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Paperless Automation for Microsoft Dynamics

Enabling Your Remote Workforce
from Payables to Payment.

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Enabling Your Remote Workforce from Payables to Payment

MOBILIZING AN EFFICIENT, STREAMLINED AP DEPARTMENT WITH AP AND PAYABLES AUTOMATION

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Empowering a remote workforce

Introduction

Doug Bertram

Doug is a Regional Representative at Metafile. He is responsible for identifying opportunities to improve operational efficiencies for clients in the Midwest and Western regions.

Angel Blum

Angel serves as Mekorma's Director of Sales, advising clients how to optimize AP payments in Microsoft Dynamics GP. She has been with Mekorma since 2007.

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Why is automation important and how does it enable a remote workforce?

- Traditional advantages still apply
- Control, Efficiency & Visibility
- Reduce Costs
- Prevent Lost documents
- Spend Management
- Paperless Green Initiative

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Who’s in the office to…

- Open the mail
- Walk something down the hall
- Talk directly with someone
- Dig in a file cabinet
- Search for a document
- Approve checks
- Print checks
- ….

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Empowering a remote workforce

No matter where your employees may be, AP automation technology provides a host of benefits. In today's presentation we will highlight a few of these including:

- Be more efficient
- Save time and money
- Improved collaboration and visibility
- Enhanced security and compliance

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Efficiency with Straight-Through Invoice Processing

Look Ma,
no hands!

Touchless Invoice Processing is the key to straight-through invoice processing.

- Data Extraction
- Automated 3 way matching to PO’s
- Automated coding
- Automated approvals

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Significantly Enhanced Access and visibility

It's essential that employees, managers and members of the C-Suite have visibility into business workflow processes and procedures. Approvers benefit by:

- Instantly send to someone
- Access to everything they need to make their decision
- Approvers want to conform and respond quickly

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Live Solution Presentation

Let’s take a look at automation…

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Introduction

Angel Blum

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Top AP Payment Challenges

- Too many manual processes.
- Reliance on paper-based documentation.
- Uncertain cash flow.

Source: Ardent Partners: AP Metrics that Matter in 2020

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Payment Approval Workflows

- Allow C-level or upper management to review and approve before payments are generated / sent.
- View supporting documentation digitally.
- Automatic notifications and electronic signatures.

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Apps, Flows, Bots and BI

New cloud-based solutions are emerging - quick to go to market and easy to scale

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Mekorma PowerApprovals

Let’s take a look at a remote payment approval workflow…

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Benefits of ePayments

"…nearly two-thirds (65%) of all AP organizations surveyed in 2019 reported both more efficient processing and increased accuracy and control as a result of paying their suppliers electronically."

Source: Ardent Partners

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Wrap up:

If you have questions about the benefits of implementing a paperless payables to payments automation solution or how MetaViewer and Mekorma could specifically improve your company's processes, feel free to reach out to us.

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