



# "AutoFORM Invoice Ensures Our Invoices Get Approved on Time"

## Overview

- **Finance Solution**  
Navision Financials 4.0
- **Challenge**  
Fast online access to purchase invoices to accelerate the authorisation process.
- **Solution**  
AutoFORM Supplier Invoice Module  
AutoFORM Archive  
AutoFORM Scanner Workstation
- **Why AutoFORM?**  
Scanned invoice images instantly available via Cobra's web based VPN and directly from NAVISION.  
  
AutoFORM uses Windows and web-browser technology delivering seamless integration with all NAVISION software. Payment status information is exchanged between Navision and AutoFORM, as well as the transaction metadata.
- **Key Business Benefits**  
By being able to view documents onscreen, managers & directors can approve invoices in less time.  
  
Eliminating filing tasks, administrators can spend more time on more value added accounts tasks  
  
Lower purchase invoice processing costs  
  
Less time spent on resolving supplier payment queries
- **Is it for you?**  
The advent of lower-cost storage systems means that every business can benefit from this document imaging technology. Without complex readjustments to your IT infrastructure your supplier invoice documents can be online and fully accessible from Navision in a matter of days



**COBRA, one of the UK's largest installers of Sky & NTL services, is using AutoFORM Invoice, a web based invoice processing solution for Navision that eliminates the cost and delays associated with paper based purchase invoice approval.**

### The Problem with Paper Based Invoice Processing

Until recently, Cobra used a cumbersome, paper-based system to obtain approvals and pay around 13,000 invoices per year. Since the managers who needed to approve them worked from over 20 different offices across the UK, spread as wide as Southampton to Aberdeen, it was very time consuming for the accounts office to ensure that documents were checked on time.

### The Solution Was AutoFORM

Dittrich, was convinced that an online document imaging system would overcome many of the difficulties. He approached Symtec, a Navision Solutions Consultancy a company that had successfully advised him in the past.

Symtec, immediately recommended AutoFORM Invoice, a new document imaging & management system that enables online invoice authorisation, via a secure VPN connection.

### How it Works the AutoFORM Way

Commenting on the solution, Dittrich said: "AutoFORM has delivered a number of efficiency and financial control benefits by streamlining and automating a number of account payable processes from authorisation right through to payment and beyond."



## Output & Document Management

### Online Authorisation - Fast & Effective

The authorisation procedure is particularly quick. Each manager just has to log on to AutoFORM and he is immediately presented with a personalised "to do list" of all the invoices that he needs to check. Authorisation is just a matter of clicking on the hyperlink to view the invoice - plus any related document such as the goods in note, and then changing the status button to approved, re-assign or query - and the job is done. Fast, simple and cost effective.

The whole process can be monitored by the accounts department. On a daily basis they can see which invoices have been approved - and more importantly those that haven't.

### What the Managers Say...

Julie Sellwood, Accounts Manager added. "We have seen a marked improvement in on time authorisations. Our managers are often out on site so they really like being able to approve or quickly check a detail on their invoices from home, a hotel, or anywhere that they might be working, while not having to carry piles of invoices around. "It also means they don't get lost or forgotten," says Sellwood with a wry smile.

**"Direct from Navision Screens or via our VPN AutoFORM link, we just click to view invoice copies on screen. The time savings are enormous!"**

### What the Accounts Team Say...

Sellwood adds "It makes the accounts team life much easier too. In particular if a supplier phones us regarding a payment, we simply access the Navision suppliers invoice screen, click on the invoice number and an invoice copy is immediately presented onscreen. And due to the bi-directional exchange of information between AutoFORM and Navision we can see its payment status, together with the details of any queries and agreements that our managers may have made - and we can do this while the supplier is still on the line. Before we had to go back and forth between each manager and the supplier, which inevitably took a few days before we had managed to reach everyone. With AutoFORM everything there is to know about each invoice is kept in the one place. The quick link access from Navision means that we can instantly access it when we need it or attach a copy to an email in the rare event of having to ask a manager to take further action.

Another advantage with AutoFORM is that the accounts payable process has been streamlined and automated. "We were wasting a lot of time and effort copying invoices, faxing them and then chasing managers to approve them. AutoFORM makes our lives much easier which will mean that we will be able to undertake more financial analysis tasks rather than spending our time faxing and filing paper" said Julie Sellwood, Accounts Manager at Cobra."

### What the Financial Director Says...

"AutoFORM is also a godsend for Finance Directors" added Dittrich. Cash management investigations, cost/profit analyses, supplier price comparisons can now be quickly completed, as I can quickly recall the invoice copies I need and view them on screen. In the past I would have to ask the accounts team to get out the original invoices, and copy them, which would hold me up whilst taking them away from other important tasks. Now I can do it myself, in less time than it would have taken me to write the list of invoice numbers."

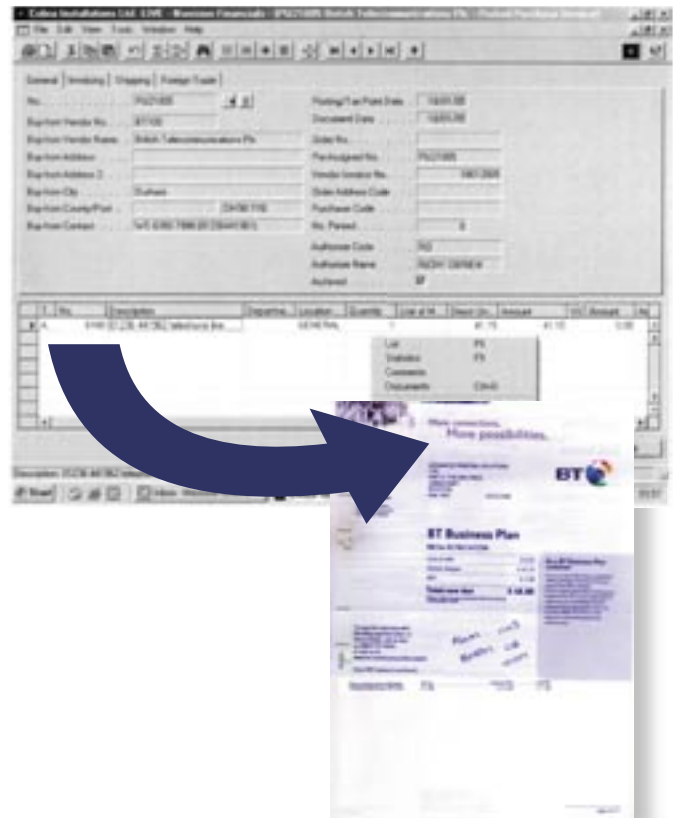
### Extensive Search and Retrieve Facilities

Dittrich continues: "The search and filter facilities within AutoFORM are superb. I can put a filter on the records and quickly see all invoices approved by one manager, the costs for one business, all the invoices from one supplier, or for a cross section of suppliers - all at the touch of a button. As there is no limit to the number of invoice records that we can hold, AutoFORM will become a very valuable source of supplier information.

Moreover, as invoices are now much more visible across the company - Directors and Managers can take greater control over payments and costs, and more secondary validity checks can be performed.

Dittrich went on to say. "I can't wait for the day we get rid of all this paper - and AutoFORM will help us do that. With AutoFORM we are more efficient - and that has to be good for our business."

**The other aspect that is notable about AutoFORM Invoice is that is modular. This meant that we could buy just the features that we needed without having to pay for lots of fancy expensive extra's that we don't require. It is an extremely useful addition to Navision and I highly recommend it."**



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