

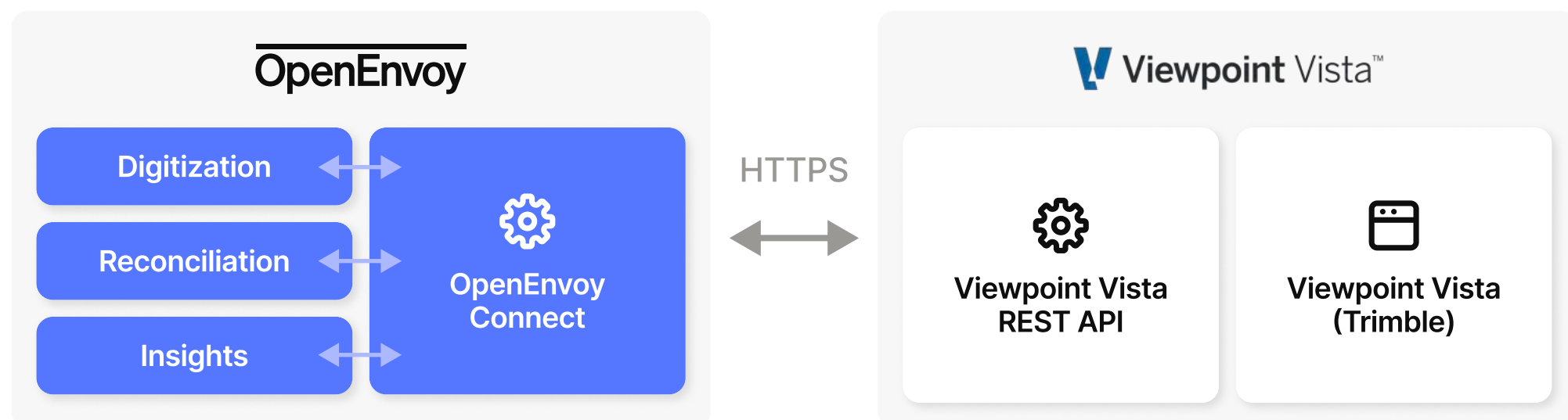
Viewpoint Vista (Trimble)

OpenEnvoy seamlessly connects with Viewpoint Vista (Trimble) using REST API.

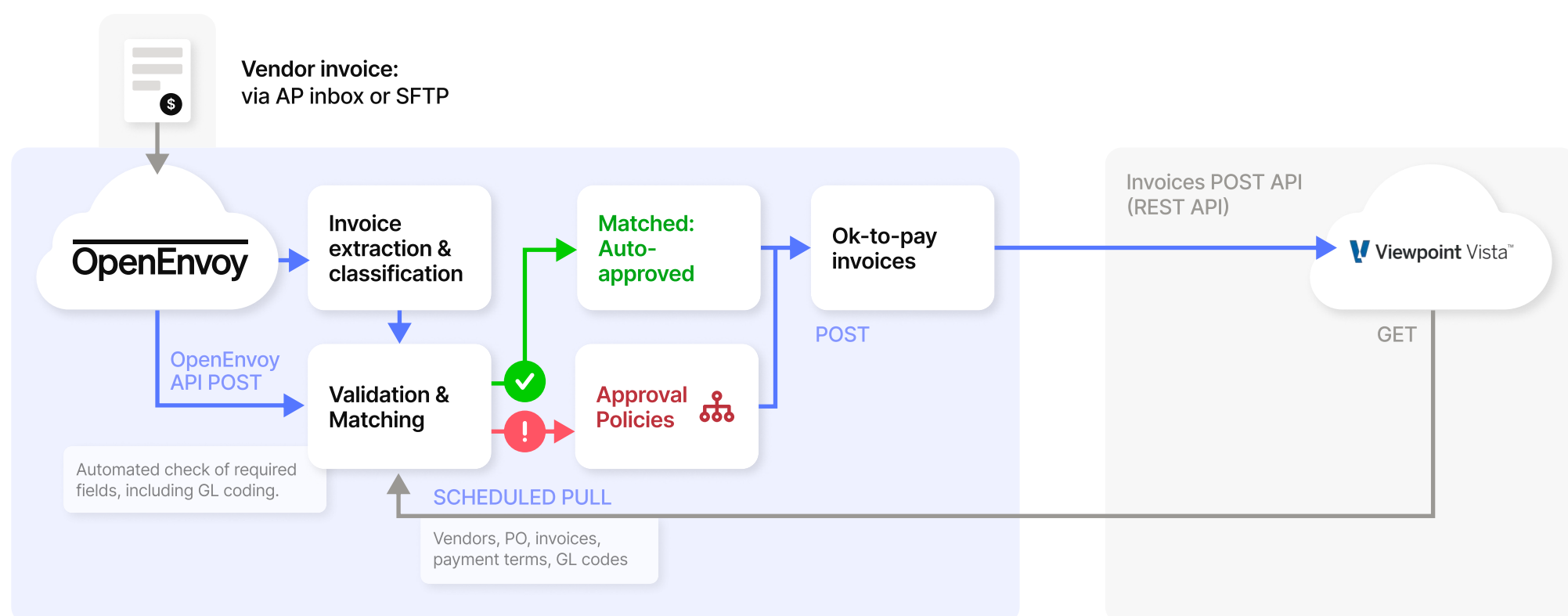
The Connect feature facilitates the smooth transfer of both master and transactional data from your organization's tenant to OpenEnvoy. This solution establishes a bidirectional transactional integration between OpenEnvoy and Viewpoint Vista, with a strong emphasis on security across all integration aspects. Additionally, our out-of-the-box deployment is designed to minimize the need for extensive IT involvement.

The connector employs industry-standard, REST-based API calls to ensure secure and real-time inbound and outbound data transfers. Notably, it incorporates audit log tracking functionality that retains records of all inbound and outbound requests and the data payload received and sent. This comprehensive tracking extends to instances of invoice request failures within Viewpoint Vista. This integrated approach ensures your seamless connection and enhances the efficiency of your invoicing process through the OpenEnvoy Viewpoint Vista Connector.

INTEGRATION OVERVIEW



VIEWPOINT VISTA (TRIMBLE) INTEGRATION ARCHITECTURE



Viewpoint Vista (Trimble)

INTEGRATIONS

Key process flows

- Viewpoint Vista is the system of record for all master data, transferred at a configured frequency to OpenEnvoy so it is always up to date.
- Master data consists of payment terms, vendors, GL Codes, and purchase orders, which flow in one direction, from Viewpoint Vista to OpenEnvoy.
- Invoice data flows are one-directional. Once invoices are fully processed (after ingestion, coding, matching, and validations), they are then transmitted to Viewpoint Vista. A subsequent transmission relays a status report detailing the outcome (success or failure) of invoice ingestion into Viewpoint Vista back to OpenEnvoy.

Planning steps

1. Initiate the integration process by creating a sandbox environment for testing purposes.
2. Conduct user acceptance testing (UAT) to validate the accuracy of the integration in correctly entering data, comparing it to your team's current methods.
3. Use this phase to identify and verify any specific details or internal practices related to data entry, ensuring that OpenEnvoy performs accurately.
4. Upon receiving approval, transition to the production phase, which will involve implementing change management on to discontinue manual invoice data entry.
5. Cease the existing manual process and change entry operations to OpenEnvoy's system.

Frequently asked questions

How often is master data synchronized from Viewpoint Vista (Trimble) into OpenEnvoy?

The synchronization of master data occurs on a scheduled basis, which is determined during the implementation phase.

What IT resources are needed to integrate OpenEnvoy with Viewpoint Vista (Trimble)?

Each integration requires the involvement of only the business process owner and an Viewpoint Vista specialist. No IT personnel are required.

The connector enables the exchange of the following transaction and master data elements:



- Payment terms
- Supplier Master (Vendor Master)
- GL Codes
- Purchase Order
- GRN/POD
- Invoices/Credit Notes

Minimal impact to IT staff



- With full access to the sandbox environment, OpenEnvoy handles all essential permission and access level configurations.
- Production access configuration aligned with the stipulated requirements of the sandbox environment.