

A CASE STUDY

# TRANSFORMING MANUAL DATA PROCESSING INTO AN AI AUTOMATED WORKFLOW

## OVERVIEW

A rapidly growing retail coffee chain primarily located in the western and southwestern regions of the United States. Founded in Portland, Oregon, the company has built a strong reputation for high quality beverages, including specialty coffees, teas, smoothies, and a signature line of energy drinks that appeal to a wide range of customers. With a focus on exceptional service, community engagement, and a lively store atmosphere, it continues to expand its presence to hundreds of locations. Its commitment to consistency, customer experience, and brand loyalty drives its ongoing growth and strengthens its position in the market.



## BUSINESS CHALLENGE

The client's leadership team identified three core issues limiting operational effectiveness:

### ➤ Scalability

As the company grew, each location had many hourly employees, making accurate time tracking difficult. The central office logged all data and handling invoices through fax or other manual methods which wasn't practical as the business expanded.

### ➤ Data Management

Excessive manual data entry led to inefficiencies and increases the risk of errors.

### ➤ Cost

The company spends a lot of time using manual labor on administrative tasks, and physical processing of documents adds unnecessary expenses.

## SOLUTIONS

### Automated Data Capture

 Trellissoft implements AI/OCR (Optical Character Recognition) technology to digitize timesheet and invoice documents. Since timesheets and FAXed invoices come in various formats, AI/OCR can efficiently interpret PDFs, images, and text, standardizing the data into digital formats.

### Efficient Data Processing

 Trellissoft uses a sophisticated ETL (Extract, Transform, Load) process to transfer and load timesheet and invoice data into downstream accounting systems (SAGE). This allows supervisors and central office staff to focus on reviewing completed tasks instead of manually entering data, improving accuracy and saving time.

### Cost Reduction through Automation

 The business can cut administrative expenses, supervisor overtime, and costs associated with managing physical documents by automating time-sheet and invoice processing and minimizing manual labor.



“

## Why Trellissoft?

Trellissoft's architects and designers excel at creating innovative and scalable data solutions. Their expertise ensures the development of reliable, efficient, and future ready business processes that customers can trust, enabling seamless operations and supporting long term growth.

”



## CONCLUSION

By leveraging AI/OCR and efficient data processing, the company can streamline financial workflows, improve overall data integrity, and reduce manual errors. This approach saves time, lowers costs, and ensures greater accuracy and reliability in handling timesheets and invoices.



## Ready to Evolve?

Discover how Trellissoft can revolutionize and optimize your manual processes with cutting-edge automation solutions.

[Schedule a Demo](#)

