



TraX
WORK FLOW

Automate your Document Approvals Process



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TraX Workflow replaces the existing manual process of chasing users to approve invoices by auto-routing supplier invoices to the correct person for authorisation. It also allows the approvers to view POs and other supporting documents, like supplier delivery dockets or certificates, from wherever they are on whatever device they're using. They can then approve, reject or query these invoices.. Updates are recorded in real-time in TraX to give all users 100% visibility of the payment cycle.



'TraX Workflow has allowed us to remove a lot of the physical pieces of paper and manual approvals from the business.'

Gemma Swift

Director of Finance,
Cammell Laird Limited

Benefits & Features

Document approval made easy

- System automatically sends purchase invoices to designated user/s for approval, based on your requirements.
- Outside of purchase invoice documents of any type e.g. contracts can also be auto routed for approval.

Can be configured to your requirements

- System can be configured to adopt your approval process rules using our rules engine functionality.
- If your process changes or users need to be amended you will be able to easily amend the system to accommodate such requirements.

Allows users to view all related documents simultaneously

- Stores all associated documents or paperwork in one place so approvers can quickly view and check any additional documentation they need in order to approve the invoice or document (like PoDs or certificates).

No more chasing people for approval

- Invoices/documents can now be approved by anyone from anywhere.

- Invoices can be approved via email or with TraX.
- TraX Workflow will automatically send approval reminders to users at pre-set intervals, set by you.

Bird's-eye view at every stage of the approvals process

- View the complete history of each invoice and see what stage it's at in the approvals process. (Who has seen it, who has approved it, who has queried it, etc.)
- Reporting functionality also allows the accounts team to identify what invoices are outstanding, awaiting approval etc. Reports can also easily be tailored to your requirements and auto scheduled to appear in your inbox.

Provides full traceability at every stage of the process

- Provides a complete audit trail of who did what and when.

Speeds up the approval process for documents

- No more calls back to the office looking for supporting documentation or querying invoices. With all the relevant information to hand, invoices can be approved quickly and easily by anyone from anywhere.



TraX
WORK FLOW

Business flows better with automated document approval.

To find out more about how Enterprise Imaging Systems and the TraX Workflow module can improve your document approvals process get in touch at

trax@enterpriseimaging.com



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