

# Tipalti ERP Integration

Tipalti offers different ERP integration methods to accommodate the needs of your ERP and accounting system, helping you complete the last mile of AP automation.



## Maximize your ERP investment & wipe out 80%+ of your Global Payables Workload while accelerating Financial Close by 25%+ with Tipalti

**Your ERP is critical for tracking finance and accounting and is one of your most valuable investments.**

But ERPs are not designed for in-depth payables execution and process-heavy operations like Accounts Payable (AP), Procurement, and Global Payments. Therefore, AP is often backfilled with staff. Conquering the last mile of ERP from a payable perspective takes a holistic approach.

Tipalti's unique solution provides visibility into every step of the payables transaction cycle—from supplier onboarding to invoice processing, PO creation and matching, to approvals and payment. You can quickly and easily connect that invaluable data to your ERP to get deeper insights on your payables spend and its impact on your operations.



## Tipalti integrates with all ERPs and Accounting systems

Tipalti offers integration that syncs invoices and invoice payment data between your ERP and Tipalti—with minimal effort from you or your IT team. Tipalti's world-class integration capabilities, advanced technology, and intuitive interface smartly and efficiently manage the lifecycle of your vendor bills and payments. Tipalti provides different ERP integration methods to accommodate the needs of your ERP and accounting system.

### Pre-Built API Integration

- Direct API to API integration
- Near real-time, automated data updates/sync between Tipalti and ERP with error handling. ERPs such as:



### File-based Integration via CSV file import/export

- **Standard Sync:** User-initiated data updates/sync between Tipalti & ERP
- **AutoSync:** Periodic, automated data updates/sync between Tipalti & ERP
- ERPs and accounting systems including:



Some ERPs require a third-party connector—these connectors are not required by Tipalti but by ERP systems that do not have native import/export CSVs. Tipalti's team of experts will help identify the third-party connectors.

Recommended Criteria	Standard Sync	AutoSync
Invoice volume per month	Less than 200	More than 200
Invoice and payment processing frequency	Weekly/bi-weekly	Daily or a few times per week
PO Matching	Not Required	Required
Client's ERP partner or IT resources	Limited	Yes
Use custom template	No	Yes

## Overview of File-based integration

Tipalti's File-based ERP integration uses CSV (comma-separated values) files to export and import text files of data between Tipalti and your ERP. CSVs are a universal file type that many systems support and companies have experience managing. It has several benefits, including quick templates update to combine files and basic logic. It is quick to apply all file objects and data at once. You can also resolve sync errors in actual files.

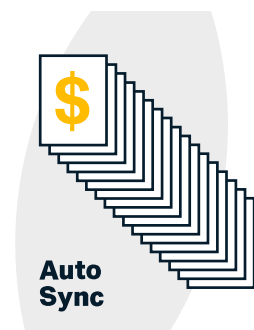
File-based integration can be configured to sync from Tipalti to your ERP in Standard Sync) with minimal user involvement and automatically (AutoSync), depending on the requirements of your AP workflows, payment and invoice processing volume, and budget for IT resources.

### Standard Sync is recommended for the following criteria:

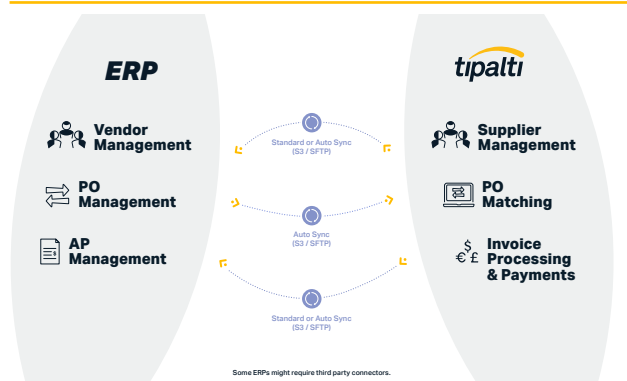
- Processing 100-200 invoices per month weekly/bi-weekly
- No PO matching is required
- ERP supports imports of all objects, including Payees, Bills, Payments, and Vendor Credits
- Limited ERP Partner or IT resources
- The AutoSync cost is not in the client's budget

### AutoSync is recommended for the following criteria:

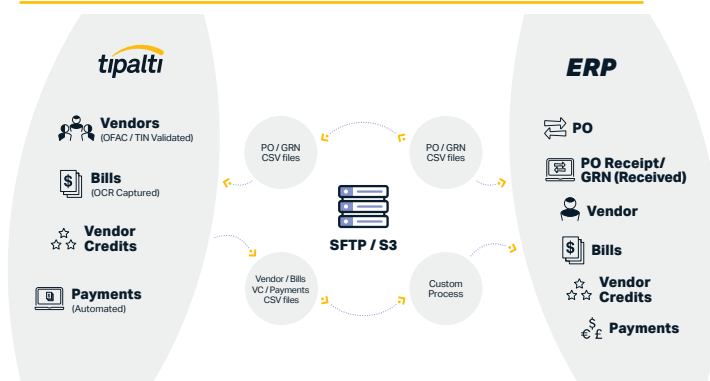
- Processing large numbers of invoices/payments on a frequent basis
- PO matching is required
- Use a custom template
- ERP Partner or IT resources are available



## ERP Integration Flow



## AutoSync Architecture



## Standard Sync Overview

The Standard Sync solution is suitable for customers who do not require frequent AP updates in their ERPs. The integration is a data file import/export sync process between Tipalti and the ERPs. Tipalti has many ERP integration templates available to use, allowing flexible mapping to meet the customer's specific data needs. Uploads with all objects are initiated by the user on an ad hoc frequency and **takes less than 10 minutes to complete.**

For ERP without templates, Tipalti's Integration Manager will do a feasibility assessment to scope with the customer and ERP partner. A new template typically takes a week to generate with test environment access and assuming no other gaps/blocks are found.

For ERPs with custom CSV integrations, Tipalti's Integration team will provide expertise on additional work that may be required by the customer.

## AutoSync Overview

AutoSync integration is the same data file import/export as the Standard Sync integration, but the sync process between Tipalti and the ERP is automated at specific intervals. AutoSync is the data transferring process that uses the SFTP or S3 file transfer protocol.

AutoSync automates generating the files and delivering them to a secure location, and reversely, collecting files and ingesting them into the Tipalti AP Hub. The same automation is required on the ERP side for the customer to complete the AutoSync process.

## How AutoSync works

- Set up the SFTP or S3 secure location
- System to archive every file that has been imported and exported in and out of the customer's system (for audit purposes)
- System to support CSV files for import/export
- System to process the data file, before the next scheduled import
- System to automatically trigger bill and payment posting, trigger PO updates (automatically update purchase order quantity and PO status)
- A basic sync error handling to manage sync error function is required.

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**2000+**  
 deployments 10+ years,  
**a proven methodology**

Number of global payees  
**4M+**  
 196 countries, 120 currencies,  
 6 payment methods, **global remittance**

Transactions over  
**\$36B+**  
 in annual global payments,  
**licensed money transmitter**

Customers swear by us  
**98%**  
 customer satisfaction rate,  
**up and running quickly**



**Tipalti's team of experts is ready to work with you to integrate Tipalti with your ERP & accounting system.**

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