

IMAGING AT:

Exelon

EXELON SERVICES USES COINS INTEGRATION WITH IMAGING

Exelon Services' Accounts Payable Department has taken their imaging workflow a step further with integration to COINS that expedites their invoice process. This integration greatly enhances their invoice workflow process by reducing manual data input, thus saving time and eliminating input errors. Here's how their process works:

PURCHASE ORDER ENTRY

Field supervisor ordering material and services enters purchase order information into COINS. This information will later be brought into the imaging system so it is included with the invoice data by the AP Department.

INVOICE ROUTING

When an invoice arrives in the AP Department, the imaging workflow begins. All incoming invoices are scanned into batches where they will soon be routed for approval. When a batch is opened, key invoice information is entered into COINS from the invoice image. After the information has been entered, the AP Clerk clicks the SCREEN SCRAPE Button in Invoice Router which pulls the data from COINS and populates some of the router fields. The AP Clerk then clicks the FETCH Button to extract the relevant Purchase Order data that was previously entered by the field supervisor when the material was requested. Using the SCREEN SCRAPE and FETCH DOCUMENT features built into the imaging software, the information pulled from COINS is consistent which eliminates the risk of error. Once the invoice information is complete in the router fields it is ready to be routed. The AP Clerk clicks the ROUTE DOCUMENT Button which sends the information and the image to the appropriate field supervisor.

Exelon Fast Facts:

- Location: Westchester, IL
- Contractor: Mechanical
- Implementation Date:
09-01-2002
- System Payback:
12 Months
- Accounting Software:
COINS





INVOICE APPROVAL

The field supervisor at anytime can view invoices that have been entered into the imaging system. The status of the invoice will depend on what stage it is in during the routing process (waiting, on hold, approved, disapproved, returned). If an Invoice is waiting for approval, Doc Notify, an automated notification program developed by Construction Imaging Systems will electronically notify the field supervisor that there are documents waiting to approve. The field supervisor then opens the waiting documents on the screen and views the image and the invoice data. When a PO is needed for invoice accuracy, the field supervisor clicks the FETCH PO Button. This button sends a command to COINS requesting all of the PO information. Within seconds the field supervisor has a copy of the PO on the screen. An "Invoice Overlay" organizes the PO information so it is easier to review. When the field supervisor is done reviewing the PO, they close the window and continue with the approval process. At this time the field supervisor can approve the invoice (in which case will go back to AP for posting). If the supervisor does not want to approve the invoice it can be saved with a different status – On Hold, Disapprove, Return to Accounting, Reroute to Another PM are status choices.

INDEX / ENTRY

Once an invoice has been approved it is routed back to the AP Department for entry into COINS. All approved invoices are verified by the AP clerk and marked as indexed. When an invoice has the status of INDEXED in Invoice Router, a command is sent to COINS where its status is set to APPROVED. All APPROVED invoices are placed on the POSTING REPORT within COINS.

BACKFILL BLENDER

After the invoice is APPROVED in COINS the Backfill Blender (which is run nightly or as requested) takes the information from the POSTING Report in COINS and populates all of the invoice data within the imaging system (i.e. Cost Codes, GL Acct #'s, Distribution, etc). The backfill also takes information from the PAID Report (i.e. check# and Check Date) and populates the invoice data within the imaging system.

Imaging with COINS Saves YOU Time:

Here's a look at how much time is spent on each step of the Invoice Routing process with COINS.

COINS PO Entry: 2.5 minutes

Scanning: 2 minutes

Routing: 2.5 minutes

Approval: 1 minute

Indexing: Less than 1 minute

Posting in COINS: Less than 1 minute

