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Going Paperless

Although I don't have any experience with lab work documentation, I do have experience with collecting receipts and invoices from employees and organizing them by their date, job, client, and vendor.

I used to work in a small electrical company performing work in the electrical field and their accounting department which relies 100% on documentation.

HOWEVER, the employees were very old school with documentation and rarely came by the main office to drop off receipts and even when they did, the receipts were either ripped in half, had coffee stains on them or sometimes just flat out missing. Sometimes I would even receive a receipt 3 months later for a $1000 transaction.

(UES)

I would have about 1000 transactions to reconcile on a credit card with very little to no documentation. It was a shameful disaster for our company.

Our third-party accountant was very upset with our company because we never kept track of receipts causing the books at year-end to be about half empty.

(Marketplace)

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In a business, it is essential to keep all documents and back in the day, storing documents in a file cabinet or at the bottom of a messy drawer was our 'save folder' for the company.

(Istock)

After a couple years of getting yelled at by our third-party accountant, I realized that the company had to make a drastic change to achieve a better reputation when it came to our accounting.

My boss was very old school. To put this into perspective I'll give you an example; while other electrical contractors recorded service tickets on a company phone app, my company was still doing paper tickets with a pink carbon paper behind it for the clients copy.


(PNG)

Doing the paper service tickets ALWAYS delayed payment. We would end up getting paid a month later giving us a negative cash flow.

(Tarver)

One day I sat down with my boss and pitched an idea to go paperless when it came to documentation. He had his doubts but nevertheless put me in charge of this new idea I had. My idea was to create a new policy on receipts or any transactions. It was very simple. The task was for the employee to scan there receipts with their personal phone and save it to a drop box file with their name on it.

(Burns)

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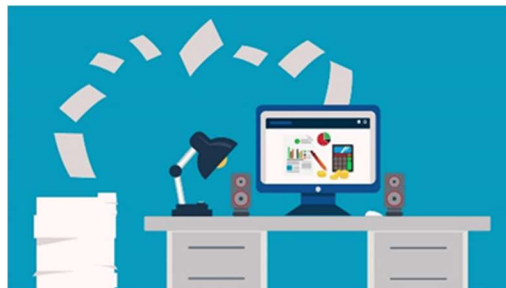
The employees were NOT happy and refused to follow my directions because they didn't know how to work the phone. Some employees that were better with technology didn't hesitate to follow the new policy and quickly jumped on board, while others set excuses to even download the application.

(Dreamstime)

Finally, my boss realized that by going paperless, it was saving time, money and our reputation. He then bought all employees company phones and I installed the correct application for them to use to scan their documents.

Although I left the company a couple months later, my boss was left with a perfect working paperless system. I contacted the new accountant and she said that the paperless solution could not have been better. She says she always gets reconciliation done every month with no issues with all the files saved on a cloud drive. On top of that, my boss also switched his paper service tickets to a faster and neater software application allowing him to get paid within days of submitting the invoice to the client versus one-month. The company and its reputation was left in good standing and my boss was able to achieve his positive cash flow he always wanted.

(VectorStock)

I know this might not identical as lab documentation, but I feel like the organization of ALL documents can always make a better team and a better company.

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