WORKFLOW AUTOMATION: REDUCE STEPS, ELIMINATE MISTAKES, SAVE TIME by Dennis Cowhey

Streamlining Operations

In today's fast-paced business environment, efficiency is paramount. Workflow automation is a powerful tool designed to streamline multi-step processes, reduce human error, and save valuable time. But what exactly is workflow automation, and how can it benefit your business?

What Is Workflow Automation?

Workflow automation is a technology that consolidates the independent steps of commonly performed tasks into a seamless, efficient process. Imagine no longer having to toggle between multiple open tabs or interrupt the customer order entry process to create a purchase order. Workflow automation integrates these related functions directly into the order entry system, making them readily accessible and easy to use.

For instance, users can create purchase orders without ever leaving the order entry screen. This consolidation of tasks creates a logical and efficient path for users, reducing the likelihood of mistakes and ensuring that all steps are completed in the correct sequence. Documents are linked within The Business Edge™ to ensure accurate processing, which we demonstrated in a recent feature presentation.

Vendor Direct Shipments: A Case Study

Vendor-direct shipments are a common practice, especially for time-sensitive customer orders or when certain products are not in stock. Traditionally, processing a vendor-direct shipment in The Business Edge™ required recreating all the order fulfillment steps that are bypassed when shipping directly from the vendor. This includes tasks like receiving, allocating, invoicing and entering the vendor invoice.

The traditional process is cumbersome and prone to errors. It might involve:

○ Entering the sales order as usual, possibly using a set purchase order (PO).

○ Manually creating a PO in a separate process, adding product codes identified during order review.

○ Adding notes to the PO indicating it is a vendor direct shipment and linking it to the associated customer order.

○ Extra handling to ensure the open sales order isn't mistakenly processed using on-hand product.

○ Manually allocate and invoice the customer order in separate offline steps.

○ Matching the Vendor Invoice with the PO

WORKFLOW AUTOMATION
Reduce Steps, Eliminate Mistakes, Save Time

The Business Edge
Simple · Focused · Effective

The simple solution with a proven step-by-step method for unlocking your fastener company's potential

* **Create Direct Shipments During Order Entry**
  * Eliminate Delayed or Missed Billing of Direct Shipments
  * POs for Multiple Vendors With Sales Order Split Feature
  * Automation Preview Lists Sales Order and Line Numbers Following Receiving
  * Direct Ship Sales Orders are Automatically Allocated and Invoiced After Receiving

* **Create Purchase Orders During Order Entry**
  * Build Large POs Based on Sales Activity
* **Automate Inventory Reservations**
  * Help People Deliver on Promises
* **Pop-Up Order Reservation Options**

Set Direct Shipment Automation: Enhancing Efficiency

Set Direct Shipment Automation changes the game. It allows users to quickly and accurately process direct shipments without the need for manual intervention at each step. Here's how it works:

○ **Integrated Order and PO Creation:** The enter and edit purchase order functions are initiated from within the customer order entry process. Users can create POs or multiple POs during order entry, working on the same familiar screens as they would in the normal PO creation process.

○ **Automatic Information Population:** Important information, such as the ship-to address, Customer PO and Products, are automatically populated into the PO from the customer order.

○ **Automatic Allocation and Invoicing:** Once the PO is received in the system, the order is automatically allocated and invoiced. This reduces the chances of delayed or missed billing, ensuring that orders are completed and invoiced promptly.

○ **Vendor Invoice Entry:** The vendor invoice can be entered simultaneously when using the "Receive POs and Post AP" function, further streamlining the process.

The benefits of this automation are clear. It eliminates manual errors, ensures timely invoicing, and provides flexibility to accommodate unexpected circumstances, such as decoupling the order and PO when needed.

Set Purchase Order: A Similar Yet Distinct Process

The Set Purchase Order function in The Business Edge operates similarly to Set Direct Shipment but with two key differences:

○ The process is complete after the POs are created, with no automatic allocations.

○ The PO is not coupled to the sales order, allowing for normal order fulfillment processes, such as receiving, picking, and allocation.

Set Purchase Order is particularly beneficial if your sales team is responsible for purchasing. It allows them to create POs efficiently and accurately during the order entry process without opening additional tabs or processes. Products identified as low on stock during order review can be easily added to a PO, with all necessary information populated automatically.

Reserve Lots: Ensuring Accuracy in Order Fulfillment

Another powerful feature in The Business Edge™ workflow automation is the Reserve Lots function. This allows users to hold specific products for a particular order, guaranteeing they are not used for another order. Whether you need to reserve lots for country of origin, certification, or pricing considerations, this feature provides peace of mind. It also integrates with wireless warehouse picking processes, making certain that the correct lot is selected every time.

Testimonial

"The Business Edge™ has made my job far easier, especially in terms of keeping the information together and connected. It's also made drop shipping from multiple vendors/suppliers to one single customer on the same PO SIGNIFICANTLY simpler. Even our billing department has found this system easier due to the orders being linked together. Overall, it's far simpler, more efficient, and more user-friendly than the alternatives!"

Colin Haddock, Vice President, A2 ZincFasteners, LLC

Conclusion

The Business Edge™ workflow automation is revolutionizing the way businesses handle multi-step processes. By reducing steps, eliminating mistakes, and saving time, it allows companies to focus on what really matters—delivering quality products and services to their customers. Whether through Set Direct Shipment, Set Purchase Order, or Reserve Lots, automation provides a logical and efficient path to achieving business success.

More Information

For more about Workflow Automation and The Business Edge™ contact Dennis Cowhey, President, at *Computer Insights, Inc.*, Tel: (800) 539-1233, email: sales@ci-inc.com or www.ci-inc.com.

COMPUTER INSIGHTS, INC.