

Yooz Covers AP Automation Needs for Canadian Roofer



Industry: Manufacturing / Construction

Location: Winnipeg, Manitoba, Canada

Employees: 100+

Invoices: 100-300+/month (seasonal), average 250

ERP: QuickBooks Desktop

"I'm confident that the team welcomes the reduction in paperwork. Returning from job sites to no folders waiting on their desks? This aligns perfectly with the supervisor's desire: software that streamlines their tasks, not complicates them."

Russell De Gagne, Controller

Previous Pain Points

Paper invoicing & manual data entry

Inefficient tracking system

Time-consuming processing

Varying invoice amounts

Cumbersome paper-based documentation

✓ The Yooz Solution

Multi-channel electronic invoice scanning with AI-powered 3-way verification and automatic coding.

Completely transparent process with real-time visibility and traceability.

Streamlined workflow with automatic, customized approval alerts for timely payments.

Easy scalability to swiftly adapt to changing demands.

Centralized, cloud-based data storage with easy accessibility.

Since 1999, Normandeau Roofing Ltd. has served as a leader in the roofing industry, offering unmatched expertise and service. With a team of over 100 employees during peak season, including 18 foremen and crews, the company serves the entire Manitoba area, North Western Ontario, and Saskatchewan.

Normandeau specializes in commercial flat roofing, re-roof, new installations, metal decking, metal siding/cladding, maintenance, and leak repairs, maintaining a strong dedication to quality and diligence in every project. This unwavering dedication ensures that clients receive unparalleled service, delivered with a passion for excellence.

The Challenge

Normandeau Roofing saw a slowdown in business during the 2019 pandemic, resulting in fewer invoices and paperwork. This meant the acting Receptionist/Accounts Payable (AP) Clerk had less work, prompting a transfer of AP responsibilities to the Controller, Russell De Gagne. However, as business picked up, De Gagne quickly realized the inefficiencies of the existing manual, paper-based process, including printing, scanning, coding, approval routing, manual data entry, limited visibility, and more. Realizing the need for change before the peak period began, he started looking to streamline operations in early 2022.

"We had less volume, insufficient for another employee but too much for me with all my other responsibilities," said De Gagne. "I knew that there was software available that could help me achieve the efficiency that I wanted."

Leveraging his prior experience with AP automation at a former company, he sought a suitable tool to streamline the invoice process before business activity peaked.

"While many software solutions fell short in delivering on their promises just doing simple tasks, Yooz exceeded our expectations. Yooz consistently delivers on its commitments, aligning perfectly with my focus on effectiveness and practicality."

Russell De Gagne, Controller

✓ The Solution

De Gagne sought a software solution that was already compatible with the existing QuickBooks Desktop financial system. After thorough research which included multiple demos and assessments, he discovered Yooz.

Yooz stood out due to its existing seamless integration with QuickBooks Desktop, two-way QB feedback, competitive pricing, tax application (GST/HST and PST), approval workflows, and user-friendliness.

These decisive factors, combined with its smooth operation during demos and alignment with Normandeau's needs, ultimately led to the Yooz platform selection.

"Given that many of our team members lack tech proficiency, the swift and smooth implementation of Yooz was a significant win. It not only streamlined processes but also enhanced communication channels."

Russell De Gagne, Controller

The Impact

Together, Yooz and Normandeau swiftly implemented the solution, establishing seamless approval workflows integrated with QuickBooks Desktop. Normandeau promptly benefited from the successful digital transformation, experiencing streamlined processes, faster invoice approvals, improved communication, and notably reduced manual errors. The digitalization of their systems provided unparalleled visibility and flexibility, increasing efficiency while reducing the risk of lost invoices. Furthermore, these new processes resulted in reduced overhead costs and eliminated the need for extensive and often repetitive manual data entry.

Users particularly appreciate the intuitive interface and the ease of tracking invoices, as well as the ability to leave and respond to comments and inquiries within the software itself. This feature notably improved communication and collaboration within the team.

Overall, Yooz's implementation delivered tangible benefits, simplifying operations, improving communication, and generating costs savings across the entire company.