briq

Accel Air Systems reduces AP processing time by over 90% with Briq AI

Accel Air Systems
Building Efficiency and Sustainability
A Service Logic Company

Background

Founded in 2003, Accel Air Systems is a Santa Clara-based industry leader specializing in Heating, Ventilation, and Air Conditioning (HVAC) solutions. They excel in providing air conditioning and ventilation systems across a diverse range of facilities.

Systems

Foundation
Microsoft Excel

Challenge

> "I wanted to scale without complicating the process **— to work smarter, not harder**. I'm always looking for ways to be efficient without adding people and hours to the process."
>
> **Jason Hoffman**
> VP of Finance
> Accel Air Systems

As Accel Air Systems expanded, it faced the challenge of streamlining its Accounts Payable (AP) processes to support growth without increasing its workforce. They needed to find a solution to automate invoice handling and seamlessly integrate into their Foundation system. However, most available solutions were deemed clunky, inefficient, and more focused on approval automation versus process automation.

Solution

> "When I watched multiple demos of Briq... I saw this is a macro on a system basis versus just being isolated to Excel. And then for me, that's when it really clicked that Briq is the solution."
>
> — Jason Hoffman

After conducting thorough evaluations of various automation solutions, Accel Air Systems made the strategic decision to partner with Briq. Jason Hoffman, VP of Finance, sought a genuine AP automation solution that could rapidly analyze invoices, seamlessly automate data entry, and integrate with Foundation. He had complete confidence in our team's ability to deliver.

The journey to implementing Briq involved a collaborative effort between the Briq team and the finance professionals at Accel Air Systems. The first step was a series of meetings to comprehensively understand Accel Air Systems' objectives and capture their existing processes' intricacies. This was essential to design an automation bot capable of executing tasks that were previously handled manually.

Accel Air Systems processes three types of invoices: purchase orders (PO), service invoices, and expense invoices. Consequently, the Briq team meticulously mapped out the specific workflows for each of these categories and how they would be processed within the Foundation system.

One unique challenge was the fact that Foundation, the system in use, was not cloud-based and resided on-site. To facilitate seamless integration, the Briq team arranged the necessary hardware to run the automations, ensuring that Briq's technology could access the system securely and efficiently.

With the technical foundation in place, Briq's developers swiftly executed the automation, completing the initial testing phase within a mere two weeks. In the first week of testing, the Briq team identified some exceptions that required attention. Thanks to the collaborative and communicative relationship fostered between Briq and Accel Air Systems, these exceptions were promptly addressed. By the second week of testing, all systems were functioning seamlessly, and the automation was ready for a successful go-live.

This collaborative journey between Accel Air Systems and Briq exemplifies a dynamic partnership where precise problem-solving and efficient communication were crucial for the successful implementation of the AP automation solution.

> "People get distracted. Bob [the automation bot] doesn't have that distraction, so when he gets data, he's going to enter it."
>
> **– Jason Hoffman**

Outcome

The AP process, which once consumed 30–35 hours per week, now demands only two-and-a-half hours. This transformation provided the AP clerk with a substantial amount of reclaimed time for higher-value tasks. Automation through Briq eliminated labor-intensive manual data entry, facilitating a strategic shift. The clerk now has the opportunity to explore and expand into new projects and areas of business, contributing more effectively.

To enhance user-friendliness, they affectionately named their automation bot 'Bob.' This touch of personalization streamlined team communication, making interactions intuitive and seamless. This streamlined communication matches the way the automation works as 'Bob' can process invoices in two-and-a-half minutes and works continuously throughout the night, significantly enhancing operational efficiency.

Since implementing Briq, Accel Air Systems achieved tangible results with a notable reduction in errors related to data entry and invoice processing. The precision of automation improved financial reporting and decision-making within the organization.

By selecting Briq, Accel Air Systems found a solution that fulfilled immediate needs and seamlessly aligned with their long-term growth objectives while elevating the overall quality and efficiency of their financial operations. As part of a larger corporate group, Accel Air Systems actively promotes wider adoption of Briq to enable the entire group to benefit from time and cost savings, as well as increased efficiency.

> "Automation lets us scale efficiently and effectively because **it doesn't matter how many invoices are coming in**; we won't slow the business down. With Briq, we're ready for growth."
>
> **Jason Hoffman**
> VP of Finance
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