NeoSystems®

NeoFlow

Nine workflows that simplify key business operations.

NeoFlow

NeoFlow is a standardized, pre-built, best practice workflow solution that builds on Neo's expertise in systems integration. It consists of 9 workflows that simplify key business operations.

Payables

The accounts payable workflow provides a platform to process vendor invoices from invoice receipt through payment. The process includes the ability to pull PO data (if used) or input non-PO payables data for validated Project, Account and Org combinations from Costpoint. The workflow helps to capture coding before receiving approval. After approval, the information is loaded to Costpoint via web services and provides the voucher number assigned from Costpoint. An additional step can be added (optionally) for retrieving the check number associated with the voucher from Costpoint.

Billing

The accounts receivable workflow pulls data from invoices created in Costpoint. Information associated with header and/or billing line items can be pulled in for completeness. The requester can choose sequential or simultaneous approval when more than one approver is required. Once approved, the workflow provides the ability to send emails from the system with standardized wording and defined email aliases.

Vendor Maintenance

The vendor maintenance workflow provides the ability to set up a new vendor with key information for reporting and tracking into Costpoint. Alternatively, existing vendor data can be pulled from Costpoint and modified before the changes are routed for approval. This process helps control unwanted, duplicate, and invalid vendor information in Costpoint.

Vendor Ratings

This process includes implementing an extensibility in Costpoint and provides a simple way of rating vendor performance. The ratings are stored as part of the Vendor record in Costpoint and can be used during procurement or reported on to alert users to potential vendor issues or a need to avoid certain suppliers.

Employee Management

The employee management workflow makes updating employee information in Costpoint seamless and easy. Authorized workflow users can quickly access, view, and provide updates to an employee's current information in an easy-to-read layout before gaining approval for changes to be written via web services to Costpoint. The often-overlooked People module is then kept up-to-date and accurate.

Journal Entry Approval

The accounting department can add, replace, and copy posted and unposted journal entries from Costpoint within this workflow to avoid the unnecessary hassles involved with un-approved entries languishing in the Costpoint database. Requests made within this process proactively gain approval prior to being created in Costpoint as "ready to post." The need to reverse errant journal entries after posting is eliminated.

Financial Statement Approvals

Financial statement approvals are streamlined and consistently replicated with this workflow. Period-end financial statements are attached for approval from the CFO, Controller, or other financial statements approver chosen by the requester. Notes and comments can be provided to stakeholders before and/or after approval with custom notifications.

Employee Workforce

Once a project is set up and active in Costpoint, this process can pull relevant data and allow authorized users to request and gain addition of employees to a project workforce. This process cuts down time and effort for the accounting department to enter the information by interfacing with Costpoint via web services to add the workforce information once approved.

Travel Authorization

This process provides the ability to pull project data for travel authorization to be gained by an employee. The baseline process includes rules-based approvals and a supplemental process for updating the authorization with actuals after travel.

NeoFlow

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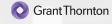thycotic

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