



How Workflow Automation Is Advancing Businesses Everywhere

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The more digital we become, the more integrated our applications need to be. When every single document, template, and piece of data is saved on-site, how do you find what you need quickly and efficiently? How do you send and share documents between co-workers that need to be filled out, reviewed, and sent to clients or customers? Without the proper software, it won't be easy.

Automation and workflow solutions have boomed in recent years for these very reasons. As businesses move towards becoming fully digitized, there needs to be a software piece that connects and integrates into all of your favorite applications, giving you the systems you're used to and the interconnectivity you need.

We can break down document management and workflow automation to discover how each is needed and what it does to improve your processes and advance your business.

Document Management

If you're using folders on your computer or a USB drive, a document management solution will be a fresh breath of air. While these older systems help you digitize your paper documents, they are tough to organize and can easily get lost when being transferred between employees and customers or clients.

A document management system is built to provide one user-friendly interface that everyone with the proper permissions can access. With shared access, everyone sees the same interface, and there is no confusion as to where someone put a certain document.

Additionally, a document management system makes it easier to send documents to others since you can do that from within the software itself—no need to use a separate application. The system can also be integrated seamlessly into your email server. Since document management systems typically come with search functionality, you can easily search for whatever you're looking for. You can even see a list of users who have worked on a specific document, in case you have questions for them.

With seamless integration, a document management solution can take your process from 0 to 60 as quickly as it takes to integrate it.

Workflow

While you can have document management by itself, you must have document management software to implement a workflow solution. Workflows allow you to set up automated processes that certain documents, invoices, and data go through in their life cycle. This greatly simplifies training and reduces the number of steps that your employees have to remember.

For example, when a new employee signs and finishes a certain document, that document can be automatically pushed to the HR representative responsible for their intake. That rep will receive a notification that a new document has been sent to them for review.

Another practical application involves delivery transactions. A delivery driver comes to your business, drops off the product, and confirms the delivery through their system. You are automatically sent a notice of the delivery, and the workflow solution pushes that notification to the correct person in charge of validating the delivery. Once that person signs off, the goods will continue moving through whatever automation rules you've set up for the rest of their life cycle.

Instead of your employees individually and manually pushing and sending documents, your customized workflow solution does everything for you.

Final Thoughts

These tools not only improve personal productivity but also allow teams and individuals to create a customized experience within their collaboration platform. You don't need to be a coder to use a document management and workflow solution, but you should have a basic understanding of the technical pieces and processes involved.

The right document management and workflow solution company can provide all the training necessary to help your business get the most out of your new system. Don't be afraid to implement these software solutions simply because your team may be uncertain. Your fears will quickly dissipate with the right training, which can easily be customized to address your specific challenges.

Looking for a document management or workflow solution for your business? [Contact us](#) today to learn about Optix and what it can do to give you back the hours you've been missing in your day.