WENGER FENSTER AG

CASE STUDY

Wenger Fenster AG

Invoicing workflow at a glance

Founded in 1932 as a one-man operation that became a family business, today Wenger Fenster AG is one of the most important and capable window construction companies in all of Switzerland. This window specialist, based in the Bernese Oberland, produces high-quality windows and glazing for long-lasting buildings. The company puts a special emphasis on balancing ecological, economic and social consider-ations. This can be seen not only in its use of sustainable and local materials whenever possible, but also in the way it optimises its processes to save resources. In order to achieve a higher level of transparency when processing incoming invoices, while also reducing the time required to validate and approve them, Wenger Fenster introduced a digital workflow for incoming invoices based on Kendox InfoShare.

Customer	– Wenger Fenster AG
	– 120 employees
	– Company headquarters in Wimmis
	– Production site in Blumenstein
	– approx. 25,000 elements produced per year
	– Processing of approx. 5,000 invoices per year

| **Industry** | Window construction |

Project	– Digital approval process
	– for incoming invoices via e-mail or paper (scanning)
	– Integration with «Sage 50» (financial accounting)
	– Header data recognition and automatic comparison with «Sage 50»
	– Multi-level approval process

| **Requirements** | – Integration with «Sage 50» |
| | – Access via mobile devices |

WHERE TRADITION MEETS INNOVATION

With its headquarters in the Swiss town of Wimmis and a production centre in nearby Blumenstein, Wenger Fenster AG has been well-known as a reliable regional partner for window construction for the last 90 years. Thanks to its development know-how and its use of the latest technologies, this family business offers its customers a wide range of energy-efficient products, including wood and wood/metal windows as well as flush-mounted roof windows for photovoltaic roofs. In order to secure the long-term future of the company and its approximately 120 employees, the management team relies on innovation and resource efficiency in all areas. The result: energy-optimised products for forward-looking construction projects. In our current age, though, internal processes also need to be sustainable and innovative. In pursuit of this goal, Wenger chose to implement a digital document management solution for accounting and invoice processing.

TRANSPARENT PROCESSES

Wenger Fenster AG produces around 25,000 window components per year. As a result, the company's headquarters in Wimmis needs to process over 5,000 incoming invoices every year as well. In order to achieve a higher level of transparency when processing incoming invoices while also reducing the time required to validate and approve them, Andreas Wenger, head of finance at Wenger Fenster AG, introduced a digital workflow for incoming invoices based on Kendox InfoShare.

Kendox InfoShare is a document management solution which processes invoices digitally to manage payables and invoice control. "My goal in implementing Kendox's solution," said Andreas Wenger, "was to increase the transparency of our invoice processing in order to better handle the challenges we faced, like open invoices and other liabilities. Thanks to this new solution, we can now quickly identify how many invoices are still open or haven't been received by the accounting team. It also means that we can generally find invoices faster, and more easily tell which invoices are currently being processed – as well as how long they are taking and who is working on them. We didn't have nearly as precise an overview of all this before."

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A CONSTANT VIEW OF LIQUIDITY

Before the invoices-received workflow was digitised, the finance department often did not have a complete overview of the number of outstanding demands until invoices had been checked by an administrator, returned to the office and added to the accounting records. "We lacked a complete overview, and finding 'old' invoices was a very time-intensive process," explained Andreas Wenger.

"Until we adopted Kendox, invoice processing was a two-track process – one paper-based and the other digital – and that lead to problems. After we received an invoice, it would go into the approval flow, and while it was in that flow, it wasn't listed as pending anywhere. As a result, nobody knew that there was an invoice waiting to be seen. The invoice would only be added to the accounting system after it came back from approval. That was the first point when we could properly track it. Up until that point, it was just 'on the way', and as long as everything went as planned, it would eventually come back. If not, we would just get a reminder."

A CONVINCING, COMPLETE PACKAGE

Wenger evaluated a number of potential providers before finally settling on Kendox InfoShare. The chosen solution needed to offer complete digital document management and highly functional workflows. All processes to be mapped within the DMS were described in a clear catalogue of requirements. The company then sought references for the various systems on offer. Three providers came under closer consideration and were asked to offer opinions on the catalogue of requirements.

For Andreas Wenger, Kendox proved to offer "the complete package": "Kendox convinced us for a number of reasons: For one thing, they offered very attractive pricing. Some of the prices were higher than their competitors', but this was because they were more realistically calculated. Kendox also has friendly and highly competent personnel right here in Switzerland. But for us, the most important criterion was that Kendox InfoShare was the only solution in the selection process that worked with an HTML front end. We saw future potential there. Also, Kendox very clearly delineated what InfoShare could and could not do! That made a very good impression on us."

One additional argument came in terms of security and compliance: InfoShare is certified as a legally compliant archiving system out of the box.

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SWITCHING TO DIGITAL INVOICE PROCESSING

For Wenger Fenster AG, Kendox Digital Invoice Approval (Mobile Invoice Approval) runs primarily on-premises at users' workstations. Invoices reach the accounts-payable team by email or are scanned in. The accounting and purchasing departments then check the facts of the invoice. As long as it is approved, the invoice is then synchronised with the accounting software Sage 50 to complete payment.

Originally, Wenger had no plan to use mobile end devices, but the system does allow for it. Ultimately, mobile access turned out to be an extremely helpful feature. Particularly during the period of home working during the pandemic, it proved very useful that the system was also available at home. However, the greatest advantage of all for Wenger was that the entire invoice approval process now runs digitally.

INTERFACES WITH ACCOUNTING SOFTWARE

Kendox InfoShare interfaces with the accounting solution Sage 50 to ensure all processes are complete and coherent. As a result, account plans and payment conditions that are stored in Sage and used for invoice approval can also be viewed in InfoShare. Once the invoices have been checked and approved, they are transferred from InfoShare to the accounting solution. As soon as they are paid, their status is automatically updated in Kendox InfoShare. There, the administrator responsible for the invoice – perhaps an energy bill, for example – can see whether the invoice has been paid or not. Both solutions are in fact fully connected in both directions: the current status of a document is visible in both Sage and InfoShare.

For Andreas Wenger, this is a key detail: "InfoShare is genuinely accessible to all users. Almost all of our employees verify an invoice at least once every now and then. So it's much more convenient when you can see the details: What did I issue for these items last year? Was the invoice paid? Is this reminder justifiable? It's much more transparent than having to check in with the accounting office each time to get these answers."

LESS TIME, MORE FREEDOM

Originally, saving time on invoices was not a significant expectation of the new solution. However, Wenger Fenster finds that the new digitised process now goes at least 10 percent faster, saving many hours of processing time each week, which can in turn be invested in other, more profitable activities. For example, invoices are now quick and easy to locate.

Window specialist Wenger receives around 5,000 invoices every year. The majority of these are invoices for materials for specific projects – glass, wood, coatings and so on. Every year, Wenger purchases nine million Swiss francs' worth (approximately 9.8 million USD) of materials. Beyond this, there is a wide range of other invoices, for administrative work or external contractors.

The accounting team perform initial checks on invoices before passing them on to the relevant department for further validation. Invoices for materials – so, the majority of all invoices – are only associated with the purchasing department. Consequently, this is where the majority of invoices are checked. Once an invoice has been checked and approved, it is passed back to the accounting department and cleared for payment. Around 30 to 40 people are involved in approving invoices. Thanks to Kendox's solution, this process is now significantly faster and more transparent than ever before.

ABOUT KENDOX

Kendox are the experts in digital document management and process automation for offices and administrative bureaus. With years of experience providing solutions using its own in-house technology, Kendox works in particular with customers in industry and manufacturing, trade and e-commerce, services, and logistics as well as with public institutions, schools and universities.

Kendox's applications are supplied and operated in the cloud from the company's own virtual data centres in Germany and Switzerland. Its software solutions are based on forward-looking technologies and meet today's security and data protection requirements.

Kendox's document and process automation solutions integrate with Microsoft 365, leading ERP solutions and many other specialist applications. Thanks to Kendox's collaboration with other solution providers and integration partners, the Kendox software platform works in any number of diverse use cases.

Kendox AG is based in Oberriet, Switzerland. It has branches and sales and consulting offices in Oberhausen (Germany), Puchheim (Germany), Vienna (Austria), and Serbia, as well as other locations in Germany, Austria, and Switzerland. Together with its partner network, Kendox provides ongoing support to over one thousand customers.

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