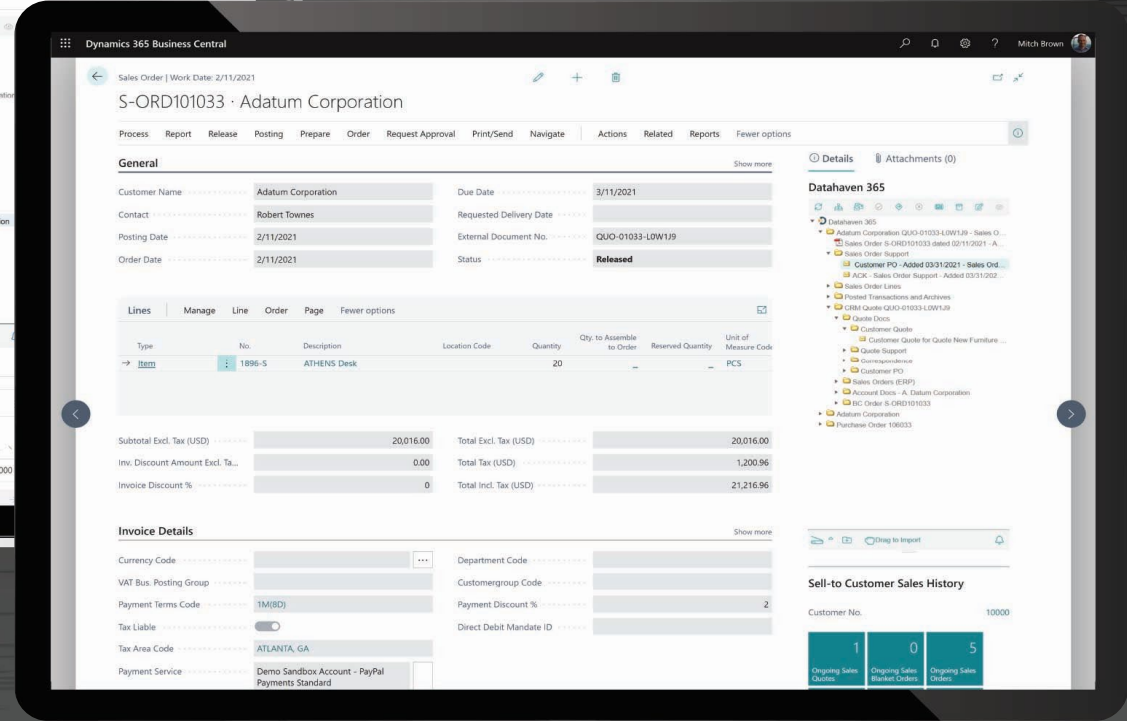
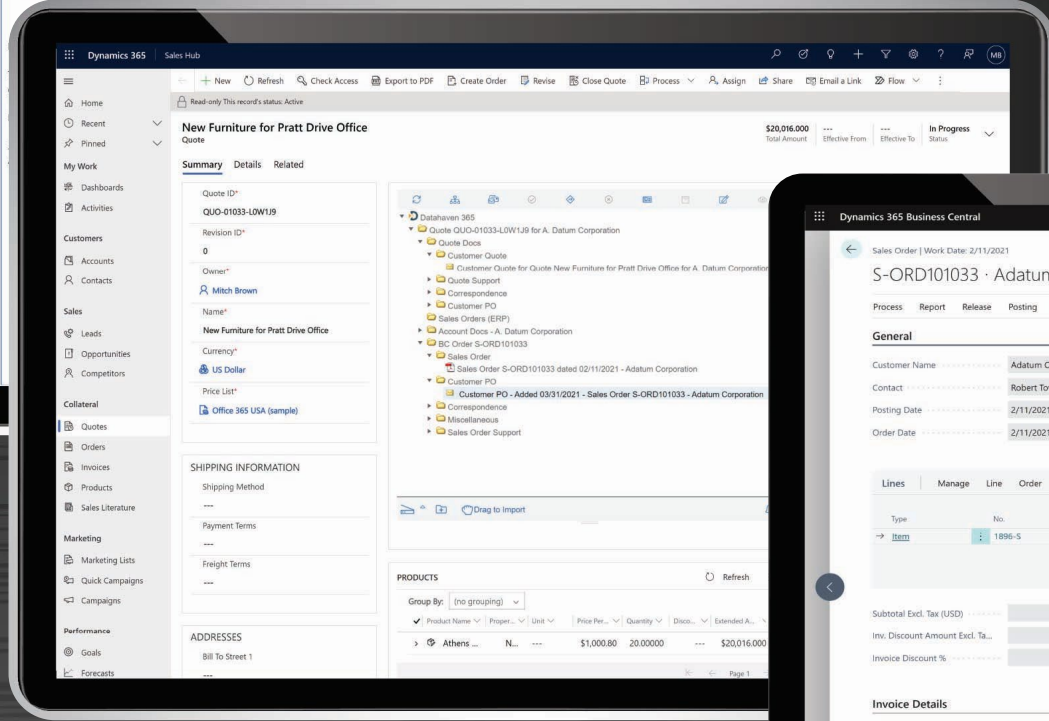
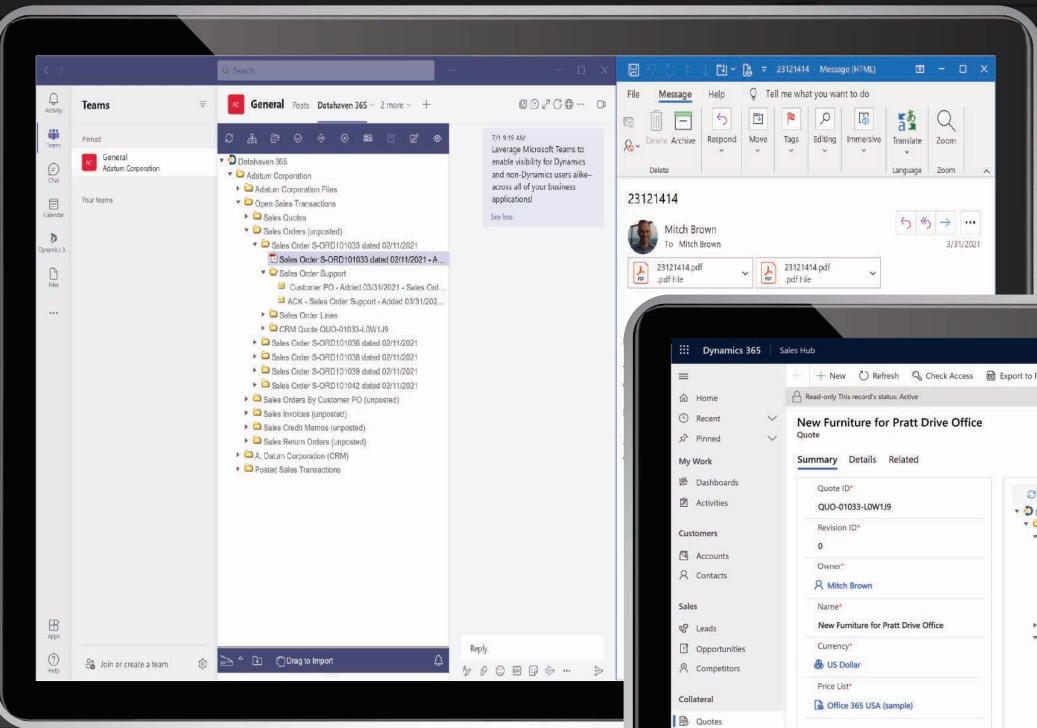


# OMG!!!

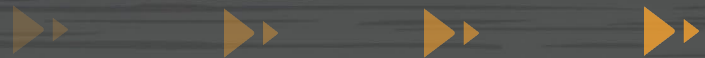
Oh my gosh!!

# WTF???

Where's the file??



## AP automation is just the start...



# Datahaven

Paperless Redefined

Mitch Brown,  
Director of Sales

[MBrown@TorrentialData.com](mailto:MBrown@TorrentialData.com)

757.502.8345

# Agenda



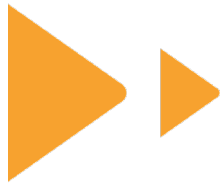
Company  
History



Wasting  
Time?



Differentiating  
Datahaven



Datahaven  
Demo



ROI



Questions  
and Answers

# “BD” (1995-2010)



# “AD” (2011 – Today)

amazon.com

Quidsi

BILLY GRAHAM  
Evangelistic Association



DISPLAYS2GO

EspriGas  
A TMG Company

GREENLEAF  
COMPACTION  
Waste and Recycling Equipment

gogo<sup>®</sup> COMMERCIAL AVIATION

gogo<sup>®</sup> BUSINESS AVIATION



HOLLY HUNT

Kamco  
SUPPLY CORP.

Gourmet<sup>™</sup>  
TRADING COMPANY

KOBRAND  
FINE WINE AND SPIRITS

Latshaw  
DRILLING



OTTO<sup>®</sup>

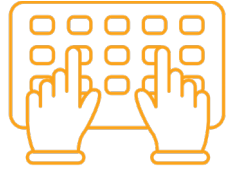
Rhodes  
BAKE N SERV

Samaritan's Purse<sup>®</sup>  
INTERNATIONAL RELIEF

RIVERSTONE<sup>SM</sup>

TalkingRain

# Wasting time with documents and email?



Entering Data

3.8 hours (14.6%)



Filing & Organizing

4.0 hours (15.3%)



Approving

6.3 hours (24.1%)



Searching

12.0 hours (46.0%)

# Wasting time with documents and email?



3.8 + 4.0 + 6.3 + 12.0

26.1 hours per week

Source: IDC





# When you think of Datahaven 365...

Think Universal



Embed across  
your ecosystem

Think Deep



Embrace every  
department

Think Efficient



Automate  
the mundane

Think Simple



Simplify  
the complex

When you think of Datahaven 365...

Think Universal

# Embed across your universe of applications

- ▼ Datahaven for Dynamics
  - ▼ ACME Corp.
    - ▼ CRM Transaction Files
      - Leads
      - ▼ Opportunities
        - Jet pack bulk purchase
        - Sales Quotes
    - ▼ ERP Transactions
      - ▼ Open Sales Transactions
        - ▼ Sales Orders
          - ▼ Sales Order ORD-1002
            - Customer PO
            - Item Documentation
            - Order Lines
          - Sales Order ORD-1003
          - Sales Order ORD-1004
        - Sales Invoices
        - Sales Credit Memos
        - Posted Sales Transactions
    - ▼ Teams Channels
      - ▼ Roadrunner Tracking
        - General
    - ▼ Power Apps

# Embed across your universe of applications

Dynamics 365 Business Central

CRONUS USA, Inc. | D4D Datahaven ▾ Sales ▾ Purchasing ▾ Inventory ▾ Posted Documents ▾ Setup & Extensions ▾ | ≡

Customers: All ▾ | Search + New Delete Process ▾ Report ▾ New Document ▾ Customer ▾ Navigate ▾ Open in Excel More options

No. ↑	Name	Responsibility Center	Location Code	Phone No.	Contact	Balance (\$)	Balance D
01121212	Spotsmeyer's Furnishings		YELLOW		Mr. Mike Nash	0.00	
01445544	Progressive Home Furnishings		YELLOW		Mr. Scott Mitchell	2,461.00	
01454545	New Concepts Furniture		YELLOW		Ms. Tammy L. McDonald	0.00	
01905893	Candoxy Canada Inc.		YELLOW		Mr. Rob Young	0.00	
01905899	ACME Corp.		YELLOW		Mr. Ryan Danner	0.00	
01905902	London Candoxy Storage Cam...		YELLOW		Mr. John Kane	0.00	
10000	The Cannon Group PLC	BIRMINGHAM	BLUE		Mr. Andy Teal	255,797.35	
20000	Selangorian Ltd.				Mr. Mark McArthur	147,258.97	76
20309920	Metatorad Malaysia Sdn Bhd		YELLOW		Mrs. Azleen Samat	0.00	
20312912	Highlights Electronics Sdn Bhd		GREEN		Mr. Mark Darrell Boland	0.00	
20339921	TraxTonic Sdn Bhd		YELLOW		Mrs. Rubina Usman	0.00	

Details Attachments (0)

Datahaven for Dynamics

- Datahaven for Dynamics
  - ACME Corp.
    - CRM Transaction Files
      - Leads
      - Opportunities
        - Jet pack bulk purchase
      - Sales Quotes
    - ERP Transactions
      - Open Sales Transactions
        - Sales Orders
          - Sales Order ORD 1002

**BUSINESS CENTRAL**

# Embed across your universe of applications

The screenshot displays the Microsoft Dynamics 365 user interface. At the top, the navigation bar shows 'Dynamics 365' and 'Sales Hub'. The breadcrumb trail indicates the current location: 'Sales > Accounts > ACME Corp.'. The main header area features the 'SANDBOX' title and a set of utility icons. Below this, a secondary toolbar contains actions like 'Save', 'Save & Close', 'New', 'Open Org Chart', 'Deactivate', 'Connect', 'Add to Marketing List', 'Assign', 'Email a Link', 'Delete', and 'Refresh'. The central content area is divided into three main sections:

- Left Panel (Navigation):** Includes 'Home', 'Recent', 'Pinned', 'My Work' (Dashboards, Activities), 'Customers' (Accounts, Contacts), and 'Sales' (Leads, Opportunities).
- Account Information:** A table listing details for 'ACME Corp. Account':

Account Name	* ACME Corp.
Phone	757-GET-MEEP
Fax	---
Website	https://GetRoadRun...
Parent Account	---
Ticker Symbol	---
- File Explorer:** Shows a hierarchical view of files under 'Datahaven for Dynamics', including folders for 'ACME Corp.', 'CRM Transaction Files' (with sub-folders for Leads and Opportunities), 'ERP Transactions', and 'Open Sales Transactions' (with sub-folders for Sales Orders and Customer PO).
- Right Panel:** Contains an 'Assistant' section with the message 'No notifications or suggestions' and a 'Primary Contact' section which is currently empty.

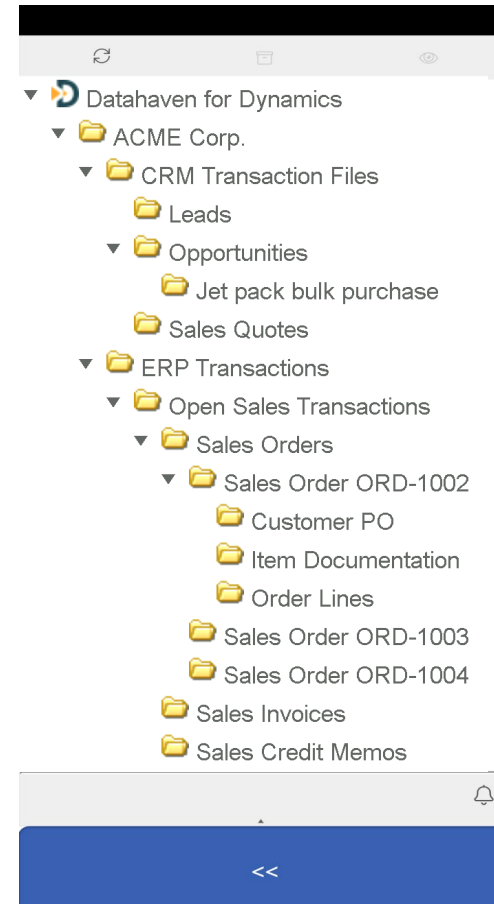
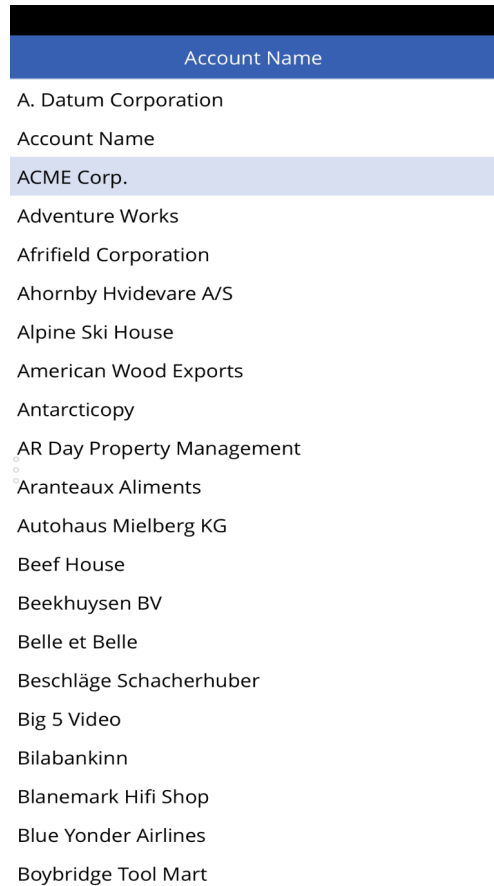
**MICROSOFT CRM**

# Embed across your universe of applications

The screenshot shows the Salesforce CRM interface for an account named 'Acme'. The top navigation bar includes 'Sales', 'Home', 'Accounts', 'Opportunities', 'Cases', 'Leads', 'Tasks', 'Files', 'Contacts', 'Campaigns', 'Dashboards', 'Reports', 'Chatter', 'Groups', and 'More'. A search bar is located at the top right. The account details section includes fields for Type (Prospect), Phone ((212) 555-5555), Website, Account Owner (Datahaven Tech), Industry (Manufacturing), and Billing Address (10 Main Rd., New York, NY 31349 USA). Action buttons for '+ Follow', 'Edit', 'Change Owner', and 'Delete' are visible. Below the details, there is a 'Related' section with tabs for 'Details' and 'News'. A message states: 'We found no potential duplicates of this Account. No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.' A 'Contacts (3)' section is also visible. On the right side, there is a sidebar with a tree view showing the account structure: 'Datahaven for Dynamics' > 'ACME Corp.' > 'CRM Transaction Files' > 'Leads', 'Opportunities', 'Sales Quotes', 'ERP Transactions', and 'Open Sales Transactions'.

**SALESFORCE CRM**

# Embed across your universe of applications



**POWER APPS**



# Embed across your universe of applications

When a record is updated

Environment: TDS Demo (datahavendemo)

Entity Name: Quotes

Scope: Organization

Attribute Filters Item - 1: statuscode

+ Add new item

Hide advanced options ^

Condition

Status Va... x is equal to 1

+ Add v

If yes

PUT documents record-route

recordId: Quote x

typeName: crm:Microsoft.Dynamics.CRM.quote

dataAreald:

to: 76

customNote:

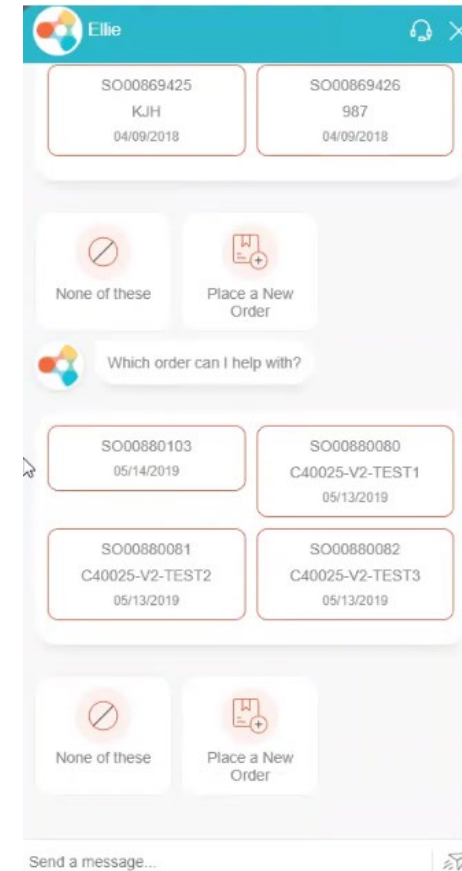
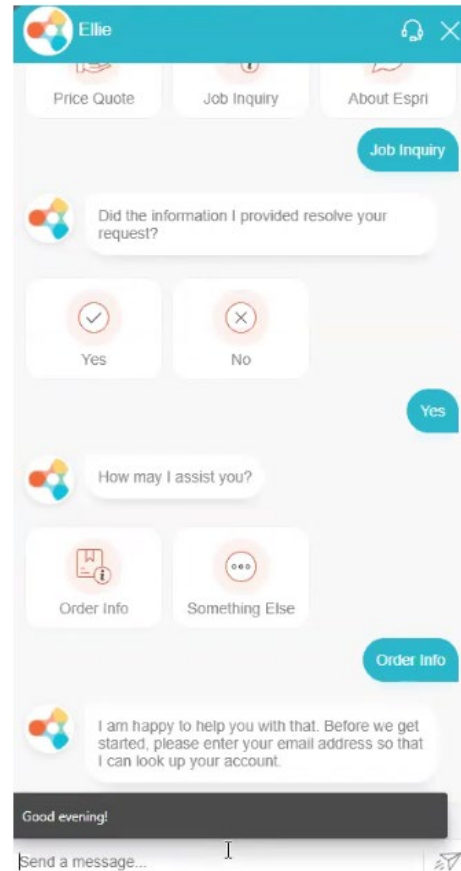
Add an action

If no

Add an action

**POWER AUTOMATE**

# Embed across your universe of applications



**POWER VIRTUAL AGENT**

# Embed across your universe of applications

The screenshot displays the Microsoft Teams interface. At the top, the header shows 'Microsoft Teams', a search bar, and the user profile for 'Torrential Data Solutions Inc'. The left sidebar contains navigation icons for Activity, Teams, Chat, Calendar, Dynamics 365, and Files. The main area shows the 'General' channel of a team. A welcome message reads: 'Welcome to the team! Here are some things to get going...'. Below the message are three circular icons with corresponding buttons: 'Add more people' (with a plus sign and people icons), 'Create more channels' (with a book and notepad icon), and 'Open the FAQ' (with a question mark and a person icon). The right sidebar shows a file explorer view for 'Datahaven for Dynamics', containing folders for 'ACME Corp.', 'CRM Transaction Files', 'ERP Transactions', and 'Open Sales Transactions', with sub-folders like 'Leads', 'Opportunities', 'Sales Orders', and 'Sales Order ORD-1002' through '1004'.

**TEAMS**

When you think of Datahaven 365...

Think Deep

# Deep Into Every Department

Assets  
Banking  
Customer Service  
Field Service  
Finance  
Fixed Assets

Human Resources  
Items  
Jobs  
Journals, Ledgers  
Marketing  
Project Operations

Payables/Purchasing  
Receivables  
Sales  
Shipments  
Supply Chain  
Warehousing

...and every application



Custom  
Extensions



ISV  
Extensions



Datahaven  
RESTful API

When you think of Datahaven 365...

Think Efficient



# AP Automation

OCR

“*Datahaven and its advanced OCR features enable us to process over 250,000 documents each month with fewer than five FTEs while cutting document cycle times by half.*”

David Bailey, Controller  
Exel Logistics (a subsidiary of Deutsche Post)

# Automation of Naming & Filing



“ Removing the document naming chore from our employees' hands led to more reliable data and better reporting. We like to think of Datahaven 365 as the “Gentle Enforcer” for our company.

Rebecca Glaser  
Enterprise Applications Manager  
Samaritan's Purse

# Think Efficient...and Simple



“ Datahaven gives each user **instant visibility** into all of the documents and emails needed to do their job.

Victor Dierckson  
IT Manager, Talking Rain Beverage Co.

“ We are now able to access every document, file, and form generated in the course of business and **instantly answer** questions from our customers.

Dean Ubriaco  
Director of Operations & IT Kobrand Corporation

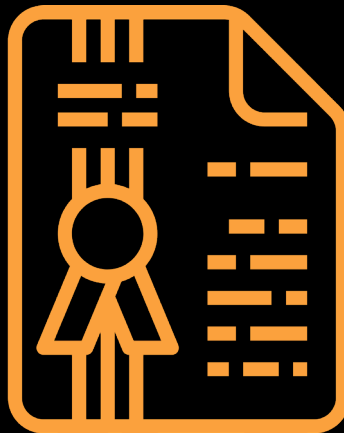
When you think of Datahaven 365...

Think Simple

# Take the complex...



# ...and make it simple



U.S. Patent No.: 9,046,993  
Other patents pending

- ▼ ▶ Datahaven 365
  - ▼ 📁 Vendor Files
    - ▼ 📁 Agreements
      - 📄 Master Services Agreement dated 11/12/2022
    - ▼ 📁 Correspondence
      - ✉ Correspondence received 11/19/2022
    - ▶ 📁 Miscellaneous
    - ▼ 📁 Tax Forms
      - 📄 W-9 dated 10/20/2022
  - ▼ 📁 Open Purchase Transactions
    - ▶ 📁 Purchase Quotes
    - ▼ 📁 Purchase Orders
      - ▼ 📁 Purchase Order 104002 dated 11/22/2022
        - 📄 Purchase Order 104002 dated 11/22/2022
      - ▼ 📁 Purchase Order Support
        - 📄 Vendor Acknowledgement received 11/23/2022
      - ▼ 📁 Purchase Order Lines
        - ▶ 📁 Datahaven 365 View + Approve User (20)
        - ▶ 📁 Datahaven 365 Processor User (5)
        - ▶ 📁 Datahaven 365 AP Automation with OCR (1)
    - ▶ 📁 Purchase Order 106028 dated 12/13/2022
    - ▶ 📁 Purchase Order 106042 dated 12/20/2022

50

Minot

11



# The “so what” of a virtual folder structure...



**Maximize visibility** of transactions in one (and across multiple) systems



**Enhance flexibility** by allowing users to use folders in the UI they prefer



**Improve consistency** when folders are named the same way and contain the same content



**Accelerate navigation** by using folders to open records across applications



**Reduce training** because we embed an intuitive folder structure inside of applications users already know



**Better security and compliance** with support for Delegation of Authority and SOX principles such as segregation of duties

“Datahaven is one kick-ass solution.

Jim Bentley, VP Business Development, Greenleaf  
Compaction (a Waste Management subsidiary)







Annotations



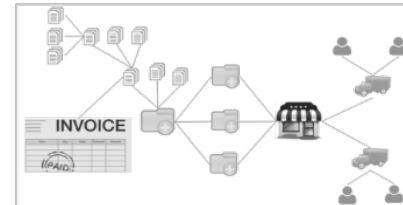
Archiving



Auditing



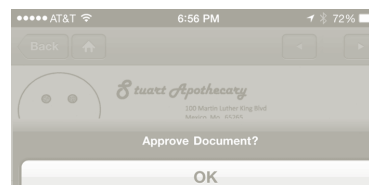
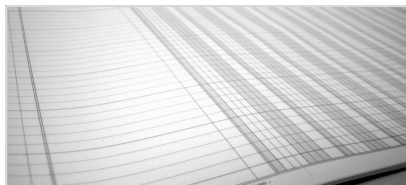
Barcoding



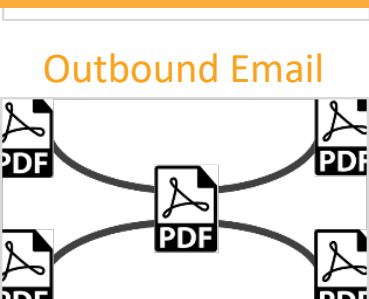
Deep Data Linking™



Drag-and-drop



# Datahaven 365 offers 450+ document-centric features



Outbound Email

Split & Merge



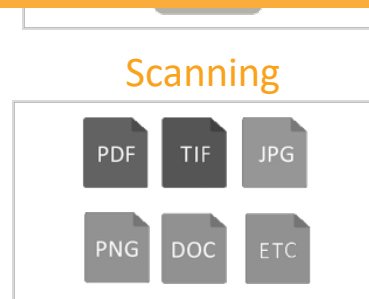
Outlook

Storage



Redactions

Subtypes



Scanning

Viewing



Search

Virtual Folders



Security

Workflow



### Maximum Visibility

“ Having a ‘single source of truth’ for all information about a transaction is a huge advantage. Everyone in the company has a consistent user interface that gives them access to the same data alongside the same documents, emails, and other electronic files. That’s one of the biggest benefits.

Erol Fikri, Director of Supply Chain, Displays2Go



### More Savings

“ We reduced our file cabinet storage requirements in the office and off-site storage by 70% since using Datahaven.

Dean Ubriaco, Director of Operations & IT, Kobrand Corporation



### Subtly Enforce Policies

“ Removing the document naming chore from our employees' hands led to more reliable data and better reporting. We like to think of Datahaven 365 as the “Gentle Enforcer” for our company.

Rebecca Glaser, Gogo



### Better Compliance

“ Datahaven 365 magically displays only what an employee is permitted to see according to our security matrix. This protects our customer's information and avoids disclosure of sensitive information that could create internal conflicts or violate our obligations under Sarbanes-Oxley.

Luanne Ruddy, Director, Operations & Integrated Business Planning - Commercial Aviation



### Increased Efficiency

“ Datahaven and its advanced OCR features enable us to process over 250,000 documents each month with fewer than five FTEs while cutting document cycle times by half.

David Bailey, Controller, Exel Logistics (a subsidiary of Deutsche Post)

# Next steps

- Discuss the benefits of electronic document management with you're your partner or a member of the Datahaven 365 team
- Request the ROI calculator
- Arrange a personalized one on one demonstration
- Download a trial from AppSource

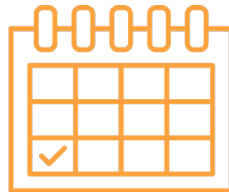


# Datahaven

Paperless Redefined



Free Trial on AppSource



Schedule a demo or a  
call to discuss your  
requirements



Calculate ROI

Mitch Brown

MBrown@TorrentialData.com

757.502.8345