



**BREAKPOINT  
TECHNOLOGY**

# PDF Ingestion

## Automate storage and information capture

Organize and manage emailed PDFs seamlessly

With Breakpoint Technology’s PDF Ingestion tool, receiving and organizing items, such as invoices from vendors, has never been easier! PDFs arriving to your inbox are automatically saved to the designated library. A custom form recognition model then extracts important information from each document such as invoice number, total amount, and invoice dates – all of which are added as columns in the library. No longer do you need to open each individual PDF or search through email to find the information you need.

The Breakpoint PDF Ingestion tool enables filtering, sorting, and search – out of the box!

- Gain back valuable time lost searching for sent documents
- Share document information with others in your organization
- Routing and integration workflows can easily be added into the process
- Create views that provide key information

### The Power of a Modern Work Platform

The Breakpoint PDF Ingestion tool leverages the power of the Microsoft 365 platform:

- SharePoint - keeping content at the center of teamwork, making files, sites and all types of content easily shareable and accessible across teams
- Teams as a hub for people that work together on a regular basis, actively engaging and working on core projects can connect and collaborate.

#### Base Cost - \$1,500



- Set up & Configuration
- Definition of 1 PDF type
- Automation of 1 PDF type
- Column Definition

Set up in your M365 environment

#### Additional PDF Type - \$250



- Definition of PDF type
- Automation of PDF type

Add on to meet your needs

#### Potential Add-ons



- Reporting/Analysis of Documents
- Workflow &/Or Notifications
- Integration with other LOB applications

Further automate your processes

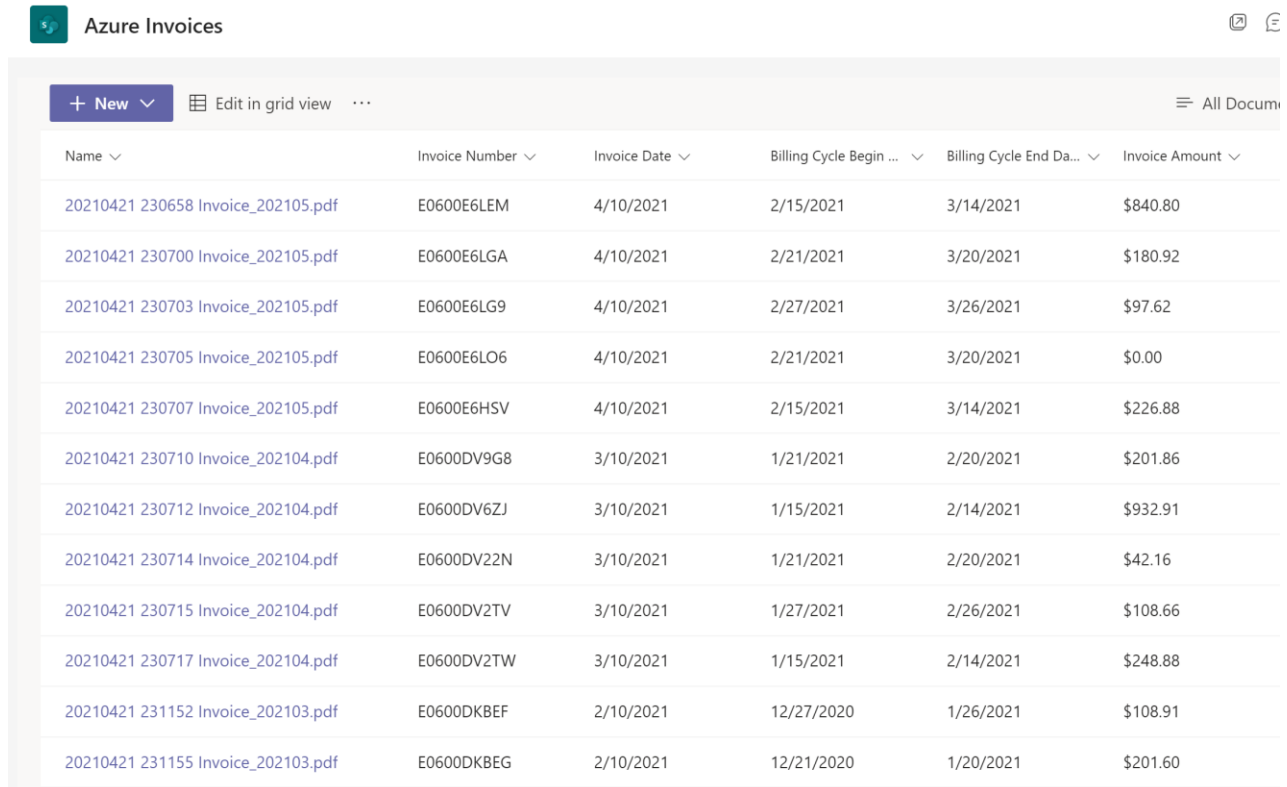
Gold  
Microsoft Partner

**BREAKPOINT  
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# Breakpoint PDF Ingestion

Automate the receipt and storage of PDFs – management in a way that allows easy retrieval, search, and tracking of key elements.



The screenshot shows a SharePoint list titled "Azure Invoices". The list has a header row with the following columns: Name, Invoice Number, Invoice Date, Billing Cycle Begin, Billing Cycle End, and Invoice Amount. The list contains 13 rows of data, each representing an invoice. The data is as follows:

Name	Invoice Number	Invoice Date	Billing Cycle Begin	Billing Cycle End	Invoice Amount
20210421 230658 Invoice_202105.pdf	E0600E6LEM	4/10/2021	2/15/2021	3/14/2021	\$840.80
20210421 230700 Invoice_202105.pdf	E0600E6LGA	4/10/2021	2/21/2021	3/20/2021	\$180.92
20210421 230703 Invoice_202105.pdf	E0600E6LG9	4/10/2021	2/27/2021	3/26/2021	\$97.62
20210421 230705 Invoice_202105.pdf	E0600E6LO6	4/10/2021	2/21/2021	3/20/2021	\$0.00
20210421 230707 Invoice_202105.pdf	E0600E6HSV	4/10/2021	2/15/2021	3/14/2021	\$226.88
20210421 230710 Invoice_202104.pdf	E0600DV9G8	3/10/2021	1/21/2021	2/20/2021	\$201.86
20210421 230712 Invoice_202104.pdf	E0600DV6ZJ	3/10/2021	1/15/2021	2/14/2021	\$932.91
20210421 230714 Invoice_202104.pdf	E0600DV22N	3/10/2021	1/21/2021	2/20/2021	\$42.16
20210421 230715 Invoice_202104.pdf	E0600DV2TV	3/10/2021	1/27/2021	2/26/2021	\$108.66
20210421 230717 Invoice_202104.pdf	E0600DV2TW	3/10/2021	1/15/2021	2/14/2021	\$248.88
20210421 231152 Invoice_202103.pdf	E0600DKBEF	2/10/2021	12/27/2020	1/26/2021	\$108.91
20210421 231155 Invoice_202103.pdf	E0600DKBEG	2/10/2021	12/21/2020	1/20/2021	\$201.60

You define the columns for each PDF type. Information then is pulled from the pdf and pushed to the columns in the list, making it easy to sort, filter, and organize. The entire list can be exported to an Excel file.

Custom columns can also be added to allow for additional management and tracking of the PDFs, outside of the documents. The full flexibility of SharePoint libraries and lists are available, including notifications and workflows, making this a scalable and extensible solution to meet your specific needs.

## Why Breakpoint Technology?

As an experienced Microsoft Gold Partner, we leverage the latest technologies, such as M365, Azure, and Power BI, to design data driven solutions that help our customers build success. Our solutions allow customers to experience their data - any way, anywhere - using the modern work platform powered by Microsoft.

