

# AI-powered AP, Expense and Procurement automation—deeply connected to your ERP.

Stream captures invoices and receipts, automates coding and policy checks, manages complex approvals, resolves exceptions and posts validated transactions to Dynamics 365 Finance & Operations, Business Central, NetSuite, Sage Intacct, QuickBooks and COINS.

D365 Finance & Operations

D365 Business Central

Oracle NetSuite

Sage Intacct

QuickBooks

COINS

REST API

**\$1B+**

in invoice value processed  
through Stream

**2.3 days**

average receipt-to-posting  
cycle time

**96%**

vendor identification  
automation at a franchise  
customer

**45 days**

contract-to-go-live guarantee

## AP Automation

AI capture at header and line level with field-level confidence and click-to-source highlighting. Vendor, GL and dimension prediction. File, exact and fuzzy duplicate detection. PO and non-PO invoices, 2-way and 3-way matching. Holds, recalls, complete audit history.

## Expense Management

Receipt capture and AI extraction, personal-expense exclusion, policy validation, category and GL coding, supervisor and department approvals, mobile and email approval, dashboards, ERP posting, combined invoice and expense digests.

## Procurement

Purchase requests and requisitions, configurable approvals, POs created in the ERP, confirmation and amendments, partial and full receipts synced back, invoice matching, integration-error monitoring, connected  
PR → PO → receipt → invoice history.

## Approvals and controls

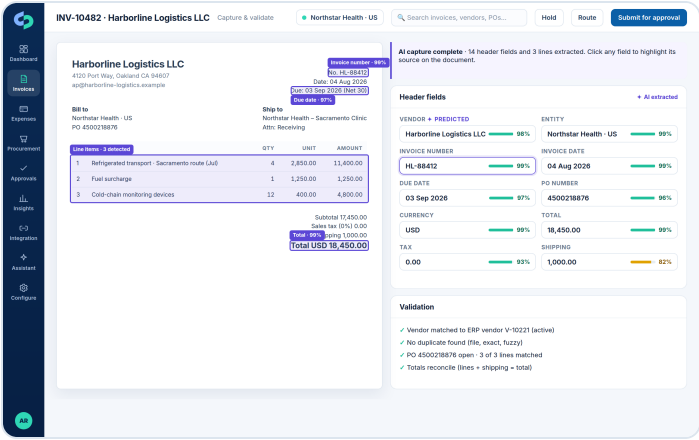
Header- and line-level rules by amount, department, entity, project and role. Up to five one-off approvers. Reminders and escalation. Approve from email digests, mobile or desktop. Every action recorded.

## ERP integration

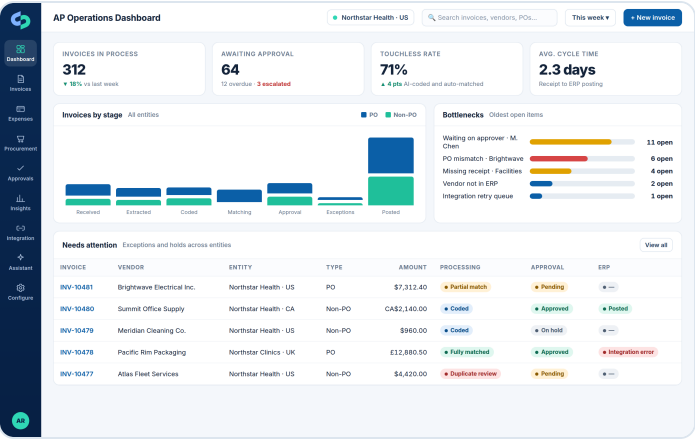
Master-data synchronization and validation, posting with attachments and approval status, vouchers and payment status back, retries and visible error resolution. Built by the team that implements the ERP.

## AI, Assistant and analytics

Explainable predictions that improve with history. Stream Assistant for plain-language questions across AP, expense and procurement. Dashboards, bottleneck and cycle-time reporting, integration status.



Header and line capture with confidence; click a field to see its source.



One view of every invoice, where it is stuck and who owns it.

## Why finance teams choose Stream

### ERP depth

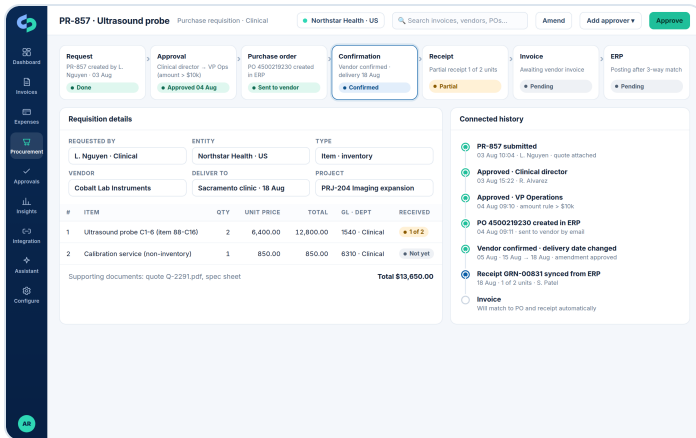
Integrations designed around your entities, dimensions and posting rules by the team that implements Dynamics 365, Business Central and NetSuite. Errors are fixed in Stream, never re-keyed.

### Configurable, not rigid

Fields, rules, workflows, tolerances, templates and integrations configured per customer, entity and industry.

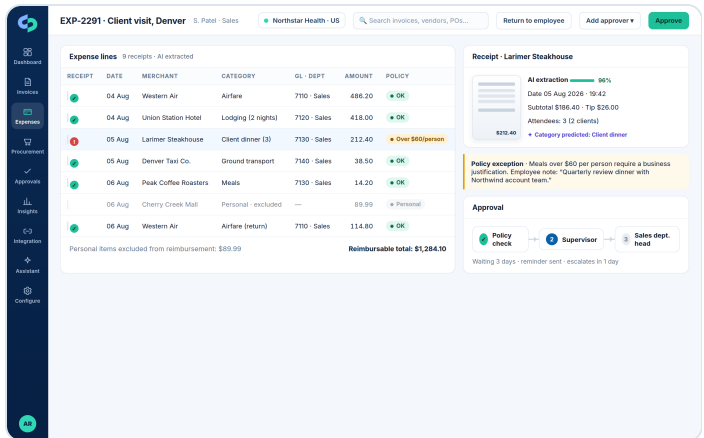
### One platform

AP, Expense and Procurement share vendors, dimensions, approvals, dashboards and audit history.



The screenshot shows a workflow for a purchase order (PR-857) for an ultrasound probe. The workflow steps are: Request (created by L. Nguyen), Approval (approved by VP Ops on 04 Aug), Purchase order (created by ERP), Confirmation (confirmed by delivery on 18 Aug), Receipt (partial receipt of 2 units), Invoice (awaiting vendor invoice), and ERP (posting after 3-way match). The 'Requisition details' table shows two items: an ultrasound probe and a calibration service. The 'Connected history' section shows a timeline of events from 03 Aug to 18 Aug, including submission, approval, creation in ERP, and receipt sync.

Request → approval → PO → confirmation → receipt → invoice → ERP on one record.



The screenshot shows an expense report (EXP-2291) for a client visit in Denver. It includes a table of expense lines with columns for receipt date, merchant, category, GL department, amount, and policy. The total reimbursable amount is \$1,284.10. A policy exception is noted for a meal over \$60 per person. The 'Receipt - Larimer Steakhouse' section shows an AI extraction of 96% and a policy exception for a quarterly review dinner. The 'Approval' section shows a workflow from Policy check to Supervisor to Sales dept. head.

Receipts, policy exceptions and coding on the expense report.

## Implementation and support

- **45-day go-live guarantee** on a scoped implementation: discovery, configuration, ERP integration, testing, training, cutover.
- Named support contact, response targets, integration monitoring, release notes and managed-service options.
- Security: SSO (SAML/OIDC), role-based access per entity, complete audit logs, encryption in transit and at rest, Azure hosting with tenant isolation, responsible AI (no cross-customer training). Attestation status shared under NDA.

## Measured outcomes (anonymized, on Dynamics 365)

- MedSpa group: 40+ to 300+ locations, 76% vendor identification automation, 70% GL mapping automation.
- Health and fitness franchise: 600 invoices per week, 96% vendor identification automation, 77% GL mapping automation.

## Next steps

- Book a personalized demo: [scalablestream.com/request-demo](https://scalablestream.com/request-demo) — bring us your difficult invoice.
- Talk to a D365 or NetSuite specialist: [scalablestream.com/contact](https://scalablestream.com/contact)
- Product tour without a form: [scalablestream.com/product-tour](https://scalablestream.com/product-tour) · ROI calculator: [scalablestream.com/roi-calculator](https://scalablestream.com/roi-calculator)