

# SyncLedger

## Stop Processing Invoices Manually. Let AI Do It.

### AI-Powered Invoice Processing Automation Platform

*"From 100s of invoice emails to ERP postings — in minutes, not days."*

by Vedvix (Nevorix)

# Agenda

#	Topic
1	The Problem — Why Invoice Processing is Broken
2	The Solution — What SyncLedger Does
3	Before vs. After — The Transformation
4	How It Works — 7 Simple Steps
5	System Architecture
6	AI-Powered Extraction
7	The Dashboard — Product Demo
8	Multi-Tenant SaaS Model
9	Security & Compliance
10	Pricing Plans
11	ROI & Cost Savings







# SLIDE 1


## The Problem

Invoice Processing is Broken








# The Problem: Manual Invoice Processing

Every business receives invoices. Every business processes them the same painful way.

Step	Manual Task	Time
1	 Check email for invoices	5-10 min
2	 Open each PDF and read it	5-8 min
3	 Type data into a spreadsheet	5-7 min
4	 Forward to manager for approval	2-3 min
5	 Wait for email reply	<b>1-3 DAYS</b>
6	 Manually enter into Sage/ERP	5-10 min

 **TOTAL: 15-30 minutes PER INVOICE + days of waiting**  
× 500 invoices/month = **125-250 HOURS** wasted

# The Real Cost of Manual Processing

Pain Point	Business Impact
 <b>Time Waste</b>	AP staff spend 60-70% of their time on data entry, not analysis
 <b>Human Errors</b>	3-5% error rate in manual data entry = costly corrections
 <b>Lost Invoices</b>	Emails get buried, attachments missed = late payment penalties
 <b>No Visibility</b>	"Where is that invoice?" — no one knows the status
 <b>No Audit Trail</b>	Who approved what? When? No record exists
 <b>Slow Approvals</b>	Email chains for approvals take days, sometimes weeks
 <b>Scaling Problem</b>	Hire more people as invoice volume grows? Not sustainable

This costs companies \$15-25 per invoice in labor alone.

# SLIDE 2








## The Solution

Introducing SyncLedger

# SyncLedger — The Solution

SyncLedger automates the entire invoice lifecycle — from the moment an invoice lands in your email to when it's posted in your accounting system.

## What SyncLedger Does

Capability	Description
 <b>Email Monitoring</b>	Auto-reads invoices from your dedicated email inbox
 <b>AI PDF Extraction</b>	Reads ANY invoice format — digital, scanned, even handwritten
 <b>Smart Data Storage</b>	All extracted data stored with original PDF linked
 <b>Approval Workflow</b>	One-click approve/reject on a web portal
 <b>ERP Integration</b>	Auto-posts approved invoices to Sage Intacct
 <b>Real-Time Dashboard</b>	Know the status of every invoice, instantly
 <b>Audit Trail</b>	Complete history of every action taken

# SLIDE 3

 Before vs. After

The Transformation



# Before vs. After SyncLedger

```
flowchart LR
    subgraph BEFORE["❌ BEFORE SyncLedger"]
        direction TB
        B1["✉️ Manually check email"] --> B2["📄 Open & read each PDF"]
        B2 --> B3["✍️ Type into spreadsheet"]
        B3 --> B4["✉️ Email for approval"]
        B4 --> B5["⌚ Wait days for reply"]
        B5 --> B6["✍️ Enter into Sage ERP"]
    end
    subgraph AFTER["✅ AFTER SyncLedger"]
        direction TB
        A1["✉️ Auto-monitored inbox"] --> A2["🤖 AI extracts data"]
        A2 --> A3["💾 Saved to database"]
        A3 --> A4["👉 One-click approve"]
        A4 --> A5["🔗 Auto-synced to ERP"]
    end
    BEFORE -.-> |"TRANSFORM"| AFTER
    style BEFORE fill:#ffebee,stroke:#c62828,stroke-width:2px
    style AFTER fill:#e8f5e9,stroke:#2e7d32,stroke-width:2px
```



# The Numbers That Matter

	❌ Manual Process	✅ SyncLedger
Time per Invoice	15-30 minutes	1-3 minutes
Accuracy	3-5% error rate	97%+ accuracy
Approval Speed	Days via email	Instant — one click
Visibility	No tracking	Real-time dashboard
Audit Trail	None	Complete history
Cost per Invoice	\$15-25	\$0.08-0.15

## Impact Summary

80% FASTER · 95% FEWER ERRORS · 70% COST SAVINGS

# SLIDE 4

 How It Works

7 Simple Steps







## How It Works — The 7-Step Flow


flowchart TB

```
START(("📧 Invoice<br/>Arrives")) --> S1["📥 1. Auto-Detect<br/>Inbox monitored every 5 min"]
S1 --> S2["📄 2. Download PDF<br/>Stored securely in AWS S3"]
S2 --> S3["🤖 3. AI Extraction<br/>GPT-4o Vision reads all fields"]
S3 --> S4["💾 4. Data Stored<br/>Saved to database with PDF"]
S4 --> S5["🔍 5. Review<br/>AP team reviews on portal"]
S5 -->|"✅ Approve"| S6["✅ 6. Approve<br/>One-click with comments"]
S5 -->|"🔧 Edit"| S5B["✏ Edit & Correct"] --> S6
S5 -->|"❌ Reject"| S5C["❌ Reject with reason"]
S6 --> S7["🔗 7. Sync to ERP<br/>Auto-posted to Sage Intacct"]
S7 --> DONE(("✅ Done!"))

style START fill:#4CAF50,stroke:#2E7D32,color:#fff
style DONE fill:#4CAF50,stroke:#2E7D32,color:#fff
style S3 fill:#FF9800,stroke:#E65100,color:#fff
style S7 fill:#9C27B0,stroke:#6A1B9A,color:#fff
```

## Each Step Explained

Step	What Happens	Who Does It
1	Vendors send invoices to your email — just like today	Vendors (no change)
2	SyncLedger detects new emails with PDF attachments	 Automated
3	AI reads the entire PDF — vendor, amounts, dates, line items	 Automated
4	Extracted data saved to database with original PDF linked	 Automated
5	Your AP team reviews data side-by-side with the PDF	 Your Team
6	One click to approve, edit, or reject with a reason	 Your Team
7	Approved invoices auto-posted to Sage Intacct with GL codes	 Automated

 **5 of 7 steps are fully automated. Your team only reviews and clicks Approve.**

# SLIDE 5

## System Architecture

How It All Connects










# System Architecture

```
graph TB
    subgraph VENDORS["✉️ VENDORS"]
        V1["Vendor A"]
        V2["Vendor B"]
        V3["Vendor C"]
    end
    subgraph EMAIL["📧 MICROSOFT 365"]
        M1["org1@company.co"]
        M2["org2@company.co"]
    end
    subgraph SL["☁️ SYNCLEDGER PLATFORM"]
        POLL["📧 Email Poller"]
        AI["🤖 AI Engine"]
        DASH["🖥️ Web Dashboard"]
        SYNC["🔗 Sage Sync"]
        DB["🗄️ PostgreSQL"]
        S3["📦 AWS S3"]
    end
    subgraph ERP["📅 SAGE INTACCT"]
        AP["AP Bills + GL"]
    end
    V1 & V2 & V3 -->|"PDF Email"| M1 & M2
    M1 & M2 -->|"Graph API"| POLL
    POLL --> S3 & AI
    AI --> DB
    DB --> DASH
    DASH -->|"Approve"| SYNC
    SYNC -->|"REST API"| ERP
    style SL fill:#e8f4fd,stroke:#2196F3,stroke-width:3px
    style ERP fill:#fce4ec,stroke:#E91E63,stroke-width:2px
```



# Architecture in Simple Terms

Component	What It Does	Think of It As...
 <b>Email Inbox</b>	Receives invoices from vendors	Your digital mailbox — vendors email here like before
 <b>Email Poller</b>	Checks for new invoices every 5 min	A tireless assistant checking mail 24/7
 <b>AI Engine</b>	Reads PDFs and extracts all data	A super-fast accountant: 1,000 invoices/hour
 <b>Dashboard</b>	Review, approve, or reject invoices	Your invoice command center
 <b>Sage Sync</b>	Sends approved data to your ERP	A bridge to your accounting system
 <b>Database</b>	Stores all data and audit logs	Your secure digital filing cabinet
 <b>S3 Storage</b>	Stores all original PDF files	A fireproof vault for every invoice















# SLIDE 6

## AI-Powered Extraction

The Intelligence Behind SyncLedger

## Traditional vs. SyncLedger AI

	 Traditional (Template-Based)	 SyncLedger (AI-Powered)
Vendor Formats	 Needs a template for every vendor	 Reads ANY format automatically
Layout Changes	 Breaks when vendors change layout	 Adapts to new formats instantly
Scanned PDFs	 Can't read scanned/handwritten	 Reads scanned, photos, handwritten
New Vendors	 Requires IT setup per vendor	 Zero configuration needed
Accuracy	 70-80% accuracy	 97%+ accuracy

Powered by GPT-4o Vision — the most advanced document AI available.



# AI Extraction Pipeline

```
flowchart LR
    subgraph INPUT["📄 INPUT"]
        PDF["Any Invoice PDF<br/>• Digital<br/>• Scanned<br/>• Photo<br/>• Mixed"]
    end
    subgraph PROCESS["⚙️ PROCESSING"]
        direction TB
        P1["1 PDF Parsing<br/>PyMuPDF extracts text"]
        P2["2 OCR Engine<br/>Tesseract reads scans"]
        P3["3 AI Vision<br/>GPT-4o understands layout"]
        P1 --> P2 --> P3
    end
    subgraph OUTPUT["📋 OUTPUT"]
        O1["✅ Vendor Name<br/>✅ Invoice Number<br/>✅ Dates & Amounts<br/>✅ Line Items<br/>✅ PO Number<br/>✅ Tax & Terms"]
    end
    INPUT --> PROCESS --> OUTPUT
    style PROCESS fill:#fff3e0,stroke:#e65100,stroke-width:2px
    style OUTPUT fill:#e8f5e9,stroke:#2e7d32,stroke-width:2px
```



Works with 100+ different vendor formats — ZERO configuration



# What the AI Extracts

Field	Example	Accuracy
Vendor Name	"Acme Building Supplies Inc."	99%
Invoice Number	"INV-2026-0847"	99%
Invoice Date	"February 15, 2026"	98%
Due Date	"March 15, 2026"	97%
Subtotal	"\$12,450.00"	99%
Tax Amount	"\$996.00"	98%
Total Amount	"\$13,446.00"	99%
PO Number	"PO-4521"	96%
Line Items	Material, quantity, unit price, total	95%
Payment Terms	"Net 30"	97%

# SLIDE 7

## The Dashboard

Your Invoice Command Center



# What Your Team Sees

SyncLedger

Mary (Approver)

Dash

Inv

Apprvl

Users

Setup

INVOICE DASHBOARD

Feb 2026

Total  
247

Pending  
23

Approved  
198

Rejected  
26









RECENT INVOICES

Vendor	Amount	Date	Status
Acme Supplies	\$13,446	Feb 15	<div></div> Pending
BuildCo Inc	\$8,230	Feb 14	<div></div> Approved
Steel Works	\$45,100	Feb 14	<div></div> Synced
Electric Plus	\$2,180	Feb 13	<div></div> Rejected

Click any invoice → View PDF → Approve in 1 click



## Key Dashboard Features

Feature	Description
 <b>Real-Time Dashboard</b>	All invoices, statuses, and KPIs at a glance
 <b>Side-by-Side View</b>	Original PDF next to extracted data — compare instantly
 <b>One-Click Approval</b>	Approve or reject with a single click + optional comments
 <b>Inline Editing</b>	Fix any field right on the portal — no re-upload needed
 <b>Smart Search &amp; Filter</b>	Find invoices by vendor, date, amount, status, or PO number
 <b>Excel Export</b>	Download invoice data with custom columns & filters
 <b>User Management</b>	Add team members with specific roles
 <b>Full Audit Trail</b>	Every action logged — who did what, and when

# SLIDE 8

## Multi-Tenant SaaS

Built for Multiple Organizations













# Multi-Tenant Architecture

```
graph TB
    subgraph PLATFORM["🌐 SYNCLEDGER PLATFORM"]
        CORE["☁️ Central Engine"]
    end
    subgraph ORG1["🏢 Organization A – Construction"]
        O1_E["✉️ orgA@company.co"]
        O1_U["👤 8 Users"]
        O1_D["📄 Isolated Data"]
    end
    subgraph ORG2["🏢 Organization B – Tech"]
        O2_E["✉️ orgB@company.co"]
        O2_U["👤 5 Users"]
        O2_D["📄 Isolated Data"]
    end
    subgraph ORG3["🏢 Organization C – Mfg"]
        O3_E["✉️ orgC@company.co"]
        O3_U["👤 12 Users"]
        O3_D["📄 Isolated Data"]
    end
    CORE --- ORG1
    CORE --- ORG2
    CORE --- ORG3
    style PLATFORM fill:#e3f2fd,stroke:#1565C0,stroke-width:3px
    style ORG1 fill:#e8f5e9,stroke:#2e7d32,stroke-width:2px
    style ORG2 fill:#fff3e0,stroke:#e65100,stroke-width:2px
    style ORG3 fill:#f3e5f5,stroke:#6a1b9a,stroke-width:2px
```

# What Each Organization Gets

Feature	Details
 <b>Dedicated Email Inbox</b>	Each org has its own inbox — vendors email invoices here
 <b>Complete Data Isolation</b>	Org A <b>cannot</b> see Org B's data — ever
 <b>Independent Users &amp; Roles</b>	Each org manages its own users and permissions
 <b>Separate Storage</b>	PDFs stored in isolated folders per organization
 <b>Own Dashboard &amp; Reports</b>	Each org has its own dashboard and audit trail
 <b>Own ERP Connection</b>	Each org connects to its own Sage Intacct instance

## Role Hierarchy





Role	Scope	Permissions
 <b>Super Admin</b>	Platform-wide	Manage all orgs, users, and settings
 <b>Admin</b>	Organization	Manage org users, approve invoices, configure Sage

# SLIDE 9

## Security & Compliance

Enterprise-Grade Protection

# Security & Compliance

Category	Features
 <b>Authentication</b>	JWT-based secure auth, Role-based access control (RBAC), Multi-tenant data isolation, Session auto-expiry
 <b>Data Protection</b>	Encryption in transit (TLS 1.2+), Encryption at rest (AES-256), Secure PDF storage in AWS S3, Org-scoped isolation
 <b>Audit &amp; Compliance</b>	Complete audit trail for every action, Who approved/rejected with timestamps, Data change history, Exportable logs
 <b>Infrastructure</b>	AWS Cloud hosting, Automatic daily backups, 99.5–99.9% uptime SLA, 24/7 monitoring



# Technology Stack





```
graph LR
  subgraph FE["🖥️ FRONTEND"]
    R["React 18 + TypeScript"]
    TW["Tailwind CSS + Vite"]
  end
  subgraph BE["⚙️ BACKEND"]
    J["Java 21 + Spring Boot 3"]
    SS["Spring Security + JWT"]
  end
  subgraph AI["🤖 AI ENGINE"]
    PY["Python 3.12 + FastAPI"]
    GP["GPT-4o Vision + Tesseract"]
  end
  subgraph INFRA["☁️ INFRASTRUCTURE"]
    AWS["AWS · PostgreSQL 16"]
    S3["S3 · SQS · EC2"]
  end
  style FE fill:#e3f2fd,stroke:#1565c0
  style BE fill:#e8f5e9,stroke:#2e7d32
  style AI fill:#fff3e0,stroke:#e65100
  style INFRA fill:#fce4ec,stroke:#c62828
```

# SLIDE 10

## Pricing Plans

For Every Business Size

## Pricing Plans

	 Starter	 Professional	 Business	 Enterprise
Monthly	\$349	\$649	\$799	\$1,499
Annual	\$3,490	\$6,490	\$7,990	\$14,990
Invoices/mo	1,000	5,000	10,000	20,000+
Users	3	15	30	Unlimited
Organizations	1	3	5	Unlimited
Email Inboxes	1	3	5	Unlimited
Storage	50GB	200GB	500GB	Unlimited
Approval	Basic	Multi-level	Custom	Custom
Support	Email (24hr)	Priority (4hr)	Dedicated (2hr)	24/7 (1hr)
Uptime SLA	99.5%	99.7%	99.8%	99.9%

## Build vs. Buy — 2-Year Comparison

Cost Category	❌ Self-Build	✅ SyncLedger
Upfront Development	\$77,250+	\$0
Monthly Infrastructure	\$2,000-4,000/mo	Included
Developer Maintenance	\$3,000-5,000/mo	Included
DevOps Cost	\$1,000-2,000/mo	Included
AI API Costs	\$500-2,000/mo	Included
Time to Deploy	14-18 weeks	1-2 weeks
2-YEAR TOTAL	\$230,500-\$609,800	\$11,878-\$45,976

 **SAVINGS: UP TO 93% with SyncLedger subscription!**



# SLIDE 11

## ROI & Cost Savings



What You'll Save

# ROI Calculator

## Example: Company processing 500 invoices/month

	Current (Manual)	With SyncLedger
Monthly labor cost	$500 \text{ inv} \times 20 \text{ min} \times \$30/\text{hr} = \$5,000$	Included in plan
Annual labor cost	\$60,000	\$6,490 (Pro plan)
Late payment penalties	~\$3,000/year	~\$0
Error correction costs	~\$5,000/year	~\$0
TOTAL ANNUAL COST	~\$68,000	~\$8,990 (Year 1)

## Results









Metric	Savings
 Year 1 Savings	\$59,010 (86.8%)
 Year 2+ Savings	\$61,510/year (90.5%)

# SLIDE 12

 Why SyncLedger?

8 Reasons to Choose Us

# Why Choose SyncLedger?













#	Differentiator	Details
1	 <b>AI-First Approach</b>	GPT-4o Vision reads ANY format — no templates. 97%+ accuracy.
2	 <b>Zero Vendor Friction</b>	Vendors keep emailing invoices — no portal, no EDI, no changes
3	 <b>Enterprise Security</b>	Multi-tenant isolation, encryption everywhere, full audit trail
4	 <b>Seamless ERP Sync</b>	One-click approve → auto-posted to Sage with correct GL codes
5	 <b>Complete Visibility</b>	Real-time dashboard — never lose an invoice again
6	 <b>Fast Deployment</b>	Live in 1-2 weeks, not months. No IT infrastructure to manage.
7	 <b>Predictable Pricing</b>	Flat monthly fee. 93%+ savings vs. building your own.
8	 <b>Scales With You</b>	From 100 to 20,000+ invoices/month. Upgrade as you grow.

# SLIDE 13

 Getting Started

Go Live in 2 Weeks

# Getting Started — 2-Week Onboarding

	Week 1	Week 2	Go Live!
Activities	 Kickoff call	 Configure mapping rules	 Start processing
	 Connect email inbox	 Test with real invoices	 Monitor dashboard
	 Create user accounts	 Refine AI rules	 Approve invoices
	 Send sample invoices	 Pilot sign-off	 Auto-sync to Sage

## What We Need From You

#	Item	When
1	10-15 sample invoices (varied vendor formats)	Week 1
2	Microsoft 365 email access for dedicated inbox	Week 1
3	Sage Intacct API credentials (test environment)	Week 1
4	GL coding rules and approval workflow preferences	Week 2



## Success Metrics We Guarantee

Metric	Target
First-pass extraction accuracy	97%+
Manual data entry reduction	90%+
Invoice cycle time reduction	80%+
Exception rate (needs human fix)	< 15%
System uptime	99.5%+
Time from signup to go-live	< 2 weeks

# ? Frequently Asked Questions

Question	Answer
Do vendors need to change anything?	No. They keep emailing invoices — no change.
What if the AI gets something wrong?	Your team reviews every invoice. Any field can be edited inline.
How accurate is the AI?	97%+ accuracy using GPT-4o Vision.
Can it read scanned/photo PDFs?	Yes — digital, scanned, and even photos.
How long to get started?	1-2 weeks from signup to live invoices.
Is my data secure?	Enterprise-grade encryption + data isolation on AWS.
What ERPs do you support?	Sage Intacct today. QuickBooks, Xero, NetSuite coming soon.
What if I exceed my invoice limit?	Invoices keep processing — overages billed transparently.



# Ready to Automate Your Invoices?

Stop spending hours on manual data entry.

Let SyncLedger's AI handle it in minutes.

 **Contact:** [sales@syncledger.com](mailto:sales@syncledger.com)

 **Website:** [www.syncledger.com](http://www.syncledger.com)

 **Book a Demo:** [calendly.com/syncledger](https://calendly.com/syncledger)

*"From 100s of emails to ERP — automatically."*

**SyncLedger by Vedvix**

*Empowering Financial Operations Through Intelligent Automation*

# Thank You

## Questions?

*Document Version: 1.0 | February 2026*