

# From Overtime to On Time: How Gen4 Dental Streamlined Month-End Close with AP Automation

**Gen4** is a dental service organization specializing in comprehensive operational support for dental practices across the United States. The company has experienced rapid growth over its five-year history, expanding to 103 locations with a lean AP team of just four members, who process around 6,000 invoices monthly. Each team member handles invoice processing for multiple dental offices, creating significant operational complexity that requires a robust automation solution.



CUSTOMER STORY | **HEALTHCARE**

# Executive Summary

**Gen4 Dental Partners**, a rapidly growing Dental Service Organization (DSO) managing 103 locations across the United States, revolutionized its accounts payable operations by implementing **Ottimate's AI-driven AP automation platform**.

The transition eliminated manual invoice processing bottlenecks that consumed 80 percent of their team's daily workload, streamlined statement reconciliation for hundreds of monthly lab vendor payments, and provided enhanced vendor management capabilities.

Custom AI configurations and dedicated support enabled the seamless processing of over 6,000 monthly invoices, reducing month-end closing time and improving financial accuracy across all locations.

## The Challenge

Before Ottimate, Gen4 relied on Bill.com for its AP automation needs, but the platform created substantial bottlenecks across its multi-location dental network. Staff members often felt overwhelmed by the number of tasks assigned to them.

"We had one inbox where everything would come in," Thomas said. "Someone on our team would log in, and there would be 800 items waiting."

The existing system's AI functionality proved inadequate for Gen4's complex, multi-location structure. Rather than accurately routing invoices to the correct dental practice, the system made assumptions based on previous transactions that were frequently incorrect.

"The system would assume whatever it did last time is what you want again," Thomas said. "When you have 103 locations, the chance of needing this to match the last invoice is slim. It would assume this belonged to the same office from the previous transaction, but this invoice was not for that location."

This created extensive manual work, as Gen4's AP team had to correct location assignments one by one for hundreds of invoices daily.

## The Solution

Gen4 chose Ottimate after a comprehensive evaluation of seven different AP automation companies. Several key differentiating factors drove the decision to select Ottimate.

"Ottimate's payment processing flexibility was critical," Thomas said. "Many AP automation platforms were very limited in payment capabilities. They either couldn't integrate with Sage or wouldn't connect to the third-party vendors we use."

Gen4 required seamless integration with Dentira, a third-party platform used by dental offices to order equipment and supplies.

"Ottimate's integration approach was different," Thomas said. "They hadn't worked with Dentira before, but they said, 'Let's hop on a call and we can figure something out.' Then they delivered on that promise."

Gen4 enjoyed exceptional support throughout the onboarding. A hands-on approach included creating custom video tutorials and frequent check-ins until the team was fully comfortable with their AI-driven AP automation platform.



**Gen4**  
DENTAL PARTNERS

**6000+**

Number of Invoices Processed per Month

Industry: **Healthcare**

Locations: **103 dental offices nationwide**

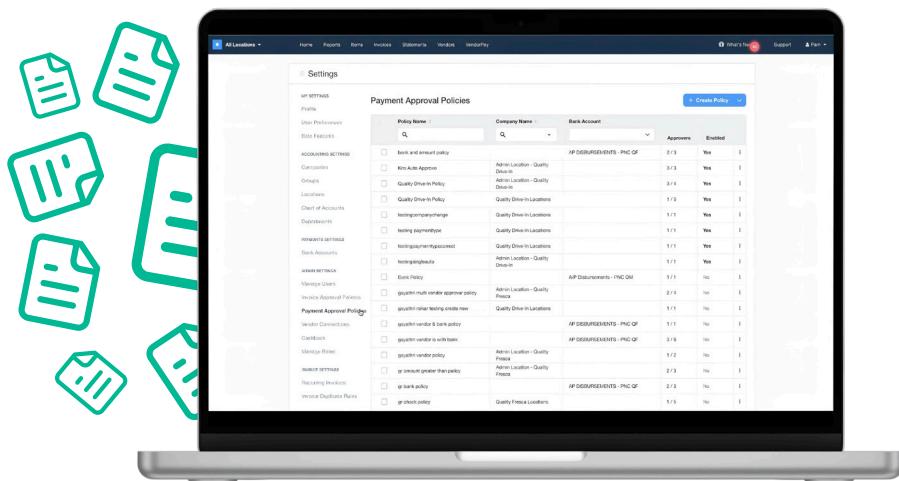
Integration: **Sage Intacct**

# The Results

Ottimate delivered efficiencies across Gen4's entire dental network. The most significant impact was in [automated invoice processing](#) and coding invoices by the dental office or vendor location.

"Eighty percent of everyone's day in AP was previously spent processing invoices," Thomas said. "We hired someone new and told them that their entire job would be correcting invoice mistakes."

AI-powered location assignment in Ottimate eliminated the constant manual corrections that plagued Gen4's previous system. Ottimate's team created custom configurations to handle Gen4's unique operational requirements, including a centralized inbox solution that automatically routes invoices to the correct dental practice.



"Ottimate gave us a general inbox for all items," Thomas said. "When dental offices send invoices to this, we automatically select everything correctly."

Statement processing capabilities proved particularly valuable for Gen4's vendor relationships. The company processes hundreds of monthly statements from dental labs, which provide services such as Invisalign. These individual patient treatments are consolidated into monthly statements rather than being processed as separate invoices.

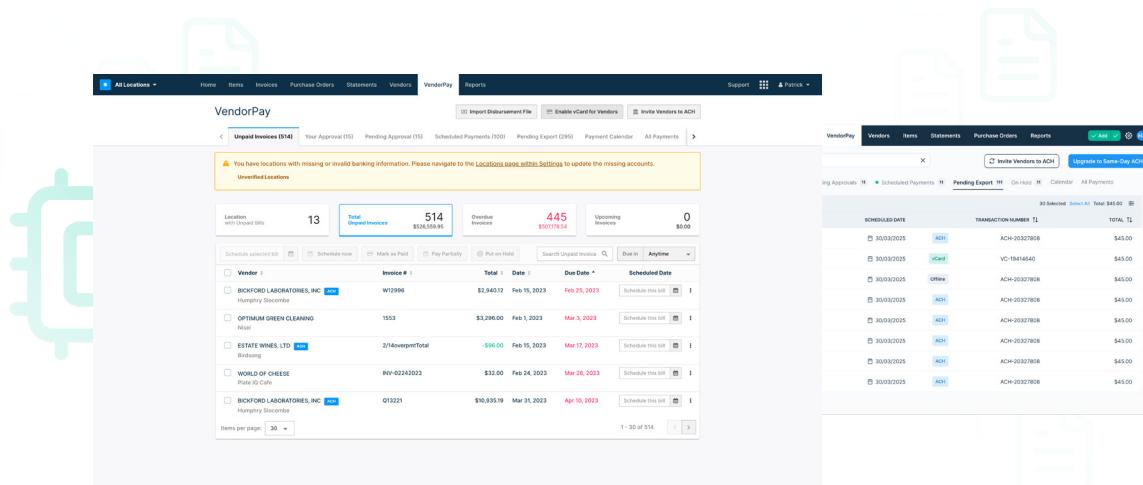
"Ottimate has a statement function where I can designate an item as a statement. It reviews the whole statement and identifies which invoices are missing versus those that are already in the system. I just click a button to trigger an email to our vendors to request the missing items."

Custom AI configurations extended to specific vendor relationships, with Ottimate's team creating specialized processing rules for high-volume suppliers. For one vendor generating 150 monthly invoices with unstructured formatting, Ottimate configured the solution to handle the unique invoice structure without user intervention.

"Ottimate created a custom method to read invoices from this vendor because they have inconsistent formatting," Thomas said. "Every time invoices come from them, they're automatically processed and routed to the correct location."

Reporting previously required a frustrating manual process. Now, Ottimate delivers instant results and eliminates complex spreadsheet manipulation.

"Vendor analysis used to take 30 to 45 minutes. Ottimate provides results in two minutes," Thomas said.



The screenshot displays the Ottimate VendorPay software interface. The main left panel shows a list of vendor invoices with columns for Location, Vendor, Invoice #, Total, Due Date, and Status. A summary at the top indicates 514 unpaid invoices totaling \$126,509.95. The right panel shows a list of scheduled payments for the month of March 2023, with a total of \$43.00. The interface includes various buttons for managing invoices, vendors, and payments, as well as reporting and support options.

Such efficiencies have enabled Gen4's AP group to focus on strategic vendor management rather than manual data entry. Month-end closing procedures used to necessitate costly overtime, but now are completed within regular business hours.

"We have what I call 'hell week'—the first week of every month when we close the books," Thomas said. "Before Ottimate, we'd all work overtime, but with the time savings, we focus on vendor corrections. I know that we have every invoice and statement."

Implementing VendorPay – Ottimate's payment processing solution – strengthened financial data security while streamlining vendor onboarding.

"With Ottimate, vendors can manage their own banking details," Thomas said.

## Looking Forward

Gen4 continues to optimize its Ottimate implementation while managing its growing network of dental practices. The company has successfully shortened its month-end closing timeline and improved overall financial accuracy across all locations.

"It almost seems like anything is possible, regardless of how different our processes are," Thomas said. "Ottimate's team continually helps with our random, one-off requests, which is huge."

Looking ahead, Gen4 remains focused on leveraging AI-powered AP automation to enhance vendor relationships and maintain rapid growth.

When asked about whether Gen4 would recommend Ottimate to other dental DSOs, Thomas said, "Absolutely – the level of support from Ottimate means that there's no way it could go wrong."

Gen4's success illustrates how AI-driven automation can facilitate strategic growth for rapidly expanding healthcare organizations that manage complicated, multi-location operations.

See how Ottimate can streamline your invoice and payment processing by [booking your demo today.](#)

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