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TECHNOLOGIES

Beyond the Status Quo with MaxRecall – Case Study Session

April 16, 2025

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Eric Whitener, VP of Operations

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Beyond the Status Quo with MaxRecall – Case Study

Learn how our customers are challenging the status quo and pushing new limits by adopting MaxRecall strategies that enhance productivity and efficiency. Are you tackling a specific project or goal right now that's requiring you to push your limits? Join the MaxRecall team for a multiple example case study of our customers' successes in addressing specific challenges.

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High Volume IDM Document Capture

- **Issue**
  - Foundation Building Supply requested a highly automated, efficient, reliable hosted document indexing tool for delivery of scanned documents to Infor IDM

- **Specific Requests**
  - Very high daily volume of Pick Tickets (POD) and PO Receivers requiring indexing and import into IDM. Previous, high cost, system failed to handle the daily volume.
  - Pick Tickets indexed via Bar Code   7,525/day
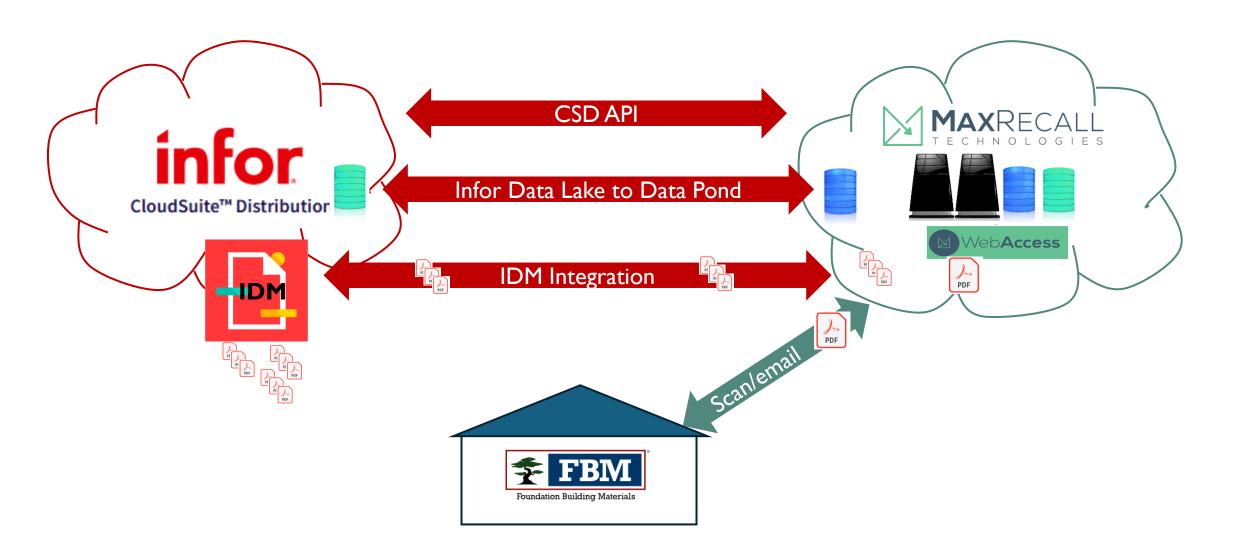 - PO Receiver indexed via OCR, RPA   1,600/day
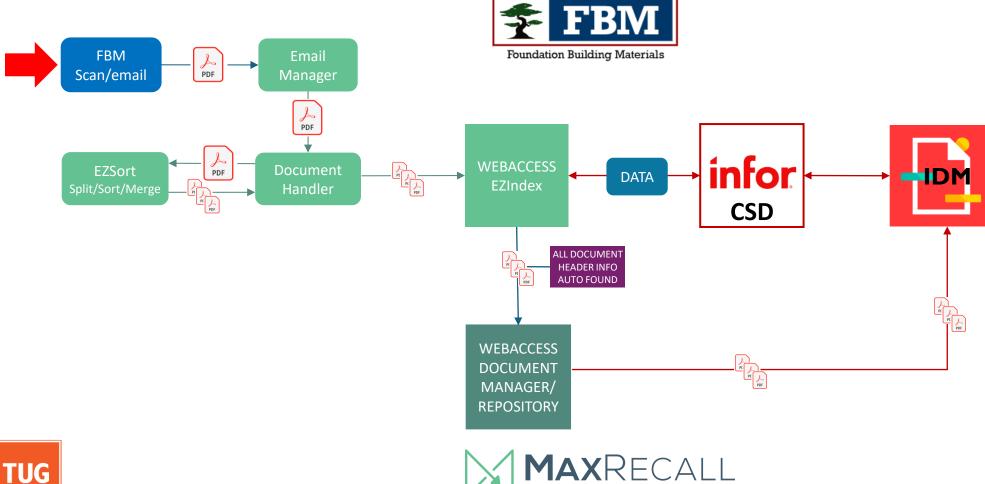 - Hosted Platform w/fixed cost

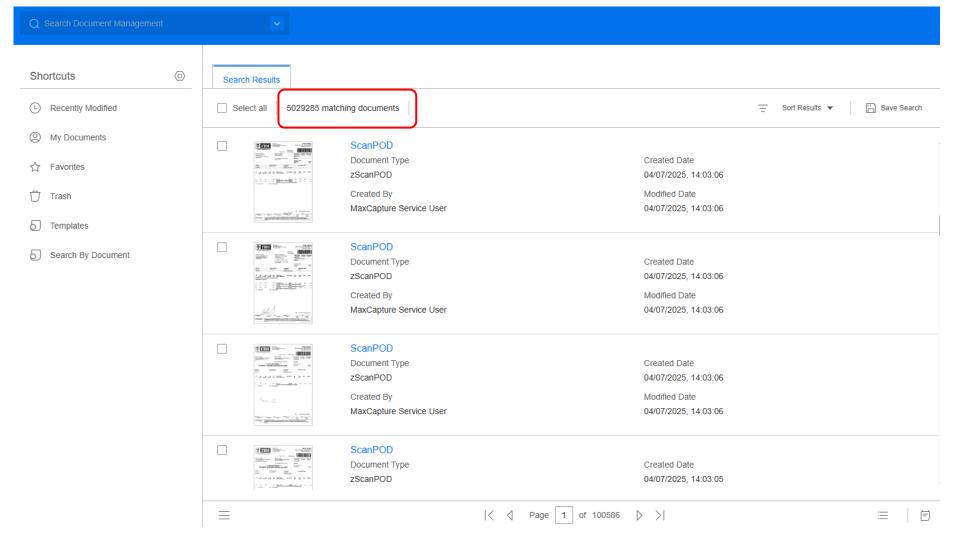# mxrIndexIDM Process Facilitation and Automation

FBM Results - 5M+ PODs Indexed and Delivered to IDM   (June 2024 to Today)

IDM Document Acquisition and Delivery (Push/Pull)

IDM Document Acquisition and Delivery (Push/Pull)

AP Expense Invoice Approval and BOD Automation with Doc Delivery to IDM

AP Trade Invoice MaxCapture and BOD Automation with Doc Delivery to IDM

AP Check and Remittance Pull from IDM with Split, Sort, and Index into WebAccess
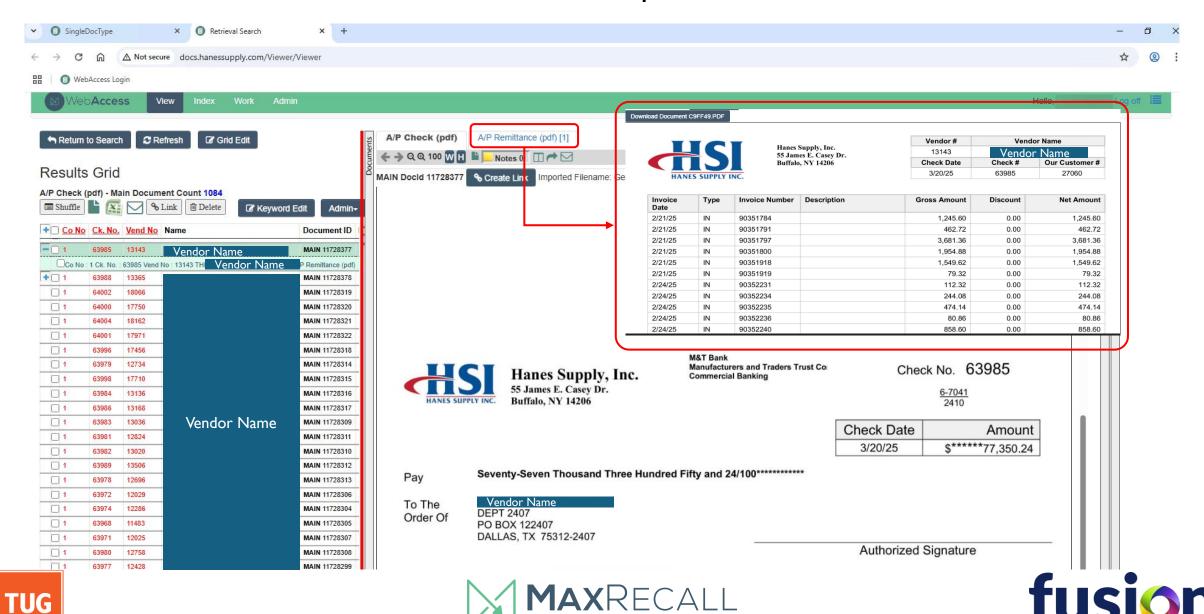
Pick Ticket (POD) and PO Receiver Doc Delivery to IDM

AP Check and Remittance Pull from IDM with Split, Sort, and Index into WebAccess

Supporting Document Capture and Automated Customer/Vendor Delivery

Supporting Document Capture and Automated Customer/Vendor Email Delivery

- **Issue**
  - Customers had a need to manage supporting documents associated with sales and purchasing. Captured supporting documents needed to be made relational to other primary documents (i.e. AP Trade Invoices, Pick Tickets and Sales Invoices). Where possible automated email delivery of supporting documents to customers or vendors was requested.

- **Specific Requests**
  - Supplier Approval and Vendor Safety Data documents (Atlantic Packaging, A+)
  - Manufacturer MTR, Heat Sheets, and Certificates of Compliance (PSSI, CSD)
  - ACH, EFT payment remittance with automated email delivery (Dixieply, SXe)

Return to Search   Refresh   Grid Edit

Results Grid

WAAP AP Remittance - Main Document Count 1

Shuffle | | Excel | | Link | Delete | Keyword Edit | Admin

+		Co No	Check Date	Ck. No.	Vend No	Name	Pay Type
−		1	2025-03-19	870200	50120	BOOMERANG PACKAGING INC.	ACH
			Apprvl T1 : Pending ApprDateTime : EXP ProcStat :		Vendor Name		TD
			Apprvl T1 : Pending ApprDateTime : EXP ProcStat : Data Entry		WAAP Expense Invoice	RLTD

WAAP AP Remittance   **WAAP Expense Invoice [2]**

← → 🔍 🔍 100 W H 📄 📒 Notes 0   Page 1 of 1 ◄ ► ✖

MAIN DocId 12034061   🔗 Create Link   Imported Filename: GenericImport_docType198_XdocType1219_docId1809045

Pages   Related Docs

WAAP Expense
Invoice 11986817

WAAP Expense
Invoice 12007484

DIXIE PLYWOOD AND LUMBER COMPANY
PO Box 2328
Savannah, GA 31402-2328

VENDOR NUMBER 50120
VENDOR NAME
Vendor Name

CHECK DATE 03/19/25

CHECK NUMBER 870200

INVOICE	DATE	REFERENCE	PO NUMBER	GROSS	DISCOUNT	NET
117129	01/13/25			1540.09	0.00	1540.09
117968	02/27/25			4667.74	0.00	4667.74
	Totals:			6207.83	0.00	6207.83

📄 WAAP AP Remittance_12034061.pdf
91 KB

DIXIEPLY
100% EMPLOYEE OWNED

---------- Forwarded message ----------
From: <apremit@dixieply.com>
Date: Wed, Mar 19, 2025 at 9:00 AM
Subject: Dixie Plywood and Lumber Company - Remittance Advice
To: Vendor email address
Cc: <apremit@dixieply.com>

March 19, 2025

Dear Vendor Name

We are emailing to inform you that we have processed a(n) ACH for your recent invoice(s). Please see the attached file for the details of the payment. Should you have any questions or require clarification, please do not hesitate to contact our Accounts Payable Department at 912-447-7000.

Thank you for your continued business.

Sincerely,

Rebecca L Hancock
Controller
Dixie Plywood and Lumber Company

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Approval Management and Process Automation

Document Approval Management and Process Automation

- **Issue**
  - Customers requested an automated approval management platform for AP Expense and Freight Invoices coupled with workflow management and automated data delivery to their Infor ERP platform.
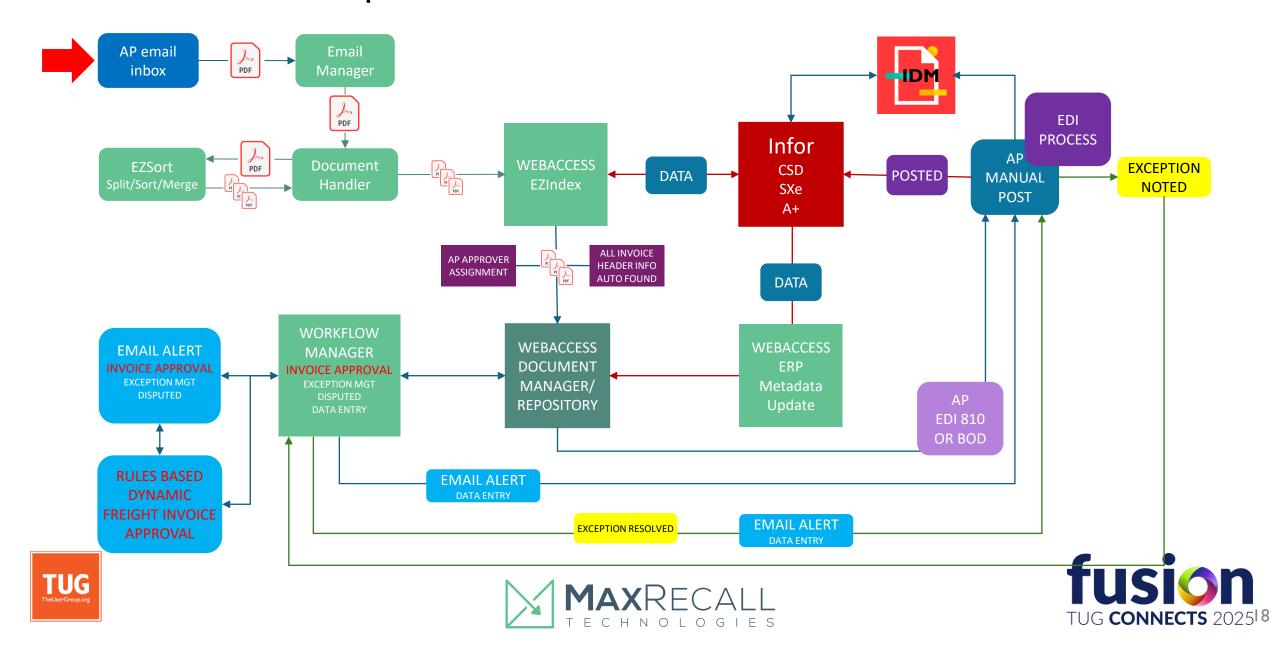
- **Specific Requests**
  - AP Expense Approval workflow automation with GL allocation and CSD expense BOD delivery. (PSSI – CSD, Headwater - CSD)
  - AP Expense Approval facilitation with workflow management for manual data entry (Dixieply – SXe, Atlantic Packaging – A+)
  - Freight Invoice "system" automated approval, routing and workflow management for manual data entry (Atlantic Packaging – A+)

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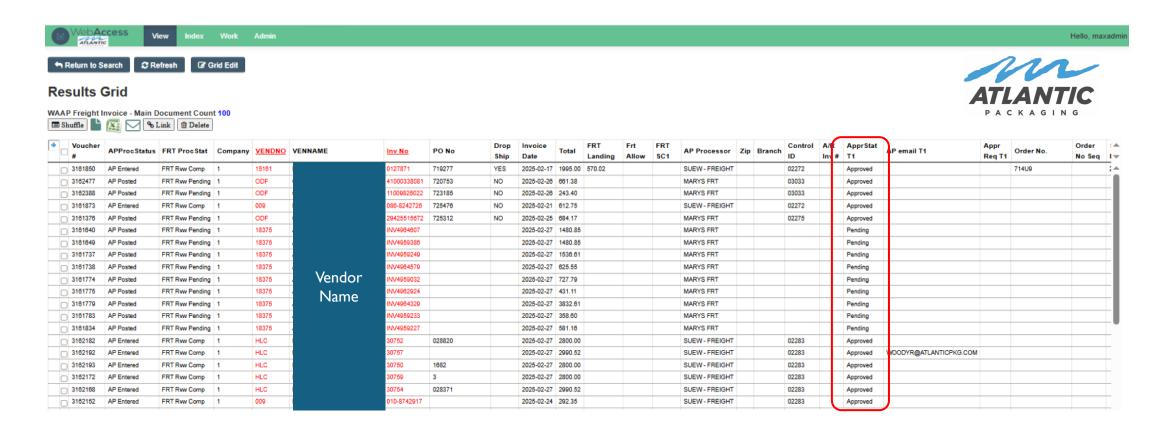
WebAccess – AP Expense Invoice Process Facilitation and Automation

Dynamic Freight Invoice Approval

AP Trade Invoice Automation

AP Trade Invoice Detailed Data Capture Automation

- **Issue**
  - Customers requested AP Trade Invoice detailed data capture coupled with workflow management, error management and automated data delivery to their Infor ERP platform.
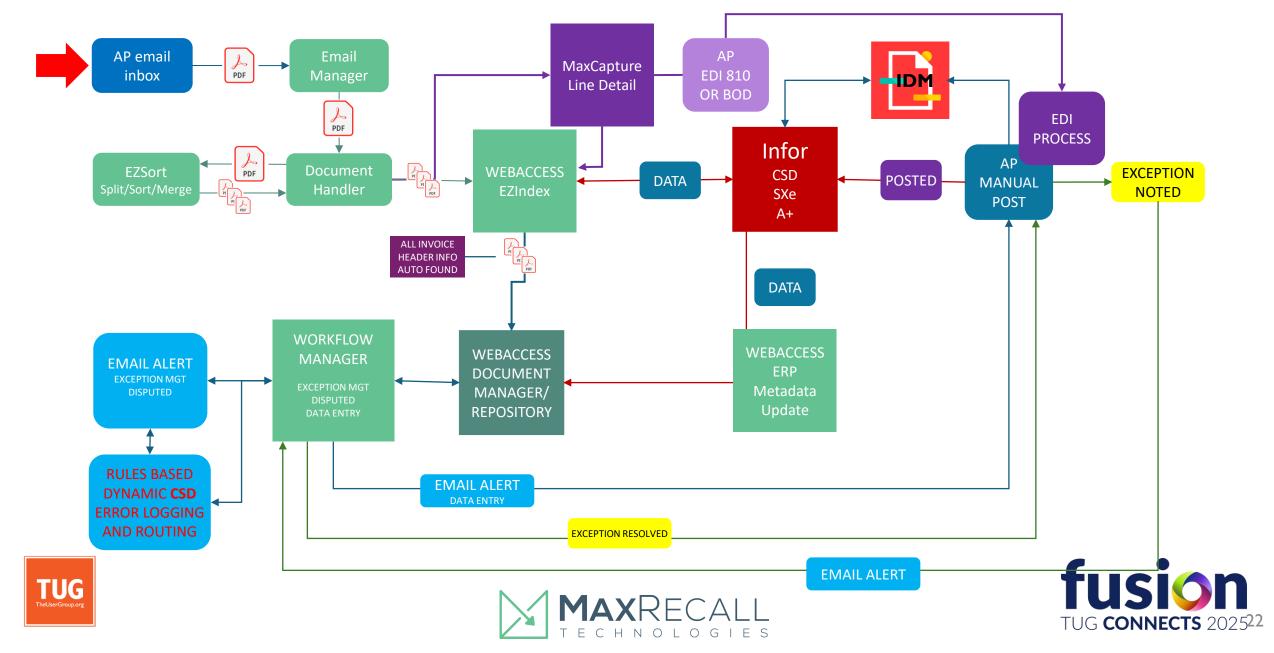
- **Specific Requests**
  - AP Trade Invoice automation and workflow for A+ (CF Stinson)
  - AP Trade Invoice automation and workflow including automated error management with BOD delivery to CSD (County Materials)
  - AP Trade Invoice automation and workflow with BOD delivery to CSD and document delivery to IDM (PSSI, Headwater, EB Bradley, Floworks, RS Hughes)

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WebAccess – AP Trade Invoice Process Facilitation and Automation

AP email inbox

PDF

Email Manager

PDF

MaxCapture Line Detail

AP EDI 810 OR BOD

IDM

EDI PROCESS

EZSort Split/Sort/Merge

PDF

Document Handler

PDF

WEBACCESS EZIndex

DATA

Infor CSD SXe A+

POSTED

AP MANUAL POST

EXCEPTION NOTED

ALL INVOICE HEADER INFO AUTO FOUND

PDF

DATA

WORKFLOW MANAGER

EXCEPTION MGT DISPUTED DATA ENTRY

WEBACCESS DOCUMENT MANAGER/ REPOSITORY

WEBACCESS ERP Metadata Update

EMAIL ALERT
EXCEPTION MGT DISPUTED

RULES BASED DYNAMIC CSD ERROR LOGGING AND ROUTING

EMAIL ALERT
DATA ENTRY

EXCEPTION RESOLVED

EMAIL ALERT

A+ Offline AP Processing Tool

A+ Offline AP Processing Tool –Error Management
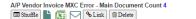
Return to Search | Refresh | Grid Edit

A/P Vendor Invoice MXC - Main Document Count 10

Shuffle | Link | Delete

PO No	PO Suf	Inv No	Total	Vend No	Name	Co No	PO Type	Invoice Date	MxC Batch ID	MXC Status	AP WF Status	FRT Status	CSD Err Stat	Error Count	CSD Error
290883	0	19246-02	17119.30	1982		1	po	2025-03-17	20250085.013	Invoice Complete	Pending CSD Processing	No Freight			
286963	0	184331738	3088.80	8632		1	po	2025-03-20	20250085.013	Invoice Complete	Pending CSD Processing	No Freight			
291056	0	000254588	252.00	1607		1	po	2025-03-20	20250085.013	Invoice Complete	Pending CSD Processing	No Freight			
291188	0	155841	724.86	12128	Vendor Name	1	po	2025-03-17	20250085.013	Line Item not matched	Pending CSD Processing	No Frt Error	Error Found	2	1. PO # Not in Purchase Orders - POEH (4606) \n 2. Inv amt out of tolerance Inv Amt 650.00000
291034	0	221747	8208.00	4567		1	po	2025-03-17	20250085.013	Line Item not matched	Pending CSD Processing	No Freight	Error Found	1	1. Inv amt out of tolerance Inv Amt 8208.00000 Rcv Amt 0.00000 \n
291154	0	30859347	4188.60	8476		1	po	2025-03-14	20250085.013	Invoice Complete	Pending CSD Processing	No Freight			
291084	0	30851322	5596.22	8476		1	po	2025-03-11	20250085.013	Invoice Complete	Pending CSD Processing	No Freight			
291069	0	7693727	3318.00	9582		1	po	2025-03-13	20250085.013	Invoice Complete	Pending CSD Processing	No Freight			
291086	0	904465857	17292.35	12567		1	po	2025-03-11	20250085.013	Line Item not matched	Pending CSD Processing	No Freight	Error Found	2	1. PO # Not in Purchase Orders - POEH (4606) \n 2. Inv amt out of tolerance Inv Amt 17292.3500
291086	0	904462752	17043.40	12567		1	po	2025-03-11	20250085.013	Line Item not matched	Pending CSD Processing	No Freight	Error Found	2	1. PO # Not in Purchase Orders - POEH (4606) \n 2. Inv amt out of tolerance Inv Amt 17045.9300

A/P Vendor Invoice MXC Error - Main Document Count 4

Shuffle | Link | Delete

PO No	PO Suf	Inv No	Total	Vend No	Name	Co No	PO Type	Invoice Date	MxC Batch ID	MXC Status	AP WF Status	FRT Status	CSD Err Stat	Error Count	Document ID
291034	0	221747	8208.00	4567	HAALA INDUSTRIES INC	1	po	2025-03-17	20250085.013	Line Item not matched	Pending CSD Processing	No Freight	Error Found	1	MAIN 15942070
291086	0	904465857	17292.35	12567	WESTLAKE ROYAL STONE LLC	1	po	2025-03-11	20250085.013	Line Item not matched	Pending CSD Processing	No Freight	Error Found	2	MAIN 15942066
291086	0	904462752	17043.40	12567	WESTLAKE ROYAL STONE LLC	1	po	2025-03-11	20250085.013	Line Item not matched	Pending CSD Processing	No Freight	Error Found	2	MAIN 15942080
291188	0	155841	724.86	12128	ALLIANCE OUTDOOR LIGHTING	1	po	2025-03-17	20250085.013	Line Item not matched	Pending CSD Processing	No Frt Error	Error Found	2	MAIN 15942072

KW edit shows error message with tooltip icon for display:

A/P Vendor Invoice MXC

MAIN DocId 15942066

Admin | Save & Next | Save

KW Log	Key Word	Value
	PO No	291086
	PO Suf	0
	Inv No	904465857
	Total	17292.35
	Vend No	12567
	Name	Vendor Name
	Co No	1
	PO Type	po
	Invoice Date	2025-03-11
	MxC Batch ID	20250085.013
	MXC Status	Line Item not matched
	AP WF Status	Pending CSD Processing
	FRT Status	No Freight
	CSD Err Stat	Error Found
	Error Count	2
	CSD Error	1. PO # Not in Purchase Orders - P

Clicking tooltip shows error messages:

A/P Vendor Invoice MXC

MAIN DocId 15942066

Admin | Save & Next | Save

KW Log	Key Word	Value
	PO No	291086
	PO Suf	0
	Inv No	904465857
	Total	17292.35
	Vend No	12567
	Name	Vendor Name
	Co No	1
	PO Type	po
	Invoice Date	2025-03-11
	MxC Batch ID	20250085.013
	MXC Status	Line Item not matched
	AP WF Status	Pending CSD Processing
	FRT Status	No Freight
	CSD Err Stat	Error Found
	Error Count	2
	CSD Error	1. PO # Not in Purchase Orders - P

1. PO # Not in Purchase Orders - POEH (4606)
2. Inv amt out of tolerance Inv Amt 17292.35000 Rcv Amt 0.00000

EMAIL ALERT

From: apckreg@countymaterials.com <apckreg@countymaterials.com>
Sent: Wednesday, April 16, 2025 12:30:01 PM
To: mweiss@maxrecall.com <mweiss@maxrecall.com>
Subject: MaxRecall AP Invoice MXR Errors Needing Review

Please review the following invoices for errors that need to be addressed.

"https://maxrecall.countymaterials.com/Viewer/Viewer/Launch?QueryName=Q1120"

COUNTY MATERIALS CORPORATION

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Thank You

Questions?

CONTACT INFO:
ERIC WHITENER, VP OF OPERATIONS
EWHITENER@MAXRECALL.COM
770-678-8812

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