



Case study

Santa Fe Relocation

Key information

Customer:	Santa Fe Relocation
Industry:	Relocation
Location:	Global (47 countries)
Number of sites:	64
Revenue:	£394 million
Employees:	1,330 +
Solution:	Docuware for Invoice Processing Secure Archival Workflow Automation Digital Forms



Background

Founded in 1980 and headquartered in London, Santa Fe Relocation is a leading global provider of relocation services, offering a comprehensive suite of solutions including moving, destination services, immigration, and assignment management.

As the company expanded, Santa Fe encountered significant inefficiencies within their finance function, particularly driven by manual processes across the AP department. With scalability front of mind, Santa Fe sought a digital solution that would streamline their processes, improve efficiency, and support their global growth.

Challenges

Santa Fe faced significant operational challenges that impacted their accounts payable department. The team struggled with paper-based processes, leading to inefficient invoice approvals, missed early payment discounts, and high postage costs for document transfers across Europe. Manual data entry into their ERP system also consumed valuable time and resources.

To address these issues, Santa Fe needed a solution that could streamline processing and provide scalability for future growth. The lack of efficiency and the burden of manual tasks made it clear that automation was essential to improve overall workflow and enhance financial controls across the business.

Requirements

ELITE thoroughly assessed Santa Fe's challenges and collaboratively established the criteria that would define the project's success:

- Centralize and securely store invoices and related documents
- Integrate seamlessly with the existing ERP system (Exact)
- Automate invoice processing to eliminate manual data entry
- Enable digital routing and approval workflows for global teams
- Ensure compliance with financial controls and regulatory requirements
- Improve visibility and transparency in the accounts payable process
- Provide a scalable solution to support future international expansion



The Solution

ELITE implemented DocuWare Cloud to automate and streamline Santa Fe's accounts payable processes, addressing inefficiencies and reducing manual workload. This solution not only improved overall efficiency but also provided the scalability needed to support the company's growth and global operations.

Invoices, both physical and digital, were scanned into DocuWare and automatically indexed, capturing all relevant data without manual input. This integration with Santa Fe's ERP system (**Exact**) eliminated the need for data entry, significantly reducing time spent on administrative tasks.



To further improve efficiency, DocuWare's automated workflow routed invoices for digital e-approval, enabling seamless collaboration across global teams. This digital routing eliminated the need for costly international postage and expedited the approval process.

The solution also included built-in rules for substitutions and escalations, ensuring that tasks were handled without delays, even when team members were absent. This increased financial control, transparency, and cash flow, while also allowing Santa Fe to retire physical filing systems in favour of secure, electronic storage.

Outcomes

The implementation of Docuware brought about significant improvements for Santa Fe, addressing their operational challenges and delivering tangible benefits across their accounts payable processes:

- **Increased efficiency:** The automation of invoice processing and data entry saved considerable time, allowing staff to focus on higher-value tasks
- **Enhanced collaboration:** Digital e-approvals and centralized access to documents improved workflow efficiency globally
- **Improved scalability:** Docuware's flexibility supported Santa Fe's expansion, extending to other functions like expense management
- **Strengthened compliance:** Provided better visibility and financial controls, ensuring compliance with internal policies and regulatory requirements



Who we are

ELITE Document Solutions are the **UK's 1# Docuware partner**, maintaining our prestigious Diamond Member and Platinum Partner status for over a decade.

We help organisations leverage the power of workflow automation to transform manual business processes; saving time, reducing operational costs and improving efficiency.

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