

SoftCo

SoftCo Procure-to-Pay

UI Text

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Platform Overview

SoftCo Procure-to-Pay automates the entire finance process from procurement to invoice automation and payment. I worked with Product Managers, Developers, and Designers to contribute UI content for the SaaS platform. This included navigation menus, breadcrumb menus, labels, action buttons, tooltips, notifications, success and error messages, input and form fields, etc.

PO Invoices

The PO Invoice Matching functionality was redesigned during my time at SoftCo.

Smart Matching, powered by AutoML Machine Learning, removes manual elements of invoice matching, resulting in an industry-leading 90% touchless invoice processing. The SoftCo Smart Matching engine applies AutoML to even the most complicated matching scenarios, such as incomplete data, missing product codes, and FX conversions, delivering unrivaled match rates and exceptional savings.

Here is an example of the **Invoice Matching screen for end-users**:

The screenshot shows the SoftCo AP Automation Invoices interface. At the top, there's a navigation bar with links for Dashboard, Orders, Capture, AP Automation (which is highlighted in blue), Suppliers, Contract, Admin, and Archive. Below the navigation is a toolbar with icons for search, filter, and export, followed by 'Cancel' and 'Send for Approval' buttons.

The main area has tabs for INVOICE DETAILS, MATCHING (which is selected), and CODING. The INVOICE DETAILS section shows an invoice for CaseID 1234 with details like Description, Qty, Unit Price, and Amount. The MATCHING section displays 'Matching Details' and 'Available Purchase Order Rows'. A specific row from the PO table is selected, showing a successful match with an invoice line item. An 'Auto Match Summary' modal is overlaid on the page, stating: 'Invoice row 1 was successfully matched on the following criteria: Order Number, Product Code, Qty, Unit Price, Amount'. At the bottom, there are buttons for 'Save' and 'Proceed to coding'.

Invoice Details					Matching Details			Available Purchase Order Rows				
Product Code	Description	Qty	Unit Price	Amount	Qty	Unit Price	Amount	Product Code	Description	Qty Avl	Unit Price	Amount
PO 1102345								PO 1102345	USD			
PC00078	Antivirus License	10	50.00	500.00	10	50.00	500.00	PC00078	Antivirus License	10	50.00	500.00
PC00091	Office 365 License	5	200.00	1,000.00								
PC00098	Figma License	4	50.00	200.00								

Subtotal 1,700.00

PO 1102345					Available Purchase Order Rows				
Product Code	Description	Qty	Unit Price	Amount	Product Code	Description	Qty Avl	Unit Price	Amount
PC00021	Dell Latitude E55...	5	1,000.00	5,000.00	PC00021	Dell Latitude E55...	5	1,000.00	5,000.00
PC00032	Dell Laptop Carr...	5	100.00	500.00	PC00032	Dell Laptop Carr...	5	100.00	500.00

Subtotal 5,500.00

Manually Coded 0.00 Net Amount 7,200.00 Unmatched Amount 0.00 Unmatched % 0.0% Matched Total 7,200.00

✓ Save Proceed to coding

Non-PO Invoices

The Non-PO Invoices module was redesigned during my time at SoftCo.

Using Machine Learning (ML), SoftCo reduces the processing time of non-PO invoice handling by 89%, with industry-leading compliance and audit checks. SoftCo intelligently identifies and learns coding patterns of previously coded invoices, allowing it to automatically code invoices with just one click. This innovative feature significantly reduces the reliance on the AP team's knowledge and enables coding in seconds rather than minutes.

Here is an example of the **Non-PO Invoice screen for end-users:**

The screenshot shows the SoftCo AP Automation interface. The top navigation bar includes links for Dashboard, Orders, Capture, AP Automation (which is selected), Suppliers, Contract, Admin, and Archive. Below the navigation is a breadcrumb trail: Home > AP Automation > Invoice-18920. A toolbar contains icons for CaseID 1234, search, and print, along with buttons for Cancel and Send for Approval. The main area has tabs for HEADER, REFERENCES, and HISTORY. A modal window is open, titled 'NON PO INVOICE DATA' with a sub-section 'Contract Matched'. It features a large green checkmark icon and the text 'Success! Invoice Matched against expected Contract cost for April. Automatically Coded and Posted to ERP'. A 'Close' button is at the bottom of the modal. To the left of the modal, there is a table with columns for Description, Date, Amount, and Open Amount. The table rows show entries for Q4 2021 Cleaning, Q1 2022 Cleaning, Q2 2022 Cleaning, and Q3 2022 Cleaning, all with amounts of 4,080.00 and 0.00 respectively. A 'Save' button is located at the bottom right of the table area.

Smart Routing

The Smart Coding and Smart Routing functionality were new features introduced to the platform during my time at SoftCo.

Smart Coding and Smart Routing utilize Machine Learning to automatically determine the correct routing and coding of invoices. Surcharge processing is automated regardless of how the charges are presented, reducing the time to process by 95%. SoftCo Exception Handling ensures the AP team is fast-tracked directly to the exact issue.

Here is an example of the **Smart Routing screen for end-users**:

The screenshot shows the SoftCo AP Automation interface. At the top, there's a navigation bar with links for Dashboard, Orders, Capture, AP Automation (which is highlighted in blue), Suppliers, Contract, Admin, and Archive. Below the navigation bar, the main content area shows a breadcrumb path: Home > AP Automation > Invoice-18920. On the left, there's a sidebar with various fields like CaselD 1234, Organization (1 Carter Inc), and several dropdowns for Invoice Type, Document Type, Supplier Number, Supplier Name, Supplier Email Address, Invoice Number, Invoice Date, Invoice Capture Date, Net Amount, Tax Amount, and Gross Amount. The main workspace has tabs for HEADER, REFERENCES, and HISTORY. A modal window titled "Send for Approval" is open in the center. This modal has a section for "RECIPIENTS" with a "Smart Route" button highlighted with a cursor. Below it, a message says "Smart Route results: 10 similar invoice(s) found with 80% using the following Approval Route". It lists two recipients: "Chad C" with a "Verify" status and "Rob Morgan" with an "Approve" status. There are "OK" and "Cancel" buttons at the bottom of the modal. At the bottom of the page, there's a footer with the text "This is really, really a big deal from an AP perspective."