

Geller Chooses Yooz to Power Account Payable



Industry: Financial Services

Location: New York City

Invoices: 2,500/month

ERP: Sage Intacct

"After our team experienced the demo, all doubts vanished. We demonstrated how effortlessly users could approve or reject invoices, add comments, and navigate the platform."

Nick Sunjka, Project Manager

⊗ Previous Pain Points

✓ The Yooz Solution

Manual data entry



Multi-channel electronic invoice scanning with a combination of OCR and **AI-powered** smart data extraction, recognition, and verification.

Difficult, slow manual invoice approvals



Highly flexible, easily scalable platform with unlimited users and locations.

Time-consuming invoice processing



Unlimited customizable workflows with tailored approval levels.

Errors from manual data entry and coding



Seamless Sage Intacct integration ensuring accurate coding.

Founded in 1984 and headquartered in New York City, Geller & Company is a premier financial and strategic advisory firm serving private companies and non-profit organizations. Geller's teams help to shape and drive their clients' financial strategies through outsourced CFO, operational management, business advisory, and other value-adding services.

By focusing on innovation, client service, and community engagement, Geller empowers clients to navigate complex financial landscapes and achieve their financial objectives.

⊗ The Challenge

Geller & Company faced significant challenges with their manual accounts payable process. Nick Sunjka, Project Manager at Geller & Company, explained, *"There were multiple touch points in how we processed an invoice,"* including manually managing a mailbox, sorting invoices into folders, and coding them—all tasks prone to errors.

With over 150 approvers who weren't accountants, *"following up with approvers to approve invoices was a huge job,"* taking valuable time away from actual invoice processing. These inefficiencies made it difficult to pay vendors quickly and increased the risk of errors throughout the workflow.

"Implementing Yooz was a game-changer for us. The transition was smooth, and the platform's user-friendly interface allowed our team to adapt quickly."

Nick Sunjka, Project Manager

✓ The Solution

Geller chose Yooz because it perfectly balanced ease of use with the ability to meet their complex workflow requirements. Nick recalls, *"We had over 100 requirements, and after an extensive review and detailed demo, we knew this was the solution."*

Yooz impressed the team with features like AI-powered recognition and verification, late task reminders for task owners and their managers, and a mobile app, all presented in a hands-on demonstration that eliminated uncertainty. *"Everyone's afraid of change... but seeing Yooz in action made them feel better."* The system's simplicity, adaptability, and seamless integration with Geller's existing processes closed the deal quickly, minimizing disruption and winning user confidence.

"Yooz has provided us with powerful tools like the Excel add-in and Yooz Reports, enabling us to analyze invoice processing times and other key performance indicators. These insights are invaluable as we strive to enhance efficiency and provide real-time data to our executive management."

Nick Sunjka, Project Manager



The Impact

Since implementing Yooz, Geller has achieved notable gains in efficiency and accuracy. Nick highlighted that the *"no touch invoice processing"* has eliminated much of the manual work by automatically capturing and coding invoices, allowing users to focus solely on validation.

Seamless integration with Sage Intacct provides easy access to invoice details and audit history, saving time and minimizing errors. Overall, Yooz has accelerated invoice approvals and lowered the risk of mistakes, enabling the Geller team to streamline their accounts payable process.

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the testimonial

