

PURCHASING AUTOMATION: Get Spend Visibility from Start to Finish

Esker's cloud-based automation solution optimises indirect spend requests and goods or services ordering by eliminating the paper-based and manual processing steps. Through an automated workflow, every spend gets the required authorisation and every invoice can be matched with a purchase order (PO). With its ability to interface with a variety of users in different company departments, the cloud-based solution is designed to maximise user adoption.



Key Benefits of Automation



- Efficient cash flow management
- Real-time budget control and follow-up
- Capture early payment discounts
- Greater process control and oversight
- Reduced risk of fraud
- Accelerated financial closing
- Better supplier management



Solution Overview

Esker takes the pain out of traditional purchasing processes by removing all manual touch points. Esker's Purchasing automation solution allows different departments (e.g., purchasing, accounting, marketing, etc.) within a company and different users (e.g., requester, budget owner, buyer, manager, etc.) to better manage indirect purchasing that generally takes place outside of the ERP system. Any business, regardless of order volume or number of employees, can automate its entire purchasing cycle in a relatively short period of time.

Electronic Purchasing Benefits

Reduced paper-based purchase requisition process

Users can quickly and efficiently place spend requests thanks to online purchase requisition forms. Printing, manually filling forms and hand-delivering the form for manager approval all become a thing of the past.

Electronic approval workflow

Thanks to an automated approval workflow, the correct level of authorisation is applied to each request, spend is within the agreed-upon budget, and the time it takes to get the purchase approved is significantly reduced.

Streamlined order management process

Electronic ordering systems improve productivity by allowing all requesters in the company to get the items they want from a catalogue of approved items in the required timeframe.

Giving users access to products and services from preferred suppliers allows the purchase to be aligned with company purchasing policies.

Efficient supplier invoice processing

Because orders are pre-approved, all invoices become PO-based and can easily be matched with the corresponding PO and goods receipt. Accounts payable (AP) staff are no longer required to chase payment approvals in order to pay invoices on-time and can even benefit from early payment discounts.

Complete spend process transparency

Transactions – from request to receipt of goods or service execution – are centrally tracked, enabling full reporting on requisitions, items purchased, orders processed and payments made. Improved spend visibility results in better accounting accuracy, on-time payments and improved supplier relationships.

Keep an eye on the pulse of your business

Esker dashboards provide every user with readily available information needed to perform their daily tasks, monitor performances, and spot problems or opportunities as soon as they arise – making every action smarter and more strategic.

Improved buyer-supplier communication

A supplier self-service portal improves business efficiency and reduces the costs of supplying goods and services. The portal provides transparency, speed and productivity that cannot otherwise be achieved using manual processes.

Inside Esker's Purchasing Solution

How it works



Purchase requisition

Requesters connect to the solution to create purchase requisitions for goods or services. They select items from an online catalogue or create the purchase requisition directly from a quotation. They are also able to ask buyers for a quotation. Requesters are informed in real time of how their request is progressing.

Approval workflow

Based on the company's buying policy, the request is placed into an approval workflow. The solution automatically routes the form to the appropriate person(s) for approval. The system allows approvers to budget-check the expenditures for each cost centre and G/L account for a given accounting period while approving the spend request. Cost-centre and business unit owners can ensure spend is within the approved budget line.

Order goods or services

Once the purchase requisition has been approved, the buyer converts it to a proper PO. In just a few clicks, the buyer is able to ask the treasurer to issue the payment and goods or services can be ordered and delivered on time. Based on information provided by the buyer, the solution automatically formats a ready-to-send PO for the supplier.

Goods or services receipt

Once goods are received, the recipient enters the goods receipt in the PO form so that when the invoice is received it can be processed on time. They may update the PO with received quantities at any time, either for part or all of the order.



Key Features at a Glance



- Easy-to-use web-based purchase requisition
- Supplier catalogue management
- Automatic requisition authorisation workflow
- Down payment workflow handling
- Automatic invoice matching
- Complete process audit trail and key performance indicator (KPI) tracking
- Quote-to-purchase-requisition conversion
- Real-time budget control and alerts
- Supplier self-service portal



Track and e-collaboration

The PO (and all related processing information) is readily available for reporting and analysis. Detailed audit trails for each purchase requisition include all steps and dates from purchase requisition to invoice processing. A supplier portal allows vendors to view and accept orders online, as well as exchange messages with their customer; and when necessary, clarify any order-related questions.

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