NetSuite Vendor Bill Approval Workflow

The 360 Vendor Bill routing and approval solution was the last piece necessary to complete our transition to paperless Bill processing. It has helped assure that (i) no Bills are lost/misplaced during processing, (ii) all Bills, including those with exceptions, are routed automatically and approved by the proper person, and (iii) our vendors are paid in a timely manner.

Tom Freeze, COO/CFO, ESI Ergonomic Solutions

CLIENT SUCCESS STORY

ESI Ergonomic Solutions is a rapidly growing manufacturer and distributor of ergonomic solutions in the office furniture industry. Founded in 1988, ESI is headquartered in Mesa, AZ, with showrooms located in Mesa and Chicago. ESI sells to office furniture dealers through their network of independent sales reps across North America. ESI has been partnering with 360 Cloud Solutions since July 2013 for consulting services related to its conversion to NetSuite as its cloud ERP system.

Business Challenge

ESI processes over a thousand Vendor Bills each month. In the past, ESI employees manually routed, reviewed and approved these Bills. Any changes required (e.g. Amount, Items, Pricing), meant the Vendor Bill had to go back through the time-consuming manual approval process again. ESI needed an automated routing and approval process with department-specific approvals where selected people would be prompted to review and approve Vendor Bills and based on the specific Bill category such as Inventory, Labor, Freight, etc.

The 360 Solution

The 360 Cloud Solutions team collaborated with ESI to leverage NetSuite's SuiteFlow and SuiteScript functionality to create an Approval and Routing Workflow Process that met their needs for:

- Department-specific approvals (Accounting, Warehouse, Marketing and more)
- Approver restriction by category (Inventory, Labor, Freight and more)
- Primary and secondary approval assignments
- Admin override
- Reject Vendor Bill feature
- Easy workflow modification if personnel changed

Client Benefits

The Vendor Bill Approval solution 360 Cloud Solutions developed is providing ESI increased efficiency, better accuracy, increased throughput by automatically routing Bill approvals out to departments, and faster payment flow to Vendors. The implementation of the solution is providing value to ESI's Vendor Purchase to Pay process.

Skills & Accomplishments

- NetSuite SuiteFlow
- NetSuite SuiteScript Architecture
- NetSuite Vendor Bill
- Automatic Bill Routing
- Faster Payments