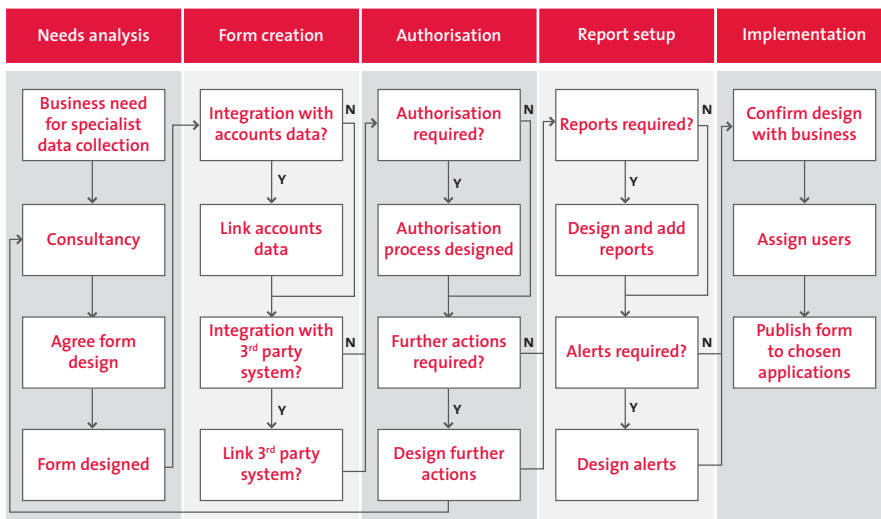


# Workflow forms

All your business information can be captured and all your paper-based forms and documents can be duplicated in an on-screen digital form with the layout of your choice.

Workflow ensures each form takes a pre-defined path as they move between your staff and managers for extra information, authorisation and sign off. Alerts are sent by email and SMS to advise if a procedure is delayed, breached or ready to action.



## Reduce paper forms

Re-create every type of business-specific form and make them accessible online to all your staff. You have flexibility to design the layout of the form and the information it holds.

Reduce paper waste and the associated storage whilst making your whole business more responsive and efficient.

## Flexible form types

Every paper docket and form in your business can be replaced with a digital version thereby saving paper and the burden of storing it. Every computer form and data record including spreadsheets and custom databases can be automated and collated into a central store. Digital forms prompt your staff for exactly the information you need tracked, monitored and stored. The system will insist that

mandatory fields are completed and will validate data that has to meet certain criteria or add up.

A single form can comprise multiple pages. The information is presented and displayed in the format you choose and with the styling necessary for your business. Tabbed pages, drop-down menus, numerical fields, date fields, data grids, and notes can all be labelled with the terminology that makes sense to you.

## Workflow & authorisation

Configurable rules automate the route each form takes as it travels through your business. You specify the information that can or must be entered at each stage of its journey. Alerts, sent to the desktop or mobile device of your staff, speed and complete the workflow process. Each form can encompass unlimited levels of approval and authorisation.

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### **Configurable workflow rules**

A typical form might be originated by one person, added to by another, approved by a manager and authorised by a director. Flexible workflow rules automate the delivery of forms around your business, ensuring all the necessary data is added and checked by the relevant person putting an end to paper-chasing and lost information. Each form can have independent rules for the data capture required and its route through your organisation.

### **Alert functionality**

Alerts and reminders prompt your staff to originate, amend or approve forms as necessary. Once you have documented your procedures and stipulated the circumstance and timing of each necessary action, the system keeps you on track. Alerts are sent by SMS and email ensuring that the message is always delivered on-time wherever your staff might be.

Next actions can be instigated by replying to the alert if appropriate. Any data that needs further clarification can be routed back to the originator for re-submission along with explanatory notes if required.

### **Authorisation**

Forms and steps in each process can be authorised by the originator if they have the authority to do so. Complex forms may need to be checked, approved or authorised by literally dozens of staff. The system can replicate your existing procedures or significantly tighten them up. You can set as many levels of authorisation as required, from simple one-step approvals to routines that encompass all the people and departments necessary to meet your stringent procedures.

### **Central storage**

Every authorised member of staff can enter and view information wherever they are located, anywhere in the world. Web-based tools empower your staff and release the burden on other departments - you no longer need to trawl through paperwork or phone around for information. It is easy to

duplicate all your information to a separate secure location.

### **All in one place**

Regardless of where data is entered, or how its image travels around your business, everything is saved and secured in the central database. This makes back-up and duplicating data off-site easier and much more reliable.

### **Browser-based**

All forms can be accessed through a web browser, providing any authorised user with instant visibility of documents wherever they are working – at home, on the move or at any of your global sites. Selected information can be made available through your company intranet, customer portals and your public website if appropriate.

### **Easy navigation**

Related forms can be linked together for easy navigation. For example, a 'personal development' form could hold an employee's career-related data, such as details of training courses they'd attended. This could link to another form such as 'sickness record' to provide you with information about that person's attendance.

### **Efficiency**

Empower your staff and release the burden on other departments. Tasks that would normally require accounts intervention or specialist knowledge, such as a request for a new supplier code or information on staff absence, can now be instigated by any authorised user.

### **Increased governance**

Two-way integration with the core business and finance system extends visibility to those hard-to-reach areas of your business.

Information can be shared with customer, supplier and employee records and analysed to provide a wealth of statistics and reports. Managers and staff are better informed, minimising the risk that anything will be hidden, overlooked or forgotten.

### **More visibility**

Digitally stored information is easier to share with a wider range of departments and staff making 'open book' policies more practical to deliver. More detailed information can be shared more cost-effectively and staying up-to-date takes less time and effort. Information can be shared with remote offices and home-based staff.

### **Additional validation**

When entering information on sundry forms, references to prime records such as employees, customers, suppliers, projects and products, can all be validated against data held in your core business system. This eliminates the mistakes and confusions that can occur when scribbling on paper-based forms.

### **Better control**

You determine who sees what and when. You remind staff to look at information that might have been ignored. You are alerted if essential tasks are delayed or overlooked. Now you have the systems to ensure that your company is following best practice.

## **Workflow form examples**

Workflow forms are highly flexible. Here are just some examples of how this functionality could benefit your business:

### **Change or edit records**

Workflow forms are flexible and can be used to smooth the creation or update of information held in the core system. For example, non-finance staff may need to enter/change a new supplier or request a project code. A workflow form enables the relevant information to be accurately captured, routed to the accounts department for authorisation and for the record to be automatically created or edited.

### **Approval of credit card expenses**

You can attach any electronic document/s to a workflow form, increasing visibility of information and speeding up your approval procedures. For example, when processing expenses, your purchase ledger clerk can send individuals a workflow form

with a digital attachment of their business credit card statement. Staff simply check the amounts and submit the form for approval by a manager. Once approved, the form posts expense journals into the nominal ledger breaking out VAT and differentiating re-chargeable expenses from subsistence.

#### **Approval of budgets**

Ensure budgets have full visibility prior to sign-off without needing to track multiple spreadsheet revisions. Budget templates can be easily distributed to a wide range of staff and entries reviewed and approved before updating the departmental or project budget.

#### **Controlled data submissions**

Workflow forms can be used to control timely and manageable data submission – both inside and outside your company. For example, you can create a form to capture specific timesheet information from your sub-contractors, designed so that time and expenses are analysed over the headings you require. Having approved the content, the system can automate entries direct to the sub-contractors ledger (see CIS) and payment.

#### **Better people management**

Forms can be used in a HR context to create a smooth dialogue between managers and staff. During preparation for an appraisal for example, a manager could send a form requesting an update on specific topics or projects. The remainder of the form might be finished during the review, circulated to both parties on completion and forwarded to a divisional manager for reference. The entire dialogue is saved in the central system and attached to the HR record of the person reviewed.

#### **Capture of KPI information**

Workflow forms can be used to capture any non-financial information that you like and this data added to any record for analysis (e.g. via your dashboard). The way in which data is entered and validated with the system can be tuned to any special requirement you may have.

#### **Who we are**

Our special skill lies in combining and refining industry standard accountancy packages to form a solution that matches your unique business needs and challenges - from in-depth reporting on business

intelligence to breakdowns of profitability per client or project, to enabling the remote data entry of timesheets, expenses or sales information.

Right down to providing real-time snapshots of business performance for senior managers on their desktop.

Our solutions deliver an unlimited number of databases to match your company structure, enable head office control of unique record management, structure Management Accounts consolidation to suit your specific needs or implement serial number stock control, that sets stock levels for warehouse management.

In short, Netcom makes sure your accounting and business system transforms the way you work and control your business. We do this by partnering with our clients, working with you to meet every challenge in a way that is cost-effective, and, above all, reliable.



Possibilities are infinite

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