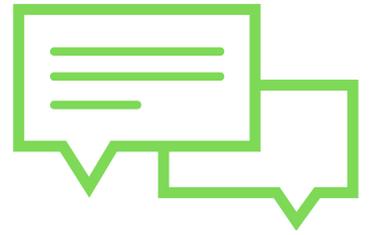


Gardner Builders

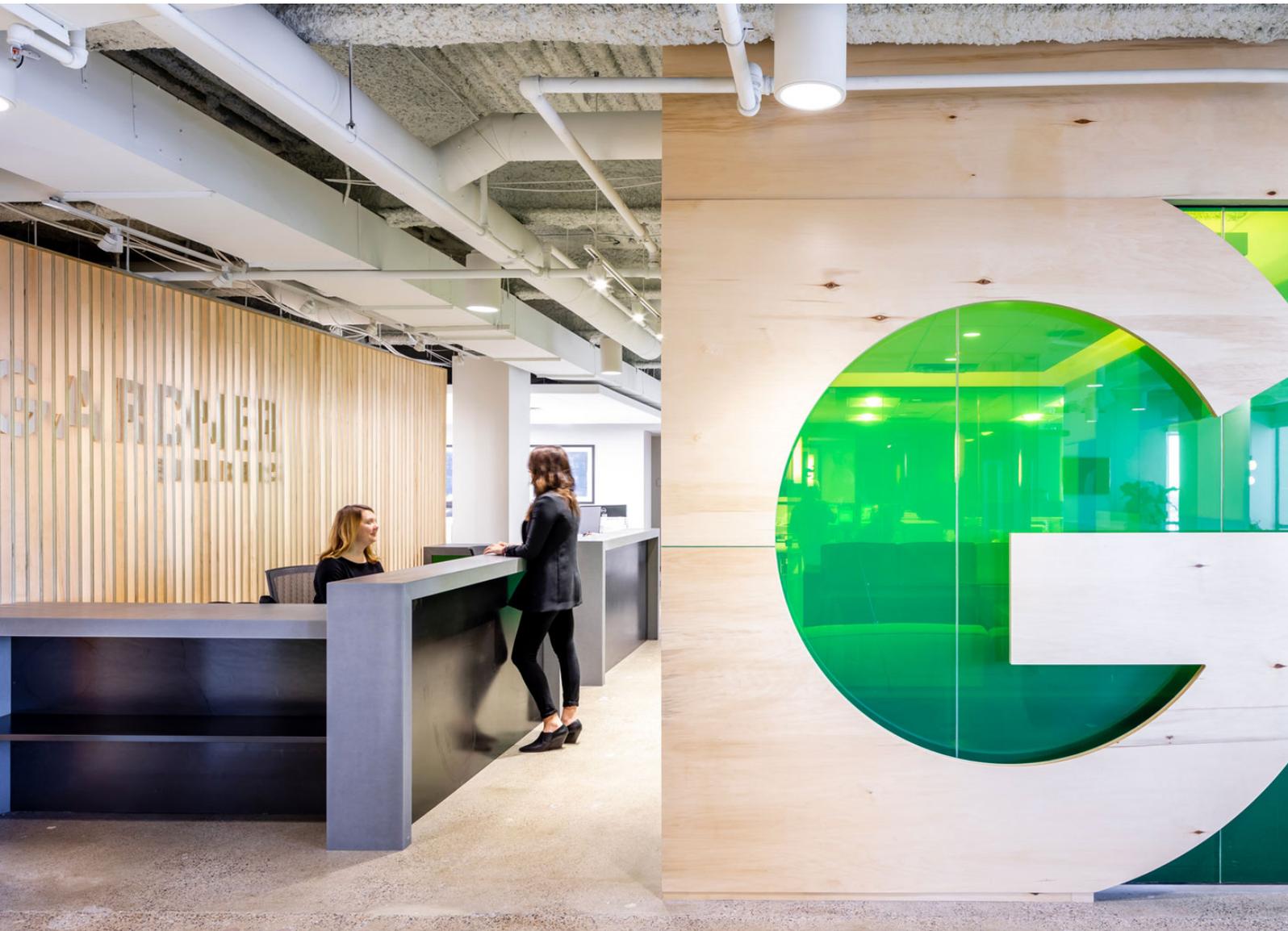


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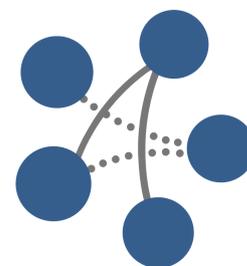
CUSTOMER SUCCESS INTERVIEW

MIKE CISAR
Director of Customer
Success // Ryvit

KATIE CRITELLI
Accounting Manager
// Gardner Builders

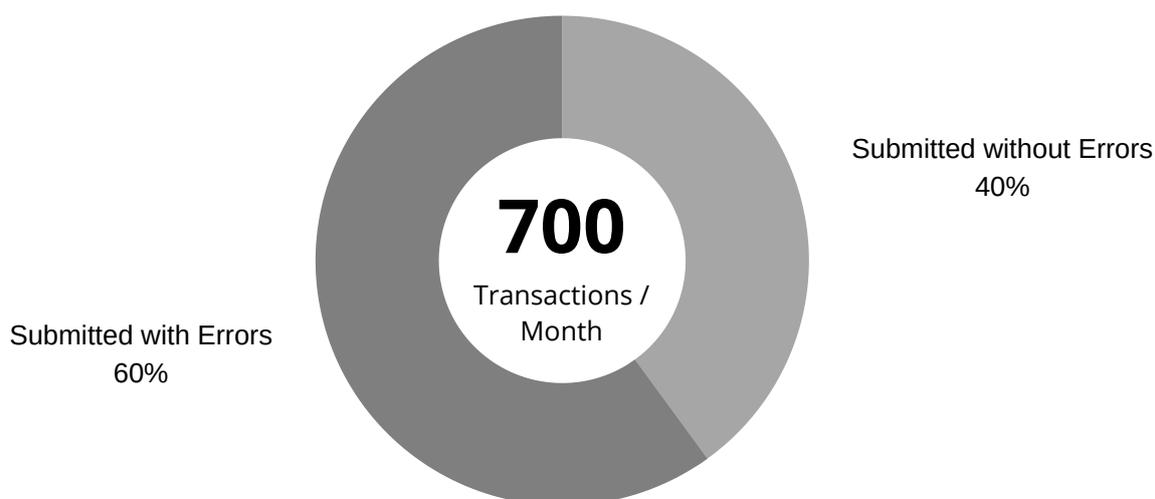


The following is a customer success interview adapted from a conversation between Mike Cisar (Director of Customer Success at Ryvit) and Katie Critelli (Accounting Manager at Gardner Builders) conducted in July 2020. For the full conversation, check go.ryvit.com.



Life before Sage, SAP Concur & Ryvit

Katie is an Accounting Manager at Gardner Builders. When she first started in 2014, their team spent quite a bit of time manually entering credit card transactions into a system called Foundation. As Katie recalls, entering the data was the easy part... what took an embarrassing amount of time and effort was gathering the information. “We had to get all of the information necessary to code each transaction from our credit card holders. It was basically us sending out a bunch of emails trying to figure out how each expenses should be coded.”



Six years ago, Gardner’s accounting team would tackle this manual process for about 700 transactions per month. Looking back on those days, Katie guesstimates that they probably saw about 30-40% of those transactions with accurate coding information the first time they were submitted by the card holders. For the other 60%, Katie says, “We can’t expect our cardholders to memorize an ever-changing cost code structure, so we would have to ask a series of questions via email, en masse, to try and figure out where each expense needed to be accounted for. It was not fun.”

The move from Foundation to Sage in 2018 did provide a little bit of help, thanks to the fact that they could now leverage an import file from AMEX to Sage, but even still, getting receipts loaded into the system was a slow adoption process by the team at large, and still required a manual coding process by Katie and her team before the file could be loaded into Sage.

“Sure there are a lot of ‘obvious charges’ - like Uber – but there are also a lot of not-so-obvious charges that need to be connected to a very specific project within a very specific account. We have about 75 cardholders. It was normal for us to spend a week out of every month just to prep the import file for Sage.”

And then, Tammy happened at TUG19

Katie credits Tammy Alexander (Channel Executive at Ryvit) for providing the final push that the team needed to pull the trigger on Concur Expense in 2019. “Honestly, when we went to TUG in May 2019 - we met Tammy – and talking to her about your connector between Concur Expense and Sage was just what we needed. If we hadn’t talked with her, I’m not sure we would have gone forward with Concur Expense, because without Ryvit, there still would have been a lot of manual file updating and importing.”

But the solution that Ryvit and SAP Concur provide together is a solution that Katie and her team got really excited about. With Ryvit, your expense list data is all automatically pulled from Sage and put into Concur Expense on an hourly basis. Your cardholders get a very clean expense reporting tool from Concur Expense that makes it easy to code their expenses against the correct projects. After they submit their reports in Concur Expense, Ryvit syncs the reports back to Sage and makes sure the invoices are all properly imported for the finance team to close out.

Life with Sage, SAP Concur & Ryvit

“The automated dataflow between Concur Expense and Sage has been fantastic. We get total control over the end-user experience for our credit card holders – which has been game-changing for us. Now, our credit card holders are only exposed to active jobs and valid GL accounts. It’s a super easy interface for our cardholders, and it completely eliminates the risk of inaccurate expense coding.”

“Sure... we’ve had issues... when you’re building a complex automation system, there are going to be edge cases and unexpected items that need to be addressed, but I’ve been really, really happy from Ryvit’s customer support team. As someone who leverages over a dozen systems to get work done, I work with a lot of customer support teams, and Ryvit’s support team is certainly one of the best around. It’s normal for me to wait days or weeks from other teams... but Ryvit never lets me down.”

“If we had to manually upkeep every active job we have, it would be a nightmare. For this month, I have people charging to at least 75-100 jobs. If I had to manually upkeep that, I would be working around the clock just on that process. I would say that we’re likely saving a full day’s worth of work every week.”

Extrapolating that over the course of the year, that’s 400 hours per year that Ryvit & Concur Expense have saved for Gardner Builders.



And that's just the beginning...

The beauty of automation is that it scales up exponentially. Gardner Builders has been doubling in size since 2015. Sure, 2020 wasn't quite as robust of a growth rate, but they still grew. They're expanding into a more national presence, which means more employees, more locations, and more dependency on a reliable coding process to keep it all organized. "Our newest division is a national arm. There are employees all over the country. We can't sit with them in the home office and provide over-the-shoulder training anymore. SAP Concur and Ryvit will play an integral role in helping us scale."

Final thoughts

"I know I've said this before, but I want to say it again... I had a great experience working with Ryvit. They did a great job understanding what I need the system to do, and they worked with SAP Concur to make sure we got the best-possible solution running for our team. I'm really happy with everything you guys have done."

And for anyone out there on the fence about automating their expense processing? "Automated dataflow is a no-brainer. Managing expenses at this volume is just too prone to error. It doesn't make sense to do it that way anymore. I've been very impressed with Ryvit's solution."