

## Case study

**Real estate development firm cuts invoice processing times by 70% and streamlines check printing with Charted**

east west partners

### East West Partners

East West Partners, a leading real estate development firm, has developed some of the world's top resort and urban communities, hotels, and office buildings. For over 30 years, they've earned a reputation for innovation and design, from the famed escalators of Beaver Creek to the iconic train canopy at Denver's Union Station. Previously, they leveraged Microsoft Dynamics SL to manage their business operations, but this system had become outdated and inefficient. With employees spread across the U.S. and a small accounting team seeking to modernize their operations, they transitioned to NetSuite in March 2024, significantly improving user accessibility and productivity.

### The challenge

Despite adopting a modern ERP system, the East West Partners accounts payable (AP) team continued to rely on a fully manual process. This involved scanning physical paper invoices, uploading them into NetSuite, manually reviewing each one, and obtaining physical signatures for checks to pay vendors. This method was time-consuming, prone to human error, and caused payment delays. With a small department handling around 500 invoices monthly, East West Partners needed an automated AP solution to improve efficiency. Additionally, managing 120+ legal entities and working with eight banks required a scalable system that wouldn't incur extra costs for each entity.

## How Charted helped

To address these challenges, East West Partners collaborated with Charted, formerly SquareWorks Consulting, leveraging their financial automation platform, with Charted Check Printing. They were impressed by the solution's ability to accommodate multiple entities without incurring additional charges and its capacity to automate the invoice process using optical character recognition (OCR) technology. Charted approached the implementation holistically, educating the team on best practices tailored to their business needs.



"One thing we've appreciated about Charted is that they understood who we were and what we were able to do from a technology standpoint, which really helped us in the learning process. They provided detailed information that helped everyone grasp how the solution would work."

**Eric Symons**  
Accounting Manager

## Implementation

As the implementation continued, Charted worked with the team to set up OCR processing rules. Given that East West Partners, as a real estate development firm, deals with substantial monthly costs and frequently pays the same vendors, they quickly realized the benefits of the OCR technology.

"I'd heard that many companies say it takes about 6 months for the OCR technology to learn your business. The second time I processed bills with the Charted OCR technology, it scanned 100% of the information needed because we're paying the same vendors each month."

Eric Symons, Accounting Manager

Considering the number of legal entities East West Partners works with, it was important for them to streamline the payment process as much as possible. Each entity also has multiple bank accounts, adding further complexity. To save time initiating payments, Charted devised a management strategy that enabled easy replication of check formats across different banks, requiring only updates to the name, bank account, and routing number.

"We can create one check format for the first bank and then make a copy, just changing the name on the check, bank account, and routing number. That's how easy it is."

Eric Symons, Accounting Manager



“With Charted I’ve saved 70% of my time processing invoices compared to our legacy software.”

**Eric Symons**  
Accounting Manager

With accountants spread across Charleston and Denver, obtaining signatures on checks was challenging. East West Partners required two physical signatures for checks over \$20,000. If the approver was not in the office, this would delay payments to vendors. To address this issue, Charted introduced digital signatures and enabled team members to approve payments via email. This allowed the accounting team to get payments approved efficiently and print checks with digital signatures, eliminating the need to ship checks for physical signatures and ensuring timely vendor payments.

“We still have that internal control that they’re looking at that payment and approving it, but they don’t have to physically be there to sign it, which has saved us a tremendous amount of time.”

Eric Symons, Accounting Manager



## Results

With a small accounting team, Charted Check Printing was a huge advantage for the company. Instead of scanning physical paper invoices and uploading them into NetSuite, they can now forward PDF invoices directly from their inbox into NetSuite. Leveraging Charted they can auto-populate invoice details, saving time and reducing human error. The team also appreciates the side-by-side comparison feature, which allows them to quickly review and verify the accuracy of the extracted information.

Charted Check Printing has also eliminated the need for physical signatures on checks. Approvers can now approve payments via email with digital signatures, streamlining the check approval routing, and allowing East West Partners to process payments faster. Additionally, the company can easily replicate check formats across different banks, significantly saving time.

By streamlining their AP process, East West Partners has not only enhanced operational efficiency but also positioned itself for scalable growth. Looking ahead, the company plans to further enhance their NetSuite environment and explore additional modules that NetSuite offers.

To learn more about Charted Check Printing, [click here](#).

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