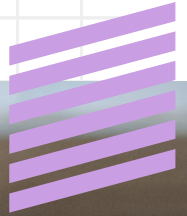


Case Study

**RDO Equipment  
streamlines  
AP processing  
across 60+  
locations.**



## INDUSTRY

**Industrial Machinery  
Distribution**

## COMPANY

**RDO Equipment**  
Fargo, North Dakota  
[rdoequipment.com](http://rdoequipment.com)

RDO Equipment 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 employs more than 2,200 team members across more than 60 sales and service locations in nine U.S. states as well as partnerships in Mexico, Russia, Ukraine, and Australia.

**RDO Equipment** implemented FileBound's document and workflow automation technology to help centralize its accounts payable operations across more than 60 locations. In addition to eliminating paper invoice processes, the company also improved collaboration capabilities across teams and drastically simplified compliance audits.



# How can a quickly growing company manage growth and improve service?

## RDO Equipment needed to standardize processes across its footprint.

RDO Equipment has a reputation as a company with an unwavering commitment to delivering superior customer solutions.

After a decade of impressive growth, the Accounts Payable team struggled to keep up with the volume of documents that had to be distributed to various locations. AP department employees were crowded with cabinets and rotating boxes of documents, and inefficient processes sometimes meant lost or delayed payments. The company realized that manual, paper-based processes could no longer meet the efficiency needs of a geographically dispersed enterprise.

## FileBound eliminated the invoice approvals paper shuffle.

To support a centralized AP operation that would provide access for widely distributed approvers and eliminate paper, the RDO Equipment team chose FileBound. Now the AP team of 12 employees can easily manage thousands of invoices each month in addition to their other responsibilities. FileBound's workflow capabilities allow hundreds of people across locations in nine states to efficiently participate in the invoice approval process.

*"FileBound has become the trusted tool everyone goes to and utilizes. We never imagined the user adoption could go so smoothly, and we couldn't do as good a job without this technology. I'm sure we'd need twice the number of people on our team if we didn't have FileBound."*

**– Evie Fletcher**

Accounts Payable Manager  
RDO Equipment



# RDO Equipment has no more worries when it comes to AP processes.

## Company streamlined AP processes and conquered the audit.

Before 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, North Dakota, for processing. The process was inefficient and made tracking down documentation to support periodic audits a headache for staff.

Now all incoming invoices are sent to the central AP department and automatically stored in the FileBound system, enhancing security and improving accessibility in one step. During audits, the auditors are provided with temporary secured access to FileBound to complete their research.

## The results

- RDO Equipment 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.
- When the company switched to a CDK Global enterprise resource planning (ERP) solution, staff was able to easily reconfigure the previous FileBound integration to support the new software.
- After seeing the AP department's success with FileBound, other business areas in the company adopted FileBound to improve their processes, including other accounting reports, receivables and credit, check images, and journal entries.
- The company was able to support rapid and significant company growth while only needing to hire three new AP employees. FileBound's automated workflow capabilities have eliminated a significant amount of manual work, cutting new hiring needs in half.

*"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 we haven't had to spend a lot of time on FileBound administration. It's just been working for all of these years."*

– IT Director  
RDO Equipment

upland  
**FileBound**

For more information visit: [uplandsoftware.com/filebound](https://uplandsoftware.com/filebound)

**Upland FileBound** delivers document and workflow automation applications that improve the operation of any organization by connecting users with the information they need to work more efficiently and effectively. With FileBound, customers can build automated workflow processes and centrally manage documents to improve compliance, collaboration, and access to information.