



## Intelligent Procure to Pay

AX	NAV	GP	SL
Microsoft Dynamics	Microsoft Dynamics	Microsoft Dynamics	Microsoft Dynamics

- AP Automation
- Intelligent 3 Way Match
- Purchase Requisition Automation
- Recurring Expenses
- Expense Management





# AP Automation



**AP Automation** is an approval workflow that automates the process of PO and Non PO invoices.

With the help of Palette workflows, automated reminders and escalation prompts can help you reduce cycle times –and ensure invoices will be paid on time.

- **Intelligent 3-Way Match**  
Purchase orders, supplier invoices, and goods receipts are automatically matched. Exceptions are flagged for reconciliation.
- **Coding & Approval Workflow**  
Invoices are gathered into a central dashboard, and automatically sent to managers to review and approve. Once approved, invoices are sent to Dynamics.
- **Recurring Expenses**  
Repeated invoices are matched to account numbers or contracts, posted to the proper GL codes and approved for payment.
- **Archive & Audit**  
Invoices are archived in the cloud for searching, reporting, and audit trail.

Get full control over invoices, know where they are and what their current status is.

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### *Full integration with Dynamics*



### *Cloud-based or local install*



Contact Us:  
[info.us@palettesoftware.com](mailto:info.us@palettesoftware.com)

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# Intelligent 3 Way Match



>>> Empower Your Employees

**Intelligent 3 Way Match** is a shared central dashboard on desktop and mobile that shortens the approval cycle and increases staff productivity.

It's a solution that automates the matching process and creates an approval workflow for exception handling.

- Automate the matching of invoices, purchase orders, and goods receipts
- Exceptions sent to approvers to validate
- Ensures accuracy of data
- Provides a complete audit trail

One invoice can contain items from multiple purchase orders, and one purchase order can be matched to multiple invoices, whether they have been delivered in part or in full.

Empower your employees with visibility into the approval process.

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Download the Guide:  
[Intelligent 3 Way Match for Dynamics](#)



# Purchase Requisition Automation



>>> Reduce Maverick Spending

## Purchase Requisition Automaton

provides visibility into maverick spending, empowers your employees, and reduces cycle times.

Take total control of your spend with Palette's solution that also provides:

- Automated invoice processing
- Intelligent 3 way match of invoices, purchase orders, and goods receipts
- Mobile and desktop approval workflow to handle exceptions
- A complete audit trail, including comments
- Can be used in conjunction with your purchasing process



Download the Guide:

[Automating Your Purchase Requisition Workflow for Dynamics](#)

Harness uncontrolled purchases and get control of indirect spend.

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# Recurring Expenses

>>> Automate monthly contract invoices



**Recurring Expenses** verifies and processes invoices related to contracts and agreements.

Repeat invoices such as rentals, phone, internet contracts and other utilities can be automatically matched to account numbers or contracts, posted to the proper charge codes, and approved for payment.

- Flexible permission structure
- Archive and search all types of contracts
- Send reminders when a contract is about to expire and has to be renewed
- Send a reminder when an expected invoice hasn't arrived
- Matching of incoming invoices against the contract
- Enable self-billing for contracts that do not have vendor invoices

In any given company about 15-25% of recurring invoices that can be set up as contracts or agreements. Some businesses might have more than 50% of their incoming invoices that could be set up as contract/agreements and handled automatically if they are within tolerances.

Eliminate the time repeatedly authorizing monthly invoices.

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# Expense Management



**Expense Management** automates one of many organization's most time consuming tasks – employee expenses.

The system gives you full control over employee expenses and an excellent overview of advance payments, credit card purchases and reconciliations.

- Photograph the receipt with smartphone or tablet and email them
- Or scan receipts and attach them
- Expenses can be reported at any time, anywhere
- Central dashboard showing advance payments and reconciliations
- Credit Card transactions can be uploaded for ease of reconciliation of both the employee's expense reports and the credit card statement when it arrives.

It's fast and easy for your employees to report their expenses immediately. The employee simply photographs the receipt with their smartphone or tablet and e-mails to a designated email address.

Simplify expense management make it easy for your employees to report their expenses immediately.

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### *Full integration with Dynamics*



### *Cloud-based or local install*

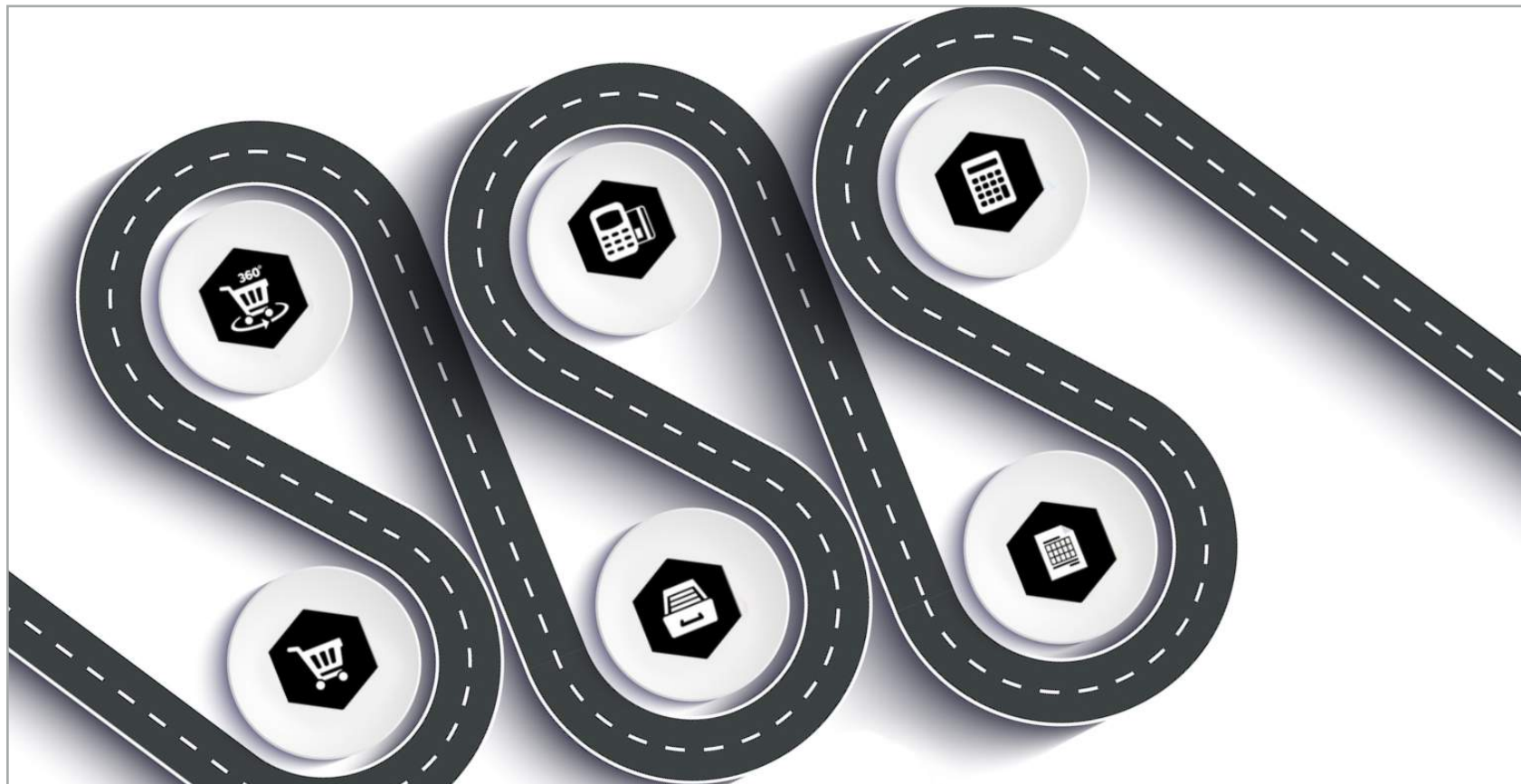


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# Modular Flexibility in One Platform



## The business is in transformation.

Manual processes are being automated and less time is being spent on gathering and compiling data, as well as in processing invoices.

Furthermore, cloud computing enables employees to access the required information remotely. Everyone has access to the same data despite their physical location, and companies are building a “single version of the truth” for the entire organization.

Faster access to data and automated administration processes enable finance and the business to collaborate more effectively.

Support your digital transformation with a suite of products you can pick and choose from.

### Full integration with Dynamics



### Cloud-based or local install



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95%

Of all our customers recommend our products as a good investment

95%

Of all our customers would recommend our products to others

92%

Of all our customers are satisfied with our products



**Palette** is a market leading provider of **Procure to Pay** automation software with over **4500 customers worldwide** and recommend ratings of **95+**.

