cloudmoyo™

Partner of choice for solutions at
the intersection of cloud and AI

Modernizing the traditional ERP system and invoice management with low-code technology

Introduction

Facing an urgency to quickly transform in order to meet business expectations, remain relevant, and adjust to change in working conditions—companies are re-evaluating how they look at and use enterprise resource planning (ERP) systems. Traditional, on-premise ERP systems are slowly edging out of adoption due to their lack of complexity and dependency on traditional coding, which creates delays to delivery timelines.

What businesses need are agile, customizable solutions that can perform ERP functions, address bottlenecks, and be delivered in reduced timelines. This has led to adoption of low-code and no-code solutions, which can accelerate digital transformation by decreasing dependency on IT and accelerate app development for business users.

Our client

Our customer, Icertis - a global software technology company that provides contract intelligence software to enterprise businesses—wanted to modernize their manual ERP system. This need was driven by the vast volumes of invoices that they faced with their procurement and commercial functions. They wanted to improve their current ERP to streamline processes, decrease errors, and enhance data visibility.

❓ Why CloudMoyo

> **CloudMoyo is a Microsoft Partner and has over 10 years of experience with Azure.**

> **CloudMoyo was referred to the consulting engineering company by Microsoft.**

> **One of our previous customers - a leading AEC company provided a stellar recommendation.**

Challenges

Icertis received thousands of invoices annually which had to be matched against purchase orders. The problem was that since the process was all done manually, and it took the team 10-15 minutes to process just one invoice. Some of the other challenges that Icertis was facing included manual processes that leads to errors in data entries, inaccessible data, and the increased cost of data migration with the traditional ERP system.
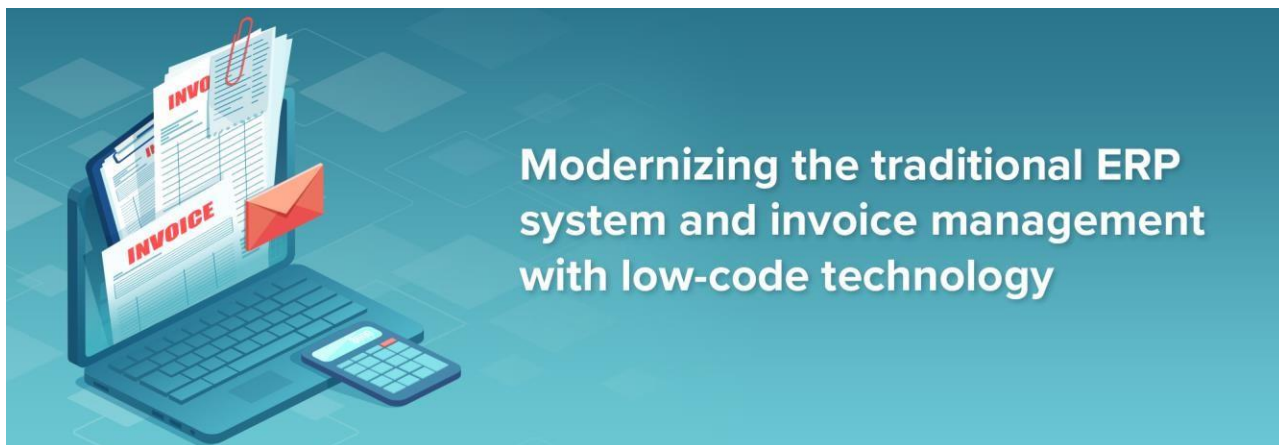
Solution

An invoice manager for procurement and commercial functions

To solve for Icertis' pain points, CloudMoyo created an invoice manager app for procurement and commercial functions, which was built using low-code app technology and would digitalize scanning and recognition of invoices. We opted to use the Microsoft [Power Platform](#) to build this app and develop a form recognizer with Power Apps and Power Automate because of its ability to support rapid development, which reduced efforts by 70% compared to the traditional approach of app development. The ML model in Power Platform, used to scan forms, was readily available, and then the integration with Icertis' contract intelligence platform would be easy using the Power Platform connector. The solution also made invoices 100% text-searchable, available for other analytics and artificial intelligence initiatives.

Using this application, an invoice manager can now take key details and analyze data that is inputted. Next, the data will be automatically matched into the correct fields in the invoice template, saving the invoice manager time, eliminating manual entry, and increasing accuracy at the same time. We were able to successfully transfer invoice details using the API from Icertis' proprietary technology, ICI-Lync.

Modernizing the traditional ERP system and invoice management with low-code technology

Value delivered

Modernizing Icertis' existing ERP system using the Microsoft Power Platform (Power Apps and Power Automate), and ICI-Lync, has enabled digitalized scanning and recognition of written or printed text, easier search and editing of documents, and increased storage space. Manual efforts have been eliminated, which has led to improved timelines and reduced errors. With this automation, the process is accelerated and is done in only 1-2 minutes.

Some of other values realized with solution include:

- A 40% cost reduction
- 99% accuracy in matching invoices against purchase orders
- An accelerated turnaround time to match-up invoices
- 100% text-searchable invoice, available for other analytics and artificial intelligence

Conclusion

With this low-code technology, CloudMoyo was able to modernize the traditional ERP system and drive innovation for Icertis, enabling an increase in accuracy and efficiency while managing and transferring data from volumes of invoices. With the power of the Microsoft Power Platform, manual processes were eliminated, data entries were decreased, and the cost of data migration has gone down.

cloudmoyo™

About Us

CloudMoyo is the global partner of choice for digital solutions at the intersection of cloud and AI. We empower customers to transform with resilience by innovating at lightspeed, democratizing data, and infusing artificial intelligence in business operations. Our solutions are delivered across a variety of flexible engagement models to drive customer value. Our FastTracktoValue customer-focused methodology is proven to accelerate vision-to-value.

Headquartered in Bellevue, WA, with an innovation center in Pune, India and a presence in Kansas City, MO, CloudMoyo has a proven track record of developing enterprise solutions for Fortune 1000 companies such as Microsoft and Kansas City Southern.

Bellevue, WA • Overland Park, KS   www.cloudmoyo.com   marketing@cloudmoyo.com