

# Automated Order Approval System

Implementation Partner: Mokxa Technologies | Customer: Fortune 100 Global Company and Among the Top General Insurance Providers in the World

## ABOUT PARTNER

Mokxa Technologies is a global business solutions provider focused on delivering peace of mind to its clients by simplifying enterprise IT.

Powered by hybrid thinking and deep technology expertise, Mokxa specializes in providing CIO services, futuristic platforms, enterprise architecture, and enterprise risk assurance to industries like healthcare, BFSI, manufacturing, and more.

## CUSTOMER AT A GLANCE

The customer is a Fortune 100 global company and among the top general insurance providers in the world, with product offerings including life, property and casualty insurance, as well as asset and wealth management services.

Characterized from the very outset by a strong international outlook and now present in more than 50 Countries, they have consolidated its position among the world's leading insurance operators, with significant market shares in western Europe. Its main activity covers regions such as Germany, France, Austria, Spain, and Switzerland.



**Industry:**  
Insurance



**Firm Size:**  
10,001+ employees



**Country:**  
France

## CHALLENGES

- Needed to improve the quality, accuracy, and traceability of documents and approval statuses
- Had to rely on manual processes for document routing, escalations, and approvals
- Purchase orders and insurance documents were sent and routed via email as PDF attachments for review, paper documents were manually sent for approvers to sign
- The business flow was time-consuming, labor-intensive, and lacked auditability for approved/rejected documents
- Storage of physical documents became a problem with increased storage costs and the need to comply with government regulations

## SOLUTION

An Automated Order Approval System was built on the Joget platform to automate and digitalize the approval processes and eliminate the need for manual effort on email responses.

The system utilized a combination of features such as alerts, digital signatures, PDF reader and writer plugins to create a seamless process, significantly reduced the turnaround time for order approvals and increased the accuracy and transparency of the workflows.

## RESULTS

- ✓ Achieved 60% reduction in paper usage and 45% increase in the velocity of document approval process, projected to save approximately \$59K equivalent in man-hours
- ✓ This has led to a more environmentally friendly and sustainable approach while freeing up valuable resources and reducing the time it takes to complete approvals
- ✓ Utilized POP3 protocol to read emails with approval requests and predetermined document formats
- ✓ Implemented PDF reader to parse data such as approver, document ID and transaction amount from PDF attachments, and intelligent validation and routing based on business rules for approval
- ✓ Enabled pre-determined email responses to indicate request approval or rejection, and added pre-recorded digital signatures of the approvers to the documents in cases where the approval is being sent back to the requester
- ✓ Provided the capability for approvers to approve or reject invoice orders via automated emails, without logging in to the application interface
- ✓ This feature further streamlined the approval process, reducing the amount of manual effort required



**60%**  
Paper  
reduction



**45%**  
Increased  
velocity



**\$59K+**  
Savings equivalent  
in man-hours