SageLink Workflow

**Automating Purchase Invoice Approval**
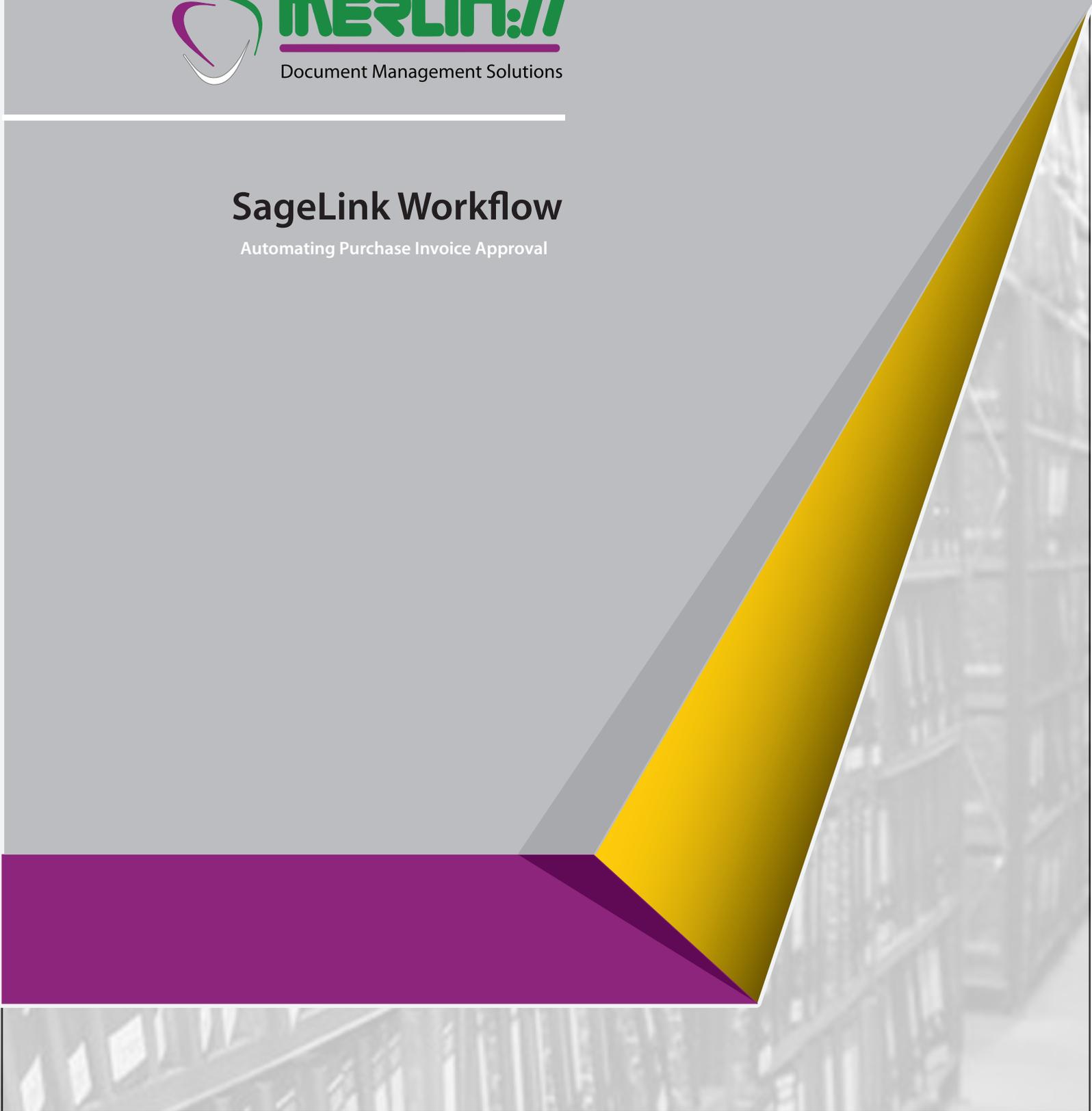
Sagelink Workflow

AUTOMATING INVOICE APPROVAL

SageLink provides a cost-slashing means of processing supplier invoices, updating Sage and archiving away the documents for easy retrieval without leaving Sage. But it assumes the invoices are approved for payment: this is no problem in a small organisation, where one person is responsible for signing offmeans they are often printed off and sent round the houses for signatures, only to be scanned back to electronic format before the benefits of SageLink can be realised. The SageLink Workflow add-on fills in that gap.

WHAT DOES IT DO?

Simple - invoices in electronic form, either as received or scanned hard-copy, go to the central Accounts user who passes it to the user most likely responsible for approval, who can then approve it, hold it while making enquiries, or pass it back to accounts to send to a more appropriate authority, perhaps one with a higher sign-off level. When approval has been received, the invoice can be paid, or if no approval can be given, it is held as a disputed item pending resolution of the query with the supplier.

This flow-chart simply describes the process:
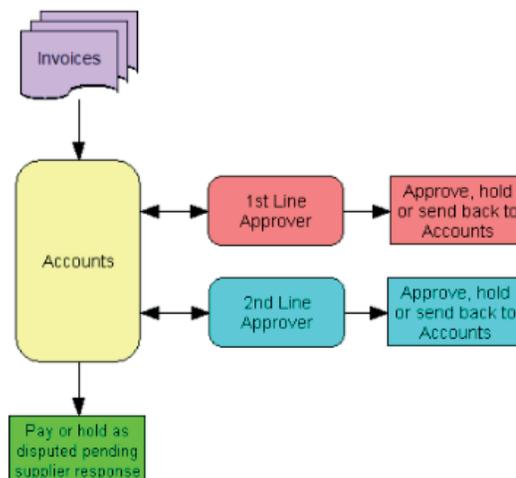
HOW DOES IT WORK?

Invoices are handled in the same way as standard SageLink and sent to the DocuStor cloud store. Accounts and approvers however can log in to DocuStor with special WorkFlow privileges and are presented only with invoices for their attention:
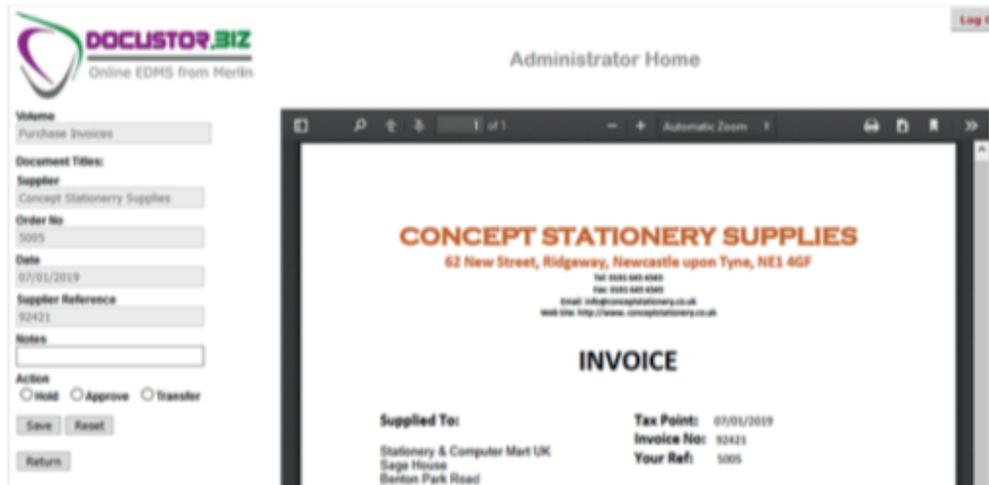
The user can choose to hold and add a note to remind him or her of the reason for holding, approve, which will automatically change the status as OK to pay, or transfer which will send it back to Accounts with a note of why that user cannot approve the invoice. Each user will receive regular emails to inform them that there are documents awaiting their attention.

There is a special user – SeeAllWF - accessed only by specified authorities, perhaps the FD and/or MD, who can see what is approved for payment or what is being held up where. They can see all invoices by clicking overview, get a report of invoices approved for payment, or directly authorise the payment:

Overview: Pay:
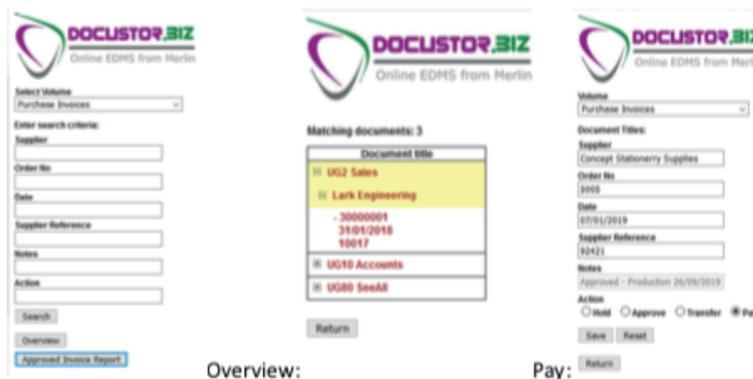
Once an invoice is paid, it is transferred to a different DocuStor Volume – Invoice Archive.