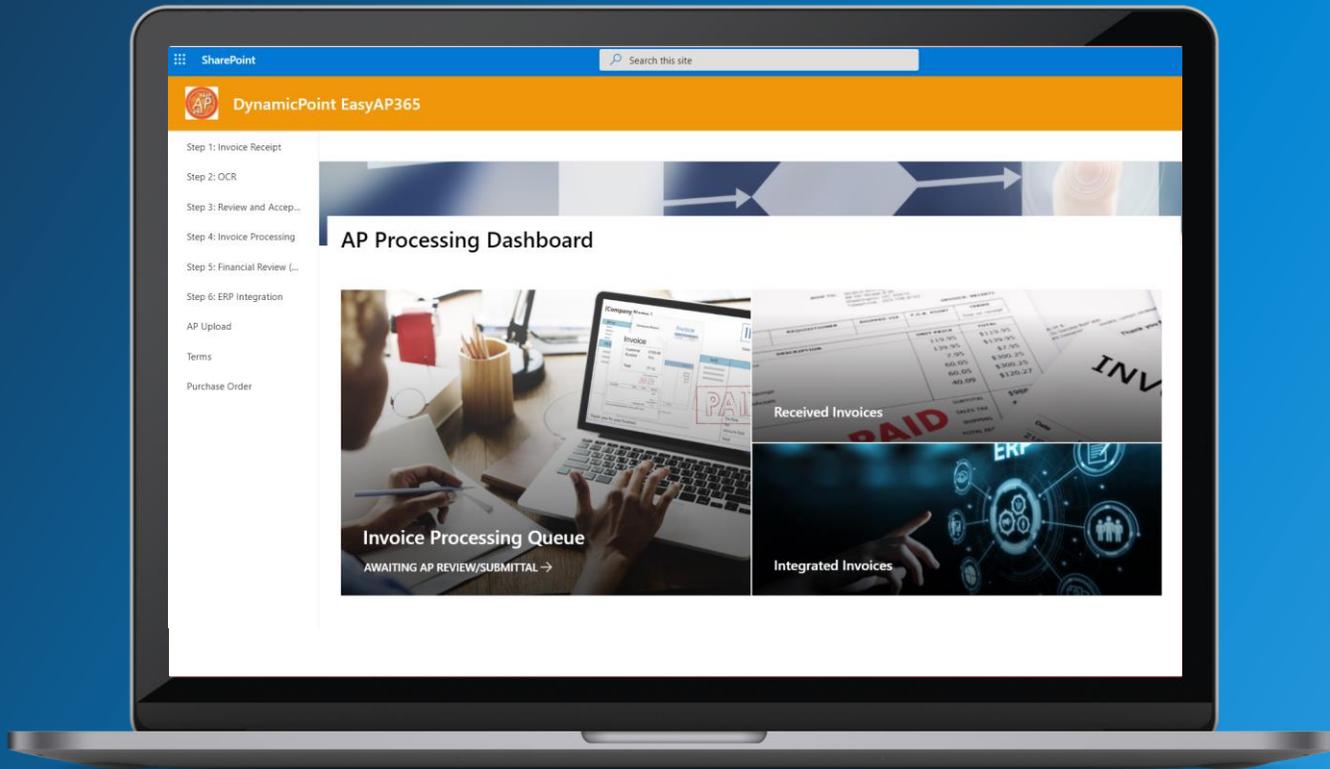


Quick Tour

EASYAP365 INVOICE AUTOMATION



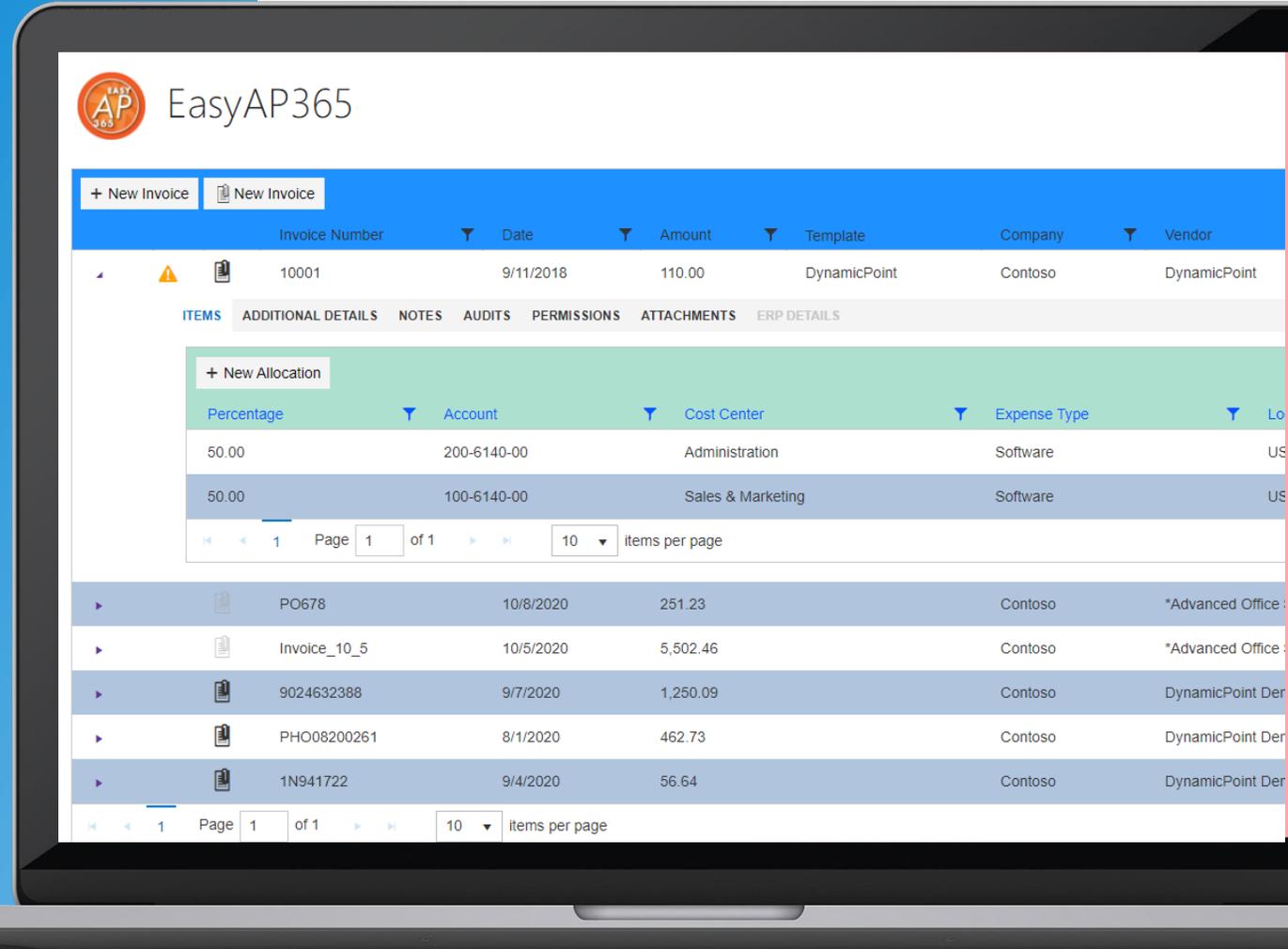
Invoice Automation for Office 365

With its familiar Office 365 interface, **EASYAP365 by DynamicPoint** keeps things simple while adding unparalleled functionality and flexibility to your accounts payable invoice automation process.

Invoice Automation for Office 365

Leverages the flexibility and security of **SharePoint**

- Invoice Automation Dashboard for submitters, approvers, and accounts payable
- Secure sharing of invoice details (including payment and approval status) while safely storing your invoices in libraries



The screenshot displays the EasyAP365 web application interface. At the top, there is a navigation bar with a '+ New Invoice' button and a 'New Invoice' button. Below this is a table of invoices with columns for Invoice Number, Date, Amount, Template, Company, and Vendor. The first row shows an invoice with number 10001, dated 9/11/2018, for an amount of 110.00, using the DynamicPoint template, from the Contoso company to the DynamicPoint vendor.

Below the invoice table, there are tabs for ITEMS, ADDITIONAL DETAILS, NOTES, AUDITS, PERMISSIONS, ATTACHMENTS, and ERP DETAILS. The ITEMS tab is active, showing a '+ New Allocation' button and a table of allocations. The allocation table has columns for Percentage, Account, Cost Center, Expense Type, and Location. The first two rows show allocations of 50.00% to accounts 200-6140-00 (Administration) and 100-6140-00 (Sales & Marketing), both for Software expense types.

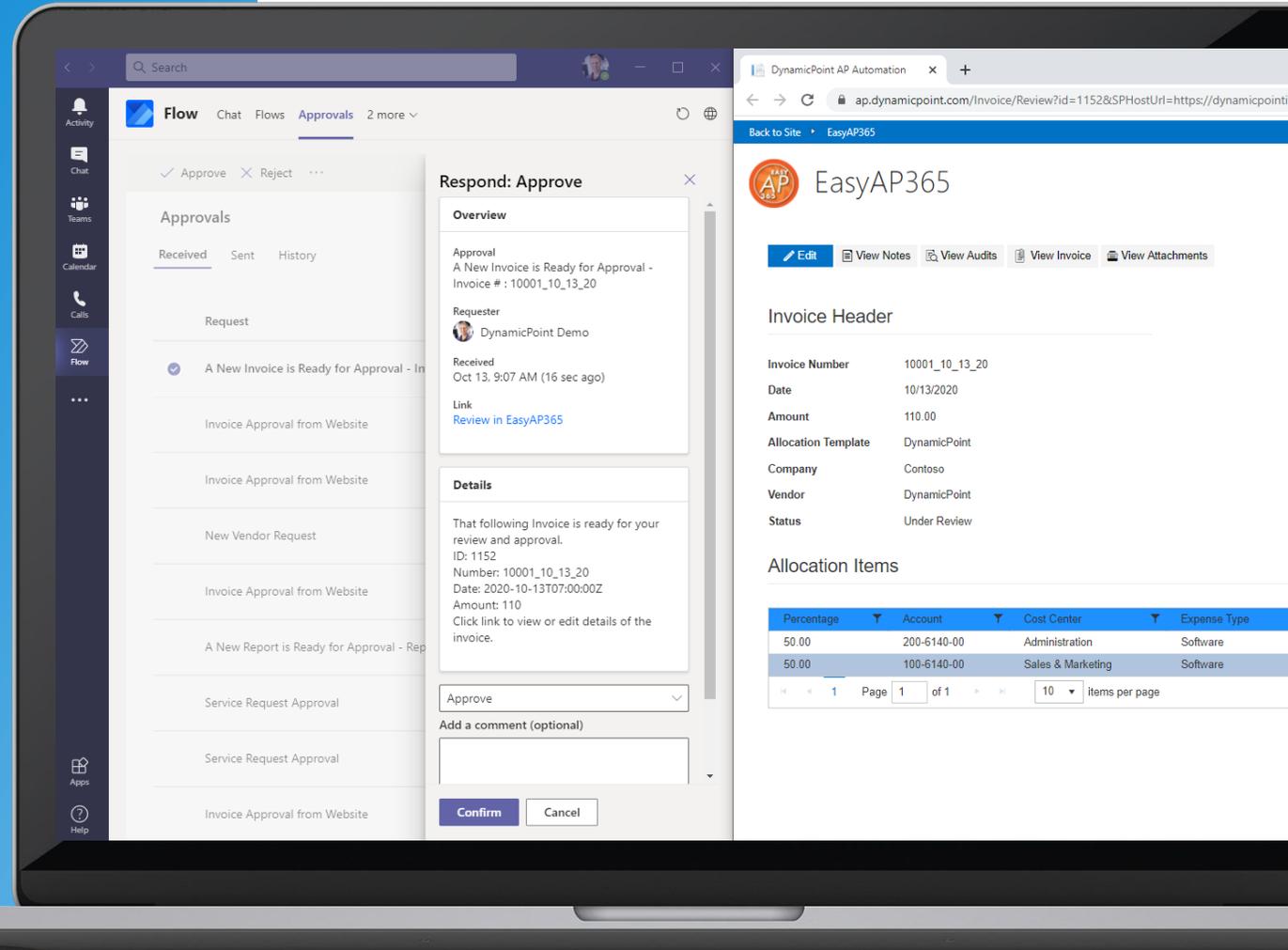
At the bottom of the allocation table, there is a pagination control showing 'Page 1 of 1' and '10 items per page'. Below the allocation table, there is another table of invoices with columns for Invoice Number, Date, Amount, Company, and Vendor. The first row shows an invoice with number PO678, dated 10/8/2020, for an amount of 251.23, from the Contoso company to the *Advanced Office location. The second row shows an invoice with number Invoice_10_5, dated 10/5/2020, for an amount of 5,502.46, from the Contoso company to the *Advanced Office location. The third row shows an invoice with number 9024632388, dated 9/7/2020, for an amount of 1,250.09, from the Contoso company to the DynamicPoint Der location. The fourth row shows an invoice with number PHO08200261, dated 8/1/2020, for an amount of 462.73, from the Contoso company to the DynamicPoint Der location. The fifth row shows an invoice with number 1N941722, dated 9/4/2020, for an amount of 56.64, from the Contoso company to the DynamicPoint Der location.

At the bottom of the invoice table, there is another pagination control showing 'Page 1 of 1' and '10 items per page'.

Invoice Automation for Office 365

Leverages the endless workflow capability of **Microsoft Power Automate**

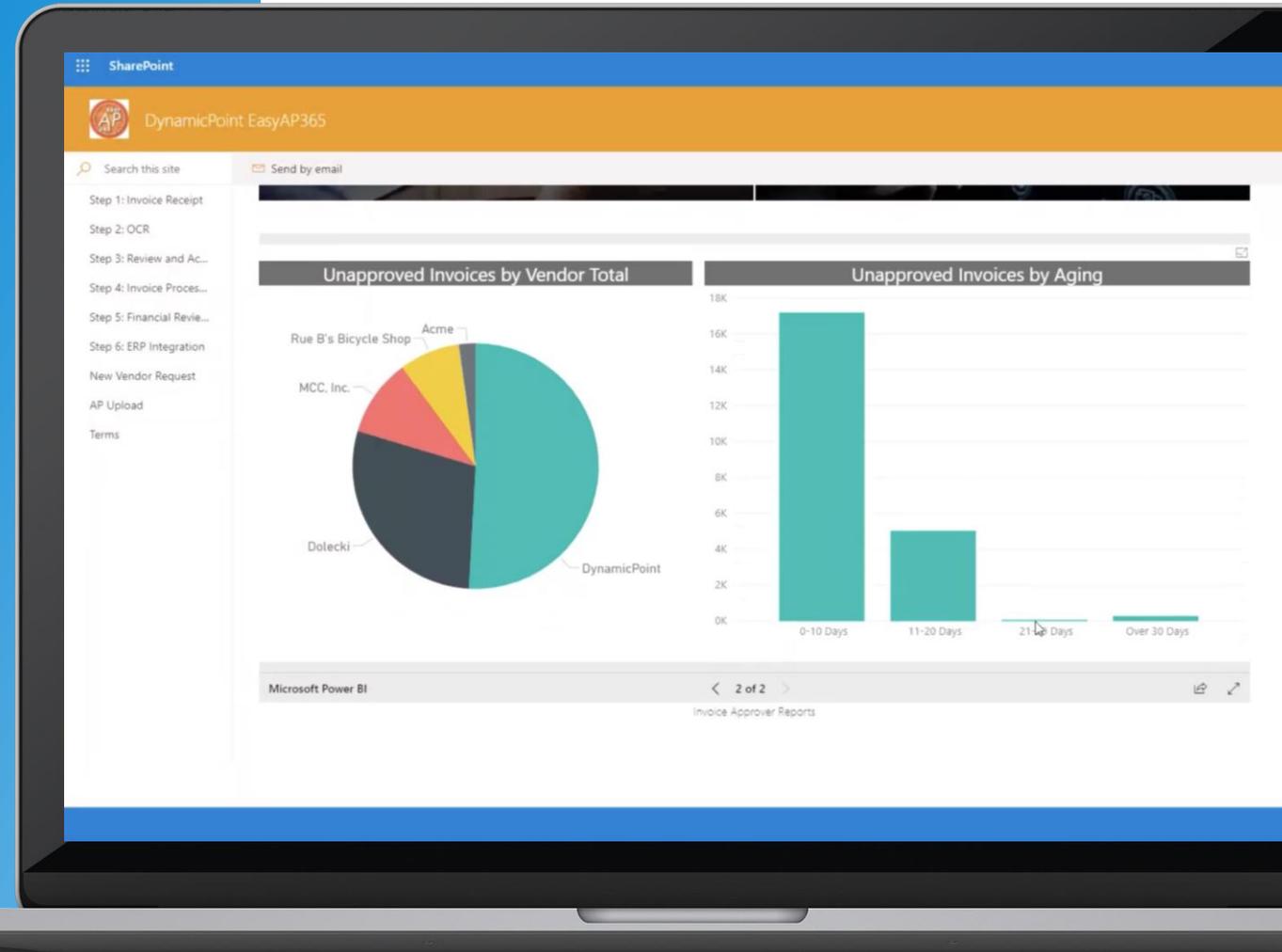
- Dramatically simplified manual invoice review and approval process
- Review and approve from Outlook, Microsoft Teams, your website or mobile app



Invoice Automation for Office 365

Leverages the business intelligence
Microsoft Power BI

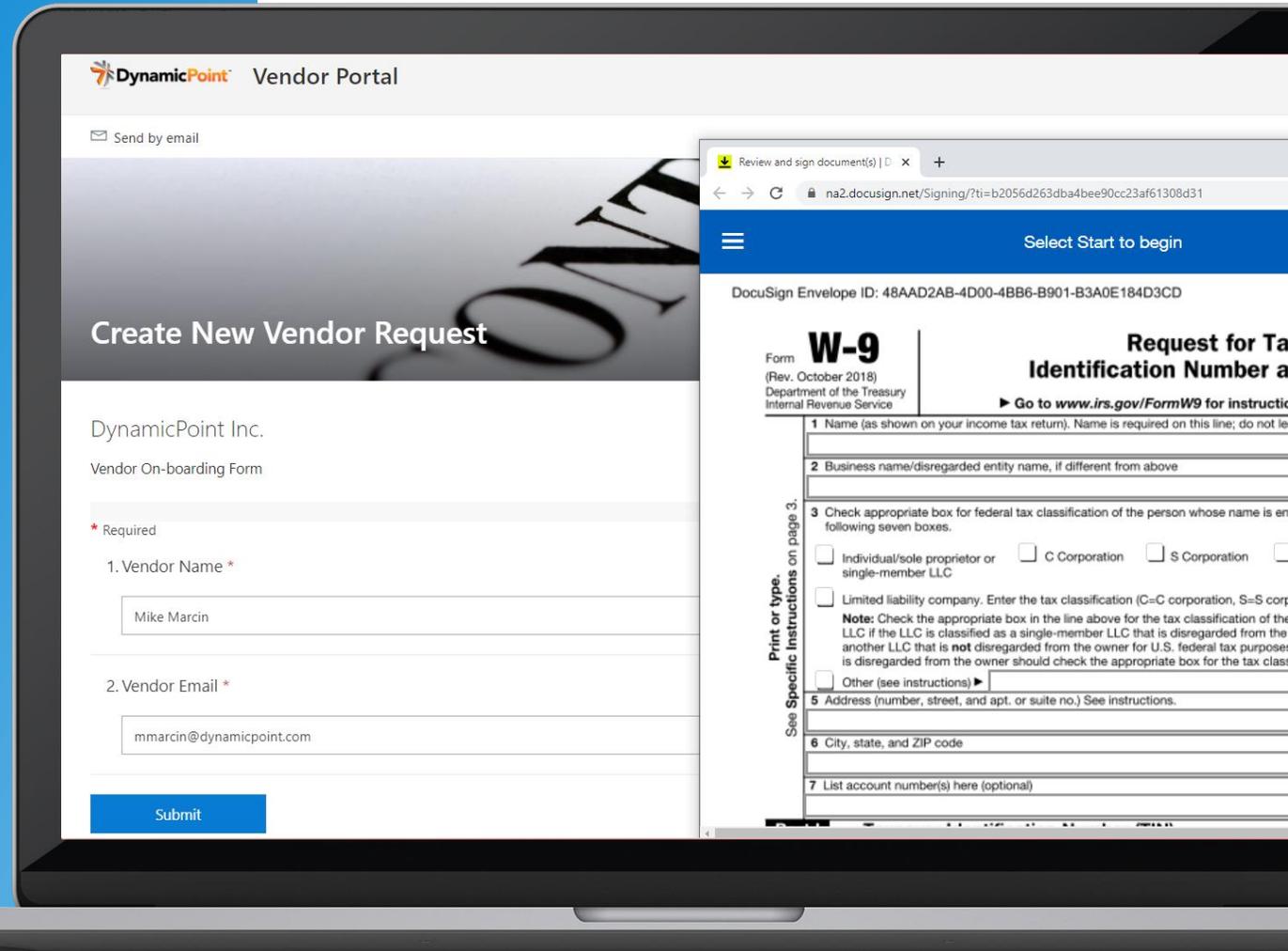
- Analyze spending across flexible categories (including departments, locations, and cost centers)
- Monitor invoice-aging and overdue-approval tasks with configurable reporting



Invoice Automation for Office 365

Leverages the simplicity and utility of **Microsoft Forms**

- Automate vendor onboarding with easy-to-design forms
- Integrate workflow for internal approval and automatic ERP creation of new vendors



EASYAP365 Features & Functionalities



Integrated OCR

Extract invoice data elements using Office 365 Integrated OCR



ERP Integration

Occurs in real-time, so no more importing and exporting



Invoice Match & Non P.O.

P.O. matching and non-P.O. invoices fully supported



Office 365-Based

All your data securely hosted in Office 365 SharePoint

A Potent Tool for All 4 Stages of Invoice Processing



Submission



Management



Review



Integration



Invoice Submission

EASYAP365 lets you use a multitude of methods for accepting invoices submitted by vendors, contractors, or internal employees:



Email

use an existing account or create an inbox for vendor-submitted invoices



Portal Page

go to designated website page, fill in required fields (company name, email address, P.O. number, amount), add a comment, click “submit”



Mobile Upload

scan with phone using OneDrive, then, submit for processing with/without edits



Check Request

enables managers who receive invoices to effortlessly complete a cover form to request approval



Fax, Scan, Drag-and-drop, And More

easily fit the system to your existing invoice receipt process



Management

EASYAP365 Invoice

Processing Dashboard is your one-stop source for managing and monitoring all invoices in the system so you can:



Automatically capture invoice metadata
using Office 365-integrated OCR



View new invoices
with a single click and attach any supporting documentation



Assign GL account line-items or match to a P.O.



Select different expense types



Default GL account assignments
using allocation template feature



Workflow

EASYAP365 automatically
kicks off upon invoice
submission:



Configurable workflow

Leverages Power Automate



Multiple methods of approval accommodated



Lightning-fast access

to invoice details enhances approval/rejection decision-making



Choose which reviewers or approvers can edit/annotate/assign invoices

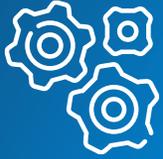


Route to reviewers/approvers

Via Outlook, Microsoft Teams, your website or mobile app



See full audit history of every workflow step



Integration

Integration and its corresponding functionality are the primary focus of **EASYAP365:**



Integrates invoices

Regardless of source direct to your ERP application



Integration framework

Allows for configuration/mapping to GL accounts and cost accounting objects



Occurs in real time



No importing/exporting

More Information

Product Page

<https://www.dynamicpoint.com/easyap365/>

Pricing

<https://www.dynamicpoint.com/easyap365-product-pricing/>

Video Demo

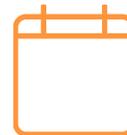
<https://www.dynamicpoint.com/product-video-gallery/#cbpf=easyap365>

Ready to Take the Next Step?



Email

info@dynamicpoint.com



Schedule Demo

www.dynamicpoint.com/schedule/