

# Purchase to Pay Solution Invoice Workflow Automation

Workflow is one of the most powerful software capabilities any organization can implement. Although not new technology, the advent of global virtual workforces, lean practices and higher turnover has created a greater need for the benefits provided by workflow. Now DataServ, via the Software as a Service (SaaS) model, has made this technology easily available for any size enterprise in any industry.

DataServ SaaS workflow contains all of the technology and best practices required to rapidly generate your ROI. Our Initialization experts provide the knowledge to tailor the workflow process to fit your unique needs and organization. Simple to use workflow provides routing of invoices anywhere in the world via ubiquitous email and web-based user interfaces. Supervisor queries provide superior visibility and process control. DataServ is scalable to support as many users as you need.

## Features of Invoice Workflow Automation:

- **Automated Initial Routing** to approvers based upon data captured at scan time reduces your AP staff time.
- **Automated Approval Routing** can be set based upon approval dollar limits and/or authority hierarchies. This automation is tailored to your approval matrix and chain of command and includes up to three levels.
- **Surrogate Routing** offers the ability to designate a stand-in to cover an approver's role when they are not available. Multi-layered routing with a time component provides alternate approver(s) in the case of unexpected process delays.
- **Work queues** can be distributed equally to each processor or sorted by vendor name, location or processor etc. into up to five queues. Workloads can easily be balanced by supervisors or managers.
- **Daily email notices** make it easy for approvers/coders to quickly approve and/or code

invoices from a simple web-based system linked to that email.

- **An integrated coding screen** is tailored to your unique general ledger accounts and process.
- **Automated Escalation** reminds an approver on a schedule or routes unattended vendor invoices to additional and/or surrogate approvers/coders.
- **Invoice On Hold** allows approvers to place invoices on hold for a limited period of time while additional details are being acquired.

## Advantages:

- Standardize Approval Matrix
- Reminders to Approvers
- Prevent Process Bottlenecks
- Avoid Errors in Routing
- Eliminate Rework

## Why DataServ Automated Workflow?

- **Assure Compliance with your Approval Matrix** — no human error in the routing, approval processes. Automatically escalate through multi-level approvals for high dollar invoices.
- **Increase your ROI** — hundreds or thousands of users across the world can approve online without ever touching a paper document.
- **Workflow best practices tailored to enhance your processes** — drive efficiencies/lean accounting practices down through your organization, while enforcing compliance, without a revolution by your constituents.
- **Increase focus on the exceptions/risk instead of the mundane** — focusing on the problem areas creates a continuous improvement/zero-defects culture rather than a "repetitive stress" environment.



- **Lower costs through reduced headcount** — automating approvals, coding, escalations, etc. will require fewer AP staff.

Invoice Workflow Automation is included in the Payables Workflow & Automation Solution Set for Purchase to Pay.

For more information call 1-877-700-DATA or visit our website [www.DataServ.com](http://www.DataServ.com).

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We know your business is unique. Tailoring is always included with DataServ.

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