

*Installing DocuWare lets Shelter Products automate accounts payable, save money and handle remote work.*



**Colin McDonell, IT Director**  
**Shelter Products, Milwaukie, OR**



"DocuWare's Workflow Manager has been transformational in the Shelter Products business. While not part of our initial evaluation, it has quickly become the key piece of the puzzle. After Accounts Payable, rolling it out to the Credit and Legal departments is the next step."



- Location:** USA
- Industry:** Service Provider
- Deployment:** On-Premises
- Department:** Accounts Payable

**Specializing in timely shipments for complex construction projects, Shelter Products distributes lumber, plywood and other materials to clients countrywide.**

Headquartered in Milwaukie, Oregon, Shelter Products is a distributor of lumber, plywood and other building materials. With sales offices in six states, the company supplies premier building contractors across the country, specializing in just-in-time shipments for projects including multi-family housing, assisted living, hotels and motels. As the company's operations grew, so did the need for an efficient accounts payable system. To streamline the accounts payable processes, the company's IT director Colin McDonell, researched document management systems. "We were interested in a proven solution with a long track record of success and a robust support system behind it," McDonell says. DocuWare had all the right parameters, including the same SQL Server platform as Shelter Products, which enabled a powerful integration.

**Faster processing saves time and money**

Installing DocuWare solved several industry-specific challenges. "In the construction business, our customers get a draw from their bank loans once a month," McDonell explains. "Quick turnaround of invoices is critical. If we miss a cut-off

by one day, we're not getting paid for an additional 30 days." The company has only a few days to take advantage of early payment discounts, and often missed that window due to lost or incorrectly routed paperwork. "The work is delegated to trader assistants who are mini-project managers. Each one oversees billing to a particular job and routing documents to the right approver," McDonell says. With roughly 100 invoices a day, paper processing took hours to route invoices to the appropriate trader assistant. With DocuWare, the documents arrive in seconds. "We recently put in an automated invoice approval process that replaced the need for sign off on paper. Because we process 2,400 invoices a month, it was a pinch point," McDonell says. Now invoices are approved within three hours, rather than possibly sitting on someone's desk for a day or two.

**Automation affords greater flexibility**

Accessing a centralized database through DocuWare offered unanticipated benefits. As Shelter Products has offices in multiple time zones, employees on the East Coast can start a task and get it ready by the dawn of the business at the West Coast headquarters. Workload can be rebalanced depending on who is busy and who is not, by reassigning tasks in DocuWare.

*"Invoices are currently approved within three hours, rather than possibly sitting on someone's desk for a day or two."*

*"If we had been dependent on paper, working remotely would have been a big issue."*

When someone is on vacation or sick, their role can be covered via automatic delegation so that work never stalls.

### **More departments to go digital**

DocuWare allowed for a seamless transition to working from home and proved invaluable to business continuity. The company had its biggest sales month in April and was able to process invoices remotely. "If we had been dependent on paper, this would have been a big issue—we could not have handled the volume of invoices we received so efficiently," McDonnell says.

*"Quick invoice turnaround is critical. If we miss a cut-off by one day, we're not getting paid for 30 days!"*



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