

# UNFORM<sup>®</sup> AP AUTOMATION TOOLS

BUSINESS PROCESS AUTOMATION SUNDAY, MARCH 8, 2020

PRINT MANAGEMENT + E DELIVERY | DOCUMENT ARCHIVING | IMAGE  
MANAGEMENT | DOCFLOW

PAUL BOUSHELL | [PAULB@SYNERGETIC-DATA.COM](mailto:PAULB@SYNERGETIC-DATA.COM) | (530) 927-5805

ALLEN MIGLORE | [ALLENM@SYNERGETIC-DATA.COM](mailto:ALLENM@SYNERGETIC-DATA.COM) | (530) 927-5796



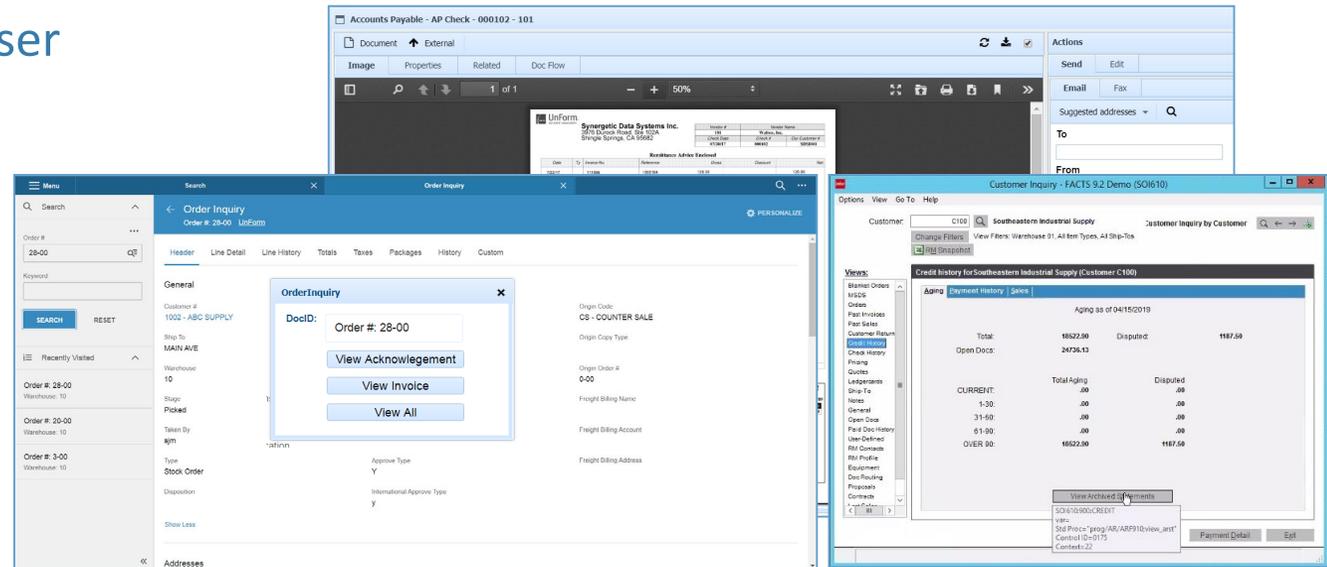
# DOCUMENT ARCHIVING

Documents can be retrieved multiple ways including:

Directly from the UnForm Archive browser

ERP Launch Points: SX.e Web UI and CSD with Chrome Web Extensions, Desktop Client for SX.e GUI, FACTS

API's / Rest for integration with websites and other applications



# DOCUMENT ARCHIVING

Documents are automatically linked when Archived to provide visibility to the entire transaction

The screenshot displays the UnForm document archiving interface. At the top, there are navigation options: 'View All', 'View Two', and a list of document counts '1 2 3 4'. Below this, there are four document thumbnails, each with a search icon and '1 of 1' indicator. The thumbnails are:

- Accounts Payable, AP Check, 000102, 101**: A check stub from Synergetic Data Systems Inc. for \$350.00.
- Accounts Payable, Purchase Order, 1000164, 101**: A purchase order for 'Blanket Order'.
- Accounts Payable, Trade Invoice, 111996, 1000164**: An invoice for 'Trade Invoice'.
- Accounts Payable, Vendor Pack List, 1000164, 101**: A vendor pack list for 'Vendor Pack List'.

Each thumbnail shows a preview of the document's content, including tables and text. The interface is designed for easy navigation and search of archived documents.

# IMAGE MANAGER: BROWSER BASED AUTOMATED DOCUMENT CAPTURE

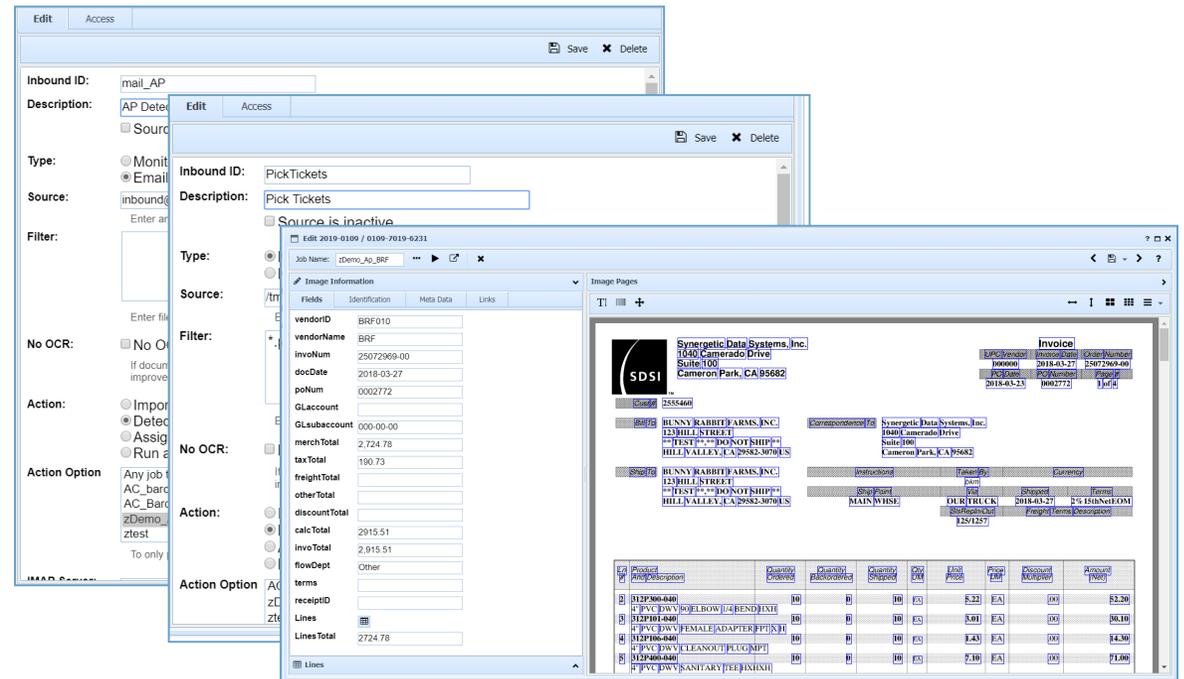
Jobs can be configured to either fully or partially automate the process to identify and index documents and to capture transaction data

## Monitored Inbound Sources

- E-mail Address
- Monitored Path

## Fully Automated, Assisted and Non-Assisted Indexing

- PDF Text Layers
- OCR
- ERP Lookup Capability
- Auto Click-to-Fill



# IMAGE MANAGER: AP AUTOMATION

Capture transaction Header and Line item data to create electronic transactions to deliver to your ERP applications.

Extracted Data Validation Capability include:

Validate against ERP Data

Duplicate Entry Check

Mathematical Validation

The screenshot displays the 'Edit 2019-0109 / 0109-6901-0005' window. The 'Image Information' tab is active, showing a form with fields for vendorD, vendorName, InvoNum, docDate, poNum, GLaccount, GLsubaccount, merchTotal, taxTotal, freightTotal, otherTotal, discountTotal, calcTotal, invoTotal, flowDept, terms, receiptID, Lines, and LinesTotal. The 'Lines' tab is also visible, showing a table of line items with columns for Qty, Item, Price, Disc, Extend, and Uom.

Qty	Item	Price	Disc	Extend	Uom
10.00	312P300-040 4" PVC DWV 90 ELBOW	5.220	.00	52.20	EA
10.00	312P101-040 4" PVC DWV FEMALE	3.010	.00	30.10	EA
10.00	312P106-040 4" PVC DWV	1.430	.00	14.30	EA
10.00	312P400-040 4" PVC DWV SANITARY	7.100	.00	71.00	EA
25.00	312P100-040 4" PVC DWV COUPLING	2.180	.00	54.50	EA
6.00	131PEF-4 EFFLUENT FILTER	10.000	.00	60.00	EA
32.00	151CHLORINE CHLORINE 1 GAL (12.5	5.150	.00	164.80	EA
8.00	252CIC100BSEN1 1" X 11" BRASS TANK	21.430	.00	171.44	EA
30.00	233TEFLONS20 TEFLON TAPE 1/2" X	0.340	.00	10.20	ROLL
48.00	233TAPE66 3/4" X 66' ELECTRICAL	0.900	.00	43.20	ROLL
4.00	233RECTOR RECTORSEAL #5 PT	16.320	.00	65.28	EA
10.00	320125GE 1 1/4" GALV 90 DEGREE	3.440	.00	34.40	EA
14.00	258100LBCV 1" LONG BODY CHECK	21.110	.00	295.54	EA
20.00	181PS40-DSI PRESSURE SWITCH	9.100	.00	182.00	EA

# DOCFLOW: FLOWS, STEPS AND ROLES

## Flows

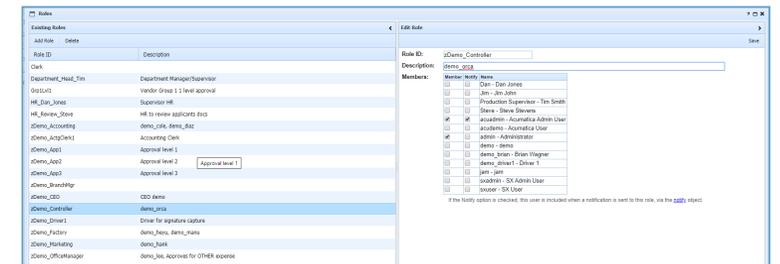
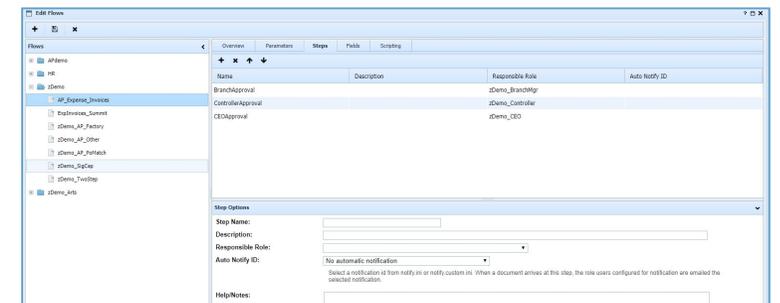
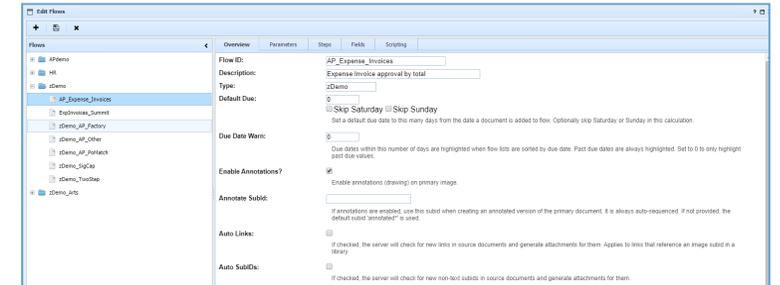
A Flow is a business Process. Flow definitions specify a series of one or more **Steps** that a document moves through, along with actions and fields enabled to respond and capture data.

## Steps

A Step is a business rule within a process. A Step's **actions** define how a user responds to and routes documents through a Flow to ensure process compliance.

## Roles

Each step has a responsible **role** assigned to it. Security and actions are controlled by roles. A role is simply a named-entity with one or more Docflow users as members. Note that any user can be part of any number of roles.



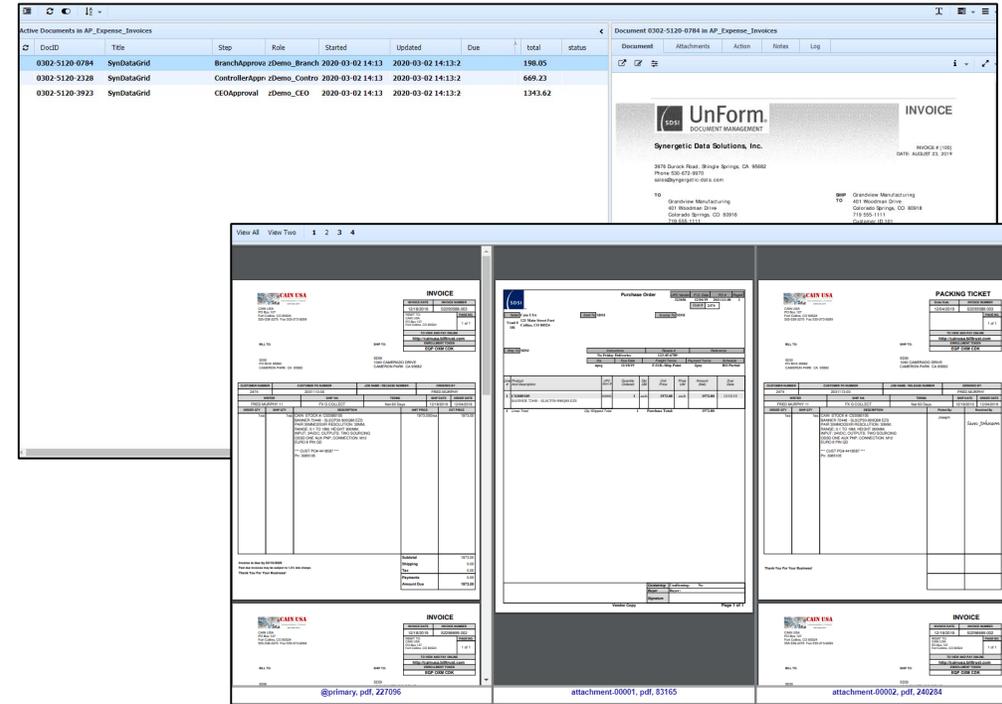
# DOCFLOW

Typical AP Flows include:

Expense Invoice approval processes

3 Way Match problem resolution

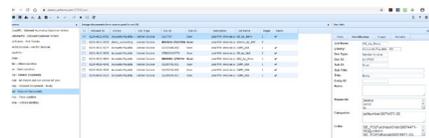
The DocFlow browser interface is 'responsive' for use on Mobile Devices and offline capability



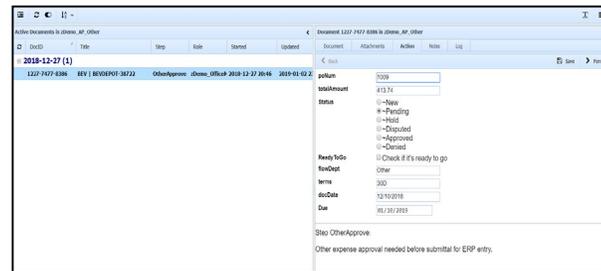
# DOCFLOW: EXPENSE INVOICE ROUTING EXAMPLE



UnForm Image Manager: Monitored Inbound Source



UnForm DocFlow



Alert  
Manager Approval & GL assignment



Alert  
Accounts Payable Entry

Monitored sources bring documents into Image Manager

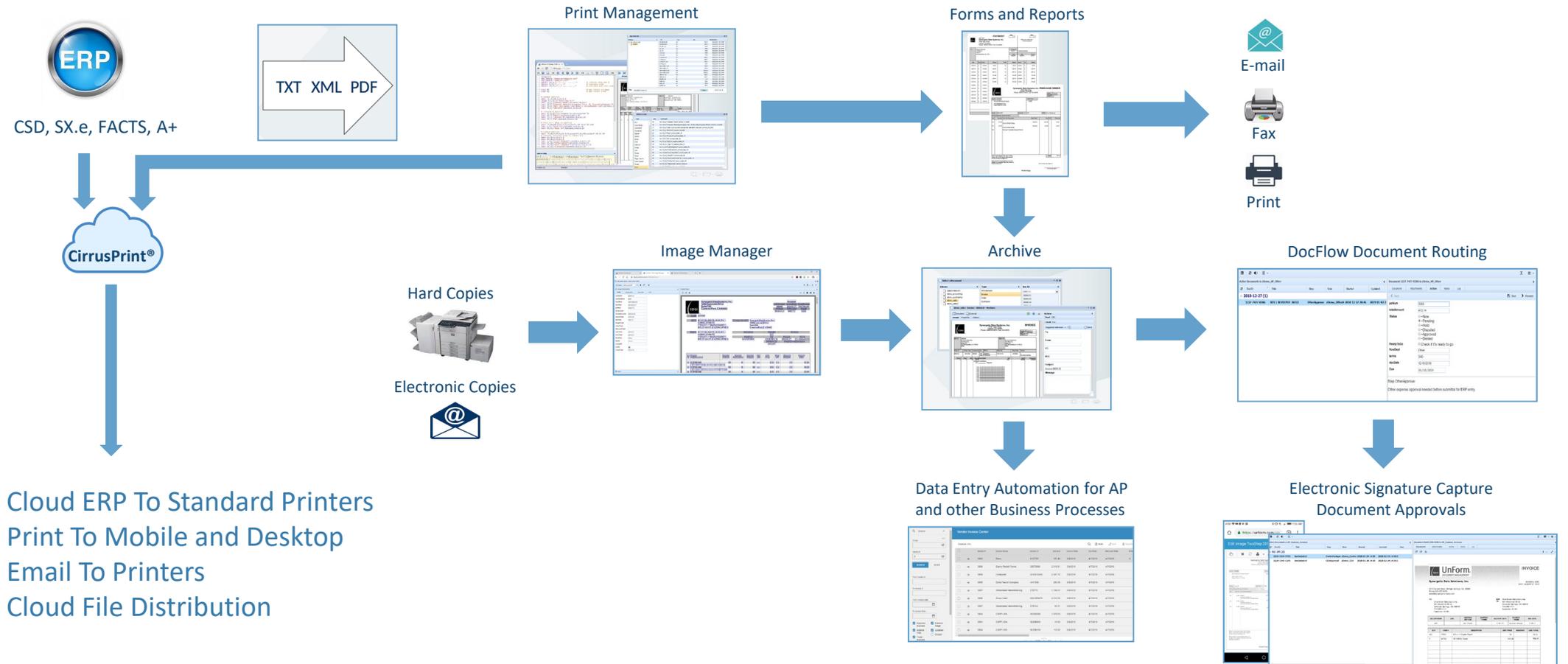
Key Data elements are captured

Document is transferred to Archive, assigned to a Flow and the Approver is notified.

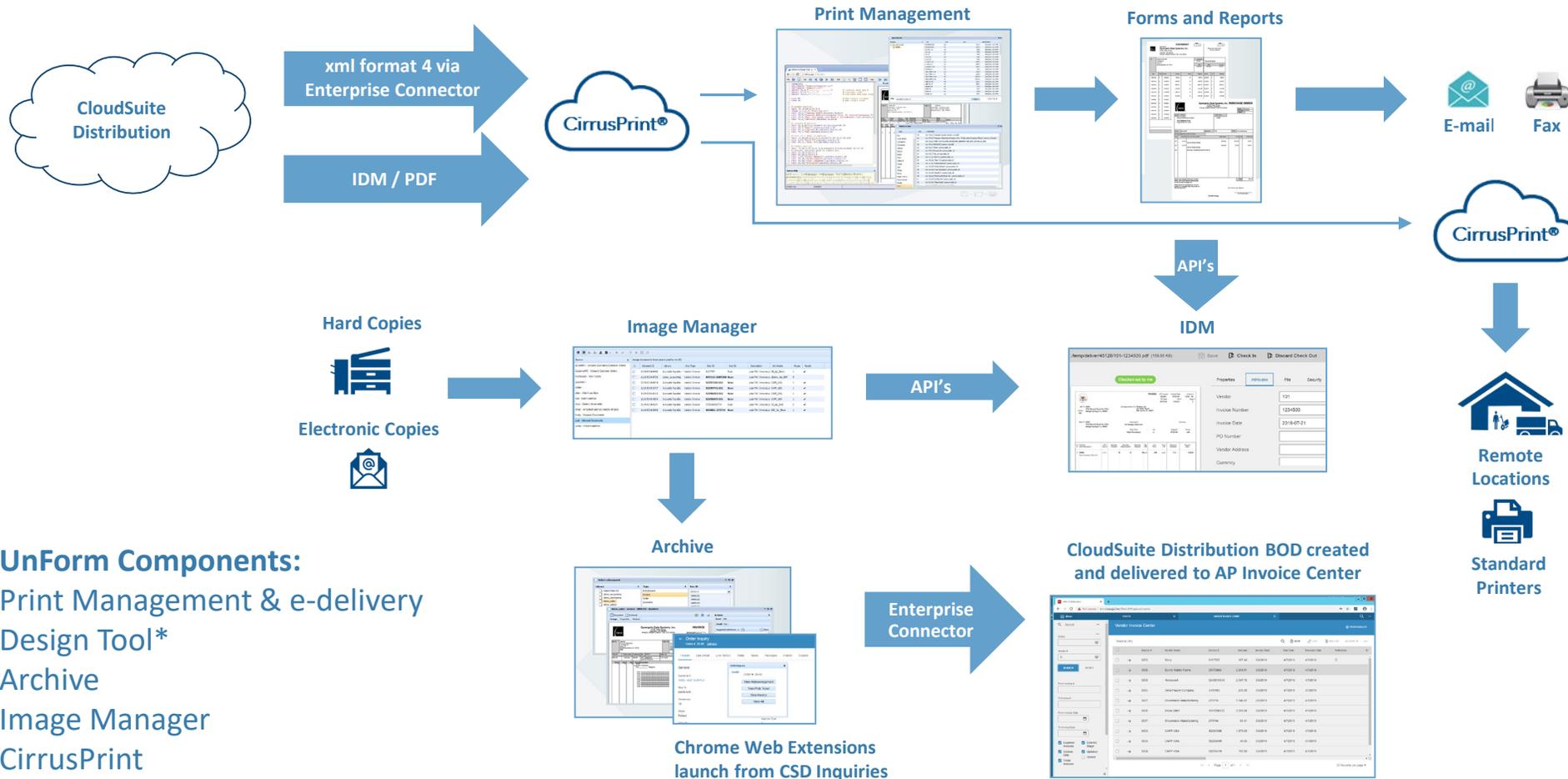
Approver reviews document, adds notes or attachments if needed and forwards document to the next Step.

When moved to the next step, Accounts Payable is notified to enter transaction and closes the flow for the document. The document, attachments and logs are saved in Archive

# UNFORM<sup>®</sup> A TO Z, END-TO-END DOCUMENT MANAGEMENT: SOLUTION SUITE OVERVIEW



# UNFORM END TO END FOR CSD AND IDM



**UnForm Components:**  
 Print Management & e-delivery Design Tool\*  
 Archive  
 Image Manager  
 CirrusPrint

Chrome Web Extensions launch from CSD inquiries

CloudSuite Distribution BOD created and delivered to AP Invoice Center

# SOLUTION DEMO

# QUESTIONS



TUG CONNECTS 20/20