Automating Business Office Workflows with Google

Real-World Processes Using Forms, Sheets, Docs & AutoCrat

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WHY AUTOMATE?

The Reality in School Business Offices

- Limited staff
- Increasing compliance requirements
- Too many paper forms
- Manual emails and follow-ups
- Duplicate data entry

OUR GOOGLE AUTOMATION TOOLKIT

- Google Forms
- Google Sheets
- Google Docs
- Google Drive (shared folders)
- AutoCrat (add-on)

WHY THIS MATTERS

- No new contracts
- No IT overhaul
- Easy for staff to learn
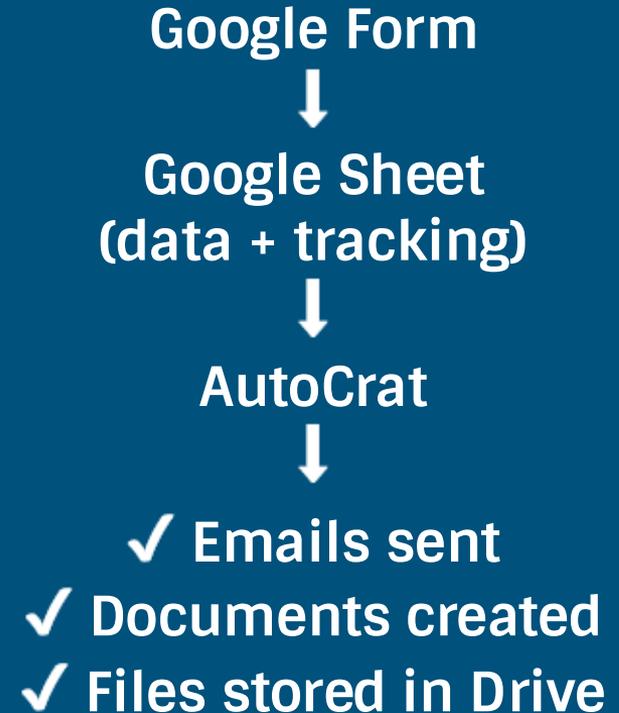
HOW AUTOCRAT FITS IN

- Takes Form or Sheet data

- Merges it into a Google Doc template

- Emails PDFs automatically

- Saves files to Drive

- Names files consistently

BWSD BUSINESS OFFICE EXAMPLES

OUR BASIC WORKFLOW

Google Form
↓
Google Sheet
(data + tracking)
↓
AutoCrat
↓
✓ Emails sent
✓ Documents created
✓ Files stored in Drive

ACCOUNTS PAYABLE: PAYMENT AUTHORIZATION

The Problem

- ❏ "Okay to pay" emails
- ❏ No consistent documentation
- ❏ Hard to track approvals

ACCOUNTS PAYABLE: PAYMENT AUTHORIZATION

The Solution

❏ School secretary submits a

  Google Form

❏ AutoCrat emails:

  ❏ Accounts Payable

  ❏ Person submitting the form

WHAT HAPPENS NEXT

❏ Responses stored in a Google Sheet

❏ AP adds the docket number when paid

❏ One place to track approvals and payments

Payment Authorization Example

BENEFITS

❏ Timestamped approvals

❏ Audit-ready documentation

❏ No lost emails

ANNUAL NON CERTIFIED EMPLOYEE LETTERS

❏ Eliminates copy/paste errors

❏ Consistent messaging

❏ Faster turnaround

❏ Easy updates year to year

❏ Documentation for disputes

Non Certified Letter Example

HANDBOOK & LAPTOP AGREEMENTS

THE OLD WAY

- ❏ Paper forms
- ❏ Chasing signatures
- ❏ Lost documentation

HANDBOOK & LAPTOP AGREEMENTS

THE AUTOMATED WAY

❏ Employee completes a Google Form

❏ AutoCrat:

  ❏ Emails confirmation to employee
  ❏ Creates a PDF
  ❏ Stores by school in Drive

Handbook Agreement

[Handbook Agreement PDF](#)

[Handbook Agreement Form](#)

[Handbook Agreement Doc](#)

NON-CERTIFIED ANNUAL EVALUATIONS

PROCESS

❏ Evaluator completes Google Form
❏ AutoCrat emails evaluation to:
  ❏ Employee
  ❏ Evaluator
  ❏ Copies stored in Drive by school

Employee Evaluation Form

Example PDF Evaluation

NON-CERTIFIED ANNUAL EVALUATIONS

RESULT

- ❏ Standardized evaluations
- ❏ Easy compliance tracking
- ❏ No missing paperwork

Employee Evaluation Form

Example PDF Evaluation

NEGATIVE LUNCH BALANCE TRACKING

The Challenge

- ❏ Individual parent notifications
- ❏ Sensitive messaging
- ❏ Time-consuming drafting

NEGATIVE LUNCH BALANCE TRACKING

Our Solution

❏ Google Sheet tracks students
❏ AutoCrat generates a document per student
❏ Message can be copied and sent to parents

LESSONS LEARNED

❏ Start with one process

❏ Keep templates simple

❏ Use consistent naming conventions

❏ Train staff on *why*, not just *how*

❏ Document your workflows

QUESTIONS