

Case Study: Otter Garden Centres

## Invoice automation - delivering measurable savings, improved accuracy and enhanced employee satisfaction



# Otter Garden Centres Transforms Invoice Processing and Employee Onboarding with DocuWare and Toshiba

**Otter Garden Centres, a well-established group of garden centres in the South West of England, embarked on a digital transformation journey to streamline their finance and HR processes. With support from Toshiba’s experienced solutions team, they implemented DocuWare to automate invoice processing and later expanded the system to include employee onboarding. As a result, the organisation now benefits from faster approvals, remote-working capability, significant time and cost savings, improved staff satisfaction, and the ability to grow from five to eight centres without increasing finance headcount.**

## About Otter Garden Centres

Otter Garden Centres operates eight retail garden centres with coffee shops and three growing nurseries across the South West. All financial operations are centralised at the Ottery St Mary head office, while invoices must also be approved at branch level. Before DocuWare, the entire process was manual, paper-based and heavily dependent on staff being on-site.

## Unlocking Flexibility: Confronting Manual Processes and Remote Limitations

When COVID-19 struck, Otter realised they had no capability for remote working, and their auditors were encouraging them to digitise invoice processing. Although they evaluated two solutions—one specifically for Sage 200 and DocuWare—they quickly recognised DocuWare’s advantage.

As Robert Brown, Chief Financial Officer, explains, “DocuWare didn’t natively export to Sage, but the workflow, processing, storage and retrieval were far better than the native Sage offering.” With Toshiba’s support, Otter developed a CSV export from DocuWare to Sage 200 and implemented Smart Connect to link documents seamlessly between the systems. The goals were clear: to enable remote working and minimise manual data entry into Sage.

## Implementation with Toshiba: Simple, Supportive and Effective

Otter was referred to Toshiba by DocuWare and were immediately impressed by the team’s approach. Robert continued, “It was the demonstration from the Toshiba team that impressed me and how simple they made it look.” Toshiba carried out an on-site scoping session, designed the workflows, and built a system that reflected Otter’s accounting needs without requiring deep accounting expertise.



# Revolutionising Invoice Processing: Automation in Action

The roll-out was progressive, starting with a team “champion” who learned the system first, followed by setting up branch managers and staff for approvals, and finally onboarding branches one by one to ensure a smooth and controlled adoption.

## Automation at Work: Redefining Invoice Processing

Otter Garden Centres replaced manual data entry, paperwork, and physical sign-offs with a series of key automations that have transformed finance operations. Goods received notes are now printed to a DocuWare print driver and stored automatically, while incoming invoices are matched to these notes via purchase order. Invoices within a £10 tolerance auto-match and post directly to Sage without staff involvement, allowing the finance team to focus solely on exceptions rather than manually checking every invoice.

The results have been transformative: branch invoice approval times have dropped from as long as two weeks to within 24 hours, finance staff have been redeployed to more value-added tasks, and paper storage requirements have fallen from 52 files per year to just three.



Audits are now far more efficient, with auditors able to self-serve through DocuWare access. As Robert Brown notes, “It’s made processing so much easier. Staff love DocuWare, it’s made their jobs more interesting.”

## Unexpected Benefits and Seamless Scalability

Although not part of the original project, Otter quickly discovered additional value by extending DocuWare into their HR processes. Previously, all new starter forms were handwritten, leading to errors—especially with misread bank details—and payroll staff had to manually key every new employee into the system. With DocuWare, new employees complete their forms online, HR can export the data directly into payroll via a CSV file, and the risk of misinterpreting handwriting has been eliminated, saving Robert at least half a day each month, with even greater time savings during peak hiring periods such as the 65 new starters processed in the Autumn.

The system has also proven highly scalable: when Otter acquired its eighth site, integrating it into the workflow was straightforward with Toshiba’s support. As Robert commented, “Support from Toshiba was superb. I can’t speak highly enough of the team, especially Scott Wood.” The solution scaled effortlessly, eliminating the need to hire additional finance staff.

# A Wide-Ranging Transformation Delivering Tangible Benefits

The implementation of DocuWare has delivered significant advantages across Otter Garden Centres' operations. Automated invoice matching and posting have accelerated approvals and payment cycles, strengthening supplier relationships, while the business's growth from five to eight centres required no additional finance staff. Paper, printing and storage needs have been drastically reduced, and audits are now far more efficient, alongside meaningful reductions in manual payroll effort.

Remote working is fully enabled, allowing staff to move seamlessly between branches and head office, and overall job satisfaction has risen thanks to the shift from repetitive tasks to more investigative, value-added work. Accuracy has also improved, with HR onboarding free from handwriting errors and invoice processing benefiting from consistent, system-driven checks.

## Future-Proofing the Business with Ongoing Support from Toshiba

Otter plans to expand its use of DocuWare into additional areas such as HR processes, appraisal workflows and other internal approvals, describing this as "another value-add from the software, using what we already have to do more." They credit much of the project's success to the responsiveness and expertise of the Toshiba team, who continue to support system enhancements. When asked whether they would recommend the solution, the answer was unequivocal:

**"Absolutely. We showed the system to another garden centre and they were blown away, especially by the speed and the HR onboarding. We'd definitely recommend it."**

## From Automation to Transformation

The partnership between Otter Garden Centres, Toshiba, and DocuWare has delivered a powerful, scalable and transformative solution. What began as a need for remote working and invoice automation has grown into a multi-department digital workflow platform delivering measurable savings, improved accuracy and enhanced employee satisfaction.

Otter's journey demonstrates how organisations can leverage DocuWare with expert implementation from Toshiba, to future-proof their operations and unlock hidden opportunities across the business.



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