

AI TO ACHIEVE PEAK EFFICIENCY

Out of the box intelligence, tailored to your needs, to enhance your business processes in Microsoft Dynamics 365.

OCTOBER 2025

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At SignUp Software we believe AI is the tool that helps to go the extra mile in automation. We strive to create **autonomous business processes** where every user interaction delivers real value to the organization.

As subject matter experts in process management, we know how to streamline workflows by focusing only on exceptions and equipping you with the right tools and insights to reach **peak efficiency**.

TAILORED TO YOUR NEEDS

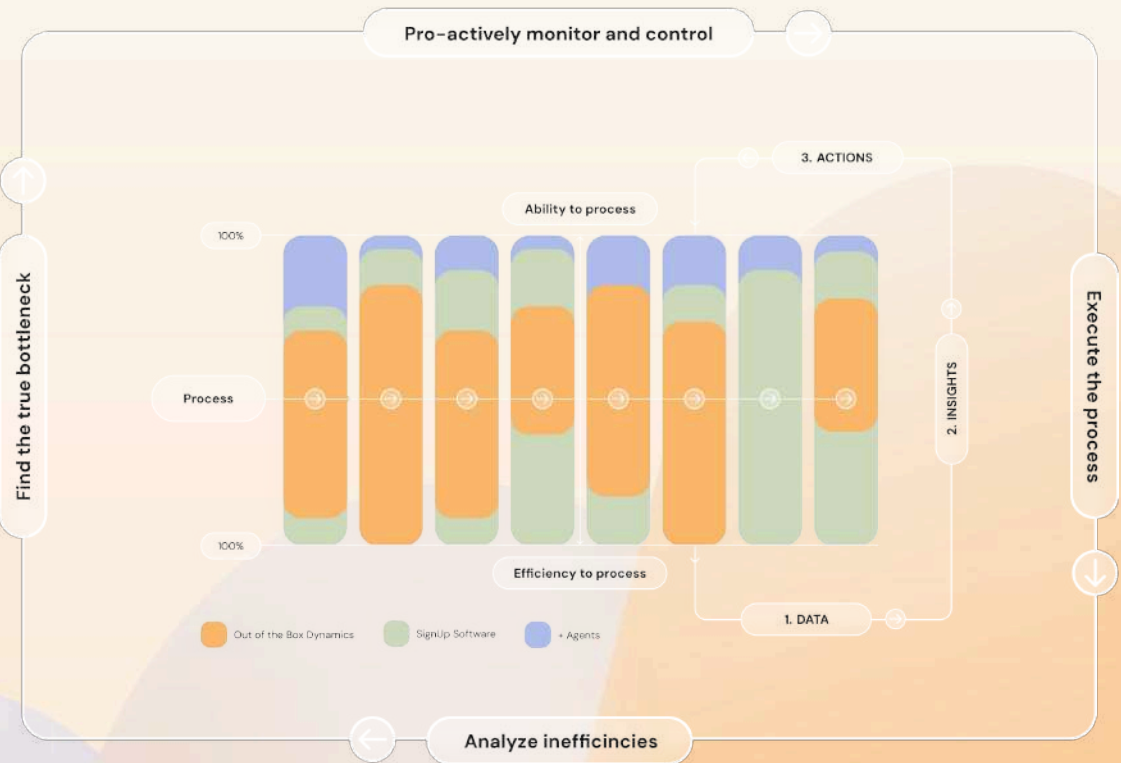
We understand that every industry faces unique challenges and that no two organizations are alike. That’s why we go beyond delivering **artificial intelligence out of the box**. We empower you to identify where AI and autonomous agents can add the most value, and to measure their impact effectively. We strive to make every business process **mineable**; enabling you to:

- Analyze value streams to find time drains and efficiency gaps in your processes.
- Utilize agents to identify risks, or high potential leakages and initiate corrective actions.
- Stay in control of your agent’s performance and fine-tune their instructions, or focus on what’s next.

OUT OF THE BOX INTELLIGENCE

When you enhance your **Dynamics 365 implementation** with a SignUp Software solution, you’re not just adopting the latest technology, you’re gaining the advantage of **industry best practices**.

- Managing exceptions is no longer about resolving a challenge but using intelligent predictions to prevent them from happening.
- Everyone can become a manager by converting repetitive corrective actions into agentic automation.
- Spend less time gathering data and more time using it to drive your organization’s strategy and success.



THE BUSINESS OUTCOME

Our AI capabilities enable faster, smarter, and more secure business operations:

- **Accelerated processes** with fewer exceptions and minimal manual effort
- **Real-time ERP insights** for better and faster decisions
- **Reduced risk** of process disruption, fraud, and audit overhead
- **Lower cost and complexity** via automation, continuous upgrades, and one source of truth
- **You are the Hero** empowered to make lasting impact, stress-free

Management by exception

Reduce complexity
Drive business process automation.

Result

Focus on understanding your business instead of executing repetitive tasks.

Spend time on engagement
From re-active to pro-active

Machine Learning

Actionable insights

Reduce uncertainty
transform process-relevant data into impact.

Result

Corrective actions based on a deep understanding of the "why" question.

Automate corrective actions
From executing to managing

Agents

Collaboration without boundaries

Reduce inaccuracy and inconsistency
Optimize the exchange of information.

Result

Reduced business process overhead in sharing information and knowledge.

Automate corrective actions
From answering to asking

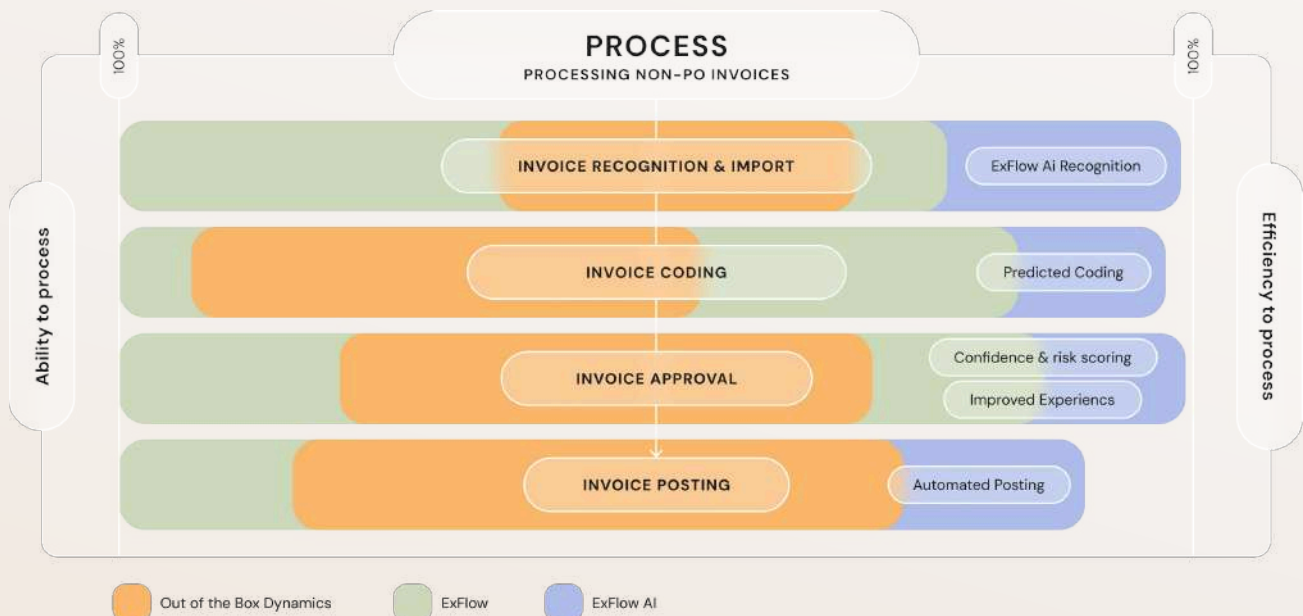
Copilot & Teams

THE ROAD TO AUTONOMOUS FINANCE WITH EXFLOW

With **ExFlow**, our mission has always been to automate what can be automated. Now, with the addition of **AI**, we can go even further, delivering true end-to-end efficiency.

Processing non-PO invoices has long been one of the most tedious, manual-heavy tasks in finance. But with ExFlow now powered by AI, this process is elevated to an entirely new level. Strengthened with AI, ExFlow closes efficiency gaps and paves the way for a **smarter, faster future**.

We achieve this by aligning our solutions with core business processes and continuously monitoring both our **ability to process** (functions and features) and our **efficiency to process** (workflow and AI). By identifying the most common efficiency leakages, we've developed an **adaptable, intelligent solution** to close those gaps.



EXFLOW AI RECOGNITION

Actionable Insights: Automate corrective actions, go from execution to management

We envisioned a recognition tool that behaves like a colleague. Not a black box, but something you can interact with and train. The ExFlow AI recognition service handles the first level of recognition for you, and learns not only from how you assign fields, but also from the logic behind your decisions. For example:

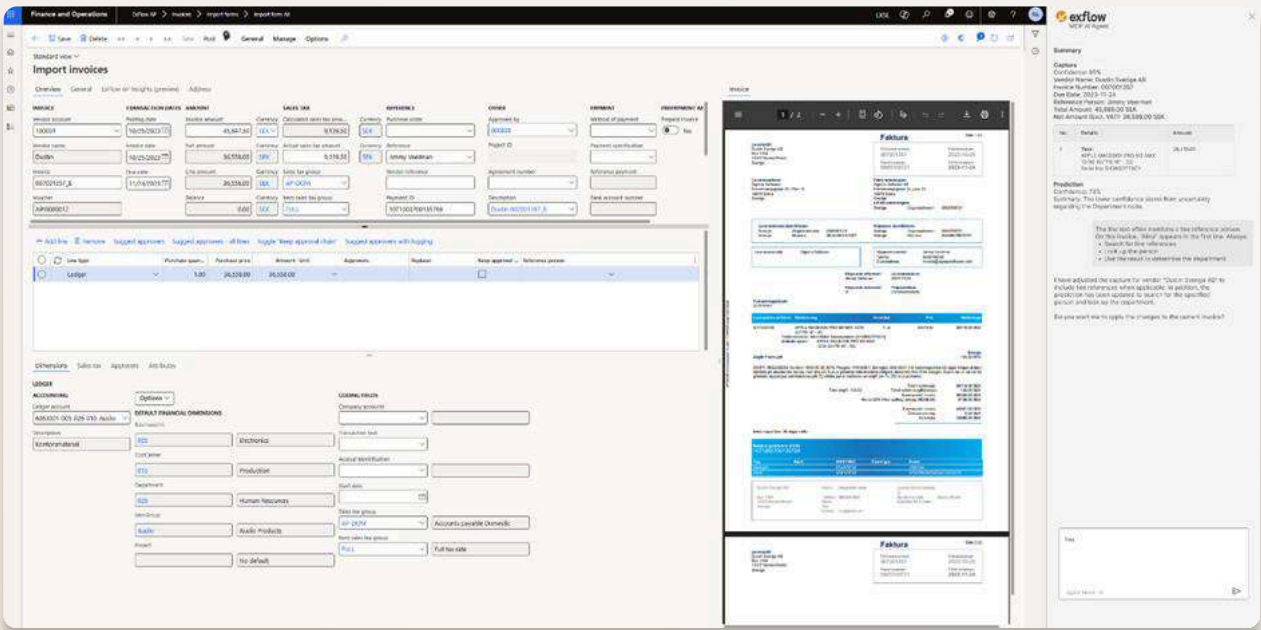
- “Next time Joel Wallgren is referenced on an invoice, please code it to business unit marketing”
- “This vendor does not calculate the tax as an individual field. Please calculate it by looking at the lines, line values, and tax percentages”
- “If you receive more than one invoices from this vendor per month, please mark subsequent invoices as potential fraud”

These are just a few ways the recognition service goes the extra mile.

01 Human-Like Interaction and Transparency
Train the AI as you would a colleague, with clear communication, avoiding the “black box” problem.

02 Adaptive Learning from Human Logic
The AI not only adapts to field positions, but also to business rules and logic which you provide. This allows continuous improvement with each interaction.

03 Advanced Automation for Complex Scenarios
From conditional coding to tax calculations and fraud detection, the AI takes on advanced tasks, taking automation to the next level.



PREDICTED CODING

Management by exception: Move from reactive to predictive exception handling

You've processed hundreds – perhaps even thousands – of invoices, yet the system still struggles to code them correctly.

Recruiting a resource who truly understands your business is nearly impossible and takes years to train. With this new capability, that expertise is **captured in a virtual assistant** that learns every day, makes smarter decisions over time, and never leaves your company.

01 Faster Knowledge Transfer

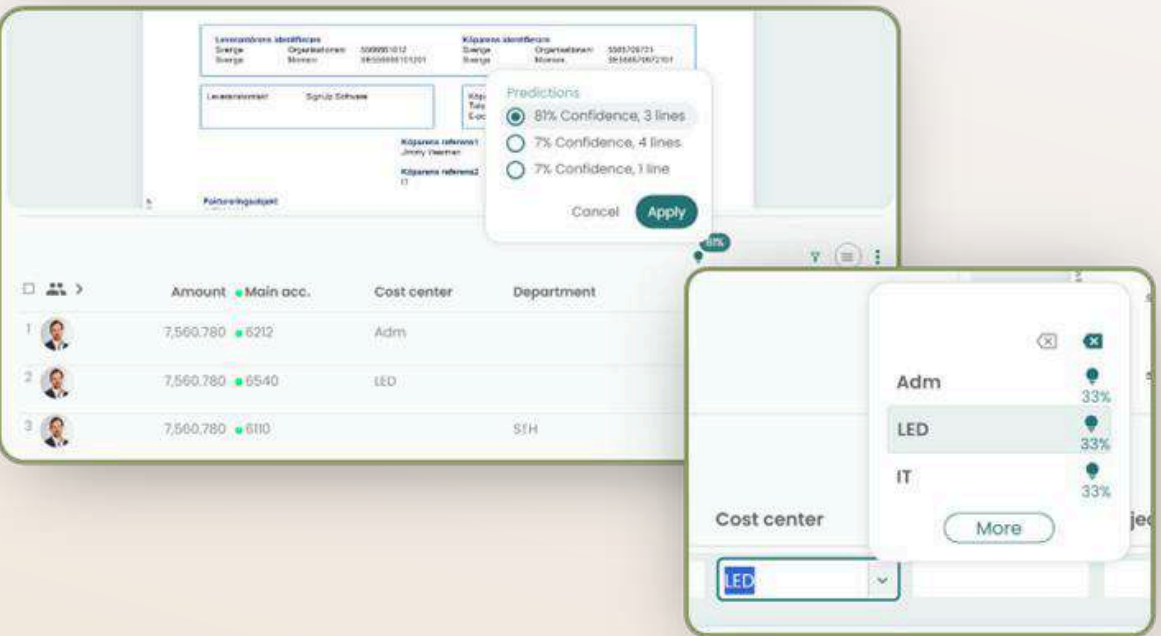
AI learns your business rules and processes in days – not years – reducing the time and effort needed to onboard new hires.

02 Smarter, Continuous Decision-Making

Your virtual assistant **continuously learns**, making increasingly accurate coding decisions over time.

03 Retention of Expertise

AI never leaves, so knowledge stays within the organization, ensuring consistent performance and long-term reliability.



CONFIDENCE & RISK SCORING

Management by exception: Proactively provide justification to not approve an invoice

Approving large volumes of invoices makes it difficult to identify anomalies, and the cost of approving the wrong ones can be significant. AI is the perfect tool to analyze large volumes of data and uncover issues that are nearly impossible to detect manually.

In an ideal world, inaccurate invoices wouldn't exist in your system, but in reality, the true value lies in spotting them quickly. Take full control and ensure no opportunity to reject or dispute an invoice is ever missed.

01 Enhanced Anomaly Detection

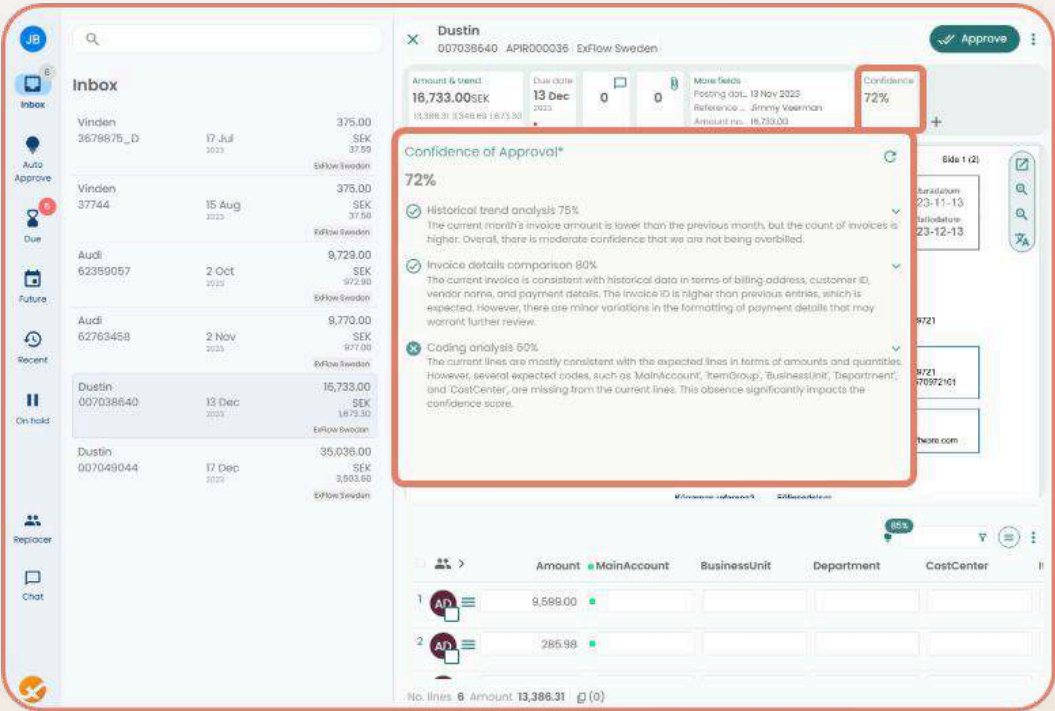
AI can analyze large volumes of invoice data to identify anomalies that would be nearly impossible to detect manually.

02 Reduced Financial Risk

By catching incorrect or fraudulent invoices before approval, businesses can avoid costly mistakes and disputes.

03 Improved Control and Efficiency

AI-driven insights ensure you never miss an opportunity to reject or dispute an invalid invoice, giving you full control over the approval process.



IMPROVED EXPERIENCE – LIVE TRANSLATIONS

Collaboration without boundaries: Focus on making decisions, not on deciphering the data

Approving invoices in unfamiliar languages? With live translations, you can skip manual translations or approve invoices based on assumptions.

01 Eliminates Language Barriers

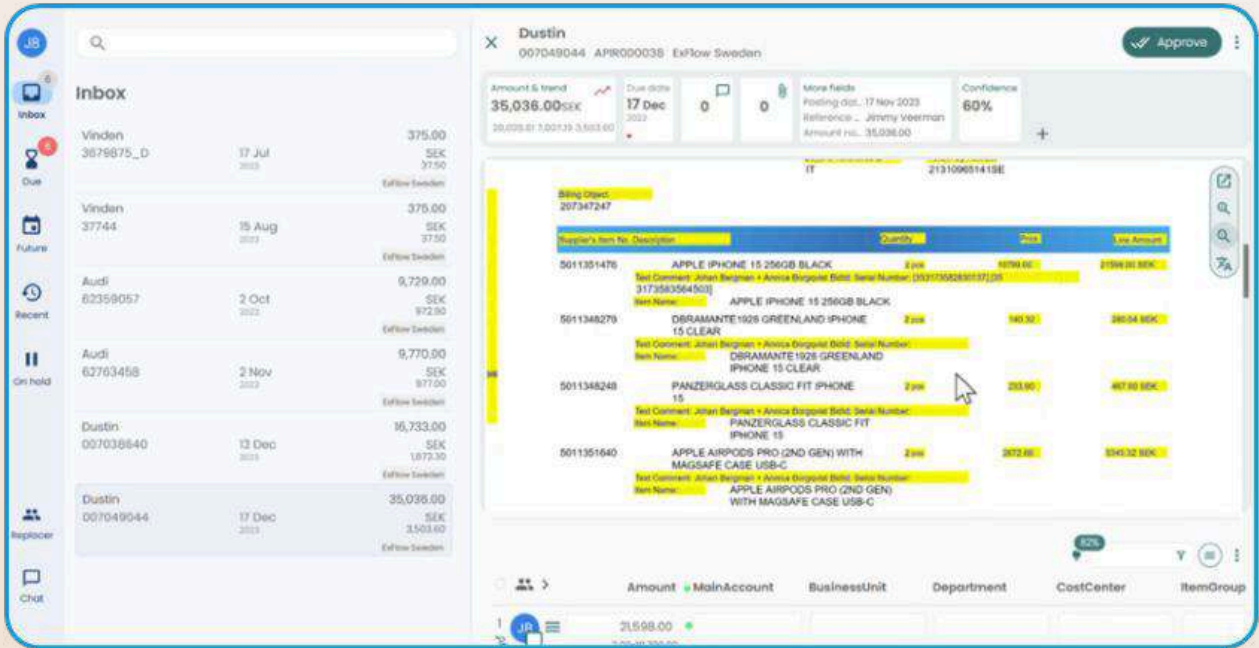
Live invoice translations remove the need for manual translations, making global invoice processing seamless.

02 Smarter, Continuous Decision-Making

Prevents decisions based on assumptions by providing clear, understandable invoice details instantly.

03 Retention of Expertise

Streamlines workflows by enabling quick and accurate approvals without external translation steps.



IMPROVED EXPERIENCE – PREDICT REQUIRED DIMENSIONS

Management by exception: Manage only the dimensions you need

Scrolling through endless financial dimension columns, unsure which one to choose, is now a thing of the past. ExFlow intelligently detects the dimensions relevant to each invoice, eliminating complexity and streamlining efficiency.

01 Simplified Dimension Selection

Automatically detects which financial dimensions are relevant for each invoice, eliminating guesswork.

02 Reduced Complexity

Removes the need to scroll through numerous columns, making the process more intuitive and less error prone.

03 Increased Efficiency

Streamlines invoice processing, saving time and improving overall productivity.



IMPROVED EXPERIENCE – INTELLIGENT SEARCH

Collaboration without boundaries: Find the invoices you need based on simple text

No need to apply a filter through manual selections. Just ask!

- “Show me all open invoices from vendor A”
- “Show me all invoices from vendor A from last year”
- “Show me all invoices that are due”

A great new way of finding the invoice you are looking for quickly:

01

Natural Language Search

Users can find invoices by simply asking questions, eliminating the need for manual filtering.

02

Faster Access to Information

Quickly retrieve specific invoices (e.g., by vendor, date, or status) without having to navigate complex menus.

03

Improved User Experience

Makes invoice searching intuitive and efficient, reducing time and effort for employees.

AUTOMATED POSTING

Management by exception: Automate what can be automated

Whenever you’re confident about automating the posting of invoices, whether from a specific vendor or under a defined risk threshold, simply tell the system to **auto-approve** future invoices that meet those conditions. If that feels too risky, you can set a **waiting period** before auto-approval, giving yourself time to review the list every few days for final validation.

01

You manage the automation

Allows you to set rules for auto-approving invoices based on vendor or risk thresholds, reducing manual workload.

02

Flexible Risk Management

Provides options to delay automation for a review period, giving you control and confidence before full automation.

03

Efficiency Gains Without Sacrificing Oversight

Speeds up invoice processing while maintaining the ability to validate and adjust as needed.

