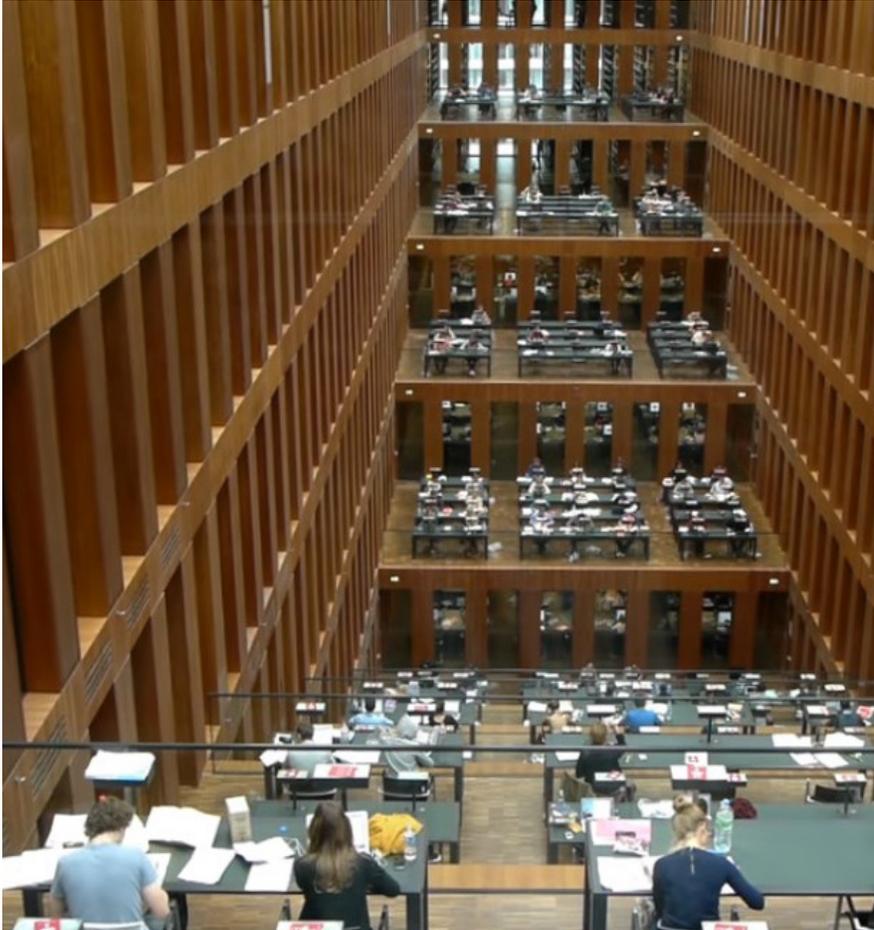# ELO customer reference

ScienceOpen tackles invoice, customer, and contract management with **ELO ECM Suite**

> ‘ELO took our invoicing, customer and contract management process and brought it *into the 21st century* by removing and streamlining the unacceptable amount of manual steps that only left room for error, confusion and frustration.
>
> — **Stephanie Dawson**
> managing director, ScienceOpen

What is ScienceOpen?

ScienceOpen is a discovery platform with interactive features for scholars to enhance their research in the open. It is a freely accessible search that puts research into context by exploring new ways to make information available for such a community. Data on research articles are analyzed which links the articles via authors, citations, keywords, journals and more. Users of this platform can further add to the context of an article with comments, recommendations or post-publication peer reviews providing opportunities for discovery, communication, and collaboration.

Did someone say *"tackle"*?

ScienceOpen had a series of pain points and it was centered around their invoice, customer, and contract management. Regarding invoicing, the process in place was extremely cumbersome; using as many as 5 different types of media to accomplish something as simple as the creation of a single invoice. Information was initially taken from a database, transferred to an email, entered in an Excel Spreadsheet, then transferred to a Word Doc and finally into a PDF where it was sent as an invoice to the customer. If that wasn't tricky enough, that information was then forwarded to Accounts Receivable for manual recording in **Quick Books**.

There was no visibility among any of those "methods" or between the two people who were equipped with an unusual amount of patience to carry out such a litany of tasks. Constant communication relative to status was necessary and the reverse logistics that was required once payment was received was equally tedious.

Customer and contract management was less than ideal, as well. Much like invoicing, this was a manual process. Customer records were set up in **QuickBooks** by Finance often causing a log jam whereby Operations had to wait their turn. Another drawback was no separation of information, meaning everybody viewed that same information regardless of job title and function which could have been interpreted as an over-exposure of financial data and privacy.

Equally frustrating was that contracts had no creation path or acceptable way of being managed along with relevant information such as email correspondence that should be contained alongside for organization and knowledge share. All these methods which had been adapted to over the years were now considered a detriment to the way a company should do business, and something needed to change.

OVITAS | ELO Business Partner

Enter ELO ECM Suite

In 2020, Ovitas Inc, the premier ELO partner in the United States, installed and implemented ELO ECM Suite for ScienceOpen. The implementation was fast and eliminated practices that had started off as inconveniences but had become major obstacles.

ELO ECM Suite came with the feature of metadata that could be leveraged to connect orphaned processes. Using this application as a central repository established a relationship between all content and metadata which helped to greatly improve the way business was done.

Tying loose ends...

Through **iLink** (an Ovitas developed solution) a relationship between **QuickBooks** and **ELO ECM Suite** is established. This is great news because it provides the ability of an automated and necessary push-pull of information between those two entities to occur.


Implementation was fast and eliminated practices that had started as inconveniences but had become major obstacles.

The information from the database formerly transferred into multiple forms of media before it could travel to its final resting place of **QuickBooks** now happens on its own. All updates regardless of entry point sync and life is wonderful again!

Customer records and contracts now have a home. Folder structure is a breeze and contract numbers are generated by the **ELO ECM Suite** but can be renamed if preferred as there are no restrictions.

How did *ELOprofessional* & *iLink for QuickBooks* enhance their business?

› Added the ability to automate

› Removed the cumbersome process that was error prone

› Removed the need for constant communication to eliminate babysitting the process

› Made it such that the new process could be easily rolled out to other employees so that it was not reliant on just 2 people
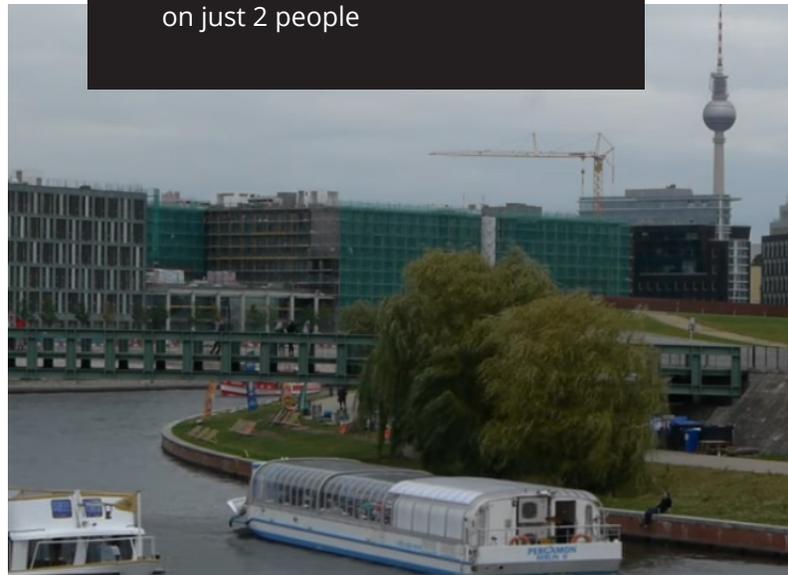
Customers are set up by name and push to **QuickBooks**; no babysitting required. Pertinent information still comes from the database but goes directly to the **ELO Central Repository** where it ties to the **Contracts Module** and finds its way to **QuickBooks**, and the nuisance of reverse logistics mentioned earlier is now solved.

ELO ®
Digital Office

Features of the ELO ECM Suite

iLink for QuickBooks — A pluggable Ovitas integration platform that joins ELO ECM Suite with QuickBooks, as previously mentioned. This Ovitas developed solution offers ease of implementation, scalability, and integration as well as both desktop and web-based application options.

QuickBooks lays claim to 85% of the small business accounting software market. Ovitas iLink technology brings ELO ECM Suite and QuickBooks business essentials together all while doing business smarter.

Remote access — EELO ECM Suite Web Client and ELO Mobile allows you to manage your business whether in the office or in the field. Seamless linking will happen behind the scenes ensuring users of either system will get what they need when they need it.

Search — ELO ECM Suite tagging and custom filtering ensures what you need is easily found. Saved filters can be customized to the needs of your business.

Workflow — Not all organizations have the same needs, but configurable workflows can be tailored to the business processes of your business to ensure nothing is missed, procedures are consistently followed and are auditable. An example of workflow is that upon creating a purchase order, notifications are sent to the appropriate people requesting sign-off before it can proceed.

About Ovitas

Headquartered in Burlington, Massachusetts and founded in 2004, Ovitas provides Content Management Lifecycle Solutions that give our customers integrated tools to create, manage, translate, transform, package, and distribute critical information from initial concept through final delivery.

Ovitas is the premier ELO Digital Office solutions partner in the USA, providing consulting, sales, and professional services for implementation, project management and on-going support. To learn more about Ovitas, visit our website at **www.ovitas.com**