

Integration: M-Files & Acumatica

Open incredible new possibilities of productivity by integrating M-Files with Acumatica. M-Files' metadata-driven document management platform enables you to **instantly find the right information** in any context, **automate business processes**, and **enforce information control**.

M-Files, Smartly Informed by Acumatica

Utilize Retrieved Data as Metadata: Employ the fetched Acumatica data as metadata for organizing and saving documents within M-Files.

Document Association: Associate documents with relevant entities such as employees, customers, vendors, invoices, and payments for streamlined document management. Clicking on objects in M-Files will go to the following items in Acumatica:

AR Invoices | AP Invoices | Employees | Customers | Vendors

Automated Synchronization Timing: Schedule data synchronization on either a predefined interval or set time, providing flexibility and control over the synchronization process.

Acumatica ERP metadata information is leveraged by M-Files Vault.

Master Data from Acumatica

Employee: Retrieve essential employee details such as names, contact information, and employment status.

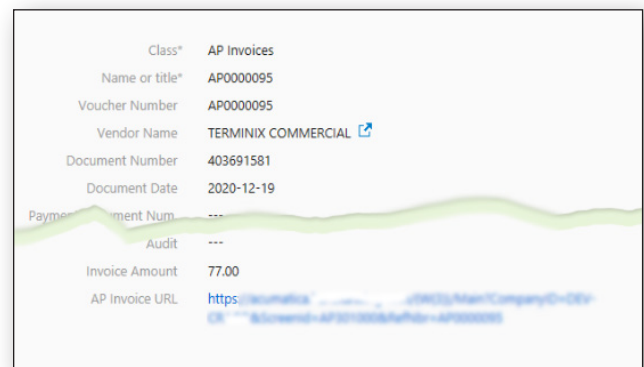
Customer: Access key customer information including contact details, billing addresses, and payment terms.

Vendor: Fetch vendor specifics like contact details, payment terms, and vendor classifications.

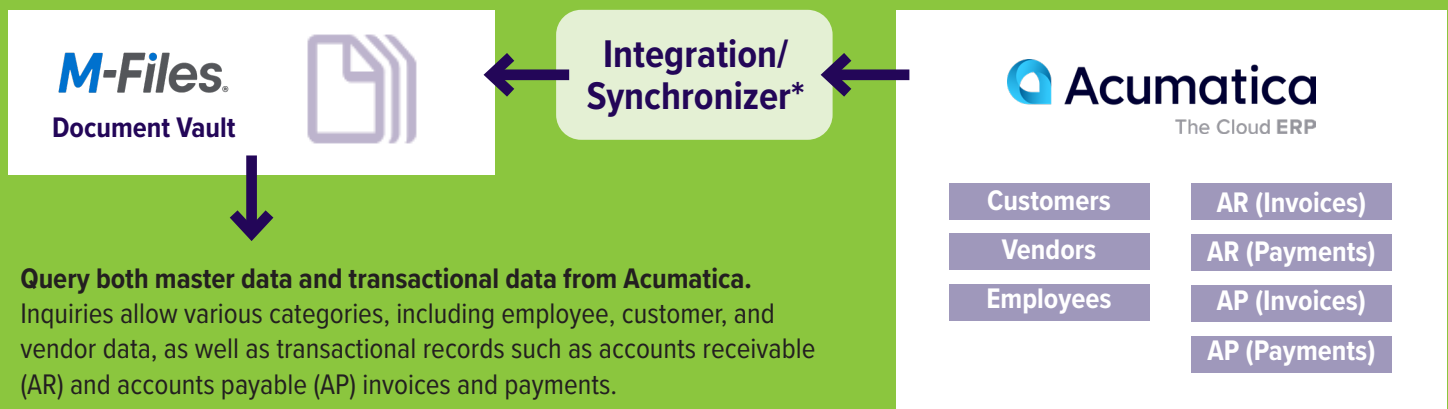
Transactional Data from Acumatica

AR Invoices & Payments: Query accounts receivable invoices and payments, providing details such as invoice numbers, amounts, due dates, and payment statuses.

AP Invoices & Payments: Retrieve accounts payable invoices and payments, offering details like invoice numbers, amounts, due dates, and payment statuses.

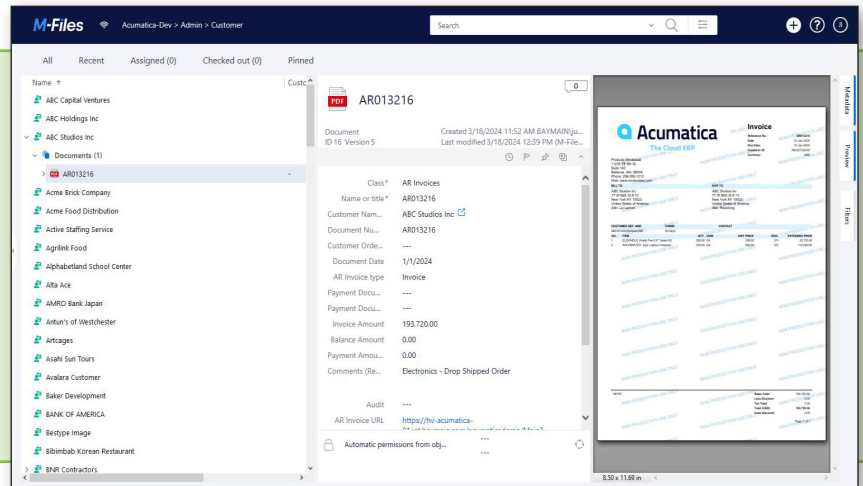


Class*	AP Invoices
Name or title*	AP0000095
Voucher Number	AP0000095
Vendor Name	TERMINIX COMMERCIAL
Document Number	403691581
Document Date	2020-12-19
Payment Voucher Num	---
Audit	---
Invoice Amount	77.00
AP Invoice URL	https://acumatica.com/Accounting/Invoices/Details.aspx?InvoiceID=403691581



Use Cases: M-Files Integration with Acumatica

M-Files provides context based views of all your Acumatica documents. Files by Customer shown here:



Integration of Accounts Payable/Accounts Receivable with Employees:

- **Document Workflow Automation:** Automate workflows for invoice processing and payment documentation, reducing manual data entry and increasing accuracy.
- **Enhanced Tracking and Reporting:** Link documents directly to financial AP/ AR transactions and vendors/customers for easy auditing and enhanced financial reporting.
- **Immediate Access to Financial Documents:** Provide instant access to financial documents linked to specific vendor/customer records, improving process efficiency and response times to inquiries.

Payroll and HR:

- **Secure Employee Document Management:** Securely manage sensitive employee documents such as contracts, performance reviews, and payroll information, with access restricted to authorized personnel.
- **Automation of HR Processes:** Automate document-driven processes like onboarding and offboarding, ensuring that all required documents are collected, filed, and managed according to HR policies.
- **Version Control:** Keep track of document versions to ensure compliance and accuracy in employee records and reporting.

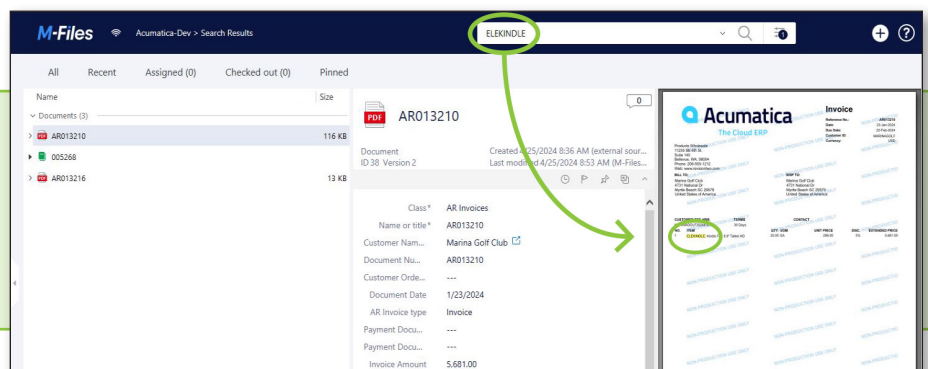
Customer Relationship Management:

- **Document Linking:** Attach and manage customer-related documents directly within the CRM for easier access and better customer data management.
- **Automated Document Control:** Automatically capture emails, contracts, and communication logs, linking them to customer records in the CRM for seamless information retrieval and management.
- **Enhanced Security and Compliance:** Manage sensitive customer data securely, with robust access controls and compliance tracking provided by M-Files.



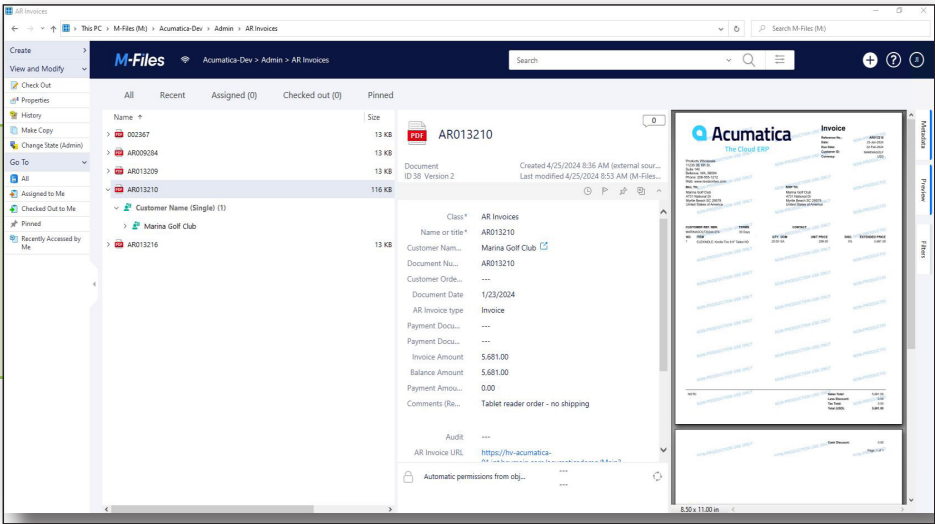
* The M-Files Integration for Acumatica was designed and engineered by Baystream.

Searches will find OCR data found in Acumatica documents.

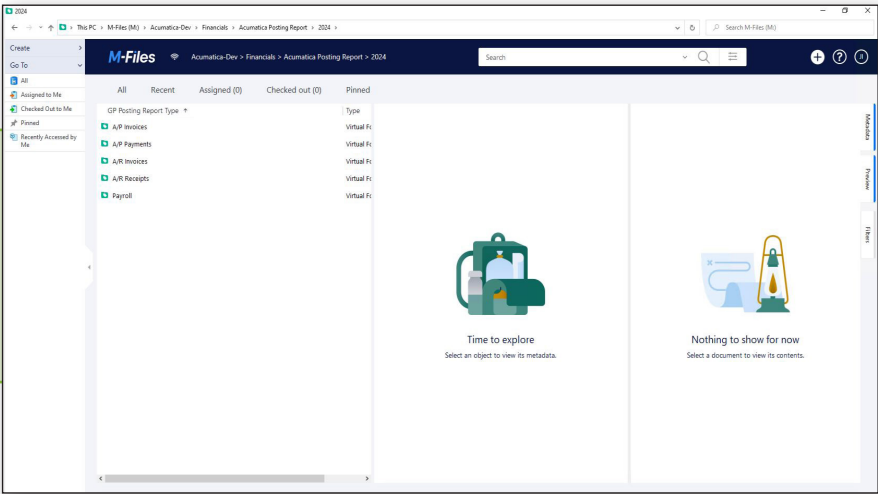


Screens: M-Files Integration with Acumatica

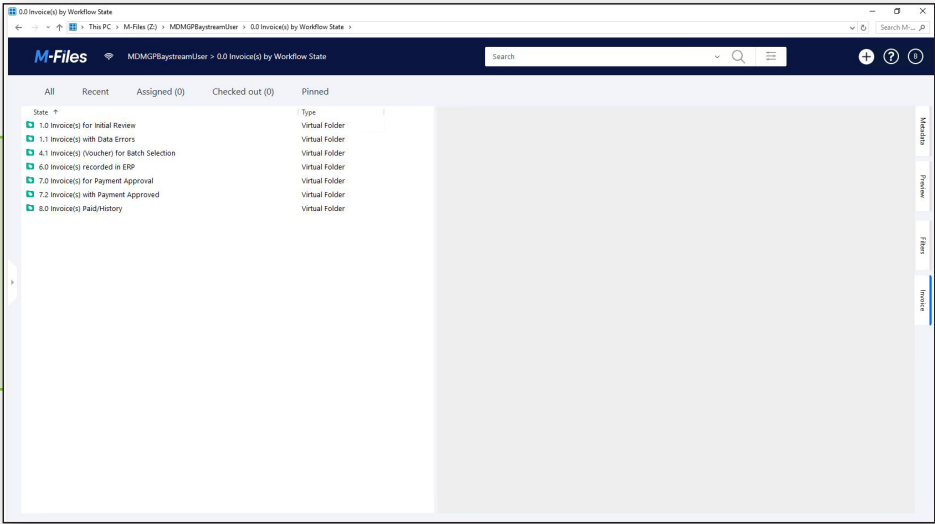
AR Invoices



Financial Posting Reports

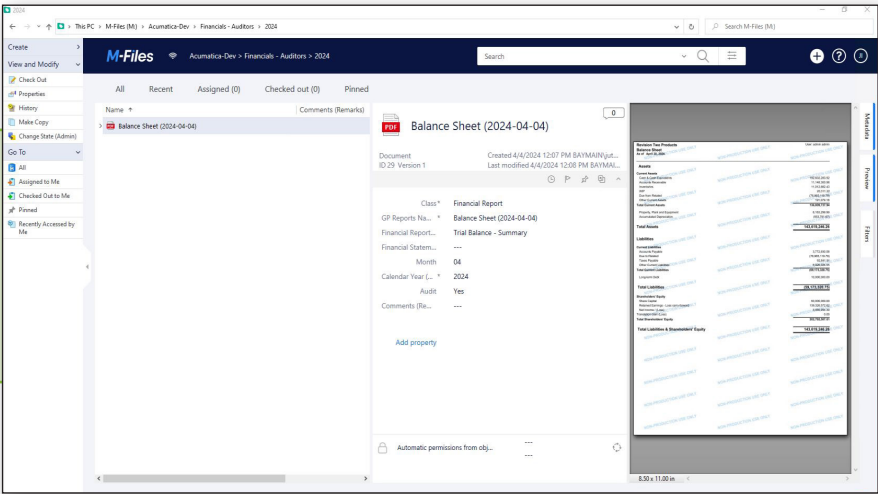
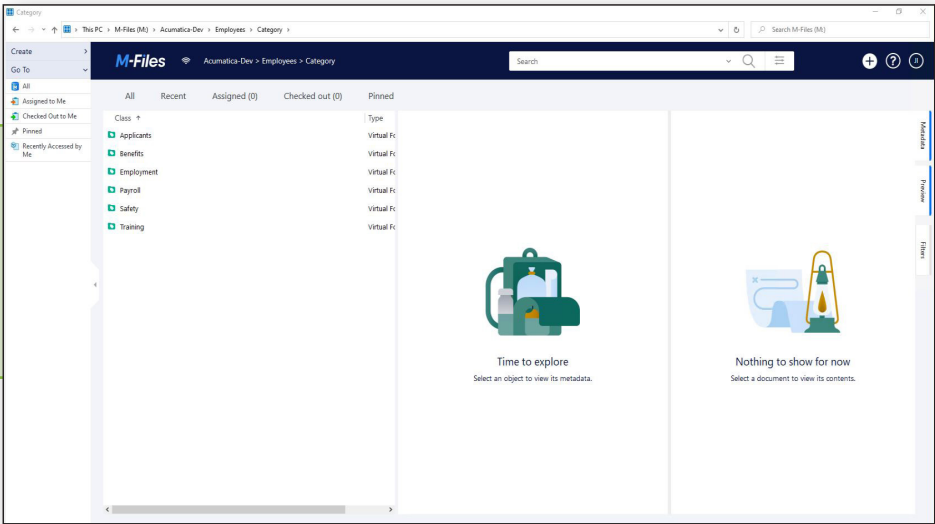


Invoice Approval Workflow



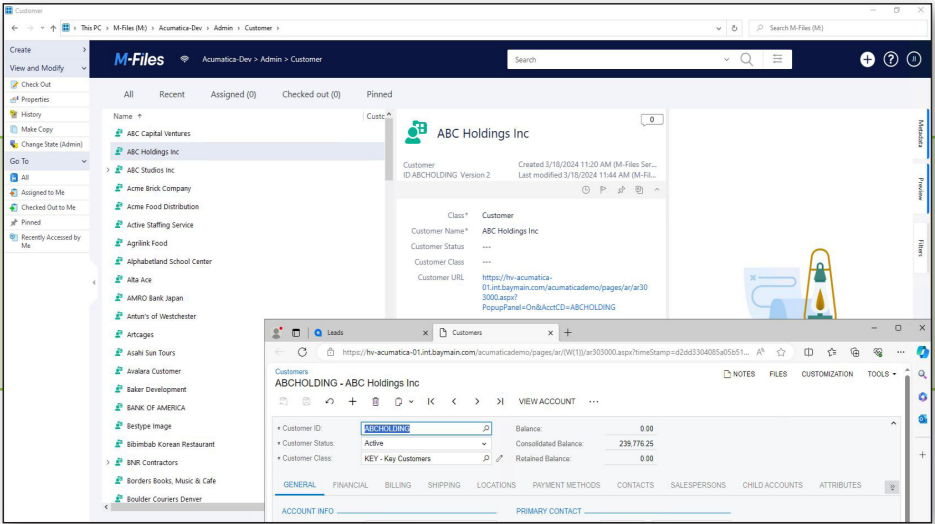
Screens: M-Files Integration with Acumatica

HR Employee Data



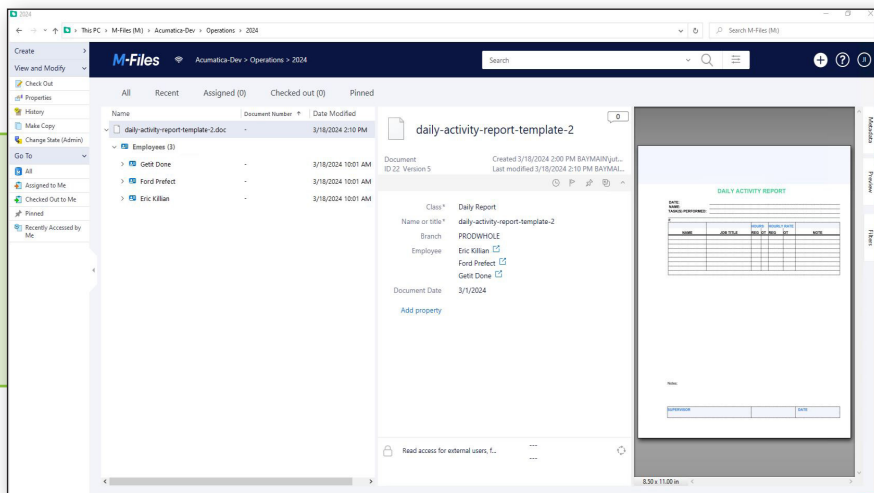
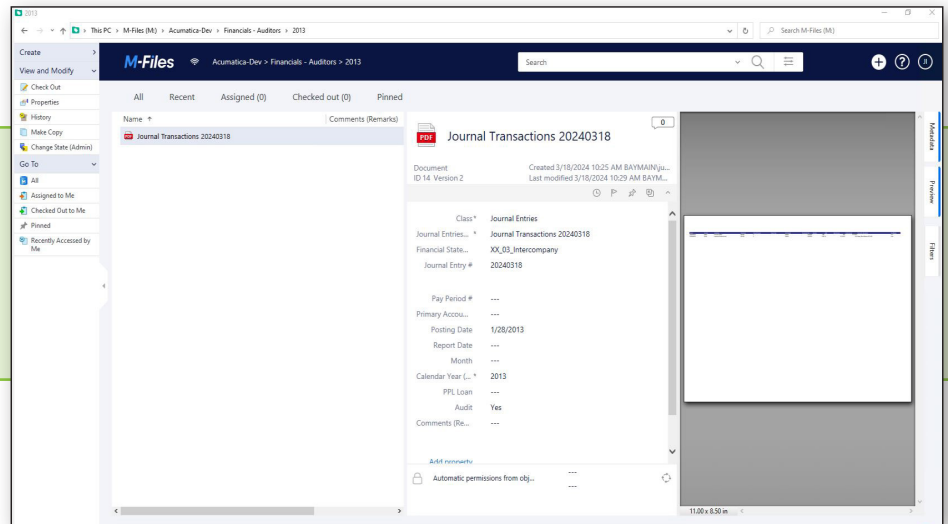
Auditing Balance Sheet

URLs into Acumatica

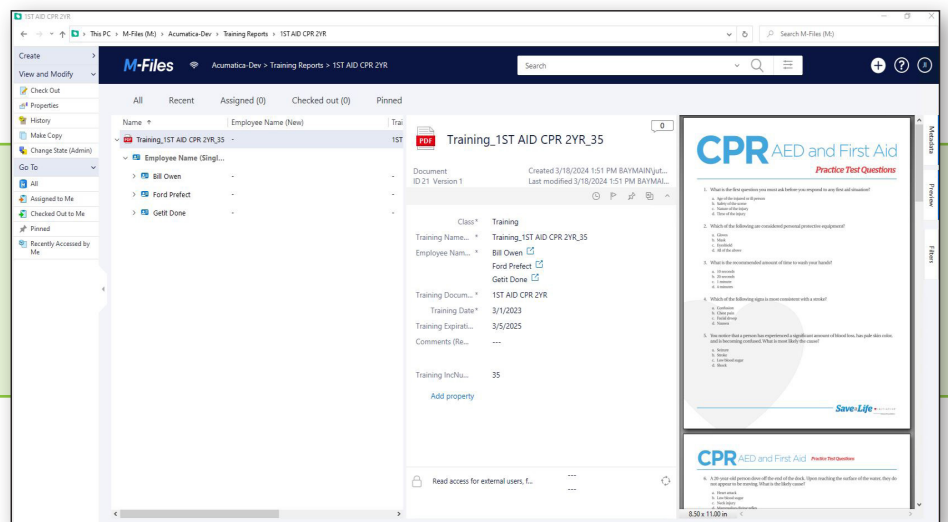


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Auditing



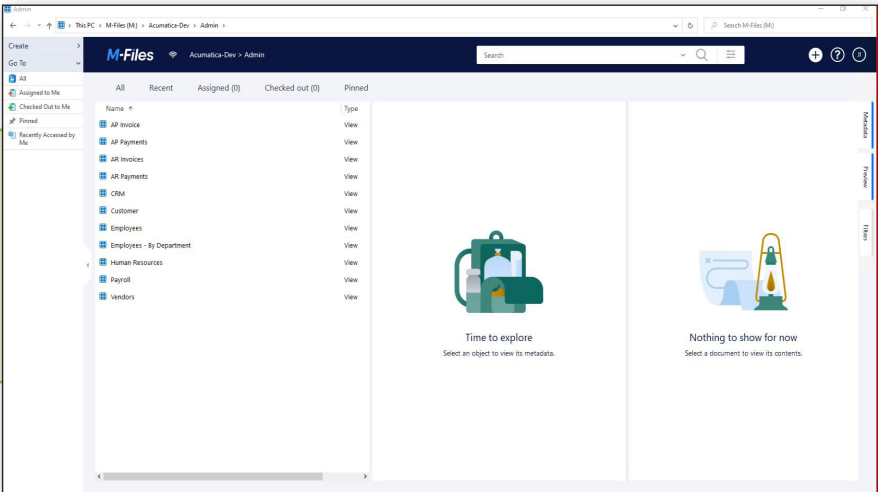
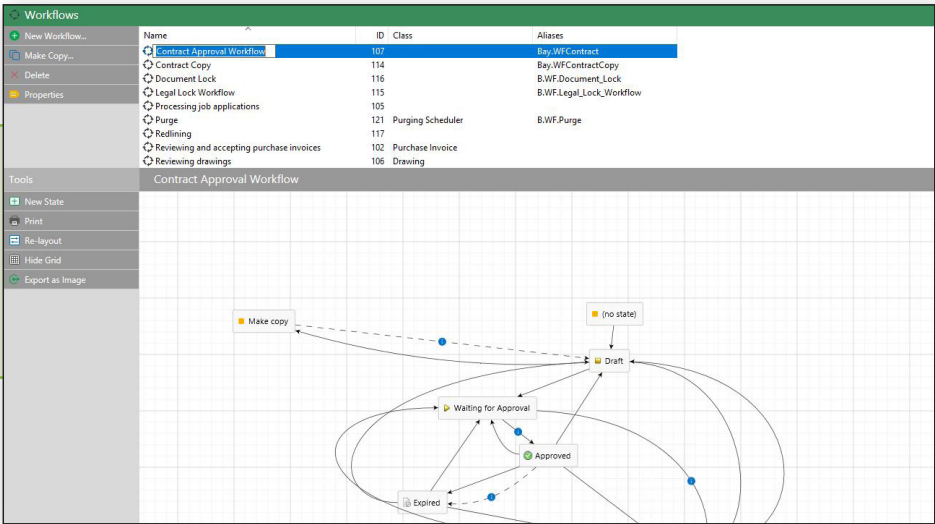
Employee Reporting



Employee Training Reports

Screens: M-Files Integration with Acumatica

Contract Approval



M-Files Admin

Vendor Workflow

