

# Using INBOOKS in Action Every Day



Every day, INBOOKS users gain back hours of time through automation, accessibility and limitless sharing.

This use-case illustrates an actual process configured and refined that helps turn tedious paperwork into a streamlined and efficient method to substantially reduce the time required for the purchasing life-cycle.

## A Transportation Authority Company uses INBOOKS to process Invoices.

### Overview

An invoice is received in one of three methods, and it is placed into a Windows folder. From there, INBOOKS TagSMART processes the invoice and reads all the data accurately directly from the document. The invoice is then routed through an extensive approval process with as many as 6 approvers depending on the total amount listed on the invoice. Once approved, an Accounts Payable Representative will review the data. Upon their approval, the data will be pushed into their ERP.

### Subject Area

Invoice Processing; Accounts Payable

### Actor(s)

Departmental and Payables Approvers

### Trigger

An invoice is received

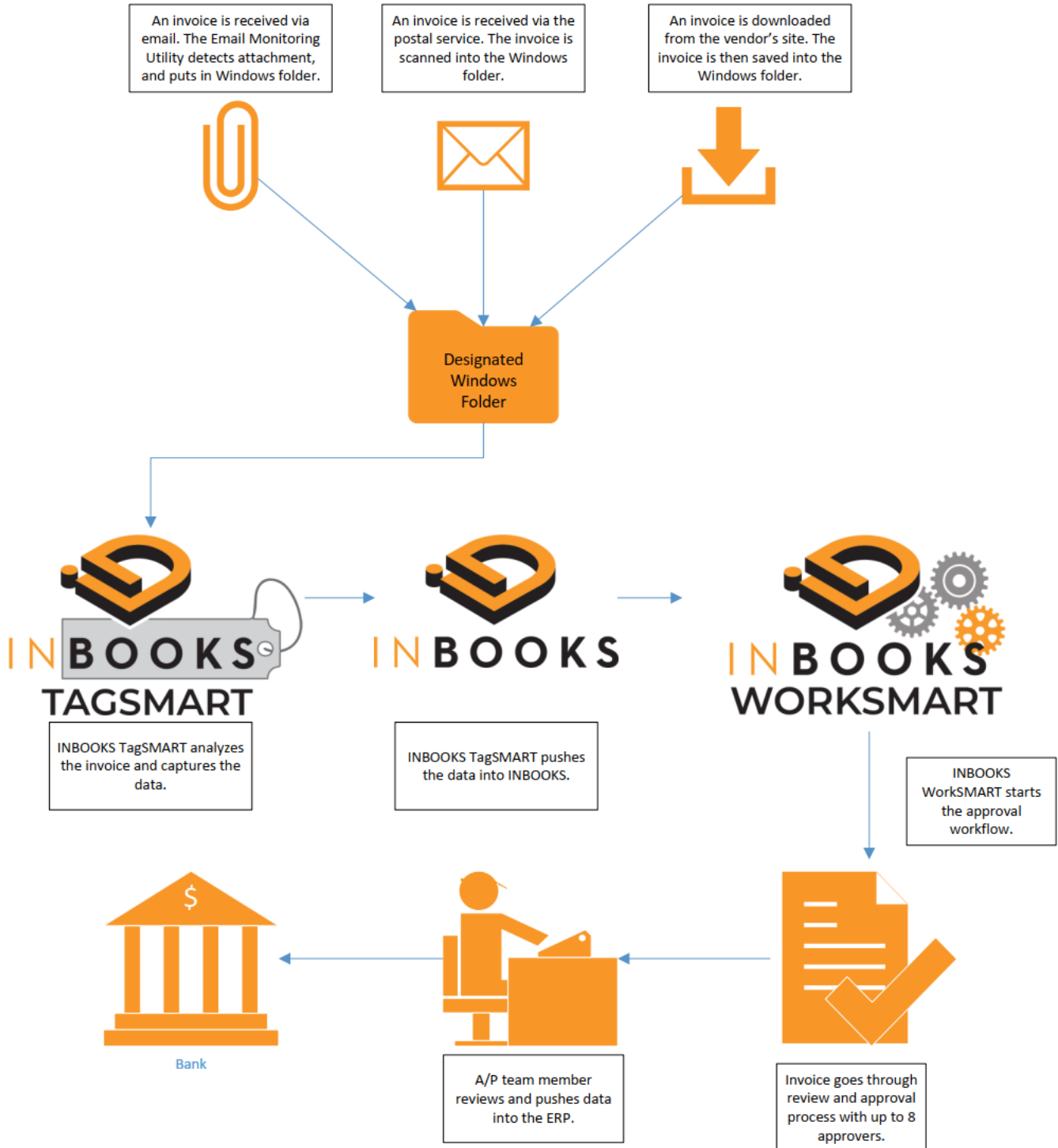
### Basic Flow

- 1) Invoices are received via email, the postal service, or downloaded from vendor sites.
- 2) Depending on the receiving method, invoices will be placed, scanned, or saved into a designated Windows folder.
- 3) INBOOKS TagSMART is launched.
- 4) An A/P representative analyzes documents in INBOOKS TagSMART.
- 5) The captured invoice data is reviewed and pushed into INBOOKS.
- 6) INBOOKS WorkSMART workflow begins.
- 7) Approvers are assigned automatically based on dollar thresholds and classification.
- 8) Once all approvers have reviewed the documents, an A/P representative is assigned as the final approver.
- 9) Upon final approval, the Invoice data is pushed into their ERP.
- 10) The information from the invoice document is transferred into their ERP including header and line item details.

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## Use Case Flowchart



 **INBOOKS**  
**USE CASE****INVOICE PROCESSING**

The following case is based off of a real customer's process that utilizes INBOOKS's features and capabilities sufficiently.



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