CloudBytes: Streamlining Procurement

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DEANDORTON

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AP Automation with Purchasing

Streamline purchasing management with AI-powered automation

- **Simplified processes:** Extend AP Automation into Purchasing to ensure streamlined workflows.
- **Automated invoice creation:** Import or email vendor invoices and Intacct auto-creates them in Purchasing.
- **AI-powered matching:** Automatically match uploaded documents to POs for faster, more accurate processing.
- **End-to-end connectivity:** Connect automated purchasing and payables seamlessly with one list for a single source of truth.
- **Unparalleled efficiency:** Reduce manual tasks, save time, and improve accuracy with AI/ML-driven automation.

Still entering data manually?

Entering 2025, manual data entry is ever-present globally for SMBs*

66%
Of organizations continue to manually enter invoice data

51%
Of users identify keying invoices and matching POs as top pain points

30%
Say AI is transforming finance & want more AI tools

*IDC Accounts Payable and Accounts Receivable research for Sage January 2024

Targeting AP pain points

30%

Of AP time is spent on Invoice Entry

23%

Of AP time is spent on Classification

28%

Of AP time spent is on Approvals

Giving time back

- What do users value **most strongly** from AI?
  - *Saving time and getting more done*
  - AI-powered AP Automation saves 100s of hours for Sage customers globally by cutting AP processing time in half
  - Depending on the size of business the AP process takes between 4 and 14 days per month
    - A small business (20-99 employees) saves a week a month or 2.5 months annually
    - A medium business (100-999 employees) saves a week and a half each month or over 4 months annually
  - We address the number one pain point in the AP process which is manual data entry
  - Embedding within the product provides an easy to use and seamless workflow

AI products that revolutionise accounting

Delivered by a world class Sage AI team recognized for accounting domain expertise and success

Providing value to users

Accelerate your procure-to-pay process

Spend **less time on manual data entry** and more time on **higher value activities**.

Easily identify and manage exceptions

Machine learning highlights duplicate and erroneous bills for you, so you can **quickly identify exceptions** that need your attention.

Streamline AP processing with an end-to-end solution

Use **one solution end-to end** for all your AP needs. Handle invoices from all your entities from within one Sage Intacct account, **with a single logon**.

Industry-Leading Accuracy

Vendor Matching

95%

Accuracy predicting vendor > 1 month

Extraction of new fields:

- Tax
- Currency
- Tax Summary (EU)
- Multi-language Support
- PO Number

Continuous Learning

- Personalized individual learning
- Digital Network learning

Designed for Trust

The more you use it, the better it gets.

More data + more feedback = greater accuracy and trust

Streamlining the purchasing process

- Why does PO matching matter?

A disjointed purchasing process leads to errors, delays, and compliance risks

- Purchasing requires **cross-functional spend management visibility and accountability** through purchasing process and approval
- Reduce hours spent manually matching POs to vendor invoices, **with scalable policies and automation**
- Manage all your **AP and purchasing in one unified source of truth**—no more switching between multiple tabs or systems.
- **Shift from a preparer to a reviewer**

- **Accurate cost control:** Ensure alignment between Purchase orders, bills, and goods receipts to ensure reliability and prevent fraud through validation
- **Expedite your Purchasing process:** Speed data entry to get to approvals quicker, and experience a smoother procurement cycle
- **Strengthen visibility:** Clear and accurate audit trails through basic error catching and traceability

Before vs. After

Product Demo

1. Set it up

- Must **subscribe to AP Automation** – Reach out to Dean Dorton to initiate process
- If already subscribed to AP Automation, configure **Target – Source** in Purchasing configuration page
- Provide access to "**Automated Transactions**" list

2. Process it

- Upload / Email invoice
- Users review and post **draft** transactions
- Users can **add / change / delete** matched PO
- Users can **change** to another Transaction definition
- Users can **change to AP Bill,** possible to set vendor preference
- It is header-level PO matching, i.e. all line items are **retrieved from matched PO**, not from invoice document

Working with AI/ML Tips & Tricks

The more you use it **the better** AI/ML becomes

Post the bills / submit for approval in order for AI/ML to **learn**

Create bills on different days as AI/ML is retrained every **24 hours**

More details can be found in Sage Intacct Help Center About AP Automation and AI (intacct.com)

What sets Sage Intacct apart in Purchasing

1

Traceable document tagging – Automated matching compares invoices and the purchase orders they match to. Assure proper governance and audit-ready compliance across business units.

2

Centralized view – View all automated transactions in one place. Discrepancies based on match tolerance will be clear and visible prior to posting, so you can always see the big picture and identify risks or errors.

3

AI-powered Automation– Industry-leading accuracy for automating bill data entry. With a 95% vendor match accuracy, standard OCR simply can't compete.

4

Strength in flexibility – Accommodate varying procurement workflows to meet unique industry-specific paths than can be evolved over time.

“AP Automation is just quicker, it’s easier”

“We were fortunate enough to be an early adopter for the AI platforms with Sage Intacct the first one being AP Automation.

“Now I can just email a bill directly into Sage Intacct. It reads directly what's on the bill. The **whole process is just quicker.** It's easier, especially being on two different coasts of the US. The entire process is just sped up. I don't have to wait for a West Coast person to wake up.”

Michael A Smith,

SVP of Finance & Accounting, Operation HOPE

Sage customer success video:
https://www.youtube.com/watch?v=nB0r7CidboQ

“Cutting our AP processing time in half”

“To be an early adopter of AP Automation has been great for us as well as **cutting our processing time in half.**

We have such a wide range of vendor sizes uploading that bill and having the system recognize,

that's this vendor and knows exactly where to pull that information.

So all we're doing is a review of the information that's in the system and then once it's approved, it's done. It's a wonderful thing. Having one source of truth **just gives me that peace of mind.**”

Michelle Pyle, Director of Finance,

Johnny’s Selected Seeds

“I complete my invoices about 50% faster!”

“I absolutely love it. Our AP process is getting easier and easier; I can now **complete my invoices about 50% faster**!

“It gives me **more time to focus** on some of the other little things”

Ginny Heatherly,

Accounts Payable Coordinator,

Andy B’s Entertainment & Bowling Centers

Can it help you?

Meet initial e-invoicing or ESG goals or regulations

AP Automation enables a paperless office that can help meet these initial needs.

Get up-to-date cash flow insights at your fingertips

AP Automation allows for up-to-date visibility into your cashflow to avoid bounced payments. Save money with on time payments and avoid late fees.

Fuel your growth by enabling your talent with the best tools

Elevate the work of your current staff and decrease reliance on hiring as the only growth lever.

When to consider a marketplace partner

- Sage offers a strong solution, but there are times an MPP could be the best solution
- Vendor onboarding/portal
- Specific approval requirements

Sage Endorsed Solution

yooz

Cloud P2P Automation. Easy. Powerful. Smart.

Sage Endorsed Solution

STAMPLI®

bill

Sage Marketplace Partner of the Year 2019/2021

tipalti®

Global Multi-Entity
Payables Automation

AP Automation Tiers

FY26 pricing as of October 1, 2025

Tier 250	Tier 500	Tier 1000	Tier 2000	Custom Tier
IFM-AP-AUTO-250	IFM-AP-AUTO-500	IFM-AP-AUTO-1000	IFM-AP-AUTO-2000	IFM-AP-AUTO-CUSTOM
Up to 250 bills per month	Up to 500 bills per month	Up to 1,000 bills per month	Up to 2,000 bills per month	> 2,001 bills per month
$110 / month	$195 / month	$330 / month	$550 / month	Custom – see additional info
Overages = $0.50 per bill per month on all tiers				

Tier Policies:

- Tier 250, Tier 500, Tier 1000, and Tier 2000 are non-discountable.
- Customers can upgrade to a higher tier during their subscription but can only downgrade at renewal.
- Billing is annual based on monthly calculations above.

Online Help

- AP Automation with Purchasing
- AP Automation in Video Library

Q
A

Client Referral Program

- Visit our website
- Introduce a colleague
- Get a $25 gift card after they meet with Dean Dorton
- Get a $500 gift card when they become a client

https://deandorton.com/erp-software-referral-program

Thank you

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