

# Your Playbook to Workflow Automation Success in Manufacturing

*A Step-by-Step Guide to Eliminating  
Information Bottlenecks in Your Plant*



# What to Expect from This Playbook

Modern manufacturing runs on efficiency. Every delay, data error, or missing document slows production, disrupts supply chains, and impacts already thin margins.

This playbook shows manufacturers how to eliminate information bottlenecks by automating document-driven workflows. Inside, you'll learn where documents fit into key manufacturing processes and how to start streamlining your plant with practical workflow automation steps.



# Manufacturing: A Lean Operation That Demands Efficiency

Manufacturers operate on razor-thin margins, where even a minor roadblock can result in major setbacks. But despite an industry-wide push for automation, the way many plants manage their information remains the same.



**Information Silos Between Departments**



**Production Bottlenecks from Missing Documents**



**Disconnected Teams Across Plants or Locations**



**Manual Data Entry Slowing Operations**



**Limited Visibility into Process Status**



**Compliance and Audit Risks**

The Lean mindset must move beyond the warehouse and factory floor to how information is managed.

## Automation Maturity Assessment

What are Manual Manufacturing Workflows Costing You?

(1 point for each question that applies to your organization)

- Information Access:** Teams work with outdated or delayed information from bills of lading, order packets, ERP data, and more.
- Audit Readiness:** Audit documents, such as compliance certifications and inspection reports, are time-consuming to prepare and locate.
- Workflow Efficiency:** Invoice processing, order processing, and other information-based tasks are time-consuming and error-prone.
- Remote Collaboration:** Teams across departments and locations find it challenging to stay informed of changes, delays, and process status.

If you scored a point for even one of these issues, order process automation can provide substantial benefits for you.

### Your Score

**0-1 Points:** You may already have some automation in place, but there are likely opportunities to improve visibility and efficiency.

**2-3 Points:** Manual processes are likely slowing productivity and increasing risk. Workflow automation could deliver immediate gains.

**4 Points:** Your organization is losing valuable time and resources to inefficient document processes. Automation should be a top operational priority.

# Why Workflow Automation Drives Success

Workflow automation transforms static documents into active data that drives your manufacturing processes. Instead of information sitting in email inboxes, shared drives, or paper files, automation extracts key data and routes it to the right people and systems instantly.

## Accounts Payable

- Automated invoice processing
- Timely approvals
- Informed payment planning

## Quality & Compliance

- Automated ISO document tracking
- Effortless audit preparation
- Full visibility of compliance records

## Accounts Receivable

- Automated Order Processing
- Faster processing of proof of delivery
- Quicker & more timely customer billing

## Vendor & Contract Management

- Centrally archived agreements
- Automated expiration tracking
- Streamlined vendor onboarding

## Production & Shop Floor Documentation

- Free-flowing job travelers
- Automatic data entry into ERPs
- Readily available information



# Prioritizing Workflows: Your Investments from A-Z

Manufacturers must navigate document-heavy processes across numerous departments, including:

- Procurement
- Production
- Quality Assurance
- Logistics
- Finance
- Compliance

The most successful manufacturers begin with high-impact processes where automation can quickly reduce manual work, eliminate errors, and improve visibility. Workflow automation is an investment, and fast results are key to maintaining momentum and support. Prioritize processes with a proven ROI and low-effort implementations.

## 1. AP Invoice Processing:

**Before Automation:** In high-volume environments like manufacturing, manual data entry, matching, and invoice approvals quickly become time-consuming and error-prone.

**After Automation:** Automating payables results in more timely payments, better cash flow management, and greatly enhanced productivity from your administration team.

## 2. Automated Order Processing

**Before Automation:** In high-volume environments like manufacturing, manual order entry is time consuming and requires significant labor to create orders in your ERP.

**After Automation:** Automating incoming orders from email, scan and other means uses AI to create orders and leaves only the exceptions to the humans so they can focus on higher level tasks.

## 3. Production Order Packets

**Before Automation:** Production order packets travel across the entire factory floor, but multiple versions and simultaneous needs create confusion and bottlenecks in production workflows

**After Automation:** Enforced version control and cloud access to order packets means that every team is working with up-to-date information exactly when needed, shortening production cycles and reducing errors.

## 4. Quality Control Documentation

**Before Automation:** Material testing reports, machine inspection reports, and certification records are all crucial for customer and regulatory audits, but manually locating these documents takes time and hands away from other vital tasks.

**After Automation:** Having instant access to QA records removes the mad dash for audit preparation and allows teams to continue with their regular tasks. This access also enhances the customer experience by enabling fast responses to questions and inquiries.

## 5. Engineering Change Orders (ECOs)

**Before Automation:** Engineering change orders are needed by numerous teams on the factory floor, but outdated versions and delayed access can lead to major errors and production bottlenecks.

**After Automation:** With instant access to the latest versions across all teams, each batch of goods will be made according to the latest standards. This eliminates the need for corrections and delays while waiting for information.

## 6. Vendor/Customer Onboarding

**Before Automation:** Engineering change orders are needed by numerous teams on the factory floor, but outdated versions and delayed access can lead to major errors and production bottlenecks.

**After Automation:** With instant access to the latest versions across all teams, each batch of goods will be made according to the latest standards. This eliminates the need for corrections and delays while waiting for information.



# ERP Integration: Unlock the Full Value of Your Manufacturing Systems

Your ERP already manages critical operational data, but many document-driven processes still exist outside of it. Workflow automation bridges that gap. These vital connections fuel your plant with the latest information, provide greater visibility, and facilitate additional automation throughout your operation.



**Eliminate data entry:** Route up-to-date transaction data, inventory records, and more from your documents directly to your ERP.



**Gain real-time information:** Ensure all systems and departments use the same information for clearer decision-making.



**Fuel processes and analytics:** Use this real-time data to power your ERP processes, including payment scheduling, inventory management, and predictive analytics.



*“Square 9 is extremely efficient and stable; it is easy to learn, use, and deploy, and it requires very little maintenance. Square 9 integrated well with our Infor VISUAL ERP system, and while that system has document management capabilities built into it, they were not sufficient for our needs”.*

**- Brian O'Connor**

IT Manager at HARCO Laboratories Inc.



# Building a Business Case For Workflow Automation in Manufacturing

Even when workflow automation makes operational sense, leadership teams often require clear financial justification. Building a strong business case ensures your automation initiative gains the internal support it needs.

## Step 1: Quantify Current Document Volume:

How many invoices are you processing a month? How many production packets are being routed a week? How frequently are your records being audited?

## Step 2: Calculate Labor Costs:

How many hours does each process take? How many team members are required for these processes, and what are their hourly rates?

## Step 3: Assess Risks & Soft Costs:

What unexpected outcomes can happen with your current processes? Have you lost compliance documents? Has production been delayed due to missing information? Are vendor disputes slowing orders?

## Step 4: Set Benchmarks for Success:

What would your operations look like if all teams had access to the right information? How much time would you save on data entry? Set reasonable benchmarking metrics, such as reduced data entry errors, improved productivity, or more efficient audit preparation.



## Your Implementation Roadmap

An ideal workflow automation implementation will solve challenges in their entirety with minimal disruptions. Successful automation projects follow a structured rollout plan that minimizes disruption while maximizing early value.



**Phase 1: Audit Your Processes:** Record how information flows, what data is manually entered, and where bottlenecks occur.



**Phase 2: Inform Stakeholders:** Keep those who will be using this solution vested in its development. Listen to input and address concerns.



**Phase 3: Roll Out Your First Use Case:** Choose a process or department where the most value will be created. Use this as a proving ground for the value of future investments.



**Phase 4: Expand Your Workflows and Archives:** Once your first use case is creating results, you can expand your solution into other areas of your plant.



**Phase 5: Benchmark Success:** Note time saved, process cycles shortened, cash flow improvements, and other metrics that show clear improvements from your solution.

## Future-Proofing Operations

The best workflow automation platforms grow with your manufacturing operation. Look for solutions that can easily expand into new processes as your needs evolve. Crucial components for this versatility include:



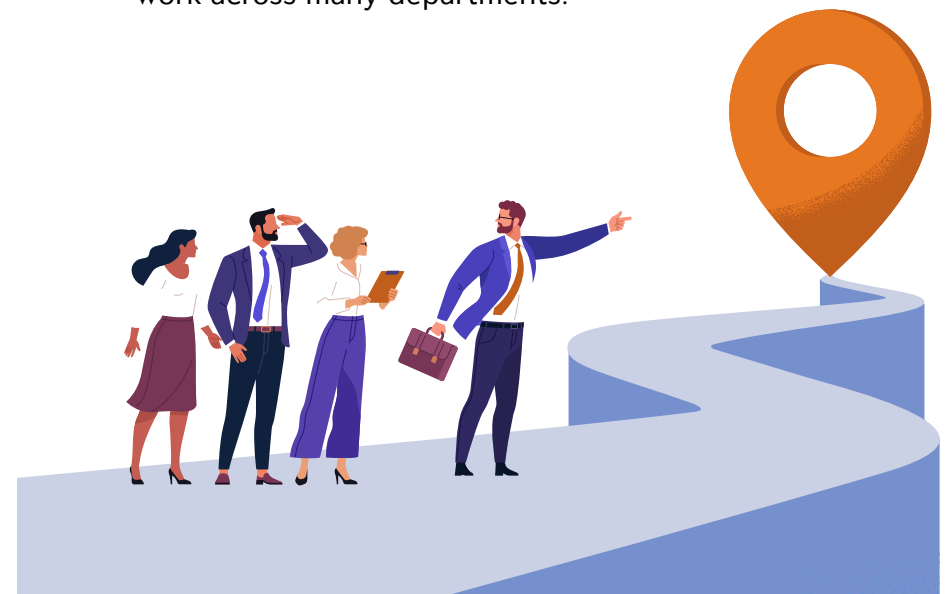
**Generative AI Data Capture:** Look for AI capture automation that works with any document, regardless of type or format. This capture automation should be accurate and easy to set up.



**No-Code Integrations:** Solutions that can effortlessly integrate with a variety of line-of-business applications will ensure success with future automation efforts. Look for integrations with minimal points and middleware that complicate workflows and security.



**Flexible Workflow Automation:** Robust workflow builders that adapt to your unique processes will enable you to expand automation across any department. Look for workflow automation that is easy to implement and can work across many departments.





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## Why Square 9

Square 9 Softworks is a generative AI-powered platform that removes the frustration of extracting data from documents, forms, and all external sources so that you can harness the full power of your information. Release your team from repetitive tasks while your work flows freely in areas like accounts payable, order processing, onboarding, contract management, and more. The Square 9 platform captures your unstructured content, transforms it into clean, searchable data, and securely shares it across your organization to accelerate your decisions and actions.

**Contact Square 9 for a no-obligation discovery session and see how transforming your organization can lead to a more efficient, secure, and informed plant.**

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