All easy – and made possible by the new invoicing portal

The story in brief

In light of the broad palette of shipping services Sartori & Berger offers, it is no surprise that the company has a large amount of very heterogeneous invoices. Until now, these were created individually and locally in Excel, within all the departments at the company's various locations, sometimes as a PDF but also frequently printed out on paper and sent out. It became increasingly obvious that standard software is not a suitable long-term solution: the invoices became more and more complex and, for example, the tax law requirements and the effort involved in checking and correcting the invoices increased. It was not possible to fulfil different requirements and layouts with uniform and centralized specifications using standard software.

This is why Sartori & Berger looked for an individual solution and commissioned Consist with developing a new invoicing portal which had to be tailored to the company's specific workflows and requirements. The service provider aimed to present its staff with a universally usable tool with which they could easily create invoices at any location, according to uniform specifications, give these a final check, send them electronically and archive them permanently. This would improve work processes and also be another considerable step towards digitalization. The advantages include such aspects as electronic processing, the option to create invoices when working from home, flexible versions through variable input options, the traceability of the receipts produced and the possibility of global access to the invoices and annexes.

Consist selected an agile process approach for this project. Over two-week sprints and with active involvement by Sartori & Berger, Consist developed the customized, user-friendly invoicing portal called easy desk.

SARTORI & BERGER SB

About Sartori & Berger GmbH & Co. KG

This traditional company, founded in 1858, is a renowned expert in shipping services which it offers to all sectors of the maritime industry. They include, for example, port agency activities, cruise services, ferry services, terminal operations and customs services. Part of their portfolio is also providing individual customer support relating to organizational and administrative solutions.

The modern central invoicing portal at Sartori & Berger, which is adapted to meet their business requirements, plays a crucial role for the internal accounting and invoicing team.

Sartori & Berger employs over 250 staff members in all its branches by the North Sea and Baltic Sea.

The task

♦ Developing a cross-departmental invoicing portal which is designed to meet the special business requirements

♦ Uniform, simplified and controlled invoice creation, including digital dispatch, integration into the accounting department and electronic archiving

The challenge

♦ Very unique requirements for a uniform invoicing portal which adhere to the diverse customer portfolio

♦ Enabling homogenous and structured invoice production with a control function

♦ Keeping costs and effort for corrections low

♦ Simple sending process

The solution with Consist

♦ Developing an invoicing portal which is tailored to meet Sartori & Berger's individual needs

♦ Conducting an agile project in two-week sprints with Sartori & Berger as the product owner

♦ Technological configuration:
  • Back end: Spring Boot, Apache FOP (library) for generating PDFs, Liquibase (library) for database management
  • Front end: Angular 11, Angular Material Design (CSS/UI component library)

Particular strengths of Consist

♦ Successful joint projects in the past

♦ Successful and trusting cooperation, specialist know-how

♦ Agile process model
  • Active involvement by Sartori & Berger in the development topics
  • Creative, (cost) transparent and customer-oriented implementation of the requirements

Customer benefits

More efficient and effective accounting as a result of

♦ Reduced effort from
  • Simpler structures in the invoice form
  • Reduced amount of subsequent corrections and cancellations
  • Automatic sending and transfer to the digital archive
  • Simplified transfer into the accounting workflow

♦ Improved quality from
  • Obligatory review and approval (of all invoices and credit notes) before sending
  • Uniform, visually appealing layout

Customer quote

"We experienced extremely good collaboration with the Consist team. In addition to quickly implementing our ideas, Consist also provided extra input and always showed us various possible options. We are fully satisfied with the result and have been successfully using the new system since the start of 2022. This tool offers our company new opportunities and simplifies our processes."

Adina Gläser, Controlling at Sartori & Berger, and Steffan Mickler, Supervisor | Accounts Receivable Department at Sartori & Berger

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