

# Ephesoft ERP Integration Solution Brief

Intelligent document processing (IDP) involves more than just capture, classification and extraction of business data from digital and paper documents. It also enables workflow automation and application integrations to accurately deliver the relevant business data to systems of record and process management tools like Robotic Process Automation (RPA) platforms, Business Intelligence (BI) tools and line of business applications such as Enterprise Resource Planning (ERP) systems.

With all the hosted, as-a-service, and on-premises ERP offerings in the market, defining workflows and standardizing on capture processes is complex. Through the lens of digital transformation, simply choosing an intelligent document processing platform to act as the document and data onramp to your ERP system might not be enough. Business processes need to be mapped, pain points documented, application architectures and security requirements detailed and staff retrained for a successful modernization, ERP cloud migration or consolidation project.

For example, adding an iPaaS (Integration Platform as a Service) element to the overall architecture would allow customers to add an approval workflow, or archive step to their existing business process. Customers could then transform their accounts payable manual processes to automatically capture and extract data from vendor invoices, notify and request payment approval using iPaaS, archive digital invoices in a cloud service like Box to provide an audit trail, while simultaneously sending line item data into Oracle/NetSuite for final payment.

Using modern architectures and secure API calls, customers could design workflows that fit the business

process and leverage existing business applications. Microsoft customers could leverage PowerAutomate to receive digital invoices, archive those documents in SharePoint Online, request payment approval and then send to Dynamics 365.

For these accounting IT initiatives, Ephesoft recommends a thorough process and architectural review, led by experienced, cross-functional business and technology experts, who understand the value and limitations of various applications and can guide customers through a digital transformation project.

## Architecture

When planning a digital transformation project for the accounting department, organizations must consider the following aspects of ERP integration and workflow:

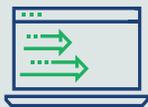
- Does the current AP or AR workflow and departmental business processes support the organizational goal for digital transformation and intelligent automation?
- Are the current processes adapted for digital transformation, or are there paper based processes that need to be re-engineered?
- Is a branching workflow with conditional logic required once documents and data enter the organization?
- Is there an existing Business Process Management (BPM) or Robotic Process Automation (RPA) system that can be leveraged in the new process architecture?

Are there existing IT resources to design, manage and provide governance for this process?





# How It Works



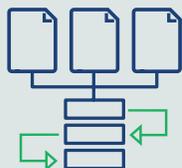
## Document Arrival

i.e. invoices, remittance checks, purchase orders, T&C documents, contracts



## Document Processing

Image Cleanup, Document Identification, Data Extraction, Data Enrichment



## Workflow or Conditional Logic and Document Routing

(iPaaS, RPA, BPM)



## ERP & Records Management System

# Teaming Up for Success

Ephesoft works hand-in-hand with our partners to deliver a range of consulting services that get these and other questions answered prior to any technology deployment. This team of experts will design a solution that is right for your business, removing risk from usually complicated modernization efforts, and will be with you the whole way to guarantee success.

## Partner Capabilities and Expertise:

- Document your existing processes and point out easy modernization and automation strategies
- Map the current business processes to determine whether there are more efficient workflow options
- Design-in RPA integration points, which can augment business processes
- Leverage iPaaS (Integration Platform-as-a-Service) workflow solutions to build business logic into your workflows
- Create opportunities for new integration points to accelerate workflows
- Detail special data requirements for the destination system(s)
- Discover if the document data needs to be routed to multiple locations
- Determine whether invoice, remittance documentation and purchase orders require archival for long-term retention or interactive search
- Understand data flow volumes to quickly identify bottlenecks
- Monitor workloads to understand if the accounting team deals with surge processing or seasonal ebbs and flows
- Design and document a system that will achieve your business goals and provide a modern efficient business architecture



## Success Stories



### DH Pace

Reduced errors, expanded ability to process additional 1,000 invoices per month, freed up 635 labor hours per month.



### J. Barbour and Sons Ltd

A retail giant achieved 400% increase in invoices processed per day at 36 seconds per invoice.



### Honda Logistics

The transportation and logistics powerhouse turned their AP department into a profit center.

## Next Steps

Ephesoft understands that modernization project success depends on addressing the business needs of the customer in a way that aligns with organizational priorities and budget constraints. Our trusted partner community can help design an application architecture that matches the business requirements, to maximize project success. With hundreds of successful projects under their belts, they can do the same for you.

If you have questions, or would like a consultation, reach out to us and we will connect you with a certified partner that will deliver project success.

For more information, contact us [here](#) or visit our [website](#).



## IT'S EASY TO GET STARTED

SCHEDULE A DEMO

### United States HQ

+1 (949) 335-5335  
info@ephesoft.com

Ephesoft, Inc.  
8707 Research Dr.  
Irvine, CA 92618  
United States

### United Kingdom

+44 (0) 1184665000  
info.eu@ephesoft.com

### Australia

+61 2 9056 7490  
info.au@ephesoft.com

### Germany

+49 6126 5503510  
info.eu@ephesoft.com

### Italy

+39 (02) 8088 6345  
info.it@ephesoft.com

### France

+33 1 8288 4002  
info.eu@ephesoft.com

### Singapore

+65 3163 5499  
info.asean@ephesoft.com