

# Microsaas Automated Invoice Automation

AI-Powered Invoice Automation for Finance Teams

Mike Dhall  
Founder

Microsaas Tech Corp  
166 Geary St STE 1500 Suite #518,  
San Francisco,  
California 94108

Mobile: +1-416-904-4360

Email: [mike.dhall@mcrsaas.com](mailto:mike.dhall@mcrsaas.com)





# AI-Powered Invoice Automation for Finance Teams

## Agenda

<b>Problem</b>	The costly and inefficient reality of manual invoice processing.
<b>Solution</b>	Our AI-powered Automated Invoice Processing SaaS.
<b>Product Overview</b>	Live demo screens showcasing Upload, Review, Approval workflows.
<b>Market Opportunity</b>	\$1.2B underserved mid-market segment ready for disruption.
<b>Business Model</b>	Scalable SaaS subscription by invoice volume tiers.
<b>Go-To-Market Strategy</b>	How we plan to acquire pilots and scale customer acquisition.
<b>Competition and Differentiation</b>	Why we win against SAP VIM, Stamplicy, Rossum, and others?
<b>Team</b>	Founder expertise and strategic fit for this market.
<b>Fundraising Ask</b>	\$300K SAFE at \$9M Cap to fuel MVP and pilot acquisition.
<b>Next Steps</b>	Timeline, key milestones, and how investors can participate.

# The Problem

Manual invoice processing remains slow, expensive, and error-prone — even for companies using advanced ERP systems like SAP and Dynamics.

## Key Pain Points

<b>High Operational Costs</b> Finance teams manually key in invoice data, leading to \$10–\$20 per invoice processing costs.	<b>Slow Approvals and Payment Cycles</b> Manual reviews cause delayed approvals, missing early payment discounts, and damaging supplier relationships.	<b>Human Errors and Compliance Risks</b> Mistakes in amounts, tax rates, and GL coding lead to audits, compliance failures, and financial loss.	<b>ERP Complexity for Mid-Market Companies</b> Solutions like SAP VIM or Ariba are heavy, expensive, and over-engineered for mid-sized companies.	<b>Limited Use of AI in Current Processes</b> Most finance teams lack AI-powered tools that can extract, validate, and process invoice data automatically.	<b>Poor Visibility and Tracking Across Finance Teams</b> Manual and email-driven invoice approvals create fragmented workflows, lost documents, and no centralized dashboard for AP status tracking.
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## Market Data Points

- Over 25% of invoices globally are still processed manually, even in companies running SAP and Microsoft Dynamics. (Source: IOFM)
- Manual AP processing errors cost businesses up to 1.5% of total invoice value annually. (Source: Ardent Partners)
- Mid-market companies report 40% slower invoice approval times without automation. (Source: PayStream Advisors)

## Impact on Finance Teams

- Wasted thousands of staff hours annually
- Increased risk of late payment penalties
- Frustrated vendors and damaged business relationships
- Higher finance operational costs, cutting into margins
- Lack of audit-ready, centralized invoice data

## Problem in One Sentence

*"Manual invoice processing is still a hidden operational tax on mid-market companies, slowing finance teams, wasting money, and exposing them to compliance risks — because ERP-native solutions are too heavy, and lightweight AI-driven alternatives are missing."*

# The Solution

An AI-powered, modular Invoice Automation SaaS designed specifically for mid-market SAP and Dynamics users — reducing costs, accelerating approvals, and improving finance visibility without the burden of heavy ERP customization.

## Key Features

<b>AI-Driven Invoice Data Extraction</b> Automatically captures key fields from uploaded PDFs (supplier name, invoice number, amounts, tax rates, PO numbers) using Azure Document Intelligence.	<b>Smart Review and Validation Workflow</b> Side-by-side PDF preview and editable extracted fields enable fast human review and correction if needed.	<b>Approval Routing and Workflow Automation</b> Role-based workflows for AP clerks, managers, and finance leads — no need for email-based approvals.	<b>Real-Time Dashboard and Reporting</b> Centralized dashboard showing invoice statuses: Pending Review, In Approval, Approved, Rejected — improving finance tracking and audit readiness.	<b>ERP-Friendly, Lightweight Integration</b> Ability to export validated invoice data into SAP, Dynamics, NetSuite, or any ERP via API or flat file upload — no heavy IT customization needed.	<b>Multi-Tax Support and Automatic Tax Validation</b> Detects applicable tax rates (e.g., GST, VAT, HST) directly from invoice content and flags discrepancies automatically during the review stage.
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## Key Advantages

<b>Deploy in Weeks, Not Months</b> Minimal setup — pilot launch ready in 2–4 weeks compared to 6+ months for SAP VIM/Ariba projects.	<b>Flexible, Modular Pricing</b> Pay based on invoice volume tiers; scale affordably with growth.	<b>Mid-Market Focus:</b> Designed for mid-sized companies often ignored by SAP and Oracle heavy solutions.	<b>Azure-Native AI Backbone</b> Built fully on Microsoft's Azure AI stack — ensuring enterprise-grade security, scalability, and performance.	<b>SAP Fiori / Material UI User Experience</b> Familiar, intuitive UX reduces training effort for finance teams already using SAP or Dynamics.	<b>Designed for Rapid Compliance Readiness</b> All extracted and approved invoice data is audit-trail ready by design — making tax compliance, internal audits, and financial reporting much faster and easier.
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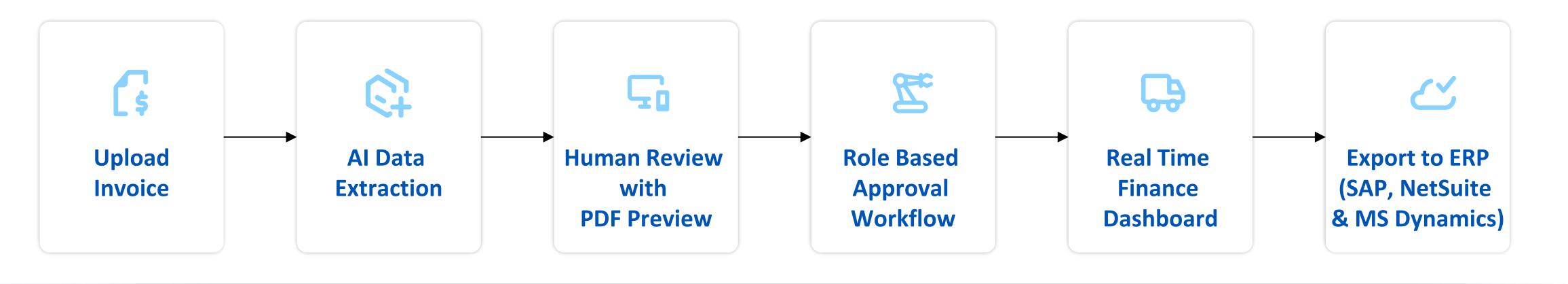
## Solution in One Sentence

*"We automate invoice processing from upload to approval with AI-powered extraction, human-in-the-loop validation, multi-tax support, and real-time dashboards — helping mid-market companies break free from manual processes without the cost and complexity of traditional ERP automation tools."*



# Microsaas Product Overview






We have built AI-powered invoice automation platform for mid-market SAP and MS Dynamics users — targeting a \$1.2B underserved market. Our solution automates invoice upload, extraction, validation, approval, and ERP integration. Fast deployment, modular scalability, and real-time finance insights create a capital-efficient, high-growth SaaS opportunity for investors with clear demand and strong ARR potential.



## Microsaas Modules

Upload Invoice	AI Data Extraction	PDF Review & Smart Validation	Approval Workflow	Analytics Dashboard	ERP Export & Integration
Drag-and-drop or bulk upload PDF invoices; secure cloud storage; triggers AI extraction automatically.	Microsaas Document Intelligence extracts key fields (supplier name, invoice number, PO number, amounts, tax rates).	Inline PDF viewer next to editable fields; human reviewers can quickly validate or correct extracted data.	Role-based routing (AP Clerk → Manager → Finance Lead) with full audit trails and notifications.	Track KPIs: pending invoices, cycle times, approved values. Real-time finance visibility across invoice statuses.	Export validated invoices through APIs or flat files to SAP, Dynamics 365, NetSuite, and others.

## Why Finance Teams Love it?

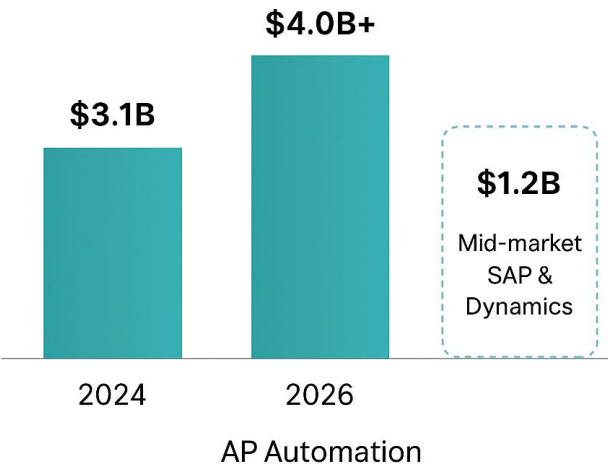
 Deployed in Weeks	 Modular Setup	 AI-First, Not Template-Based	 Built on Azure + SAP Fiori UX	 Designed for Compliance
Fast implementation — go live in weeks, not months like SAP VIM.	Start with invoice upload and review; scale up to full automation at your pace.	Learns invoice formats dynamically; reduces dependency on rigid templates.	Enterprise-grade security, seamless scalability, and intuitive user experience.	Real-time audit trails and tax validation built into every step of the workflow.



# Revenue Model – Subscription-Based SaaS

The global shift toward finance digitization is accelerating — and invoice automation is now a top priority for CFOs looking to reduce cost, error, and time.

- Global AP Automation Market:**
  - \$3.1B in 2024, growing at 12–15% CAGR (expected to exceed \$5B by 2028)  
*(Source: Ardent Partners, Markets and Markets)*
- Manual Processing Still Dominant:**
  - Over 25% of AP invoices globally are still processed manually
  - Companies lose up to 1.5% of invoice value annually due to delays, errors, and lost discounts  
*(Source: IOFM, PayStream Advisors)*
- CFO Priorities Shifting:**
  - 80% of finance leaders plan to automate AP processes by 2026  
*(Source: Gartner Finance Research)*



## Our Focused Niche: Midmarket SAP & Dynamics Users

Segment	Characteristics
Revenue	\$50M-750M annual revenue
ERP	SAP ECC, S/4HANA, Microsoft Dynamics 365, NetSuite
Geography	North America, Europe, Middle East
Industry	High Tech, Banking & Insurance, Manufacturing, Healthcare, Services
Pain	Costly ERP add-ons (VIM, Ariba), slow approvals, no real-time insights

### Market Sizing Example

- ~50,000 mid-market SAP/Dynamics customers globally
- Assume 10% addressable = 5,000 target accounts
- Average ARR per customer: \$10K–\$40K
- \$50M–\$200M obtainable ARR within 5–7 years

### Why This Market Is Ready Now?

- Cloud ERP adoption is accelerating (SAP S/4HANA, D365)
- Global e-invoicing mandates and compliance pressure (Europe, GCC)
- AI investment and budget allocation in finance departments
- Finance teams want automation without IT-heavy implementations

## Opportunity in Summary

- This is a large, growing, and deeply underserved segment. We're not boiling the ocean — we're laser-focused on a high-intent, high-value niche.*
- This is a high-margin, fast-growing segment with clear pain and buying intent. Rather than chasing the entire market, we're executing a focused strategy on an underserved, high-value niche — where we can win fast, scale efficiently, and deliver strong recurring revenue growth."*



# Revenue Model – Subscription-Based SaaS

We operate a tiered SaaS subscription model, with pricing based on the number of invoices processed per year. The platform is modular, enabling companies to start small and expand usage over time — driving natural upsell and strong net revenue retention.

## Pricing Tiers

Tier	Invoice Volume	Annual Price (ARR)	Use Case
<b>Starter</b>	Up to 10,000 invoices/year	\$12K-\$15K	For lean finance teams getting started with Automation
<b>Growth</b>	10K-50K invoices/year	\$25K-40K	Mid-sized companies scaling AP operation
<b>Enterprise</b>	50K+ invoices/year	\$60K-\$120K+	Multi-entity or multi-country operations with higher volumes

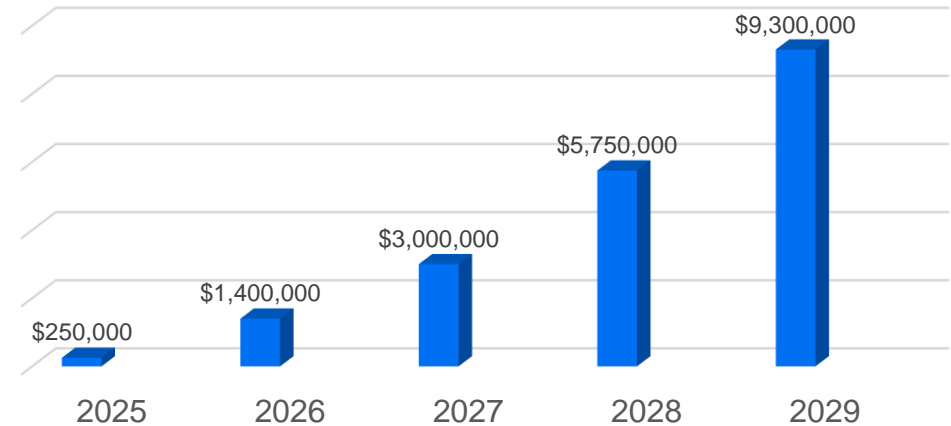
## Monetization Strategy

- ARR-Driven: Subscription model ensures recurring revenue with high gross margins (80%+ target).
- Land and Expand: Start with invoice upload + review modules, grow into approval, dashboards, ERP integration.
- Low CAC via Product-Led Growth: Frictionless pilot → upgrade to paid.

## Add-On Monetization:

- Supplier onboarding
- PO 3-way matching
- Tax compliance engine
- ERP connector packages

## 2025-2029 ARR Growth



## ARR Growth Assumptions

- Avg ARR grows with adoption of more modules
- Customer base grows via outbound + channel partners
- Net retention lifts value per customer over times

## How we score ARR?

- Apollo.io + LinkedIn outbound → pilot wins
- Partner programs with SAP/Microsoft + Azure Marketplace
- AP and finance automation events
- Account expansion post-pilot through added modules

## Revenue Model in Summary

*Our capital-efficient, scalable SaaS model captures a fast-growing, underserved mid-market, driving high-margin recurring revenue, strong customer retention, and predictable ARR growth to maximize long-term investor returns.*



# Go-To-Market Strategy

Focused, capital-efficient go-to-market strategy to validate early, scale rapidly, and capture the underserved mid-market finance automation opportunity

## Phase 1: Pilot Launch & Validation (0–6 Months)

- Target Early Adopters:
  - Mid-market SAP and Dynamics users (\$50M–\$500M revenue)
  - Industries: Tech, Manufacturing, Healthcare, Services
- Pilot Acquisition Channels:
  - Direct outbound via Apollo.io and LinkedIn targeting CFOs, Controllers, Finance Directors
  - Warm intros through professional networks and SAP ecosystem partners
  - Offering 60–90 day pilots with seamless onboarding
- Pilot Incentives:
  - Discounted first-year pricing
  - Free setup and onboarding support
  - Early adopter testimonials in exchange for discounts

## Phase 2: Commercial Launch & Scale (6–18 Months)

- Sales Strategy:
  - Direct SaaS sales (founder-led initially)
  - SDR (Sales Development Rep) support via Apollo.io for lead generation
  - Account-based marketing (targeting companies by ERP type and invoice volume)
- Marketing Strategy:
  - Thought leadership content (LinkedIn posts, whitepapers on AP automation)
  - Presence on Azure Marketplace
  - Co-sell partnerships with Microsoft CSPs (Cloud Solution Providers)
- Event Strategy:
  - Attend and exhibit at GITEX, SAP Sapphire, and IOFM
  - Webinars: "Modernizing AP Processes with AI" targeting finance teams

## Phase 3: International Expansion (18–36 Months)

- Focus Regions:
  - North America, Europe (DACH, UK, Nordics), UAE/GCC
- Localized Versions:
  - Multi-currency and multi-tax capabilities for European and Middle Eastern invoicing
- Channel Development:
  - SAP SI (System Integrator) partners
  - Azure Consulting Partners
- Partnerships:
  - SAP PartnerEdge Program
  - Microsoft ISV Success Program

## Key Metrics to Track GTM Success

Pilot-to-Paid Conversion Rate	CAC (Customer Acquisition Cost) Payback	Lead-to-Customer Close Rate	Customer Retention Rate	Average Sales Cycle Length
50%+	< 12 months	> 20%	> 90% annually	< 60 days

## GTM in Summary

***Our Go-To-Market strategy is highly focused: start with pilot validation, scale with proven outbound and strategic partnerships, and expand internationally by leveraging finance transformation trends and ERP cloud adoption.***

# Competition and Differentiation

Winning where legacy platforms are too heavy and modern tools are too shallow — delivering the right solution for an underserved, high-growth mid-market.

## Key Competitors

Competitor	Focus Area	Gaps
SAP VIM (Vendor Invoice Management)	Heavy enterprise-grade AP automation for large SAP customers	Expensive, complex to deploy (6–12 months), overkill for mid-market
SAP Ariba	Procurement + Invoice network (B2B marketplace)	Focused on supplier networks, not AP automation workflows
Stampli	Payment-first AP automation for SMBs	Weak ERP integration, mainly standalone or QuickBooks focus
Rossum.ai	AI OCR Invoice Data Extraction	Limited beyond OCR; lacks complete approval workflows and ERP readiness
ABBYY FlexiCapture	Intelligent Document Processing (IDP)	Requires extensive configuration and technical setup, no finance-specific UX

## Our Differentiation Strategy

Area	Our Advantage
Deployment Speed	Launch pilots in 2–4 weeks (vs. 6–12 months for VIM/Ariba)
Mid-Market Focus	Specifically built for SAP/Dynamics mid-sized companies (underserved niche)
End-to-End Workflow	Full cycle: Upload → AI Extraction → Human Validation → Approval → ERP Export
Azure Native	Flat file and API export designed specifically for SAP, Dynamics, NetSuite integration
Modular and Affordable	Start small (upload + review) and expand modules as finance maturity grows

## Positioning Summary

- **SAP VIM and Ariba** are too heavy and costly for mid-market finance teams.
- **Rossum and ABBYY** offer extraction but **no true AP workflow integration**.
- **Stampli** is lightweight but lacks true ERP integration readiness.

*We combine the best of AI-driven automation, ERP-friendliness, and modular scalability — without the heavy cost, complexity, or time-to-value barriers that legacy and SMB tools face.*



# Founding Team

**Built by an enterprise insider who knows the pain — and exactly how to solve it at scale.**

## Mike Dhall – Founder & CEO

- 25+ years of experience leading global SAP transformations across Fortune 500 clients
- Previously delivered multi-million-dollar SAP S/4HANA, Ariba, and finance automation programs across North America, Europe, and the Middle East
- Deep functional expertise in Accounts Payable, Procurement, ERP integration, and Fiori UX
- Former advisor to SAP and Microsoft partners; understands mid-market buyer needs deeply
- Founder of a successful SAP advisory business generating \$550K+ annual revenue
- MBA (Ivey Business School), SAP Activate Certified

*“I have lived the AP automation pain — from SAP VIM deployments to failed Ariba rollouts — and built exactly what I wished existed.”*

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## Advisory Board

- **Finance Automation Advisor:** AP Automation Implementation Leader from SAP (committed and engaged)
- **Azure Partner GTM Advisor:** ex-Microsoft Partner Channel Strategist (committed)
- **SaaS Growth Advisor:** Serial B2B SaaS Founder with \$10M+ ARR exit (early-stage mentor)

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## Why We’re the Right Team?

- Deep domain expertise in SAP, Azure, and finance workflows
- Strong execution track record in enterprise delivery + SaaS prototyping
- Founder has existing network and access to first 10 pilot prospects
- Smart use of resources: outsourced dev + founder-led GTM for capital efficiency
- Ready to build team with Product, Sales, and Engineering hires post-funding

# Fundraising Ask & Use of Funds


***Raising \$300K to turn a validated prototype into a revenue-generating SaaS business — built to scale, priced to win, and ready to capture a \$1.2B opportunity.***

## Our Raise

We are raising \$300,000 on a SAFE (Simple Agreement for Future Equity) with a \$9M Valuation Cap and 20% Discount.

- Instrument: Y Combinator SAFE
- Maturity: No fixed maturity, no interest
- Conversion: Upon next priced equity round or liquidity event
- Optional: Open to strategic angels, co-investors, or early customers

**SAFE – Key Terms**

 **SAFE**

<b>Valuation Cap</b>	\$9,000,000
<b>Discount</b>	20%
<b>Maturity</b>	None
<b>Interest</b>	None
<b>Conversion</b>	Equity financing or liquidity event

## Use of Funds

Category	% Allocation	Key Activities
Product Development	40%	Expensive, complex to deploy (6–12 months), overkill for mid-market
Go-to-Market Execution	30%	Apollo.io campaigns, outbound SDR support, landing 5–10 pilot customers
Engineering & DevOps	15%	Contractor team for backend/API, PDF viewer, Azure AI tuning
Legal, Compliance & IP	10%	Legal review, SAFE management, IP protection, entity setup in target regions
Contingency/ Buffer	5%	Unexpected scope, pilot support, cloud service spikes

## Milestones This Round Will Achieve

- ☒ Launch production-ready MVP with ERP-ready invoice export
- ☒ Secure 5–10 pilot customers with clear conversion roadmap
- ☒ Build investor-ready SaaS KPIs: MRR, CAC, Retention
- ☒ Prepare for Seed Round with validated product-market fit
- ☒ Position for Azure Marketplace listing and Microsoft GTM support

## What we offer Investors

- Clear capital efficiency (low burn, high build velocity)
- Massive market with underserved niche focus
- High-margin, recurring revenue SaaS model
- Experienced founder with deep domain credibility
- Strong ARR expansion potential after pilot traction

## In Summary

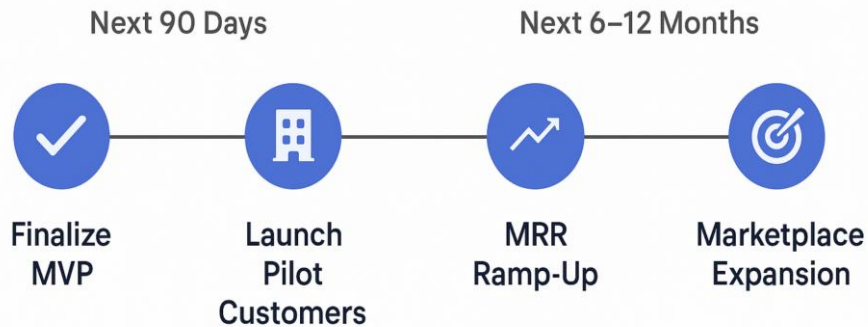
***“We’re building a capital-efficient, high-retention SaaS platform targeting a \$1.2B+ mid-market gap — and this round gets us from MVP to repeatable revenue.”***



# Next Steps

*From MVP to Revenue in 90 Days — with a clear, focused plan to scale intelligently and deliver investor returns.*

## Timeline



## Next 90 Days (Post-Funding Close)

- ✓ Finalize MVP
  - Add approval routing, ERP export module, and multi-tax logic
  - Complete internal QA and partner review
- ✓ Launch 3–5 Pilot Customers
  - Signed pilot agreements with target SAP/Dynamics mid-market companies
  - Deliver onboarding, AI model tuning, and success tracking
- ✓ Refine Key Metrics
  - Monitor invoice throughput, review-to-approval time, accuracy score, pilot-to-paid conversion
- ✓ Publish Product Collateral
  - Launch marketing site, pilot case study, and LinkedIn thought leadership content

## Next 6–12 Months

- 🚀 Convert Pilots to Paid Accounts
  - Target 50%+ conversion from pilot to ARR
  - Upsell additional modules (e.g., PO matching, dashboards)
- 📈 Begin MRR Ramp-Up
  - Grow to \$15K–\$25K MRR with 10+ paying customers
- 🎯 Marketplace & Channel Expansion
  - Azure Marketplace listing
  - Activate Microsoft/Azure CSP and SAP SI partnerships
- 🧠 Team Growth (Post-Raise)
  - Contract Product Designer & Sr. Engineer
  - Hire part-time SDR for GTM acceleration

## Funding Timeline

- Investor conversations: [Current Month]
- SAFE close target: [+30 days]
- Product dev completion: [+45–60 days]
- Pilot launches: [+60–75 days]
- Seed round planning: Q1/Q2 2026 (post-revenue traction)

## In Summary

***“We’re building lean, executing fast, and laser-focused on turning early pilots into real revenue within 90 days.”***

Contact information:

**Mike Dhall**

Founder

Microsaas Tech Corp

166 Geary St STE 1500 Suite #518,

San Francisco,

California 94108

Mobile: 416-904-4360

Email: [mike.dhall@mcrsaas.com](mailto:mike.dhall@mcrsaas.com)

