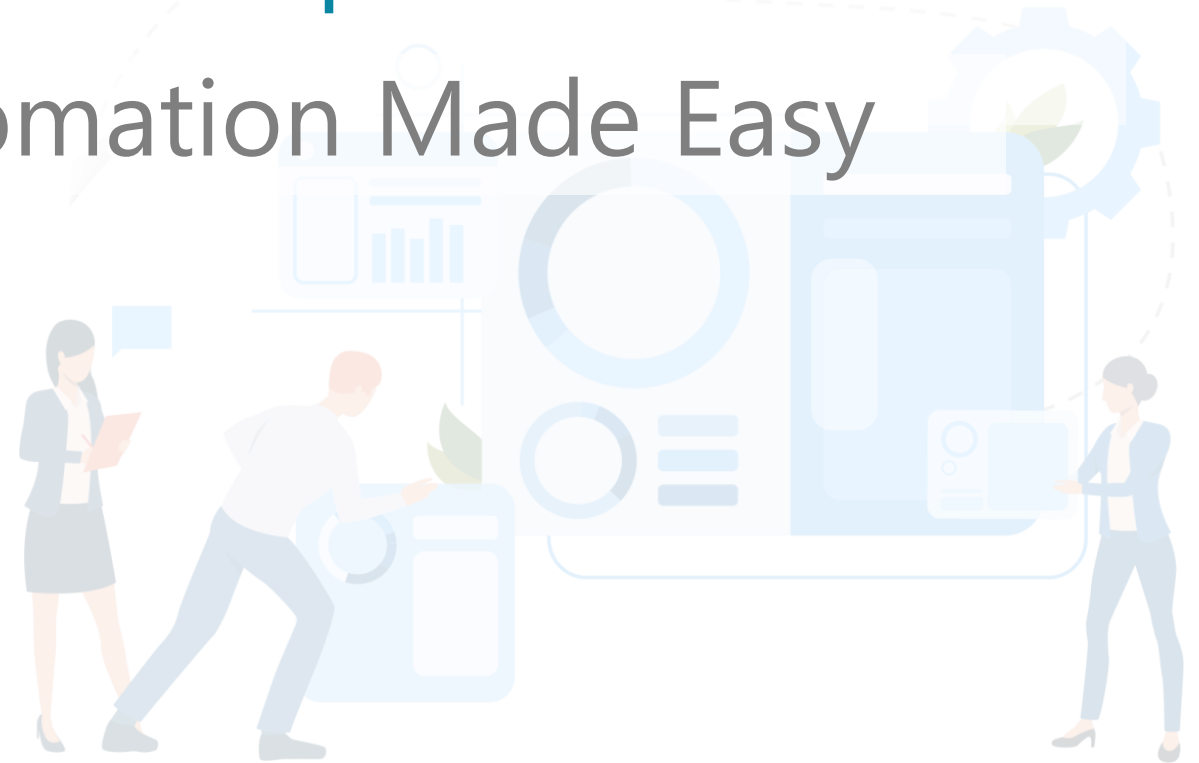# AffableBPM Importer Module

Automation Made Easy

AffableBPM Importer Module

Other sources of data

Attachments
(email or other apps)

FTP servers

Manual file
upload

Browser

AffableBPM Importer Module

Files to be
processed

Microsoft Machine
Learning

Web Application

AffableBPM SaaS Solution

AffableBPM

ERP Integrations

intuit quickbooks

Dynamics 365

NETSUITE

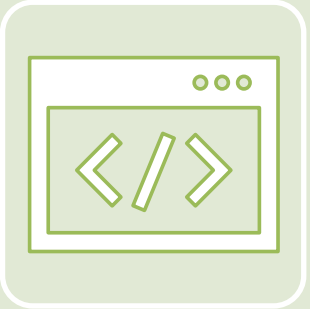Many other leading
accounting systems and ERPs
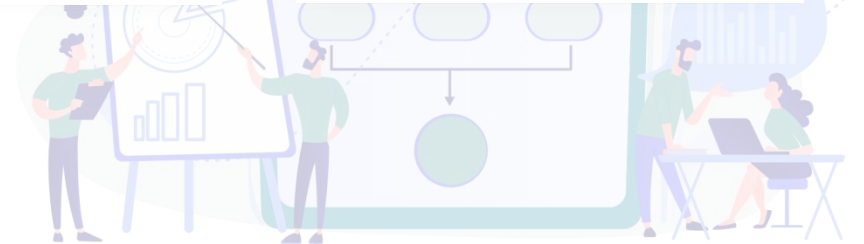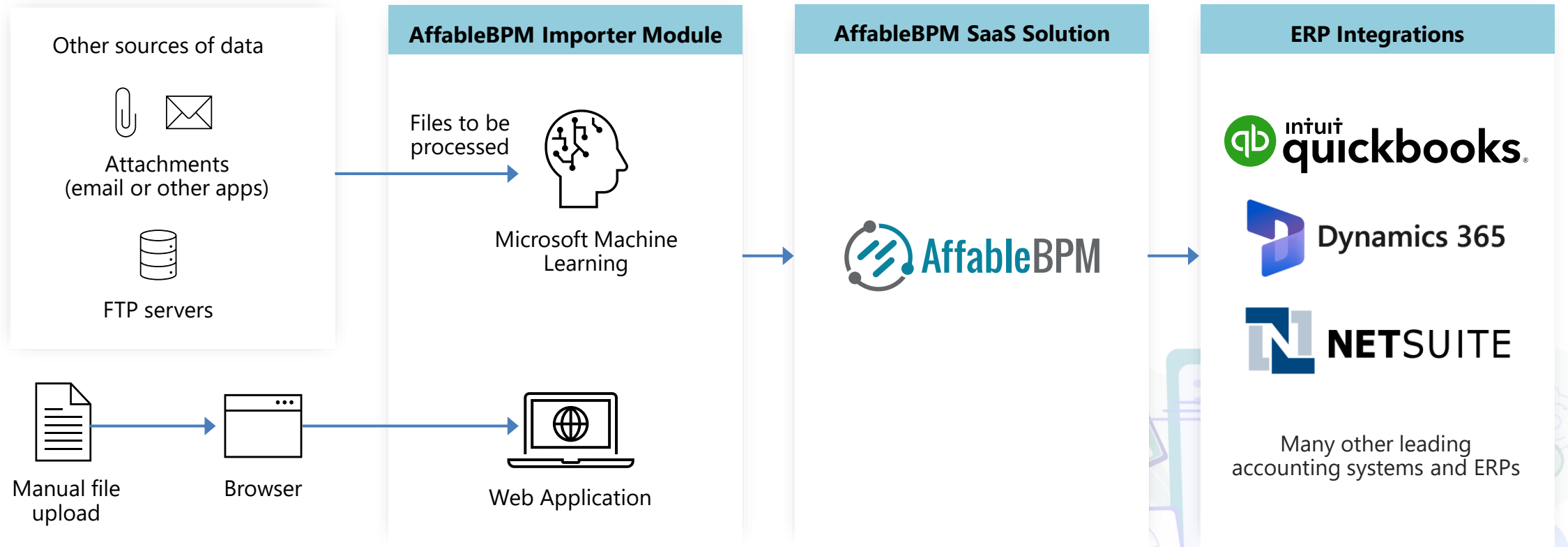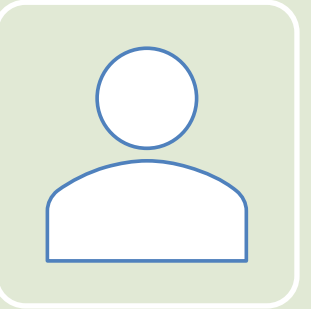
AffableBPM Scan / Importer Module

AffableBPM Scan Module should be able to pull the invoices from mailbox (Outlook, Gmail etc), shared folders or FTP locations.

User should also be able to upload manually the documents to AffableBPM Scan web interface.

These invoices should be sent to capture process in Microsoft Machine learning (Azure Form Recognizer)

Azure Form Recognizer extracts the field elements from the document and sends to application through SDK

AffableBPM Scan module will call Affable Core application API or batch process to upload the extracted field data of the Invoice documents.
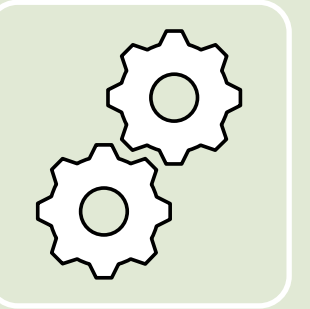
AffableBPM Core application will have business rules/configurations to route the document for further approval / processing.

Ability to attach document reference from email program and push the email correspondence to document record. (Nice to have)

AffableBPM Integrations

AffableBPM Core Application will have an integration framework to export the data to external applications.

There will be pre-built connectors with various ERP or accounting systems to share the data.

Based on pre-defined triggers (Real time or Batch) the data will be pushed to external system.
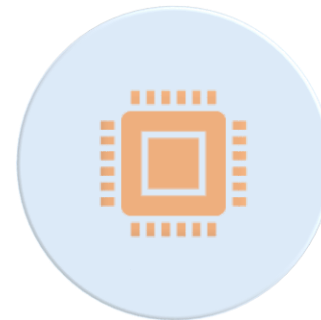
The preferable method of data integration will be API. In case the external system does not support API then we will need to look at feasibility and implement custom approach like RPA/Bot.

AffableBPM Importer Module

Main Advantages

Cost-effective solution	Time-saving	Reduced errors

Integration capability	Flexibility

AffableBPM Importer Module

Some of the types of documents that can
be used to extract information include:

Invoices	Purchase orders	Receipts	Insurance claims	Health records
Financial statements	Tax forms	Application forms	Contracts	Legal documents

AffableBPM Importer Module

Some of the key information that can be extracted
from documents:

Customer name	Customer address	Vendor name
Vendor address	Invoice number	Invoice date
Payment due date		

Total amount due	Line-item details (such as product or service descriptions, quantities, and prices)	Purchase order number
Purchase order date	Shipping address	Tax ID number
Bank account information		

Routing number	Check number	Insurance policy number
Claim number	Medical diagnosis	Account numbers

By accurately extracting this key information, the AffableBPM Importer Module can help your businesses automate data entry, reduce errors, and streamline processes.