

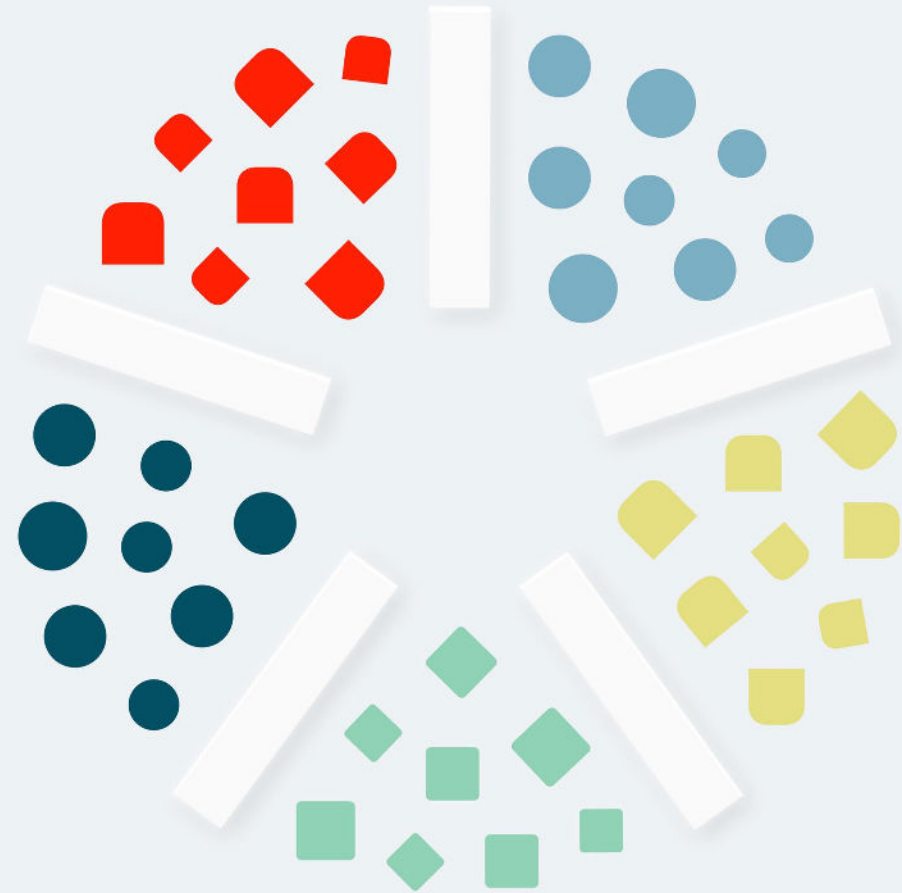


Introducing DocStar— Microsoft Dynamics BC Integration

September 21, 2023

John Smetana
Territory Manager

Jim Greco
Sr. Solutions Engineer



Today's Speakers



John Smetana
Territory Manager
Epicor (DocStar)



Jim Greco
Sr. Solution Engineer
Epicor (DocStar)

Today's Topics

- Dynamics Community: Involvement and Partnership
- Integration with Microsoft's Dynamics Business Central (BC)
 - What is it?
 - Who can benefit?
 - How does it work?
- Demonstration
- Q&A



Dynamics Community

... Involvement and Partnership

Dynamics Community: Involvement and Partnership



WennSoft
SYNERGY 2023

Integration with Microsoft Dynamics Business Central (BC)

What is it?



DocStar Integration with MS Dynamics BC

What is it?

- **Accounts Payable – Document & Data Dependent Business Process**
 - Reduction of Manual Tasks: Document Handling, Approvals and Data Entry
- **DocStar Intelligent Data Capture (IDC)**
 - Capture Data from Invoices: semi-structured documents
 - No Templates ... using AI and Machine Learning
 - Header/Footer | Line-Item-Detail (optional)
- **DocStar Modules and Components for Integration**
 - Workflow
 - DataLink
 - Web Services/API

Who can benefit?



DocStar Integration with MS Dynamics BC

Who can benefit?

- **Accounts Payable (AP) Team Members**
 - Reduction of Manual Tasks receiving & handling invoices
 - Approvals become a digital workflow process
 - No more folder drag-n-drop & saving files with a naming convention
 - No more highlighters and hand-written notes & scribbles
 - No more guessing and "list making" of who to follow-up with
 - No more relying on Scan-to-Email back-and-forth for approvals to pay
- **Approvers of Invoices to Pay**
 - Everything is at that person's fingertips to approve, deny or request more info
- **CFOs/Controllers/Accounting Managers**
 - 24/7 Visibility of in-process invoices and their status
- **Accounting/Finance: Audits are a breeze ... less time and stress**

DocStar Integration with MS Dynamics BC

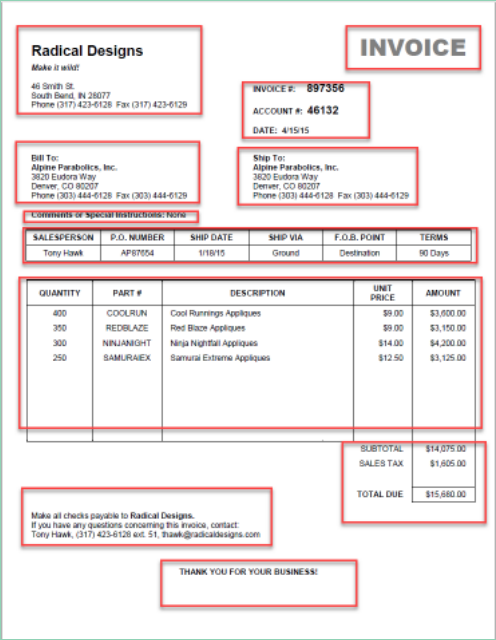
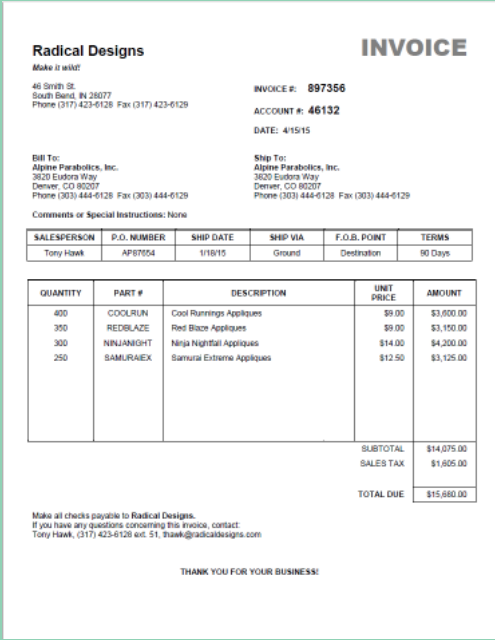
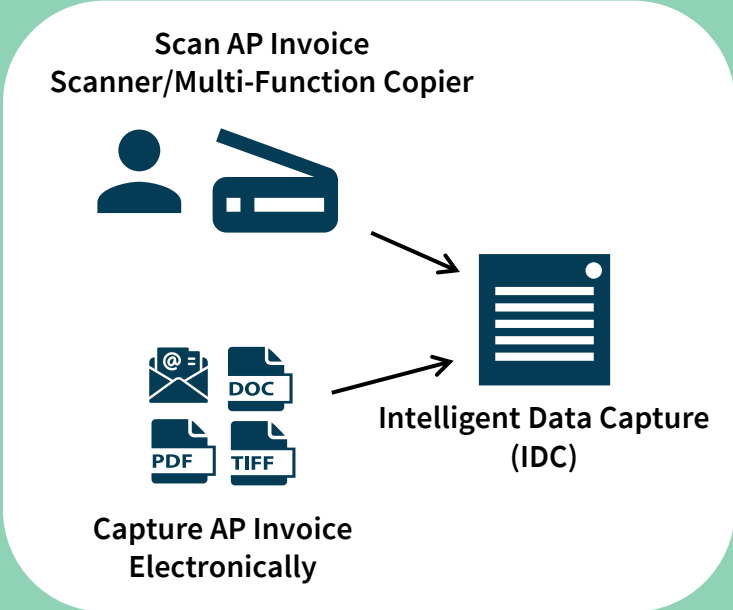
How does it work? DocStar IDC



Capture

Classify

Extract



Header

Detail (optional)

Footer

How does it work?



DocStar's Integration with MS Dynamics BC

How does it work? Invoice Matching and Approval Workflow

Micro Bond Inc.
The science of strong bonds since 1970!

P.O. Box 305
Roxford, MT 22097
Phone (406) 889-5288 Fax (406) 423-6129

DELIVERY TICKET
PURCHASE ORDER:
106254

TO:
Scott Neal
CRONUS USA, Inc.
7122 South Ashford Street
Atlanta, GA 31772

SHIP TO:
Scott Neal
CRONUS USA, Inc.
7122 South Ashford Street
Atlanta, GA 31772

P.O. DATE	REQUISITIONER	SHIPPED VIA	F.O.B. POINT	TERMS
7/18/2023	Scott Neal	Ground	Destination	90 Days

QTY	UNIT	DESCRIPTION		
6	1896-S	ATHENS Desk		
6	1900-S	PARIS Guest Chair, black		

** By signing this document, you agree that the products listed above have been delivered in good condition. Upon receipt of this delivery ticket an invoice will be generated for the products listed above.

Send all correspondence to:
mmurphy@microbondinc.com
Or:
Attn: Michael Murphy
P.O. Box 305
Roxford, MT 59930
Phone (406) 889-5288

Received by _____ Date _____



CRONUS

CRONUS USA, Inc.
7122 South Ashford Street
USA
Westminster
Atlanta, GA 31772

PURCHASE ORDER
The following number must appear on all related correspondence, shipping papers, and invoices:
P.O. NUMBER: PO2075

TO:
Michael Murphy
Micro Bond, Inc.
P.O. Box 305
Roxford, MT 59930
Phone (406) 889-5288 Fax (406) 423-6129

P.O. DATE	REQUISITIONER	SHIP VIA	F.O.B. POINT	TERMS
7/18/2023	Scott Neal	Ground	Destination	90 Days

QTY	PART #	DESCRIPTION	UNIT PRICE	TOTAL
6	1896-S	ATHENS Desk	\$10.00	\$60.00
6	1900-S	PARIS Guest Chair, black	\$20.00	\$120.00
SUBTOTAL				\$180.00
SALES TAX				\$11.55
SHIPPING & HANDLING				\$25.00
OTHER				
TOTAL				\$216.55

1. Please send two copies of your invoice.
2. Enter this order in accordance with the prices, terms, delivery method, and specifications listed above.
3. Please notify us immediately if you are unable to ship as specified.

Send all correspondence to:
Scott Neal
CRONUS USA, Inc.
7122 South Ashford Street
Atlanta, GA 31772

Authorized by _____ Date 7/18/2023



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P.O. Box 305
Roxford, MT 59930
Phone (406) 889-5288 Fax (406) 423-6129

INVOICE
INVOICE: 878632
ACCOUNT: 39654
DATE: 7/18/2023

Bill To:
CRONUS USA, Inc.
7122 South Ashford Street
Atlanta, GA 31772

Ship To:
CRONUS USA, Inc.
7122 South Ashford Street
Atlanta, GA 31772

Comments or Special Instructions: None

SALESPERSON	P.O. NUMBER	SHIP DATE	SHIP VIA	F.O.B. POINT	TERMS
Michael Murphy	106254	7/18/2023	Ground	Destination	90 Days

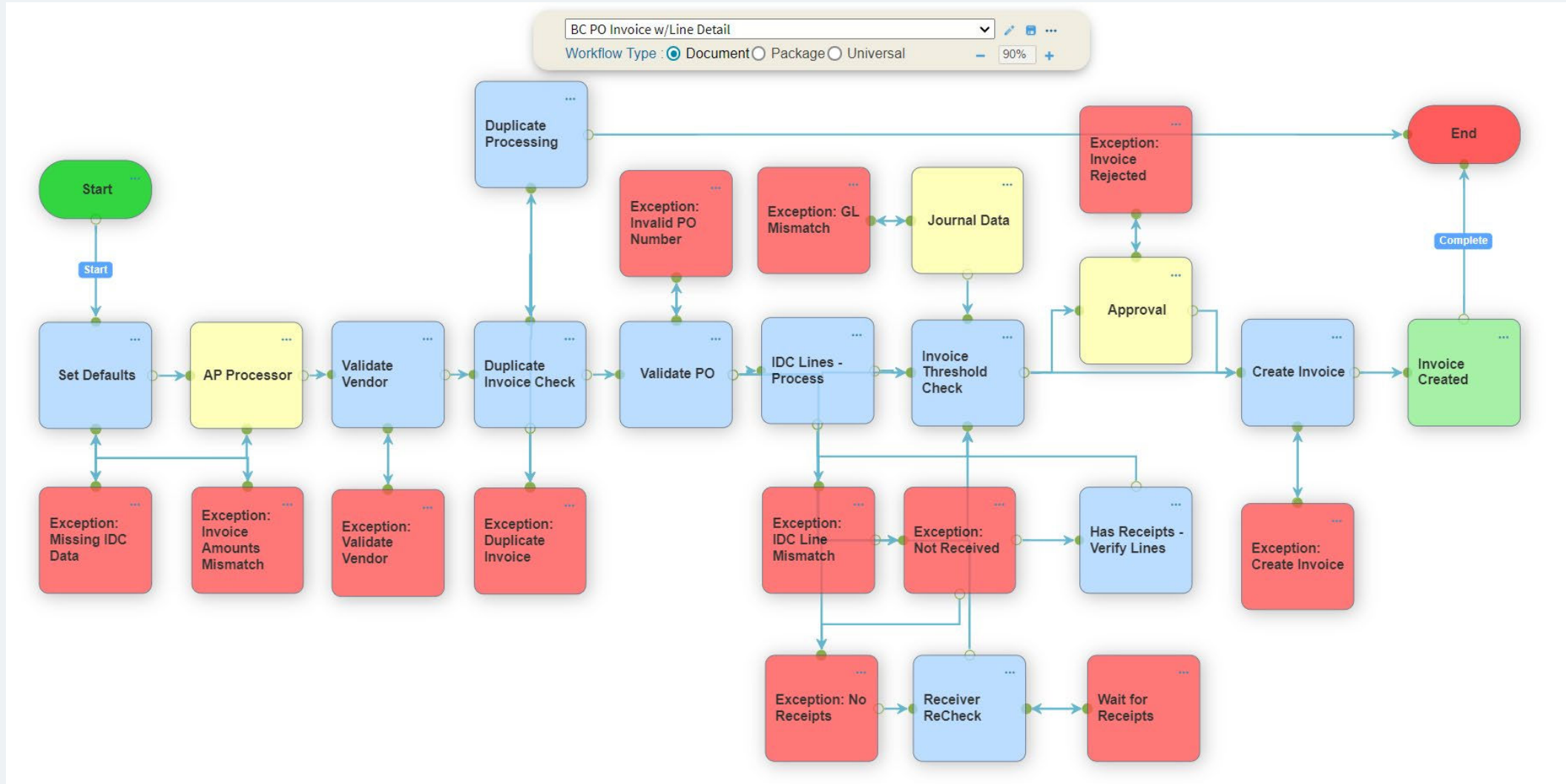
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SHIPPING & HANDLING				\$25.00
TOTAL DUE				\$216.55

Make all checks payable to **MicroBond, Inc.**
If you have any questions concerning this invoice, contact:
Michael Murphy, (406) 889-5288 ext. 2, mmurphy@microbondinc.com

THANK YOU FOR YOUR BUSINESS!

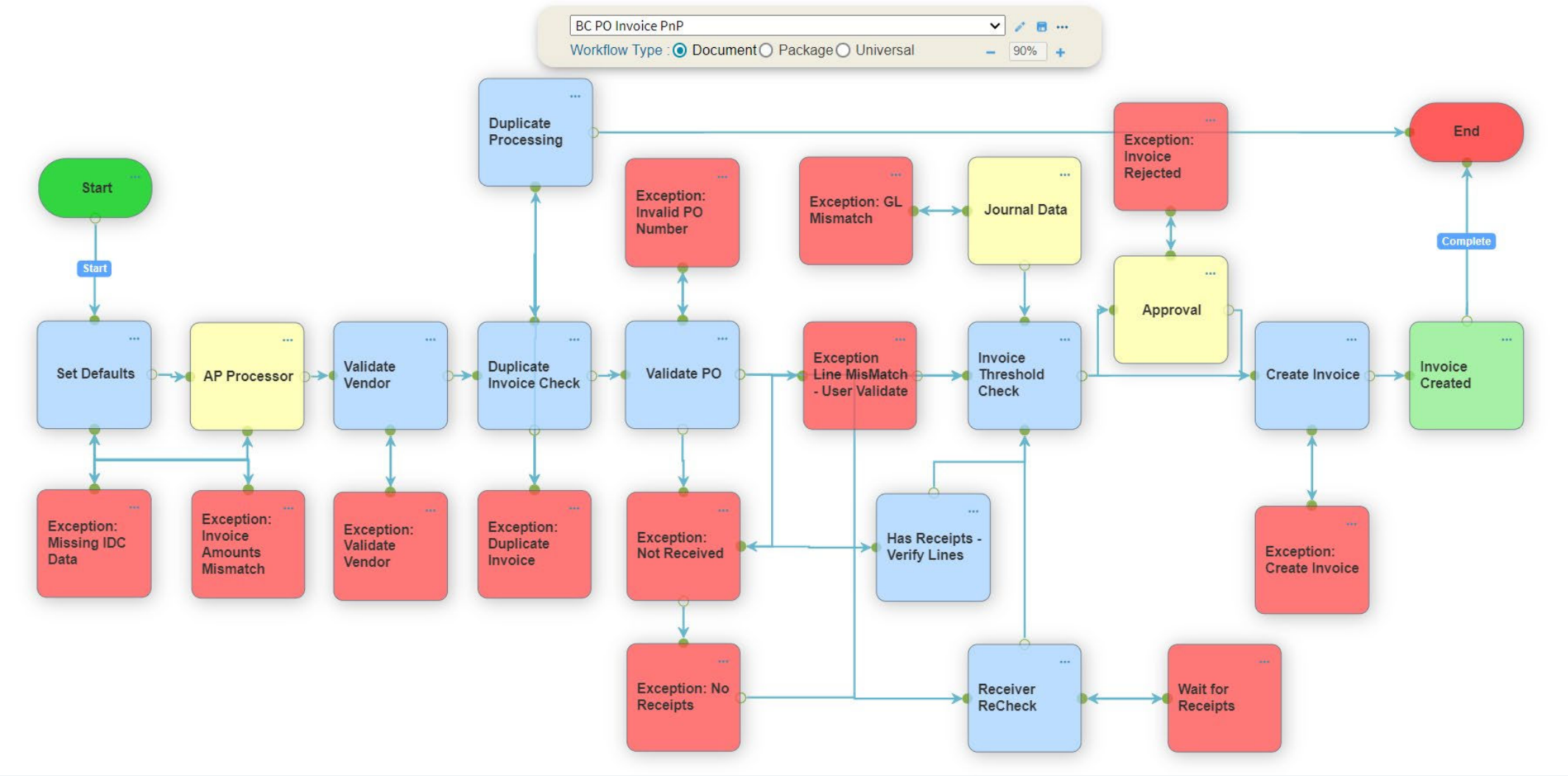
PO Invoice w/Line Detail Use-Cases: Workflow

How does it work? Workflow Design



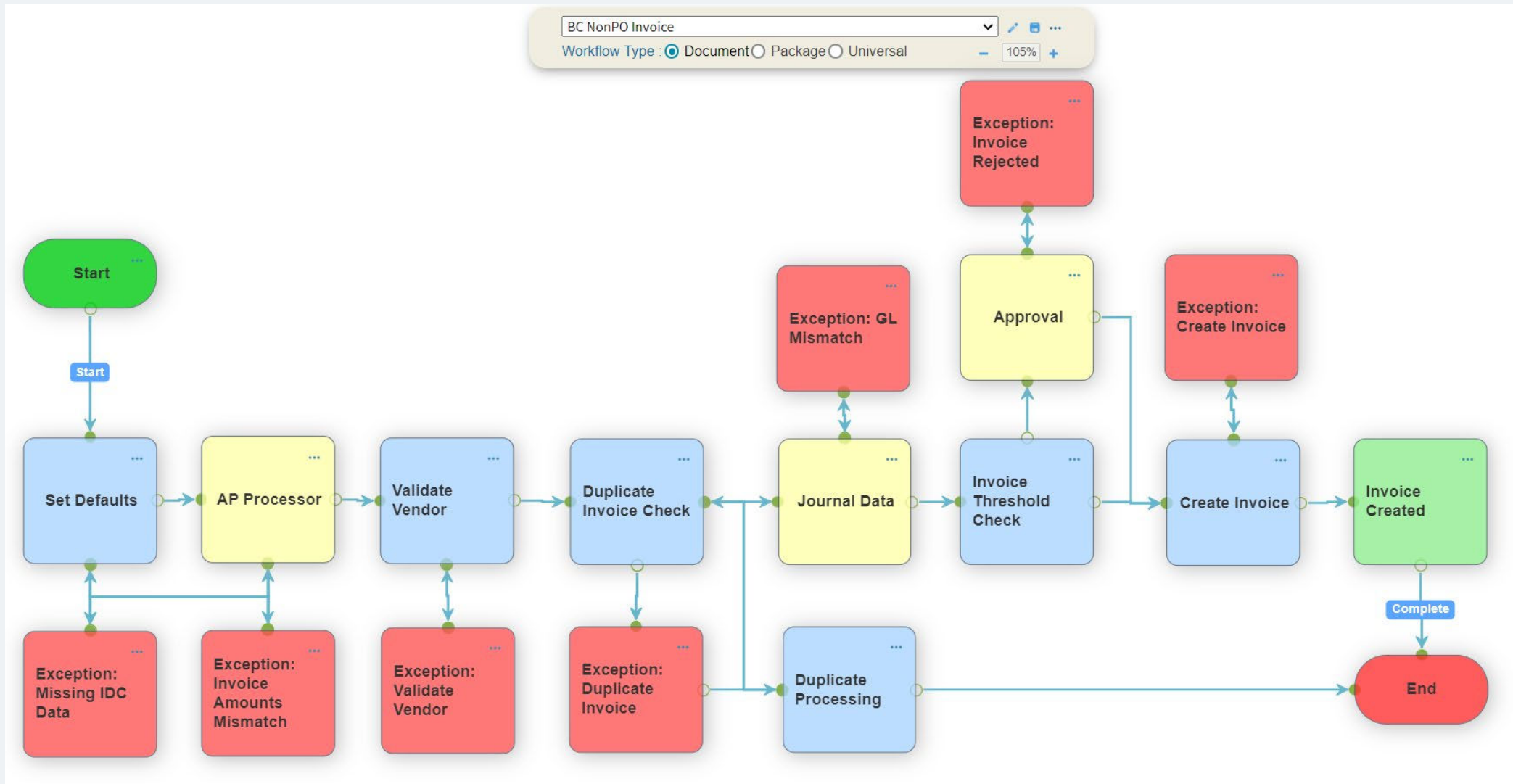
PO Invoice Pull-and-Present Use-Cases: Workflow

How does it work? Workflow Design



Non-PO Invoice Use Case: Workflow

How does it work? Workflow Design

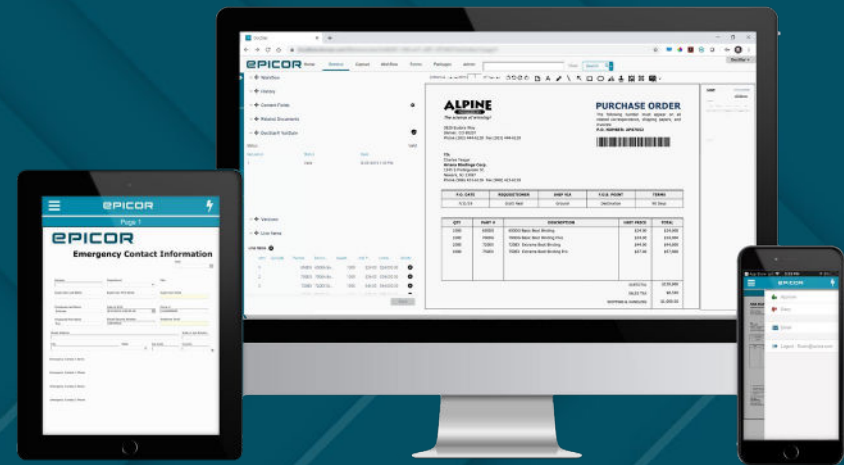


DocStar Integration with MS Dynamics BC

How does it work? DocStar + BC Integration



Demonstration



DocStar

an Epicor solution

Learn More

About

Helping businesses translate vision into action for more than 27 years, DocStar offers the industry’s most flexible and innovative enterprise content management and process automation platform. Easy to implement and use—both in the cloud and on premises—DocStar proven technology and global process expertise empowers organizations to operate at peak performance, navigate change, and grow.



Contact

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[Learn More on AP Automation](#)

[DocStar ECM for MS 365 BC Fact Sheet](#)



Q&A



Thank you

Questions? To learn more how DocStar can work for you contact:

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