

**Purchase to Pay delivers full document workflow capabilities  
creating an end-to-end solution for Accounts Payable automation**



**Purchase Requests are initiated through a web form which feeds directly into SmartSearch for approval, automated Purchase Order generation, indexing and final payment routing, streamlining the processes of your Accounts Payable department.**

Coupled with Square 9's award-winning enterprise content management technology, Purchase to Pay automates the complete Accounts Payable process from document capture through archival and final destruction.

Purchase to Pay captures accounting records at high speed through scanning, web forms submittal or email capture. Purchase to Pay provides users with the ability to extract high value accounting information without slowing the flow of business with inefficient manual data entry.

The result is a streamlined digital process, starting with a unique web based requisition interface to trigger the purchasing cycle. Combined with specialized workflow tools, Purchase to Pay then handles the routing, matching, approval and distribution of both Purchase Orders and Invoices.

Securely stored within SmartSearch, records effortlessly flow through an organization with automated efficiency while workflow escalations automatically take place along the way. Once the process is complete, records are archived for future reference in full compliance with all IRS mandates. Users are also granted the ability to set automated record retention deadlines so when documents are no longer needed, they are promptly queued for destruction.

## Features & Benefits

- Requisition Web Form Processing
- Automated Approval Routing
- Automatic Purchase Order Generation and Distribution
- OCR-Enabled Scanning
- Automated AP/GL Coding & Three-Way Matching
- Integration with QuickBooks, Microsoft Dynamics and other leading financial systems
- Robust Security & Compliance
- Automatic Record Retention Processing



**Access, share and  
approve invoices  
on the go directly  
from your mobile  
device to keep  
business processes  
moving forward!**

**How it works****1****eForm Requisition Submitted**

The Purchase to Pay process is initiated by the completion of a web based requisition form. The eForm can be submitted anywhere, anytime through a convenient web based browser.

**2****Automated Email to Manager for Approval**

After the eForm has been submitted, it is automatically routed by email to the designated approving manager. The manager reviews the requisition and approves for further routing.

**3****PO Generated and Distributed**

With the manager's approval of the requisition, a workflow process will automatically generate a purchase order for vendor distribution via email.

**4****Invoice Scanned with OCR**

When the invoice is received from the vendor, it is then scanned into SmartSearch with Optical Character Recognition (OCR) assisted indexing, streamlining data processing while eliminating errors in manual entry.

**5****AP/General Ledger Coding Applied**

During the indexing process, users have the option to apply cost centers and GL codes to the invoice line items for accurate bookkeeping.

**6****Three-Way Match is Performed**

SmartSearch will now automatically match your incoming invoices to their respective purchase orders and packing slips.

**7****Invoice Routed for Approval**

After the three-way match is performed and confirmed, SmartSearch will route the invoice for final approval and payment.

**8****Feeds into Financial System**

Purchase to Pay can feed high value data to QuickBooks, Microsoft Dynamics and many other leading financial systems to accommodate any bookkeeping needs.

**Contact your Square 9 Authorized Reseller or Regional Sales Manager today  
for complete details on how to take advantage of Purchase to Pay**

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