



Automate Invoice Processing with Kofax TotalAgility for Dynamics 365 F&O

Kofax TotalAgility is a comprehensive digital workflow management platform that provides Microsoft Dynamics 365 Finance and Operations customers with the technology needed to standardise and manage their ongoing requirements for automated document processing.

TotalAgility provides multichannel document capture, business process management, adaptive case management, Robotic Process Automation (RPA), advanced data integration, process intelligence and analytics, eSignature, and customer communications management—in a single platform.

A single-vendor Intelligent Automation strategy drives a much higher ROI and value over point solutions providing greater efficiency via streamlined flow of data and content, lower cost of ownership and the ability to easily scale across the enterprise by eliminating the siloed friction of point solutions.

Xcellerate IT, a Kofax Platinum Partner, offers an accounts payable automation solution utilising the TotalAgility platform, that enables D365 F&O customers to adopt and adhere to best practice principles in accounts payable automation.

The Xcellerate IT solution for accounts payable automation integrated into D365 F&O is built on the TotalAgility platform with specific components tailored for automating an efficient accounts payable process. However, once the TotalAgility foundation has been initially laid, it can then be expanded very easily to benefit other areas of the business by transforming an unlimited number of end-to-end business processes, without many of the same initial upfront costs.

Work Like Tomorrow.™

Benefits

- Empower the accounts payable team with a powerful capture platform to be able to reassign their roles to more value-added tasks such as reconciliation, exceptional handling and complex query management
- Reduce the time the business has to spend dealing with invoices for approvals and reduce lost invoices/paper
- Vastly improve visibility on spend - ability to understand accruals in real-time
- Automate the capture of email attachments directly into TotalAgility with no touch. The auto-classification and separation of documents will further reduce the manual touch of invoices by the AP team
- Streamlined workflow capabilities for business users to approve coded invoices
- Provide a reporting capability with controls to enable insight and analytics of the invoice lifecycle
- A single platform for the ingestion of all invoice formats including both traditional and e-invoices
- Ability to search and view legacy invoice information including meta-data and images and use for duplicate checks within TotalAgility

TotalAgility Core Capabilities

Kofax TotalAgility accelerates high-value business processes by orchestrating digital workflows and automating touchpoints that previously required human intervention, removing the need for analog and paper-based interactions entirely.

Document Intelligence: TotalAgility brings its market-leading cognitive capture capabilities to the hands of business analysts and non-technical users to solve content-centric challenges, including classification and extraction from financial documents, contracts, forms and other information-intensive documents. Your organisation can accelerate information-intensive workflows by applying cognitive capture and artificial intelligence to unstructured data in order to automate and extract information and unlock data insights.

Connected Systems: TotalAgility brings together your business systems (applications, legacy, chatbots, mobile, etc.) across internal and external business processes. Our ability to connect systems lets you streamline data across your operations, bringing new, innovative business models to market —faster.

Process Orchestration: TotalAgility makes it simple to add and manage digital workforce capacity on-demand, with the flexibility and agility you need to scale and optimise service levels. This frees up bandwidth so your people can move away from mundane, repetitive tasks and focus on high-value, strategic work, improving employee satisfaction and productivity.

Embedded Artificial Intelligence: The AI embedded in TotalAgility hyper-accelerates your automation efforts and gives customers more flexibility in how they want to analyse content and more power to process and understand complex unstructured documents. With no coding required, you can easily deploy advanced Natural Language Processing (NLP) and Machine Learning (ML) technologies to think, act upon and interpret data for uses such as content classification, summarisation, sentiment analysis and more.

Low-Code: Low-code enables business users and citizen developers to build smarter and configure solutions on TotalAgility. Low-code is achieved on

the platform by providing intuitive design, preconfigured functionalities, components of services and simplified integration with third-party applications. In addition, the TotalAgility designer features a drag and drop interface for creating solutions and facilitating the configuration of business logic (rules, forms, conditions, loops, etc.).

Unified Intelligent Automation

TotalAgility provides pre-built integration to other capabilities of the Kofax Intelligent Automation Platform, seamlessly orchestrating intelligent automation solutions that transform the capacity and performance of your operations.

Process Insights and system monitoring provide advanced and actionable analytics for any business process, helping your business make informed, effective decisions sooner, and providing valuable insight to drive process optimisation.

Mobile & omnichannel access engages customers, partners, suppliers and employees on any device at any stage of a business process, delivering rich experiences on mobile devices and supporting the broad spectrum of digital and physical channels your business must support.

RPA Workforce of Choice extends our market-leading cognitive capture capabilities to third-party RPA vendors. Your organisation can get more value from your RPA investments, regardless of RPA vendor, with the ability to process unstructured data, faster and more accurately.

Customer communications accelerate engagement by delivering low-latency, two-way, omnichannel customer communication that's faster, more targeted and less expensive.

E-signature makes crucial agreements possible faster, while allowing customers the flexibility to use any signature format they wish.

Deploy On-Premises or in the Cloud

TotalAgility provides a versatile, modern, open architecture and is designed to give organisations the flexibility to deploy either on-premises or in the cloud with these deployment options:

- **Your premises, or your cloud:** Install TotalAgility on-premises or in your preferred cloud, to empower your employees, customers and suppliers to cognitively capture unstructured content, and automate and orchestrate the processes that use that content.
- **The Xcellerate IT Cloud:** Rely on Xcellerate IT to take care of the installation and configuration of the systems that support TotalAgility, by subscribing to the Xcellerate IT Cloud service running on Microsoft Azure. Get started developing your intelligent automation application immediately without the hassle of installing and configuring hardware and software. Achieve faster time to value, increased scalability and business agility, lower cost and reduced IT dependency.
- **Docker container:** Simplify and accelerate deployment of your TotalAgility software and projects by creating and deploying a Docker container into any Docker-supported on-premises or cloud-based environment.

Off-the-shelf flexible integration

TotalAgility offers a variety of pre-built connectors, web services and synthetic API methods that allow customers to accelerate implementation of their solution and leverage and extend their existing software assets.

Design for Compliance and Agility

TotalAgility Designer is an easy-to-use visual environment that supports high productivity application development. It supports modeling,

design, analysis, simulation and testing of high-quality customer engagement processes. Control and compliance goals can be met by designing processes to ensure enforcement of policy, procedure and regulation. Business agility goals can be met by enabling process flexibility at execution time, so key interactions can be orchestrated while processes are “in-flight.”

User Experience Drives Productivity and Improvement

The TotalAgility Workspace delivers the right work to the right person at the right time, enabling people to engage in process execution in a manner appropriate to their role. Process participants work efficiently, effectively, intelligently and transparently, and can participate in process improvement as they innovate daily with customers, partners and others.

Process Optimisation

TotalAgility enables manual and automatic intervention in in-flight business processes, so they quickly adapt to changing circumstances. TotalAgility can react to events and changes in context, throughput, capacity and workload. As exceptions occur or case-by-case differences in requirement must be handled, TotalAgility can automatically respond with new processes and/or empower knowledge workers to intervene productively.

Discover more about TotalAgility at
xcellerateit.com.au



www.xcellerateit.com.au

Xcellerate IT Pty Ltd

Level 2, 73 Walker Street,
North Sydney NSW 2060

T + 61 2 8228 6600

