

Approval Workflows

**FROM MANUAL TO
AUTOMATED**

**THE ULTIMATE GUIDE TO
OPERATIONAL EFFICIENCY**



ACCESS
APPROVED

**For IT
Teams and
Tech-Savvy
Leaders**

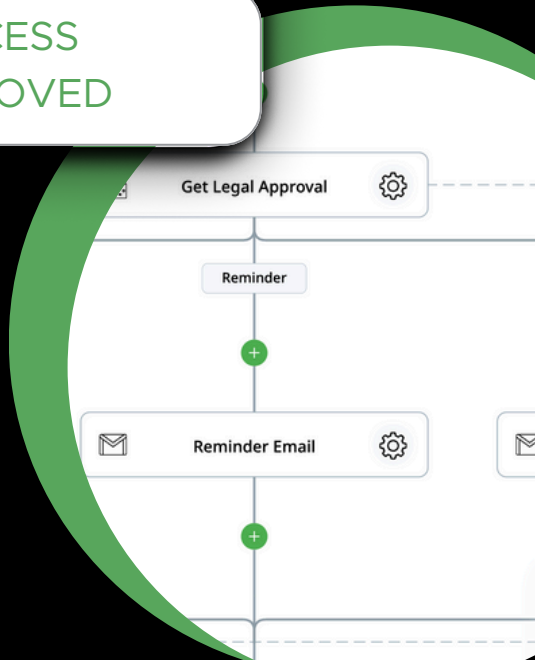


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Why Approval Workflows Matter

An approval workflow is a structured process that ensures requests, decisions, or tasks are reviewed and authorized by the right people before moving forward. Whether it's approving leave requests, invoices, or contracts, these workflows are vital for maintaining accountability, transparency, and efficiency in an organization. Without a clear workflow, approvals can become delayed, misrouted, or lost, leading to inefficiencies and potential errors.

Automating these workflows eliminates bottlenecks, improves communication, and ensures every step is documented. In today's fast-paced business environment, a well-designed approval workflow is essential for staying agile and compliant.

KEY COMPONENTS OF EVERY APPROVAL WORKFLOW ARE: STAKEHOLDERS, STEPS, AND DECISIONS





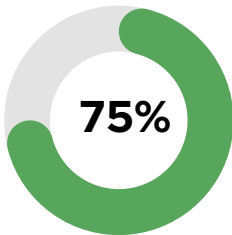
Why Automate Approval Workflow?

Manual approval workflows are inherently prone to bottlenecks. The most common pain points are:

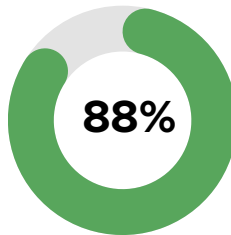
- **Delays:** Emails get buried, approvals are missed, and processes grind to a halt.
- **Errors:** Without a standardized process, approvals can be misrouted, skipped, or based on incomplete information.
- **Lack of Transparency:** Chasing down stakeholders leads to waste of time and increased inefficiency.

Automating approval workflows addresses these challenges head-on. According to the latest reports, organizations can save up to 77% of the time spent on routine tasks through workflow automation, leading to faster decision-making and increased operational efficiency.

Also, workflow automation can reduce repetitive tasks by 60-95%, allowing employees to focus on more strategic activities and improving overall productivity.



Of time an average business saves on workflow automation



Of errors are being captured by workflow automation

70%

of business owners think workflow automation offers a strong competitive advantage to their company (according to 2024 survey results)



Essential Approval Workflows You Can Automate in Minutes

When introducing automation, it's essential to prioritize workflows that save the most time and deliver the highest impact. Here are the top approval workflows that companies can automate quickly for immediate results:

Invoice Approvals

Invoices often pass through multiple hands for validation, causing delays in payment processing. An automated invoice approval workflow routes invoices to the right stakeholders, integrates with finance tools, and tracks the process end-to-end for faster approvals and error reduction.

Access Approvals for Security

Granting access to tools, drives, or corporate data often involves high stakes and multiple approvals.

Automating this workflow ensures proper authorization while maintaining compliance and security protocols.

Leave Request Approvals

Manual leave requests often result in back-and-forth emails and delays. Automating this workflow ensures requests are routed directly to the appropriate manager, approvals are trackable, and employees receive timely responses.

Vendor Approvals

Onboarding new vendors involves compliance checks, approvals from multiple departments, and proper documentation. Automating this process speeds up approvals, reduces errors, and ensures vendors are onboarded efficiently and securely.



Top Tools for Approval Workflow Automation

Approval workflows require tools that ensure structured decision-making, seamless communication, and compliance across departments.

Zenphi – Best for Google Workspace

Zenphi is a no-code platform designed specifically for Google Workspace users. It integrates seamlessly with tools like Gmail, Drive, Sheets, and Forms, offering unparalleled ease in automating approval workflows.

Zenphi also supports over 100 third-party integrations, making it ideal for businesses that want a simple, scalable solution for managing approvals across departments. Its visual workflow builder and customizable approval workflow templates make it a top choice for IT teams and business users alike.

Power Automate – Best for Microsoft Ecosystem

Microsoft Power Automate is ideal for organizations operating within the Microsoft ecosystem. It excels at automating multi-step approval processes in tools like SharePoint, Teams, and Outlook. It often requires technical expertise to create and maintain more complex workflows.

ZENPHI – BEST FOR GOOGLE WORKSPACE

Appian – Best for Enterprise-Grade Approvals

Appian combines low-code capabilities with enterprise scalability, making it a strong choice for cross-functional approval workflows. However, it's more suited for businesses with complex, large-scale needs rather than simple workflows.



Zenphi in Action: Invoice Approvals

With Zenphi, hundreds of companies already streamline invoice approvals with tailored workflows, ranging from simple tasks to fully integrated, end-to-end invoice processing automation.

Build a Simple Invoice Approval Workflow

Using Zenphi, some clients quickly set up a straightforward approval process. When an invoice arrives, Zenphi automatically assigns a task to the relevant manager for approval.

End-to-End Invoice Processing Automation

For organizations looking to scale and optimize efficiency, Zenphi enables end-to-end invoice processing that includes steps like:

- **Invoice Capture:** Zenphi retrieves invoices directly from your email inbox or other sources, ensuring all invoices are captured in one place.

- **Intelligent Document Processing:** Using advanced AI, Zenphi extracts key data (e.g., vendor name, invoice amount, date) from unstructured invoice files, saving time and reducing errors.
- **Three-Way Matching.** If company's purchase order (PO), vendor profile details and supporting documents match, Zenphi forwards the invoice to Finance for payment, ensuring a seamless process.

Popular feature among Zenphi users — add a PAID watermark to the invoices that were paid automatically



INVOICE

Invoice For	Company	Invoice ID
	Street Address	Issue Date
	City, State, Zip Code	Due Date
	Telephone Number	Terms
Description		Quantity
PAID		
Subtotal		
Tax (0.05 - 20%)		
Amount Due		

“

Previously we were forced to outsource our Invoice verification process overseas, but with Zenphi, we were not only able to bring it back in-house, we reduced our costs and decreased our processing time significantly

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JOSH COHEN

**President &
Business Owner**

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Zenphi in Action: Access Approvals for Security

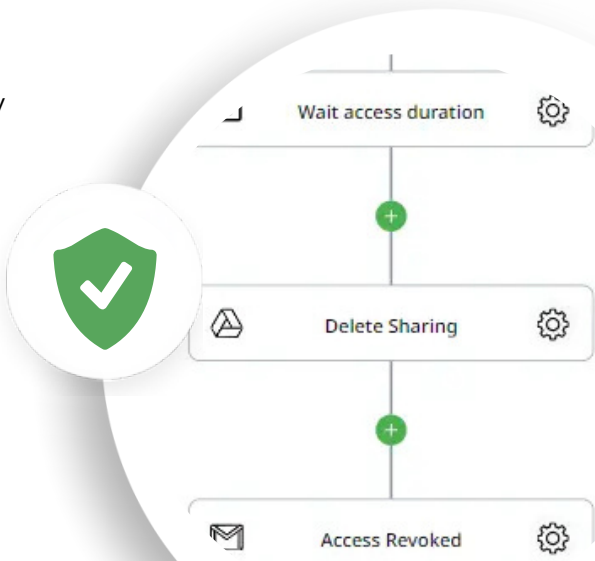
End-to-End Secure Access Automation

Many companies already utilize Zenphi to create end-to-end automation that ensures only authorized individuals gain access to company's sensitive data. Here's how it works:

- **Request Submission:** Employees or contractors submit access requests through a form or email. Zenphi automatically captures the request details.
- **Identity Verification:** Zenphi validates the requester's credentials against company directories, ensuring only authorized users can proceed.
- **Policy and Compliance Checks:** The request is cross-checked against company policies (e.g., role-based access controls or access limits for sensitive data).

- **Approval Workflow:** Then Zenphi routes the request to designated approvers, ensuring proper authorization levels are met. If approved, access is granted automatically (e.g., adding the user to a shared drive or system). If denied or flagged, Zenphi sends the request for further clarification or escalation to the IT/security team.

Zenphi also allows to add steps to the workflow that would revoke access automatically as soon as the approved access period is over



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Thanks to Zenphi, our compliance and data security protocols have improved by 100%. We are also saving now up to 40-50 hours per workflow, completely eliminating the need for manual intervention in some processes

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FRANCIS FRAIN

**Assistant VP, Information
Security and IT
Infrastructure**

Emerson College





Zenphi in Action:

Leave Request Approvals

Build a Simple Leave Request Workflow

With Zenphi, organizations can quickly automate the leave approval process that includes just a few steps.

End-to-End Leave Request Automation

But most companies use Zenphi to fully automate workflow that simplifies every step of the process:

- **Request Submission:** Employees submit their leave requests through a Zenphi form or directly via email. Zenphi captures all relevant details (e.g., leave dates, type of leave).
- **Policy and Availability Checks:** Zenphi help to automatically verify the request against company policies, such as leave quotas or overlapping schedules, ensuring compliance and availability.

- **Approval Workflow:** The request is routed to the designated manager for approval. If approved, the workflow proceeds to the next steps.
- **Out-of-Office Auto-Reply Setup:** Upon approval, Zenphi automatically generates and configures an out-of-office auto-reply in the employee's Gmail. This ensures colleagues and clients are informed about the employee's leave.

For leave requests that exceed policy allowances (e.g., unpaid leave), Zenphi can automate the calculation of any required compensation adjustments



Calculate Business Hours

Inputs Output Usages Errors

Time Zone*
...Standard Time

Start Date*
...2024 8:58 AM

End Date*
...2024 8:58 AM

Start Hour of Business Day*

“

Zenphi simplifies automation tasks effortlessly. Every automated process seamlessly integrates with GSuite, ensuring smooth communication and data management throughout the workflow.

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KEVIN VACANTI

**Advanced IT Support
Specialist**

Purple Wave
Auctions





Zenphi in Action: Vendor Approval

Vendor onboarding approval is a critical process for ensuring that your organization collaborates with reliable and compliant suppliers. Performed manually, this processes can be slow, prone to errors, and lacking in transparency.

End-to-End Vendor Approval Automation

Zenphi enables organizations to fully automate the vendor approval process from onboarding to final approval, ensuring no step is missed. Here's how it works:

ZENPHI LOGS ALL ACTIONS, PROVIDING A CLEAR AUDIT TRAIL FOR COMPLIANCE AND PERFORMANCE REPORTING

- **Form Submission:** Vendors submit their details via a Zenphi-powered form, uploading necessary

documents such as business registration, certifications, and payment information.

- **Data Management:** Zenphi automatically captures the submitted details and updates a Google Sheet, creating a centralized and trackable database for all vendor submissions.
- **Task Creation for Approvals:** Zenphi assigns tasks to the relevant managers to review the submission.
- **If Approved:** Zenphi sends an automated confirmation email to the vendor, notifying them of their approval status and next steps (e.g., onboarding instructions or account setup). If rejected, Zenphi triggers an email requesting additional information from the vendor or notifying them of the rejection with detailed reasons.



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