

Transforming Invoice Management with AI Automation

A non-profit organization dedicated to housing development faced significant operational challenges with its inefficient vendor invoice processing system.

The organization was overwhelmed by a manual approach to handling vendor invoices, primarily in PDF format, which required tedious, time-consuming extraction of critical information. Each invoice took about 2–3 minutes to process, leading to nearly five hours each week being consumed by this task alone, effectively diverting staff from more strategic initiatives crucial to the organization's mission. This inefficient workflow not only burdened the team but also introduced human error risks, making financial reporting potentially inaccurate and delaying critical decision-making.

Transforming a Manual Process into a Fast, Accurate, AI-powered Workflow

In response to the client's challenges, TeamLogic IT crafted a tailored, AI-driven invoice automation solution utilizing Microsoft Azure OpenAI and Document Intelligence Services. This advanced system was designed to automate the extraction of essential data fields from incoming PDF invoices, significantly expediting the processing time and virtually eliminating the potential for human error. The proposed automation would not only streamline the invoice processing workflow but also allow the organization to reallocate staff resources toward more impactful,

strategic work, ensuring improved turnaround times and enhancing overall data reliability.

The proposal presented by TeamLogic IT included a one-time development cost that was appealing to the client, along with a modest monthly managed AI services fee aimed at ongoing management, monitoring, support, user training and consultation for future expansion. This economically viable solution not only addressed immediate challenges but also positioned the client for future technological growth.

Upon successful deployment, the organization expects to save approximately five hours of processing time each week, allowing staff to focus on initiatives that drive their mission forward in housing development.

Moreover, recognizing the potential of automation, the client has already identified two additional project opportunities in collaboration with TeamLogic IT. This partnership not only addresses the immediate challenges but also positions the organization for a more efficient and impactful operational future. Through this strategic approach, the non-profit is set to enhance its capabilities and support its growth objectives more effectively.

Move forward with **The Color of Confidence**[®].