



metaviewer
Paperless Automation for Microsoft Dynamics

AP Automation:
Intelligent. Affordable. Green.

MANUAL

Processes

RPA

Robotic Process Automation

MetaViewer and Microsoft Dynamics® come together
for a tightly integrated paperless automation solution.

AX

Microsoft
Dynamics

D365

Microsoft
Dynamics

GP

Microsoft
Dynamics

NAV

Microsoft
Dynamics

SL

Microsoft
Dynamics

Technology to automate your tedious financial processes.

Your Microsoft Dynamics ERP solution has improved the overall effectiveness of your financial and human resource management. You may have noticed, however, that the volume of paper being produced, stored and recycled continues to grow. This is where Touchless Invoice Processing comes in!

MetaViewer AP Automation – Full integration with Microsoft Dynamics ERPs brings order to the growing chaos using a highly efficient and fully visible workflow to manage the capture, routing and storage of your documents. MetaViewer gives you dramatically increased control of your business information and processes with Touchless Invoice Processing functionality enabled by Robotic Process Automation (RPA) technology.

It's not just automation, it's Robotic Process Automation. RPA is the use of software to automate tedious, high-volume, repetitive tasks that previously required human intervention. RPA automates tasks that are taking up your employees' time and resources. MetaViewer uses RPA and Intelligent Recognition technology to capture invoice data, eliminate repetitive processes and make documents and data more readily available for better expense management.

Just imagine how good you and your department will look when you start capitalizing on early-payment discounts, reducing your invoice processing costs and improving your vendor and customer relations – all without manual intervention!

Let's take a look at the Big Picture. MetaViewer Paperless Automation is the fastest and easiest way to capture, manage and access data. By capturing information from virtually any document – print or electronic – MetaViewer allows your organization to effectively manage all business-critical content, from procurement to payment and back again. That's the Big Automation Picture.

The screenshot shows the MetaViewer AP Automation software interface. The main window displays an invoice for 'ADVANCED OFFICE SYSTEMS' with the following details:

- Vendor Name: Advanced Office Systems
- Payable Type: Non-PO Invoice
- Invoice Date: 02/15/2022
- Invoice Number: 3864
- Remittance Location: PRIMARY
- Payment Terms: Net 30
- Due Date: 03/17/2022
- Early Pay Date: \$ 0.00
- Early Pay Discount: \$ 0.00
- Transaction Description: Company Name: Fabrikam, Inc.
- Invoice Amount: \$ 2,675.00

The summary table at the bottom shows the following data:

Company	Account Number	Description	Type	Debit	Credit	Tax Detail ID
1	000-2100-00	Accounts Payable	PAY		\$2,675.00	
2	000-6630-00	State Sales Tax	TAXES	\$150.00		USASTE+PS6N0
3	000-6640-00	Chicago City Sales Tax	TAXES	\$25.00		USCITY+PS1N0
4	500-6150-00	Supplies-Allocated - Cons...	PURCH	\$2,500.00		
Totals (4 items)				\$2,675.00	\$2,675.00	
Invoice Total: \$2,675.00						

The right-hand panel shows automation rules and verification status:

- The Non-PO Invoice has been verified.
- The payable could not be automatically verified and coded and requires manual processing.
- The following automation rules did not succeed:
 - A user-defined automation rule has not been configured for this payable.
- The following automation rules succeeded:
 - All required fields have a value.

Created by Automated Process on 12/14/2020 3:32 PM CST

100% Touchless.

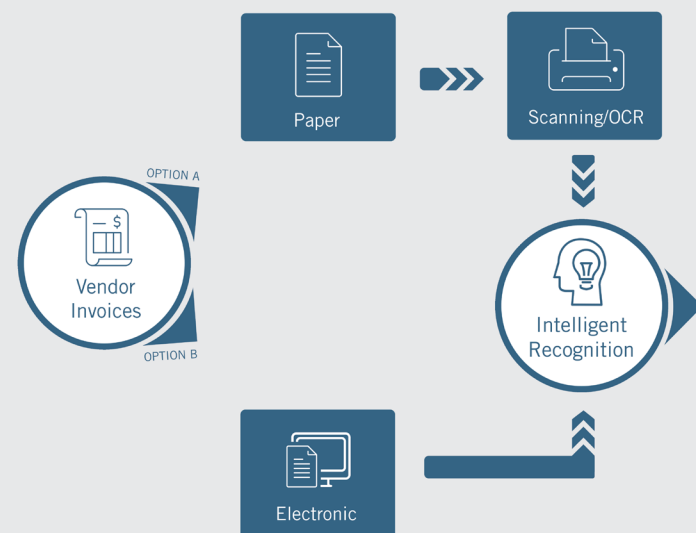
Why not?!

MetaViewer Automation is designed with the modern business in mind. So, whether you consider your company to be state-of-the-art already, or you're still in the throes of manual processes, MetaViewer is the ideal fit for any company looking to increase efficiency and maximize ROI.

We offer Touchless Invoice Processing featuring RPA technology that identifies any document that comes into your organization and routes it through workflow steps without human intervention. Let's break it down:

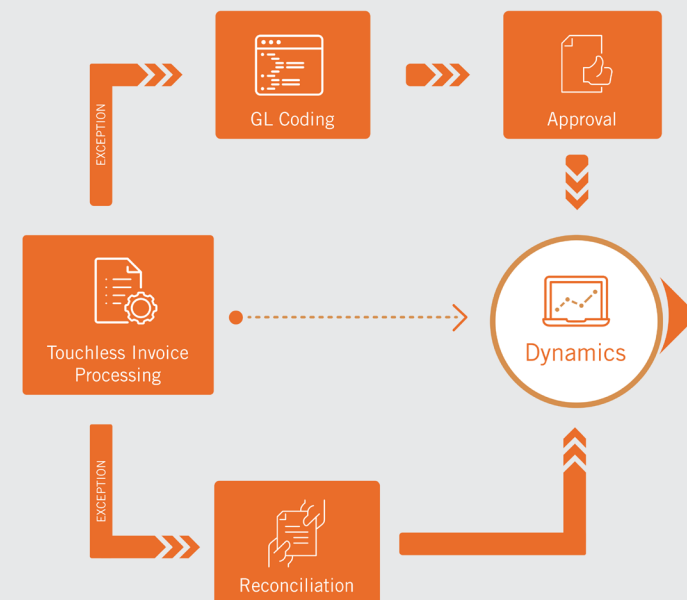


Capture



MetaViewer Intelligent Recognition captures documents using state-of-the-art technology, then intelligently reads, extracts and indexes transactional data – whether it arrives on paper or electronically. All of this while eliminating manual data entry AND without the pay-per-invoice burden of other solutions.

Workflow



MetaViewer's automated workflow facilitates two- and three-way matching and reconciliation with Microsoft Dynamics, routes documents for approval, standardizes processes, automates GL coding, allows online approval workflows and notifies users about the status of invoices. MetaViewer gives you real-time views into your entire AP process.

Payment



Paperless payment technology further streamlines the payable process and pays you cash back.

Retrieval



Instant and secure access from anywhere. Find all appropriate documents within a second or two using a web-based search or directly from your ERP solution with the click of a button.

Integration – Integration is automatic. MetaViewer blends with your existing environment in perfect harmony. MetaViewer's automation solution tightly integrates with all Microsoft Dynamics ERP and financial modules (AX, D365 Business Central, Finance and Operations, GP, NAV and SL).

MetaViewer enhances your Microsoft Dynamics ERP solution by adding integrated eInvoicing, Intelligent Recognition, workflow and document imaging. View all transaction documents and reports directly from your Microsoft Dynamics application.

Let's do the math.

Compelling ROI, full visibility and functionality well beyond AP Automation is something every financial executive can appreciate.

Reduce Costs

- Eliminate lost discounts
- Boost the number of invoices processed per employee
- Decrease dispute resolution time
- Reduce errors, wasteful spending, and discourage fraud

Expanded Functionality*

- Expense Reports
- Auto Allocation
- Payment Batch Approval
- Purchase Requisition
- Journal Entry and Workflow
- New Vendor Add
- Packing Slip Receiving
- Auditor Search
- Contract Management
- Check Capture
- Shipment Receiving Workflow
- New Hire Document Processing
- Order Processing
- Intercompany coding
- Enterprise Expansion: AR, HR and Legal

"I can't even quantify the time and cost savings, but it is substantial. Our AP department was pulling their hair out trying to reconcile invoices to receipts at month's end, nothing else was getting done. Now our PO reconciliation process is automated and so much easier."

-MetaViewer Customer since 2013

Provide True Executive-Level Visibility

- Eliminate paper-based "blind spots" in your financial processes
- Real-time charting and customizable Excel data extraction provides instant analytics of your current financial situation
- Easily drill down to specific transactions and documents with a single click
- Identify performance issues and bottlenecks, anticipate problems and avoid surprises
- Increased spend management

* Speak with a representative about available solution expansions for your ERP.

Expanding Solution Options

Available to add at any point in the process

AR/Order Processing

HR

Contracts

Login. Get Automated.

More than just software. Proven, Tested Best-Practices.

With 40 years of experience, MetaViewer is a real-world tested, out-of-the-box, enterprise-level solution. MetaViewer is designed to get your accounts payable staff up-and-running with an automated paperless system that fits seamlessly with your existing financial technology, all without delay and within your budget. Configured for your individual and unique business needs, MetaViewer easily expands across your enterprise to any department that processes paper.

Implementation isn't one-size-fits-all. We have an implementation method that works for you.

MetaViewer Online. MetaViewer in the Cloud is software as a service (SaaS). We host it in our datacenter, support it and make sure it is always safe, available and up-to-date. Eliminate the cost of maintaining your own infrastructure and the burden on your IT staff. Available anytime, anywhere, for a monthly fee.

MetaViewer Licensed Software. On-Premises, in your environment. You purchase the software and MetaViewer experts provide the implementation and ongoing support and enhancements. A painless transition to the benefits of Paperless Automation.

MetaViewer NOW Automation specifically created for small and mid-sized organizations handling 1,000 invoices or less per month that want to streamline their accounts payable processes, MetaViewer NOW is packed full of the same industry-leading functionality as our flagship product, MetaViewer.

1 Document Capture
Automatically captures and extracts data utilizing Intelligent Recognition technology from your scanned paper and electronic invoices.

2 Intelligent Workflow
Approvers and AP staff can quickly approve, route, reject or reassign an invoice using MetaViewer via the web.

3 ERP Integration
A MetaViewer "retrieval" tab is easily integrated into all appropriate Microsoft Dynamics screens. This will display the corresponding document and audit trail related to the transaction.

4 MetaViewer Mobile
On-the-go invoice approvals, GL code viewing and more from your smartphone or tablet. View pending invoices and simply tap them to see more information, including line item details and the original copy of the invoice.



Microsoft
Partner



Gold Application Development
Silver Enterprise Resource Planning



To learn how MetaViewer can enhance your Microsoft Dynamics ERP solution, generate substantial ROI, and automate your manual, paper-burdened processes, contact your sales representative or visit www.metaviewer.com.

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