

A cloud-based solution to help you electronically forward Purchase Orders to obtain approval signatures for processing invoice Payments.

Key Features



Submitting Purchase Orders for Payment Approval

- ✓ Purchase Orders generated by Financial Systems should be scanned to create digital pdf files
- ✓ If the Financial system directly creates PDF POs, then scanning can be avoided
- ✓ When a PO needs to be approved for payment, Requestor will initiate workflow in the portal and attach supporting PO PDF file. Person(s) required to approve will be selected in the work-flow steps
- ✓ Payment approval request will now be electronically routed to approving person(s)



Electronic Review and Approval

- ✓ Electronic PO will automatically route to the participants of the workflow in the order established in the setup
- ✓ Each approver(s) in the workflow receives a task requesting review and approval
- ✓ Approver can review PO document attached and using stamp feature can add a signature and also Text Box to provide any additional comments
- ✓ If approver is out of town, an authorized person can reassign the approval task to others
- ✓ Status of a PO Payment approval can be checked by querying the process with PO number or key word



PO Processing, Records Storage and Archival

- ✓ After all the participant(s) approve, the PO the work-flow is routed to the PO processing staff
- ✓ Upon reviewing the signed off "Approval to Pay" PO copy, staff can initiate the payment process in financial system
- ✓ If needed, proofs of payment and other info can be stored in Digital File Cabinets for efficient archival



Benefits

- ✓ Eliminates the need to Physically route PO copies to departments
- ✓ Eliminates the need to physically store paper documentation
- ✓ Meets all retention mandates efficiently and makes auditing easier
- ✓ Quickly respond to inquiries with less resources
- ✓ More efficient tracking on the status of payments