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The Association of Accounting Technicians Keeping Track of Invoices at Every Stage

"Introducing PTX Connect has been excellent. Just being able to track which customers have received invoices is the greatest benefit. All of this has given us an easy-to-use tool that has greatly assisted with our credit control procedures."

- Mark Merfield
Working Capital Manager



Challenges

- Cumbersome and time-consuming process chasing undelivered invoices
- Difficult to track which clients received documents before the 30-day terms
- Frequent late payments or no payment received at all due to customers not receiving invoices

Solution

- PTX Connect
 - Collaborative, cloud-based solution
 - Dynamic and easy-to-use tools that allow the effective management of the full lifecycle of financial documents

Results

- Decreased process turn-around time and saved one full day per month compared to old process
- Improved payment times and cash flow with advanced invoice delivery and tracking
- Visibility to when an invoice is delivered and can track when viewed and downloaded
- Reduced incoming calls and enquiries for duplicate documents

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