Heavy Equipment Dealer Streamlines AP Processing Across 60+ Locations

Through a decade of impressive growth, RDO Equipment Co. has been able to hold the line on accounts payable costs while providing a high level of service across nine states using Upland's FileBound.

Business Needs

Since the purchase of its first John Deere dealership in 1968, RDO Equipment Co. has grown rapidly and now includes more than 60 locations and new product lines. Committed to providing superior service to all of its internal customers, RDO Equipment Co. realized that manual, paper-based processes couldn't meet the efficiency needs of a geographically dispersed enterprise. The accounts payable team struggled to keep up with the volume of documents that had to be distributed to various locations and were sometimes lost or delayed.

The Solution

RDO Equipment Co. implemented Upland's FileBound document and workflow automation to manage its centralized accounts payable operation that supports more than 60 locations across nine states.

Benefits

- Throughout a decade of rapid growth, RDO Equipment Co.'s AP department has been able to manage the influx of new invoices with only a minimal increase in staff using FileBound document and workflow automation.
- Workflow capabilities allow hundreds of people across locations in nine states to efficiently participate in the invoice approval process to avoid late or lost payments.
- RDO Equipment Co. leveraged FileBound's content management capabilities across multiple business areas, making documents easily available to those who need them while protecting them from unauthorized access.

RDO EQUIPMENT CO.

Founded in 1968, RDO Equipment Co. is a family owned and operated company that provides and supports innovative solutions for John Deere agriculture, construction, lawn and garden; Vermeer; Topcon; and RDO Water customers. The organization, with headquarters in Fargo, N.D., employs more than 2,200 team members. The company has more than 60 sales and service locations in nine U.S. states and partnerships in Mexico, Russia, Ukraine, and Australia.

"We achieved everything we were looking for with FileBound. We got rid of paper and made the documents available to everyone in the field. The workflow aspects of our solution have worked well, and historically we haven't had to spend a lot of time on FileBound administration. It's just been working for all of these years."

– **David Green**, IT Director, RDO Equipment Co.

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Customer service begins at home

RDO Equipment Co.'s corporate philosophy is that an unwavering commitment to employees creates a sincere focus on delivering superior customer solutions. "RDO Equipment Co. is a company dedicated to customer service," says David Green, IT director. "Products without service and support are commodities, so we're trying to be the best partner for our customers."

More than 10 years ago, RDO Equipment Co. realized that its accounts payable shared service couldn't deliver outstanding services to its internal customers and vendors with manual, paper-based processing. In addition, AP department employees were crowded with cabinets and rotating boxes of documents.

To support a centralized AP operation that would provide access for widely distributed AP approvers and eliminate paper, the RDO Equipment Co. team reviewed many solutions. According to Green, they chose FileBound because it had the functionality they needed with a licensing model based on document volume that made sense for the company.

Prior to using FileBound, invoices would have to be sent to the locations where approvers would write on the documents and send them back to the Field Support Office in Fargo for processing. Now, all incoming invoices are sent to the central AP department.

RDO Equipment Co. employees at more than 60 locations can access their invoices immediately through FileBound, eliminating the need to contact the AP department directly. AP reports created with FileBound are routinely used by more than 400 employees. During audits, the auditors are provided with special access to FileBound to complete their research.

The efficiency gains from FileBound allow the AP team of 12 employees to manage thousands of invoices monthly for the entire company, in addition to their other responsibilities. One of the reasons RDO Equipment Co.'s FileBound solution has been such a success is its ease of use. "Even with new employees joining our team, I've never heard anyone say it's too complicated," says Evie Fletcher, AP manager at RDO Equipment Co.

Delivering ongoing value for a decade

RDO Equipment Co.'s goal is to create long-term relationships with its customers and partners, and FileBound has become one of those partners. Since selecting FileBound in 2004, RDO Equipment Co. has grown significantly, adding new stores across the organization and new divisions such as RDO Integrated Controls and RDO Water. Yet, Ms. Fletcher estimates that there are only two or three more people on the team than there were when FileBound was purchased. "We couldn't do as good a job without it," states Ms. Fletcher. "I'm sure we'd need twice the number of people if we didn't have FileBound."

Not only has FileBound adapted to a growing volume of documents, it has also adapted to other changes. For instance, RDO Equipment Co. switched to a CDK Global enterprise resource planning (ERP) solution (formerly PFW Systems Corp) and was able to easily reconfigure the previous integration to support the new software.

Other business areas in the company also use FileBound to improve their processes, including other accounting reports, receivables and credit, check images and journal entries. "It's become the tool everyone goes to and utilizes," says Ms. Fletcher. "We never imagined it would go that well."

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About Upland Software

Upland Software (Nasdaq: UPLD) is a leader in cloud-based enterprise work management software. Upland provides seven enterprise cloud solution suites that enable more than one million users at over 9,000 accounts to win and engage customers, automate business operations, manage projects and IT costs, and share knowledge throughout the enterprise. All of Upland's solutions are backed by a 100 percent customer success commitment and the UplandOne platform, which puts customers at the center of everything we do.

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