

Fact sheet Digital invoice processing
for Microsoft 365 and
SharePoint Online

Perfect design and perfect range of functions

Processing incoming invoices is a very simple task

Looking to optimize your invoice processes? Are you using Microsoft 365 at your company? Then simply choose digital invoice processing from d.velop AG.

d.velop smart invoice for Microsoft 365

d.velop smart invoice for Microsoft 365 enhances your SharePoint with efficient tools for automatically processing incoming invoices. They cover both the entry and automatic classification of invoices and the subsequent release cycle and transfer to the ERP system. Our solution places a special emphasis on transparency, time-savings and compliance with legal requirements.

Better than paper

Check, approve, post – the work with d.velop smart invoice for Microsoft 365 is the same as your workflow with paper documents, but much more intuitive, fast and convenient. Tedious searches? Far from it! All the invoices and information about a case or customer are on screen in one click. That is, of course, provided that you have access authorization for such information.

The benefit of digitally optimizing your existing process quickly becomes clear.

Recorded and classified correctly

How do your incoming invoices arrive at your organization? Digitally via an e-mail inbox? In special formats such as XRechnung? Or as classic paper documents? No matter how they arrive, d.velop smart invoice for Microsoft 365 harmonizes the receipt of invoices and processes all the information in the same way. For you, that means no need to worry about monitoring and processing invoices arriving via different channels.

The artificial intelligence (AI) in d.velop smart invoice for Microsoft 365 monitors and imports the channels automatically. Separating and scanning individual invoices with barcodes, a process with which you may be familiar, can be fully dispensed with. The AI also provides support in this regard. The same applies to the subsequent classification and synchronization with any master data or order data from the ERP system.



Simple release of cost or purchase order calculations.

Give it a tick – release via workflow

The software automatically transfers the classified invoice to SharePoint Online. In combination with our supplier dossiers, the incoming invoice is then immediately sorted correctly. Any accompanying documents, such as order documents, goods receipts, and so on, can be viewed in the dossier immediately.

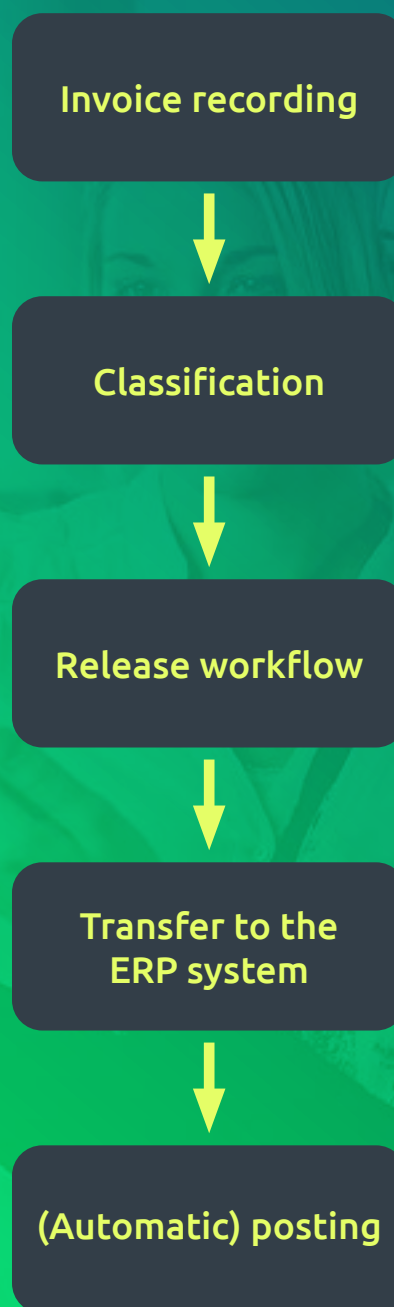
The task overviews in d.velop smart invoice for Microsoft 365 give you perfect oversight at all times. You can track the current release step for any invoice whenever you want. Account assignment templates and automatic assignment to the responsible employee are other essential functions for helping your accountant.

For many companies, it is also vital that invoices are released in accordance with a dual control principle. Naturally, this comes as standard in d.velop smart invoice for Microsoft 365. Integrated workflows control processes such as verification and release.

ERP integration made easy

The challenge nowadays is often to record incoming invoices in the ERP system rapidly and without any errors. Thanks to the standard interfaces to Microsoft Dynamics, SAP and other ERP systems, this task is another one that can be dealt with easily through automation. Following the release, the assigned invoice information is transferred to your ERP system so that it can be posted there directly. Accessing the invoice from ERP is also no issue thanks to the integration capabilities of the solution.

The digital invoice process



Rapid research procedure

Once cases have been closed, it may subsequently become necessary to view an individual invoice or a whole order dossier once again. One important thing to bear in mind in this case is that the technical backgrounds for doing so may differ. A project manager may have to access the information again directly from MS Outlook or MS Teams, while an accountant might want to open the document from the posting in ERP. By integrating into the principal systems, the software solution once again places a focus on supporting you as a user.

In focus: Argument for digital incoming invoice processing

Cost optimization through faster processing

- Reduced operating costs
- Secure revenues from cash discounts

Increased transparency

- Information is easier to find and provide
- Optimized monthly closings
- Swift processing across locations
- Lower rates of error
- Avoidance of media gaps
- Customizable, multi-stage approval process

Safeguarding the process

- Legally compliant electronic archiving
- Logging of activities

User friendly with smart invoice for Microsoft 365

- » Seamless integration into familiar Microsoft 365 applications
- » Active e-mail notification, automatic delegate rules and mailbox function
- » No time-consuming follow-ups
- » Complete process transparency
- » Minimal number of manual steps for invoice processing
- » Invoices are displayed from ERP and different leading user applications

Technical highlights

- Integration into your existing strategic Microsoft 365 and SharePoint Online platforms
- From scanning to workflow, 100% cloud based
- Rapid provision through predefined best practices
- Minimally invasive approach: You simply have to install a small application in the SharePoint app store. All the other functions are loaded via cutting-edge microservices.
- 99-percent availability of microservices
- Simple administration that you can easily do yourself if necessary.
- Integration into a wide variety of different ERP systems, including the latest systems such as Dynamics 365 or SAP S/4 HANA

Security is always paramount with us

- History functions let you track the progress of a release at all times
- Once a workflow is complete, a log is also generated for each release. This log is retained long-term in the dossier together with the invoice.
- d.velop does not obtain permanent copies of your data. All the documents remain fully in your tenant.
- In combination with procedural documentation, your incoming invoices can be stored in your system in compliance with legal requirements.



All your tasks in view.



Orders, e-mail correspondence, goods receipts and invoices can be brought together and presented clearly in order dossiers.



About d.velop AG

d.velop AG, founded in 1992 and based in Gescher, Germany, develops and markets software for the complete digitization of business processes and industry-specific procedures and provides companies with consulting on every aspect of digitization. By adding mobile apps as well as standardized and custom SaaS solutions to its established ECM portfolio of services relating to document management, archiving and workflows, the software manufacturer has also expanded to offer managed services. These services include sophisticated compliance management to provide legal certainty and ensure compliance with all statutory regulations.

d.velop provides digital services that connect people with one another and simplify and redefine workflows and cases. As a result, the ECM specialist helps companies and organizations to utilize their full potential.

A strong global network of around 300 specialized partners ensures that d.velop Enterprise Content Services are available worldwide.

d.velop products—whether on premises, in the cloud or in a hybrid form—are now used by more than 10,000 customers across multiple industries with over 2.4 million users; these customers include Tupperware Germany, eis-mann Tiefkühl-Heimservice GmbH, Parker Hannifin GmbH, Nobilia, Schmitz Cargobull, FingerHaus GmbH, the city of Wuppertal, Basler Versicherungen, DZ Bank AG, Saarland University Medical Center and Greifswald University Hospital.

d.velop AG

Schildarpstraße 6–8
48712 Gescher, Germany
Phone +49 2542 9307-0

d-velop.com
content@d-velop.com

