

Cypress Creek Manages Complex Operations with Palette AP Automation

The Challenge

Cypress Creek is an integrated solar company that develops and owns solar and storage projects.

Switching from another system that was not satisfying their needs, the company was looking for an AP automation solution that would be able to handle the 556 entities they manage including over 250 solar sites.

A Complex Organization

Cypress Creek is a company with a lot of moving parts, including development, construction, asset management and operating divisions.

Purchase orders needed to be automatically matched to incoming supplier invoices, and invoice data had to be captured. There was a need for approval workflow as well an audit trail for investigations into the multiple entities they manage.

“We manage nearly 300 solar sites. Each solar farm is its own company, and each installation has its own tax implications with our investors. We're using Palette for the audit function, to handle enquiries for all of these accounts.” - Gerry Trejo, Cypress Creek



Automated Invoice Capture

With the Palette solution the data from Cypress Creek's vendor invoices is captured and validated automatically with a 98% accuracy rate. The invoices go to a queue, visible in the Palette dashboard.

PO Matching

Palette's accounts payable automation solution matches vendor invoices to Cypress Creek's purchase orders. Once matched, the invoice is automatically sent to Sage Intacct for payment. Only PO invoices with a variance are sent out in a pre-defined, digital approval workflow to approvers or supervisors.

Approval Workflow

An automated approval workflow sends non-PO invoices to project managers to approve via email, rather than having to enter the system. If an invoice goes over the tolerance level, the system automatically sends the approval to the supervisor.

Archive and Audit Trail

Most of the 250 solar sites Cypress Creek manages are their own private entity. The company was looking for a solution that could provide an audit trail and reporting for all the operations they manage.

Having a searchable invoice archive has been a big time saver. Once an invoice is paid it is transferred from Sage into the Palette archive.

About Cypress Creek

Cypress Creek is an integrated solar company that develops and owns solar and storage projects. It's the fourth largest utility-scale O&M provider in the US.

Country: USA

ERP: Sage Intacct

Palette Solution: Invoice Capture, Invoice Processing, PO Matching, Archive & Audit Trail

Number of invoices/year: 25,000

Users: 200 in multiple locations

Key Outcomes

- Invoice data capture automated
- Purchase orders are matched to vendor invoices by the software
- Approvers receive exceptions in a workflow showing all the information they need for reconciliation
- Seamless integration with Sage Intacct
- Auditing function helps manage investigations into 300 multiple entities and locations
- The Palette solution is designed to handle complex, multiple entity, multiple-location operations

Palette AP Automation saves time, lowers costs and improves efficiency for over 2,500 clients worldwide.

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Palette Software is a market-leading vendor of financial process automation for domestic and global corporations, including AP Automation and Purchase to Pay Automation.

Palette solutions automate the connecting and matching of purchase orders, invoices and contracts, on-premise or in the cloud.

Customers experience significant and measurable cost savings, productivity gains and operational excellence. Palette solutions are GDPR compliant and optimize financial management for more than 2,500 customers in 50+ countries.



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