



**LOANVISION**

**VIP Mortgage Achieves 87%  
Faster Invoice Approvals with LV  
AP Automation**

*Customer Success Story*



V.I.P. Mortgage, Inc. wasn't launched as just another mortgage company - it was built on a mission. In 2006, Marine veteran Jay Barbour founded V.I.P. Mortgage in Scottsdale, Arizona, with two loan officers and one clear commitment: make the home loan process understandable, accessible, and personal for every borrower.

Since those early days, V.I.P. Mortgage has grown from a single branch into a full-service residential mortgage lender with more than 20 offices across multiple states. Today, our team of several hundred licensed loan originators helps thousands of families each year - funding several billion dollars in home purchase loans, refinance loans, and specialty mortgage products annually.

Despite that growth, V.I.P. Mortgage has stayed true to its founding values: honest guidance, transparent lending, and building lasting relationships - not just closing transactions.

## CHANNELS SERVED

Retail

## NUMBER OF EMPLOYEES

600-700

## SYSTEM REPLACED

Manual entry

## REASON FOR SWITCH

Automation

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# THE CHALLENGE

With approximately 600–700 employees across branches and joint ventures, VIP Mortgage processes nearly 1,000 invoices per month with a small accounting team and a single dedicated Accounts Payable Administrator – Alexa Williams. Prior to automation, invoices were manually entered into Loan Vision as they arrived, creating an ongoing race to keep up with volume, especially during month-end close.

Invoices flowed into a centralized payables folder from vendors and internal staff throughout the month. As volume increased, prioritization became difficult. At the beginning of each month, the team focused on closing out the prior period, often pushing appraisals and other invoices into secondary folders until time allowed. Managing time, rather than optimizing processes, became the norm.

With a single Accounts Payable Administrator and only occasional help from an accounting assistant, invoice volume regularly outpaced available capacity.

“Alexa was one person trying to manually key in invoices as they came in,” states Angie Groleau, Senior Accountant at VIP Mortgage.

Invoice approvals created another major bottleneck. Every invoice required manual review, forcing leadership to block out hours at a time just to keep payments moving.

“I would carve out four hours a day just to approve invoices,” remembers Groleau.



# THE CHALLENGE

Manual entry also increased the risk of errors. After hours of reviewing invoices, even small mistakes could lead to significant consequences, adding stress and rework to the process.

“As silly as it sounds,” begins Williams, “99% of the time you’re looking at all the information and entering it correctly. But there’s that 1% where you could be typing the GL number instead of the amount ... and end up accidentally sending an incorrect check out.”

As invoice volume continued to grow and with the team being down an accounting assistant, VIP Mortgage needed a way to maintain performance without adding headcount, prompting the search for an automated solution.



# THE SOLUTION

Because Loan Vision had already been serving as VIP Mortgage's general ledger for over a decade, extending automation within the same environment was a logical next step. LV AP Automation allowed the team to modernize accounts payable without introducing a new system or disrupting existing accounting workflows, a critical factor in their decision.

"There was no room for error or chaos. It needed to just be seamless," states Groleau.

Implementation focused on layering automation onto familiar processes. Over the course of approximately two months, the team completed six weeks of structured training, gradually building confidence and preparing real-world invoice templates directly within Loan Vision.

"It was really nice the way they rolled it out," remembers Williams. "We weren't being thrown all the information at once. Each training built on what we learned previously. Amanda [Blake] did a great job training. She was fabulous."

By the time LV AP Automation went live, the team had created more than 100 vendor-specific templates, ensuring they were prepared to automate high-volume invoices immediately. This preparation proved critical, as the system was implemented just days before month-end close.

"It was really nice to be able to send off 20 or 30 invoices at once and not have to shove them off to the side and worry about them later," says Groleau.

As the team grew more comfortable with the system, automation began working in the background, registering invoices while staff focused on higher-value tasks.

"It's like a crockpot. You just set it and forget it," laughs Williams.

# THE RESULTS

After implementing LV AP Automation, VIP Mortgage experienced immediate and measurable improvements across approvals, processing time, accuracy, and workload distribution.

## **87% Faster Invoice Approvals**

Before automation, invoice approvals required up to four hours per day. With LV AP Automation, approvals now take approximately 30 minutes—an 87% reduction in approval time.

This shift eliminated the need to block out half-day approval sessions and allowed leadership to review invoices more frequently and efficiently.

“LV AP Automation absolutely does what it’s supposed to do. After implementing, I can now go through and basically just approve invoices because I know they’re correct.”

## **40% Faster Early-Month Invoice Processing**

Previously, the first five business days of each month were spent catching up on large invoices and attachments. With automation in place, VIP Mortgage now completes this work in three days, reducing early--month processing time by 40%.

“For example,” states Williams, “I started January on the 5th, and by the 7th or 8th I was done.”

## **33% Reduction in Total Monthly AP Effort**

Manual AP processing previously consumed about 3 weeks per month for the VIP Mortgage Accounting Team. Today, even with some invoices still handled manually, total AP processing time has been reduced to approximately two weeks, a 33% reduction in overall workload.

Accounts payable is no longer the dominant focus of the VIP Mortgage accounting team’s day. With automation running in the background, staff can focus on higher-value work with greater confidence.

“We aren’t bogged down in payables every day like we used to be,” says Groleau. “Payables used to be our entire focal point. Now it just runs in the background, which frees us up to focus on the business and other priorities.”

# LOANVISION

Since launching at the MBA Technology Solutions Conference and Expo in 2013, Loan Vision has helped reduce risk, streamline manual process, and lower operating expense for over 270 customers by combining a leading financial management solution with loan level accounting. Loan Vision strives to help transform accounting departments across the mortgage industry, aiding them in reaching maximum efficiency and offering tools to give them better insight into their profitability. We believe that every mortgage bank should have instant access to the financial information needed to make quick, strategic decisions and pride ourselves on providing, not only just the right tools, but also the right implementation approach and ongoing support to allow customers to maximize their use of our software.

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