IA Product Features

Our Invoice Automation Solution is designed to help organizations gain efficiency, improve accuracy, enhance visibility, and eliminate paper in their accounting processes.

There are two main users of our IA product:

Processors
typically members of the AP team that handle the routing of all invoices.

Approvers
members of the team that sign off on invoices.

As Invoice Automation grows, the feature set and capabilities will expand as well. Below is a list of the current features.

FEATURES	DETAILS	BENEFIT/VALUE ADD
Invoice Ingestion into System	Invoices can be ingested into the system in a few ways: • Emailed • Scanned to email • Uploaded by Processor	Electronic invoices eliminate the need for paper.
Artificial Intelligence Engine	We have an AI engine imbedded in the product that reads captured invoices and extracts data points.	Pertinent information is read from the invoice, minimizing the amount of manual data entry.
Archive Page	All invoices are archived within the application. • Processors can view all posted invoices. • Approvers can view all invoices they have approved.	User can search for and view any invoice that has been uploaded to the system. Eliminates the need to keep paper invoices.
Invoice Separator	QR code that can be printed and placed between invoices prior to scanning into the system. Once scanned, the system will read the QR codes and split the invoices appropriately.	Enables user to upload invoices in bulk.
Manual Splitting of Invoices	User can view, split, and delete individual pages from a document that is loaded in the system.	Enables user to upload invoices in bulk.
Document History	All actions taken on an invoice are captured and documented on the individual invoice.	Provides an electronic audit trail. User is also able to see who an invoice is awaiting approval from.
Merge Document	User can merge a PDF into a document that is already loaded in the system.	Additional or supporting documentation can be added to an invoice after it is loaded.
GL Type Ahead	The populated list of GL codes is narrowed down as a user is typing.	Saves time spent searching for GL codes.
Tiered Approvals	An invoice can be set up to flow through multiple levels of approvals. The processor and each approver assigned to the invoice can view all tiers of approval for the invoice. All approvals will be captured in the document history.	Invoices are electronically routed through all required approvers, eliminating invoices getting lost in the shuffle, and removing any guess work on who an invoice is sitting with.
Express User	This option is available only for approvers that provide a cell phone number. When an invoice is ready to be approved, express users are sent a unique link that when clicked triggers an SMS code to be sent to the user's phone. The code can be entered on the log in page taking the user directly to their invoices needing approval.	Allows an approver to log into the system quickly and easily on either a desktop or mobile device.