DOCTECH



Did you know?

6 ways to automate your invoice approvals

There is great potential for automation in the processing of incoming invoices. But not every digital workflow fits every invoice or every organisation. Explore the possibilities! Our automation map is a step-by-step guide to flexible workflow options — from the simplest routing to fully automated approval processes — it's like magic.



BASIC APPROVAL

1 As simple as this

Every invoice workflow starts with capture, regardless of the format in which you receive it. Intelligent OCR technology reads and extracts all data for you before the invoice is stored securely in a central repository. As a next step, the invoice is automatically validated and passed to your accounting department. They are in charge of completion and an optional GL coding. And that's it – invoice processed!



2 Manual or automatic assignments

Now let's expand this simple workflow a little bit. Usually, at least one other person outside the accounting department reviews and approves an invoice. The accounts payable representative can assign it with one click; the approval is simple, digital and accessible from a mobile device. Do you want to assign the invoice automatically? No problem. If a certain vendor's invoices are always reviewed by the same people, the workflow can automatically route those invoices to predefined approvers. An invoice workflow is not interrupted even if a team member is absent and enjoying a well-deserved holiday. It is simply forwarded to a designated substitute.





MULTI-LEVEL APPROVAL

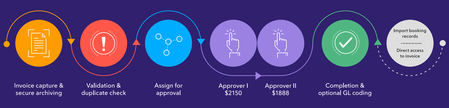
3 More than one approver

Invoices with higher amounts often require a multi-level approval process. You can control this with user-specific approval limits: If someone reviews an invoice that exceeds their threshold, it is routed to another person in the process, such as a manager. Alternatively, you can set a general threshold above which invoices are always checked by another colleague.



4 Several cost centers

For some invoices, different departments are responsible for approval. In this case, simply allocate the costs of the invoice to the responsible cost centre when you assign it. This process is scalable to any person and includes an automated forwarding based on approval limits and absence rules.





MAGIC APPROVAL BASED ON STRAIGHT-THROUGH PROCESSING

5 Fully automated approval from selected vendors under a defined amount

The fastest approval process is fully automated. One straight-through processing method is to route invoices from selected vendors directly to posting if they are below a certain value. This "QuickMatch" is well suited, for example, to recurring vendor invoices that arrive in the same amount each month.



6 Fully automated approval through invoice matching

Invoices can automatically be matched with different data and documents such as purchase orders or delivery notes. Reconciliation is possible down to item level! If all match correctly, the invoice is directly approved and ready for completion and posting in no time at all.



This and much more is possible with DocuWare!

Audit-proof archiving of all invoice formats	Quick, mobile access to documents	Direct integration into your accounting system	Full transparency and status overview
Seamless collaboration	Powerful OCR and intelligent indexing	Approval documentation on the document	Flexible integration with Power BI or other dashboards

See how easy invoice approval can be?

Let modern invoice processing make all your wishes come true.
We are happy to assist you, just contact us!

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www.doctech.co.uk

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