

# Strategic automation through human connection

Customized API-based EDI integration with your Acumatica Cloud ERP



Your Enterprise Resource Management (ERP) system is the lifeblood of your business processes, facilitating your operations across every department within your organization.

## But what about your interactions with partners *outside* of your organization?

## Powerful and automated ERP & EDI integration

At Vantree, we help you efficiently, reliably, and automatically import and export documents to and from your trading partners with Electronic Data Interchange (EDI), using the same Acumatica Cloud ERP interface that you work with every day.

The results are **improved data accuracy, faster data exchanges, and improved operational efficiencies.**

You have **more visibility** into your data, **fewer errors** in shipping and billing, and you **increase the speed** by which you send and receive documents and data with your trading partners.

## The value of Vantree

We deliver automation engagements through human connection. Driven by a partner-for-life ethos and a relentless curiosity, we craft strategic automation engagements – delivered through a hands-on, human approach – that support and drive your business, and empower your growth through loyalty and long-term relationships.

### UNPARALLELED SERVICE

We aim to go above and beyond what you expect. We do what it takes to ensure that you trust that we understand your business.

**We strive to be the best vendor you have ever partnered with.**

### ADVANCED TECHNOLOGIES

Our proprietary software allows us to develop customized solutions that lead to deeper integrations, in less time.

**We strive to deliver technologies that give you a competitive advantage.**

### INDUSTRY EXPERTISE

Our steadfast focus on the future keeps us ahead of trends and helps us to exceed your expectations. Our boundless creativity is driven by a deep passion for innovation.

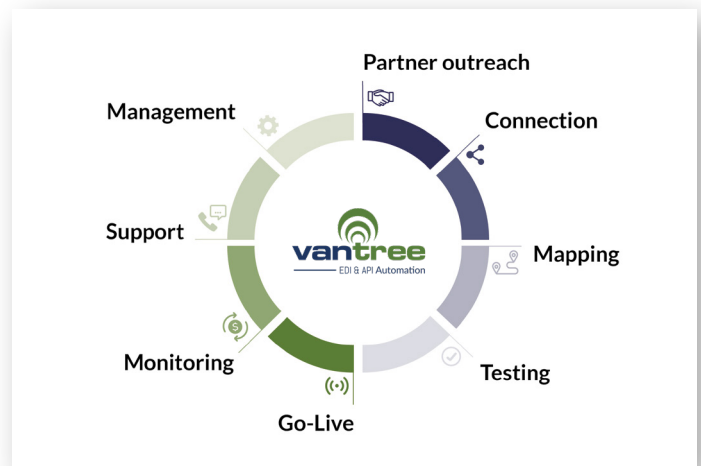
**We strive to help you see further.**

## A different way of doing business

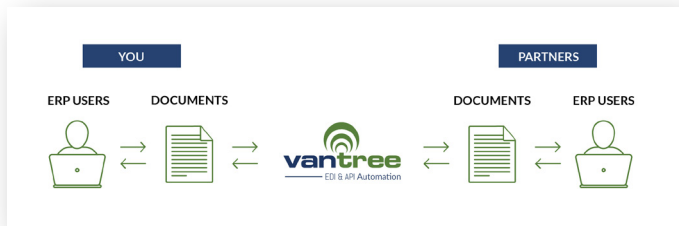
Our teams work as an extension of your teams: they'll know your business inside and out and will be with you for the lifetime of our partnership. They work with you to fully customize your solution for deep integration, based on your business, your trading partners, and your document needs.

You'll have worry-free 24/7 visibility into your critical data, as we take care of the end-to-end management throughout your entire project lifecycle.

- **OPTIMIZE YOUR WORKFLOWS** with increased efficiency.
- **STRENGTHEN YOUR RELATIONSHIPS** with cleaner data, fewer errors, and faster reaction times.
- **INVEST IN YOUR FUTURE** by anticipating growth, freeing up resources, and future-proofing your business.



## Vantree & Acumatica Cloud – How it works



The core of our integration solution is the Vantree Connectivity Suite (VCS), which sits between you and your trading partners and automates the integration, translation and delivery services of EDI and non-EDI documents to and from your Acumatica Cloud ERP.

### Any document, from any partner

Our hands-on, personal approach and proprietary software allows our team to design a fully customizable solution for your company, down to each trading partner relationship and each document type. Any environment. Any trading partner. Any document.

Invoice	→	810 Invoice
Sales Order	←	850 Purchase Order
Ship File	→	856 Ship notice/Manifest
Debit/Credit Memo	←	812 Credit/Debit Adjustment
Cash Receipt	→	820 Payment Advice
Purchase Order Acknowledgement	←	855 Purchase Order Acknowledgement
Sales Order	←	860 Purchase Order Change Request
Pick-List/Sales Order	→	940 Warehouse Shipping Order
Delivery	←	945 Warehouse Shipping Advice
Invoice	→	882 Summary Invoice
Inventory – Goods Receipt	←	944 Warehouse Stock Transfer Receipt Advice
Purchasing – A/P Goods Receipt PO	→	943 Warehouse Stock Transfer Shipment Advice
Item Master/Warehouse Inventory	←	846 Inventory Report

## Familiar interface, simple functionality

With all functions fully integrated into your familiar Acumatica Cloud ERP there's no new interface to learn, and our automated processes and the intuitive layout of your Vantree tab make it simple to import, analyze, and process incoming documents.

### Most common automation/validation rules

- Allow Duplicate Order
- Check Discount Threshold
- Validate EDI Price to Finance and Operations Price
- Match EDI Unit of Measure to Sales Unit of Measure Lookup Price
- Populate Customer Specific Packaging from Item Master into Sale Orders

For example, the Summary Tile section in the Vantree Workspace shows 2 documents that are processed and 1 with an error. With Vantree, the actions required for each instance are intuitive and easy to complete. You have full visibility into your data and any errors or omissions in that data as well as full control over correction and processing.

The screenshot shows a 'Processing' summary tile. It indicates 'Processing completed with errors, 00:00:14 Elapsed'. Below this, there are five summary boxes: '2 Processed' (green), '1 Errors' (red), '0 Warnings' (grey), '0 Remaining' (grey), and '3 Total' (grey). A 'CLOSE' button is located at the bottom right of the tile.

## Powerful insights, actionable intelligence

Your Vantree tab is your command center within Acumatica Cloud ERP, allowing you to easily receive, validate, and send any inbound and outbound documents from/to trading partners, 3PL, e-commerce, and drop ship companies on your behalf. You can also quickly view reports of your EDI transfers and modify your Vantree webservice configuration when required.

The screenshot shows the Acumatica Vantree workspace. The left sidebar has a 'Vantree' tab selected. The main content area is titled 'Vantree' and contains three sections: 'Automated Operations' with 'Vantree Import' and 'Vantree Export' options, 'Configuration' with 'Vantree Webservice Configuration', and 'Reports' with 'Vantree Transfers'. A search bar is visible at the top.

## Getting started

We've been a trusted EDI solutions provider since 1994, specializing in complex EDI integrations for manufacturing and distribution, and have a strong embedded solution with Acumatica Cloud ERP. We have deep experience working with 1,000+ trading partners worldwide, and we're ready to work with you.

Visit [Vantree.com](http://Vantree.com) today to learn more about empowering your organization's growth and better supporting your overall business objectives.