EVIDENCE-BASED CASE STUDY

Financial services | Micro company

A five-person accounting firm cuts invoice entry time by 93.8%: Sales and customer service

FINANCIAL SERVICES | MICRO | SALES AND CUSTOMER SERVICE

-93.8%	-87.5%	<1/month
INVOICE ENTRY TIME [1]	TAX-FILE PREPARATION TIME [1]	REPORTED ERRORS [1]

PROBLEM

Manual invoice entry, separate files, and hand-built tax submissions consumed time and created data-entry errors. A five-person firm had to repeat the same administrative work across as many as 200 client accounts.

SOLUTION

The firm implemented an ERP system with optical character recognition, centralized records, and automated tax-file generation. The new process captured invoice data once and reused it for records, declarations, and required files.

RESULT

Invoice entry fell from eight minutes to 30 seconds. Tax declaration and JPK preparation fell from up to four hours to 30 minutes.

BUSINESS LENS

SWOT: manual expertise served clients but limited capacity. A controlled system reduced unit effort while keeping professional review.

ASSUMPTIONS AND LIMITS

Protected company name, one respondent, no control group, and the 30-second invoice value excludes verification. Accounting is included in the site's broad financial-services category.

DEPARTMENT APPLICATION

SALES AND CUSTOMER SERVICE

Faster processing supports up to 200 clients.

Application analysis based on the cited source. It is not a separate measured result.

Prepared by Ocmulgee Business Process Solutions from the cited independent source. This is not an Ocmulgee client engagement or an original Ocmulgee result.

SOURCE [1]

Lyszczarz, 2024. Digital Transformation of Accounting Processes in a Micro-Enterprise. https://doi.org/10.30657/aek.2024.10.24

Peer-reviewed journal case | Size basis: Five employees serving up to 200 clients.