ehs
business
solutions

From Hours to Minutes: How **EHS** Cut Invoice Time by 75% and Multiplied Client Capacity

Before Ottimate, **EHS Business Solutions** employees used to go to restaurants in person to pick up physical invoices, take them off-site to scan by hand, and then return them to the clients. Now, clients can upload them at their own convenience, and they're automatically coded and routed for approval. This dramatic increase in efficiency enables each EHS employee to manage AP for five to ten clients simultaneously.

ottimate

About EHS Business Solutions

Based in Chicago, **EHS Business Solutions** provides accounting and advisory services for restaurants and hospitality companies. EHS's offerings include bookkeeping, back-office systems and training, budgeting, forecasting, and more. The company's website states that "our job is done when restaurant operators have peace of mind, the tools, and the knowledge they need to make informed decisions that help their business grow."

The Challenge

The restaurants that EHS serves receive invoices from vendors for food, beverages, and various other items used in their kitchens, as well as office supplies and a wide range of services. Initially, each restaurant employed its in-house accountant to process invoices manually, which was a significant expense. When they started working with EHS, this responsibility would be passed over. While this removed the burden for each restaurant, it created a heavy load for the EHS team.

"We would drive to our clients' restaurants, pick up bags of invoices, and take them to our employees' homes, as we work remotely," said Liz Schwartz, Owner of EHS. "Then we'd key in all of the invoices and drive them back to our clients because we didn't hold onto their data."

This was a slow, cumbersome, and costly process for EHS, which delayed the processing of invoices for their clients. As part of establishing best practices, the company recommends that restaurants utilize the same point-of-sale and back-office systems and seek an **AI-driven automation suite that standardizes and expedites invoice processing.**

The Solution

In 2018, one of Schwartz's colleagues came across **Ottimate** (then known as Plate IQ) at a trade show and immediately thought it would be a perfect fit for their needs—an invoice automation solution built specifically for restaurants. After watching a demo, Schwartz agreed. She implemented Ottimate shortly after, and once it eliminated manual tasks for a few clients and gained the enthusiastic support of her team, expanding it to the rest of their restaurants was an easy decision.

Schwartz and her team delivered a clear message to their clients: Ottimate would simplify invoice processing, improve accuracy, and result in faster and more reliable vendor payments. "Your managers no longer have to write on or code invoices—now all they need to do is scan," she explained.

With firsthand restaurant experience, every member of the EHS team already knew how to code invoices accurately. From there, **Ottimate's AI** stepped in to further streamline the process. "Ottimate learns how to code incoming invoices, and it makes everything incredibly efficient," Schwartz said.

ehs
business solutions

4000+
Number of Invoices Processed per Month

Founded: **2011**

Headquartered: **Chicago, IL**

Industry: **Bookkeeping**

Once invoices are coded, Ottimate ensures they're ready for review and payment. Restaurant managers and authorized staff are notified when payments require approval, helping streamline the process and reduce delays.

Once approved, data from completed invoices is posted to the ERP system, and payments are routed accordingly, ensuring vendors are paid on time and EHS's clients can take advantage of early payment discounts.

"Ottimate makes sure that each invoice flows through our system and our data is accurate," Schwartz said.

EHS is also using Ottimate to process invoice statements rapidly. This helps to rapidly reconcile AP within the system based on invoices that have already been uploaded, rather than having to check each item off a piece of paper and call vendors about each missing invoice.

"The Ottimate statements module is amazing," Schwartz said. "You can reconcile a statement in two minutes or less. If an invoice isn't there, you contact the vendor directly through the system and get it instantly. We also love the hot list, which identifies cost changes that we share with our clients."
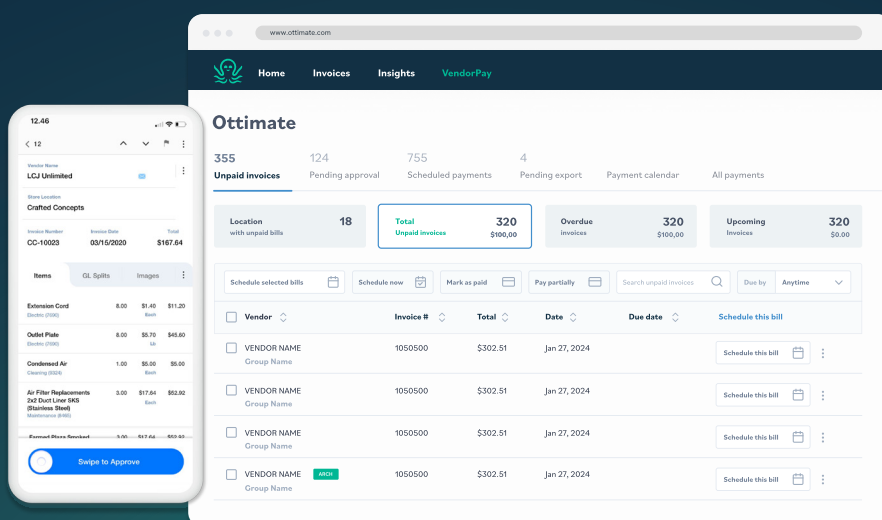

ottimate

The Results

Ottimate has transformed how EHS processes invoices. First, it eliminated the need to pick up hard copies, deliver them to staff members' homes, and take them back to restaurants. Second, staff members no longer need to spend time manually **entering GL codes** and other details in an ERP system. Third, approvals are now made as part **of a streamlined electronic workflow.**

"With Ottimate, my team spends just five to 10 hours processing invoices for each restaurant, which would've taken their in-house accountants 40 hours previously," Schwartz said.

Automating and accelerating each step in the invoice process has significantly reduced turnaround time, enabling each EHS employee to focus on multiple clients simultaneously.
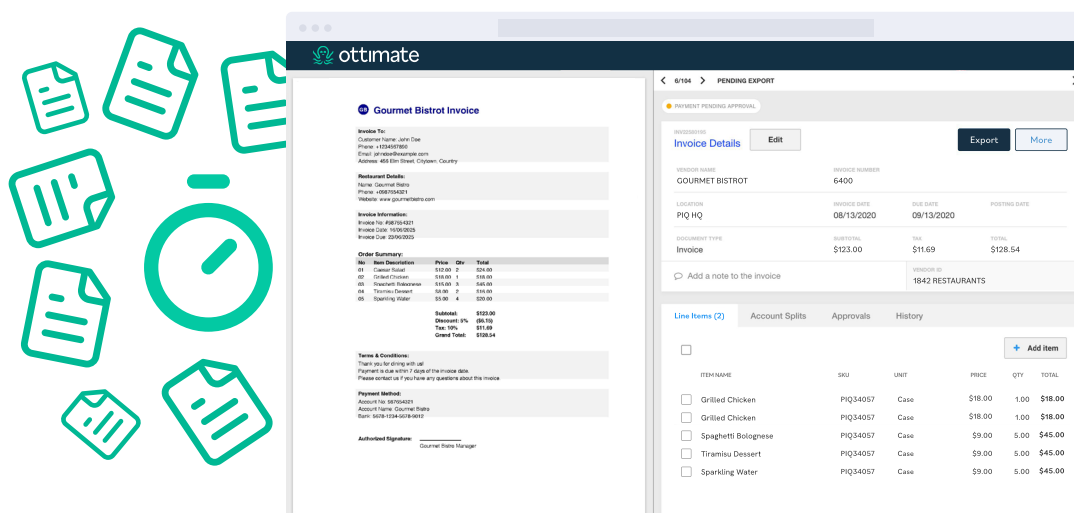
This has empowered Schwartz to expand her business while ensuring that every client gets the A+ customer service that EHS is known for. This wouldn't have been possible if the company still relied on processing paper invoices.

"There's no way I could have scaled my business the way that I have without Ottimate," Schwartz said. "Manual processes are unsustainable, and there's no way to move forward and grow with them."

For EHS to provide continuous, high-level service, it was essential to find an AP automation platform that was both reliable and flexible. As EHS prides itself on being a trusted advisor to each client, Schwartz was also determined to find a partner that she could rely on and would listen to their clients' feature requests.

"Ottimate's automation, the AI behind it, the efficiencies, and the customer service are stellar," she said. "Anytime there's a question or a small issue, it's resolved very quickly.

One of the things that impresses me the most is that the developers listen to our feedback and actually enhance the system based on the things that we suggest. I can't imagine working without Ottimate or using another system in our accounting lifecycle."

Looking back at the convoluted, slow, manual process that EHS used in the past compared to the straightforward, fast, and efficient electronic one now, Schwartz sees a night-and-day scenario.

"Ottimate has been a game changer for us," Schwartz said. "We will stay with it because it's far superior to any other AP system we've ever seen."

One of the main drivers for EHS to adopt an AP automation solution was to eliminate menial tasks, allowing staff members to serve more restaurants efficiently. Ottimate has brought this idea to life.

"Before we had this automation, each employee was designated to one client," Schwartz said. "With Ottimate, they can manage five to 10 clients. The cost savings are exponential, and it provides savings to our clients, too, because now their managers can focus on running their business and making it profitable."

Time to Transform Your Invoice and Payment Processing?

To see how Ottimate can automate your invoice and payment processing, *schedule your personalized demo now!*