull them all back out to reconcile back to a year end service charge transaction list."*

## Implementation

Martyn was very hands on during the implementation of the solution, working with Invu's professional services team who, based on Metrus' current process, designed a workflow scheduled to go live within 3-6 months.

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From a training point of view Martyn became the "super user" who taught others on how to use the system, *"With Invu it's very much a case of being able to self-teach yourself and within a day or two everyone was up to speed and using Invu."* Martyn adds.

Initially Metrus purchased Invu to help the Property Management department, a team of eleven Client Accountants, manage their invoices. Following the success of the solution the system is now being used by the Management Surveyors to send leases around Head Office via a purpose built workflow, *"Quite quickly we realised we were able to use the Invu product for other things."* Martyn adds. The solution also allows Business Surveyors to approve invoices with the assistance from the Centre Managers.

## Benefits

Invu proved its worth very quickly and the time saved meant Metrus were able to utilise the existing filing clerk within other parts of the business, *"The speed in which we could file and retrieve invoices using the system made a massive time saving."*

As more and more properties were taken on by Metrus, increasing the number of invoices, it was necessary for Centre Managers at the properties to see these invoices. Prior to Invu these would have been faxed or sent in the post, but as Martyn explains, *"Invu gave us the opportunity to use the workflow solution, so when invoices arrived they would be automatically sent onto the relevant people at a particular building for approval. That was an immediate benefit that Invu has given us."* Martyn adds, *"There is a lot of peace of mind with Invu, you know that once an invoice has gone into the system it is always going to be quickly retrievable."*

The more Metrus used the Invu solution the more they started to realise how it could be used in other ways, *"A lot of it is common sense, if paper documents always come in the same format then it's crazy that we wouldn't consider using Invu to deal with it."* Bank statements are now scanned and securely stored within Invu Document Management, which is included in the Accounts Payable solution, and as a result several filing cabinets, which were full of statements, have been removed giving the company back valuable space. *"If it works for us then I'm sure it can work for other people in a very similar format."* Martyn states.

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When Metrus first considered an Accounts Payable solution they were receiving around 18,000 invoices per annum, since implementing Invu 5 years ago they now deal with in excess of 30,000 invoices per annum. *"The fact that we have been able to deal with that increase in invoices clearly indicates that we are now able to, with Invu, process and authorise them quicker and more efficiently than we could have previously."*

The benefits that Invu brings have also been noticed by Metrus' clients. When Martyn first joined the business client statements were sent as paper copies, which would have had an associated storage cost for the client, *"Now it is very easy to pull the statement from the Invu system and email clients a copy. There is an immediate benefit there."*

A further benefit has impacted Metrus' yearly audits, where previously the team would have to manually collate information, *"Now we can give auditor's access to a PC with Invu on it and give them a 10 minute briefing on how to search and retrieve invoices. It has made dealing with auditors a whole lot easier."* Martyn explains.



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## Working with Invu

The feedback that Martyn has received since implementing Invu has been extremely positive, *“Centre managers who are not based at Head Office are able to process invoices. They can approve an invoice and tick it off against their budget.”*

*“It feels like we have had Invu forever.”*

Over the years new staff members have been taken on, *“We’ve not had to send them on any Invu training, they have all picked it up very quickly”* Martyn adds.

Martyn manages a team of 11 at Metrus, however there are also the same number of Management Surveyors in the business. At first it was thought that some of the management surveyors would not take to the new technology. However, Martyn explains, *“Without exception they all loved it and got used to it, we didn’t have people saying we can’t use it or they didn’t know how to operate it, which was because of the solutions ease of use and functionality.”*

Metrus know that if they do run into any issues the Invu support team is only a phone call away, *“The Invu support guys are very responsive and they all know a lot about the products. Whenever we do have a problem it usually gets ironed out within the hour.”* Martyn goes on to explain, *“From day one the solution worked very well. The people at Invu are very down to earth, there are a lot of people with very good Invu knowledge.”*

## Conclusion

Metrus continues to take on more properties and employ more staff since the implementation of the Invu software. To keep up with the thriving business they have purchased further Invu licences using the solution to its full capabilities, *“It feels like we have had Invu forever.”*

*“With the previous way of working it wouldn’t have been possible to take on all the new properties. We now have properties up in Derby where invoices get sent around on a workflow basis, which would have been very difficult prior to getting Invu,”* Martyn adds.

Metrus are continually thinking of new things they can do with Invu and are currently looking into the possibility of using Invu within the HR department for holiday forms, which are currently routed around the business and signed off via paper forms. Martyn and his team would also like to see the independent service charge consultants, who they deal with, circulate their budgets via Invu Workflow.

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## About Invu:

Invu develops Electronic Document Management (eDM), Accounts Payable (AP) and Purchasing solutions for a range of sectors, particularly those which are highly document dependent or where compliance is important. Invu's comprehensive product suite encompasses document and content management, purchasing, workflow, document automation and collaboration solutions.

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