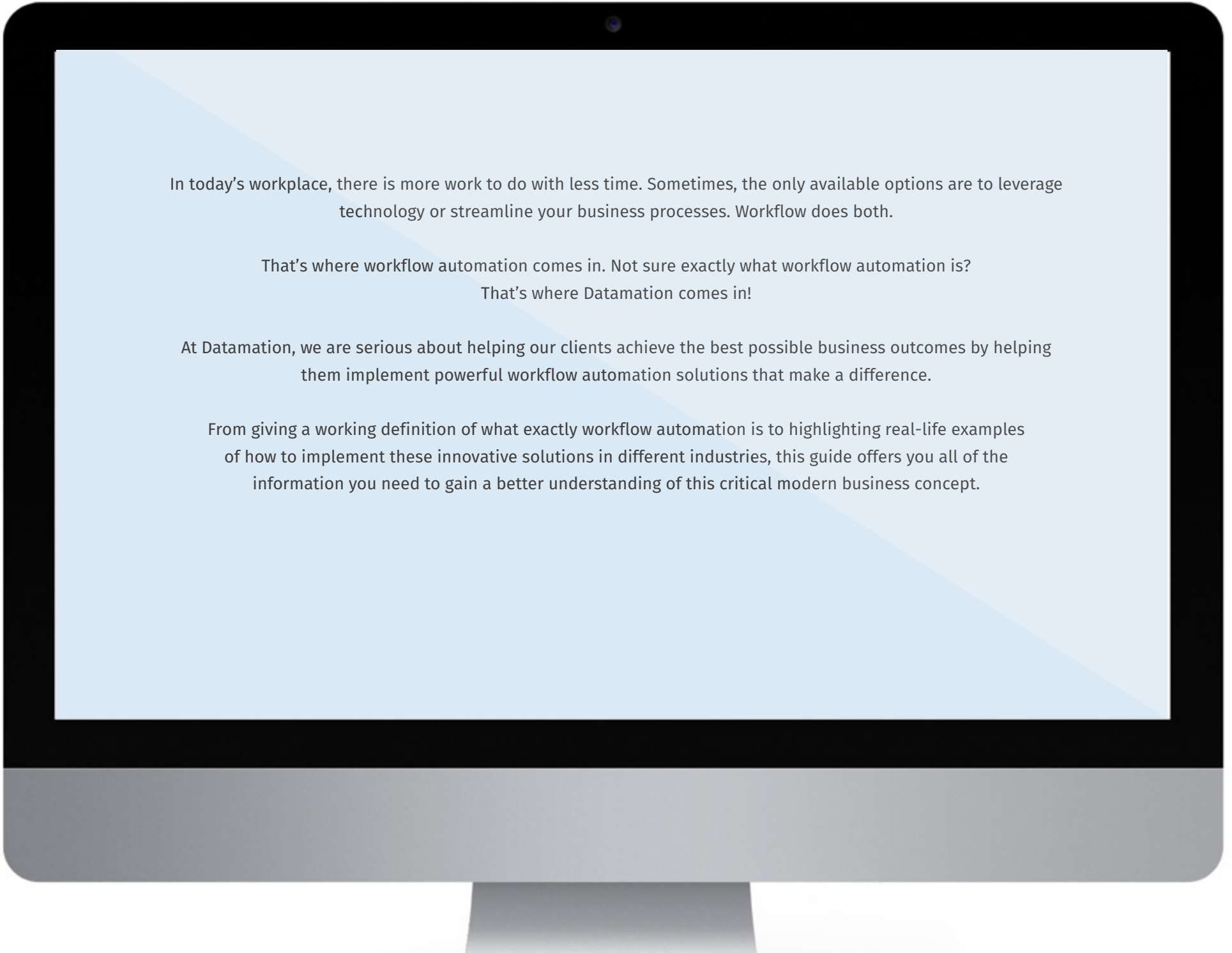


The Ultimate Guide To

Workflow Automation

Accounts Payable

A computer monitor with a black bezel and a light gray base. The screen is light blue and contains five paragraphs of text. A diagonal light blue line runs from the top-left corner to the bottom-right corner of the screen.

In today's workplace, there is more work to do with less time. Sometimes, the only available options are to leverage technology or streamline your business processes. Workflow does both.

That's where workflow automation comes in. Not sure exactly what workflow automation is?
That's where Datamation comes in!

At Datamation, we are serious about helping our clients achieve the best possible business outcomes by helping them implement powerful workflow automation solutions that make a difference.

From giving a working definition of what exactly workflow automation is to highlighting real-life examples of how to implement these innovative solutions in different industries, this guide offers you all of the information you need to gain a better understanding of this critical modern business concept.

workflow automation

a | wor·king | def·i·ni·tion

Workflow automation is any business process that is automated to ensure that the right person gets the right information at the right time. Workflow automation solutions are specifically designed to help your organization get more done with fewer people, less time, and/or a reduced budget. By implementing automated workflow you'll improve accuracy of data entry and reporting, streamline your decision-making processes, and greatly increase your daily efficiency.

Imagine a world where no more information falls through the cracks. A world where all of your departments are inter-connected and able to accurately and efficiently accomplish tasks that used to be rife with potential errors and plenty of lag time.

That's the world that has been created by workflow automation software. By identifying and implementing the right workflow solution for your organization, you'll streamline your core processes and allow your employees to focus their valuable time and attention on the real work that really boosts the bottom line.





Workflow in Action

Accounts Payable



Workflow in Action

Accounts Payable

The Problem

Some invoices are derived directly from a PO while others are special projects approved by a department head.

The Automated Workflow Solution

Routing

How It Works

Any PO invoice is automatically routed to the AP system to be matched against PO for error-free tracking and any non-PO invoice is routed to the appropriate department for approval prior to payment.

The Problem

Invoices over a certain amount require special approval.

The Automated Workflow Solution

Routing

How It Works

Any invoice over a certain amount (i.e. \$5,000 or whatever threshold makes sense for your business) are automatically routed to a designated AP employee with proper authority to review and approve.

The Problem

Manual data entry for invoices causes potential for errors and/or slows down payment processes.

The Automated Workflow Solution

Automated Forms Processing

How It Works

Software learns your form types and eliminates nearly all manual keyed entries with 100% capture accuracy.



Workflow in Action

Accounts Payable

The Problem

Not every vendor and organization you deal with is as organized as you want them to be. Sometimes this causes invoices to linger for any number of reasons, costing you time and money.

The Automated Workflow Solution

Notifications

How It Works

Set up rules to create notifications for a broad array of situations (i.e. invoice not paid after 60 days, tax exempt certification is expired, a new vendor needs to share their W9 info, etc.).

The Problem

Requesting a PO or disbursement requires manual routing to various stakeholders creating inefficiency.

The Automated Workflow Solution

E-Forms and E-Signature

How It Works

Electronic forms (E-Forms) eliminate all need for manual routing of a paper request so that a PO can be issued more expeditiously and then approved directly via E-Signature.

The Problem

Tracking all the activity in the AP department to get a clear picture of your organization's financial picture is nearly impossible.

The Automated Workflow Solution

Analytics

How It Works

Custom tailored reports are automatically generated around key metrics like transactions based on volume, amount ranges, departments, PO vs non-PO invoices, processor productivity, and more.

The benefits?

A blue-tinted background image showing a group of five business professionals (three women and two men) sitting around a table, looking at documents and charts. The image is used as a background for the text overlay.

Workflow in Action

Accounts Payable

The Benefits

Pay your bills in **30% less time**

Meet 100% of compliance an retention of AP documents

Scan and eliminate **ALL accounts payable paperwork** as it comes in

Access any vendor invoice in **under 30 seconds**

To Flow or Not to Flow

How Do I Know if Automated Workflow is Right for Me?



Accuracy

Accurate information is a vital asset in any business. If you're depending on manual information entry for data points that will ultimately be critical to your bottom line, you're potentially playing with fire. By replacing manual data entry with automated workflow form processing solutions, you'll eliminate the vast majority of potential errors and ensure that the data at your disposal is accurate and powerful.



Multiple Departments

Any piece of information or form that needs to be manually routed through multiple departments is at risk of becoming inefficient. Often times, paper documents languish at the bottom of the "To Do" bin. With E-Forms and Routing solutions, you can eliminate any potential snags in the chain of command and efficiently process any information.



Too Much Paper

The more physical paper you rely on for your business processes, the more you're potentially risking accuracy and efficiency in your organization. By replacing physical forms with E-Forms and E-Signature processes, you're positioning your organization to become more efficient, more accurate, and more capable of boosting the bottom line.



Manual Decisions

Why take chances? If you are privy to compliance rules for records retention or anything else, you expose your organization to serious risk when you rely on manual processes. By automating those decisions and processes, your organization eliminates that risk and ensures optimal efficiency for maximum revenue.

Datamation: Your Partner in Workflow

Our team at Datamation is focused on helping our clients achieve the best possible outcomes for their business. From Accounts Payable to Human Resources and all industries and departments in between, we've worked with countless clients to help them identify inefficient business processes and then formulate a powerful automated workflow solution to help them move their business forward. When it comes to automated workflow solutions, experience counts.





Your Best Tomorrow Starts Today.