

# PT-X Connect for Microsoft Dynamics 365 for Finance and Operations

Organisations deploying an ERP system such as Microsoft Dynamics 365 need to spend time converting existing documents and creating new documents. This includes invoices, statements of account, credit notes, order agreements, product labels, delivery notes, purchase orders, remittance advices and even cheques.

Large organisations typically have to manage multiple templates for the same document across different business entities, geographic regions and product lines. Differing business requirements can impact the content and presentation of each document.

Legislation, such as data protection (GDPR), and compliance obligations impact how companies use, maintain and store documents.

## **Document management capabilities**

PT-X Connect for Dynamics 365 - a powerful cloud-based document management solution - has been designed specifically for customers of Microsoft Dynamics 365 for Finance and Operations. A fully integrated solution, it enables customers to reduce the time required for implementing Microsoft Dynamics 365, and minimise the IT effort required whilst benefiting from world class document design and management capabilities.

Creating and maintaining documents and forms becomes simple and straightforward with superior functionality for designing, delivering and archiving documents. An estimated 66% saving in development time compared to using Microsoft's SQL Server Reporting Services (SRSS) ensures you remain on schedule and on budget for going live on your Microsoft Dynamics 365 project.



PT-X Connect eliminates the need for SSRS skills and customers benefit from:

- Rapid document creation and distribution
- Easy, off-the-shelf document design capabilities over SSRS technical coding
- Ability to email, print and preview documents without leaving the Dynamics 365 environment
- Proof of delivery and receipt for business critical documents
- A first class user experience for customers and suppliers
- Secure, online storage and automated archiving according to your business rules
- Enhanced collaboration opportunities

## Simple and efficient document design

Organisations typically use a Bottomline consultant or an accredited Microsoft partner to create initial document templates. However, using PT-X's document design capabilities, business users can create, design and manage all branded and unbranded document templates.

A familiar Windows interface along with project assistants and template wizards ensures users can design documents with the minimum of effort, eliminating complexity and reducing development timescales.

Designed and formatted templates are then uploaded to PT-X Connect for Dynamics 365 and associated with a profile for document creation and delivery in the cloud. The solution supports a rapid, iterative approach using real-time data to facilitate design and testing without the need for formal specifications, ensuring a better user experience. Features include:

- An Expression Logic Builder enables layouts to be changed dynamically to add messages or personalise the document
- Dynamic pagination tools display correct headers and footers according to each document section (first page, continuation and last page), resizing as required
- Support for 150 different types of barcodes to track documents and print product labels for manufacturing and logistics processes
- Deploy forms into different regions with international spell checkers and support for ASCII and Unicode standards
- Externally designed documents can be imported using XML Paper Specification (XPS) standards for further editing in PT-X

## Powerful and flexible document creation

PT-X Connect for Dynamics 365 uses a Connector to deliver a seamless, integrated experience for the user enabling documents to be rendered and formatted efficiently. It requires no special software or hardware and can be installed quickly ensuring that you can preview, print or email documents directly from within the Microsoft Dynamics 365 environment, without needing to log in to a separate system. PT-X Connect then manages the resulting document output distribution.

The Connector additionally allows documents to be enriched using other Bottomline solutions such as PrecisionForms Extended. PrecisionForms Extended can combine Microsoft Dynamics 365 data with external data sources ensuring they use the most up to date operational, financial or market data. It also allows you to configure advanced workflows, archive documents locally and print your documents to secure 'on demand' printers which is not possible using SSRS.

Documents can be created as PDF files which are easily shared with your customers and suppliers. Advanced PDF technologies are available such as interactive forms, audio tagging and embedding data such as images, HTML, CSV and XML files.



## How it Works





*Full database backups occur every 4 hours and complete transaction logs every 30 minutes*

## Secure document storage

The repository in PT-X Connect for Dynamics 365 provides secure, 24x7 online document storage. Undelivered documents can be resent with ease and the customer and user experience is enhanced with self-service for accessing current and historical documents. The solution enables you to meet compliance requirements for regulated processes along with your own corporate policies. Documents are stored for as long as required for business purposes and then automatically deleted which helps meet GDPR commitments.

Retrieve documents from PT-X's secure storage facility when they are created. This means that users can access a copy of the original PDF in Dynamics 365 and publish it externally using the Dynamics 365 portal, SharePoint Online or Azure.

The PT-X Connect repository is replicated to Bottomline's separate Disaster Recovery data centre in real time. Full database backups occur every 4 hours and complete transaction logs every 30 minutes ensuring complete peace of mind for the safety and security of your documents.

## Flexible document distribution

PT-X Connect for Dynamics 365 sends documents according to your own business rules and the document profile. Documents can be emailed as attachments or as unique links for the customer or supplier to download. Documents can be securely printed from the cloud to any onsite printer using PT-X Link.

By tracking engagement rates in real-time you have immediate visibility over how recipients interact with transactional documents. The powerful Insights Dashboard highlights potential bottlenecks or items at risk, allowing you to proactively act on delivery failures and unopened email. This can help to shorten payment timescales, improve cash flow and ensure timeliness for goods received.



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*Bottomline estimates that as many as 5-10% of business documents go undelivered. Additionally, 30-50% of documents are not opened, printed or downloaded which can cause delays and unnecessary business risk. Developing greater visibility over your documents is a vital step in improving the effectiveness of your business communications.*

## Exploit collaboration opportunities

PT-X Connect facilitates flexible collaboration opportunities with customers and suppliers. A discussion area allows recipients and senders to ask questions and manage disputes within the context of the document preventing process delays and shortening resolution times. Each conversation is captured and stored for audit purposes.

Any recipient who receives a document from PT-X Connect can register for self-service enabling secure online retrieval of documents such as policies or quotes. Any queries can be flagged and addressed efficiently leading to faster resolution, delivering estimated savings of 98% compared to managing queries over the telephone.

The use of interactive forms allows data to be captured and processed automatically, streamlining back office processes and improving efficiency.

## Security and resilience

Bottomline Technologies has been an innovator in business payment automation technology for 30 years providing solutions to some of the world's largest banks and enterprises. PT-X Connect for Dynamics 365 is hosted within the same infrastructure supporting these solutions. Accredited to ISO 27001 standards, the data centre offers the very highest levels of security, resilience and Disaster Recovery. PT-X Connect applies stringent security policies to data storage and access to customer information using Digital Certificates and SSL Encryption.

## Conclusion

The PT-X Connect for Dynamics 365 solution is a powerful cloud based document management solution for Microsoft users that want a convenient and trouble free way of creating, personalising, delivering and storing business documents. Fully integrated with Microsoft Dynamics 365 for Finance and Operations, it offers a simplified user experience and sophisticated document design capabilities yet remains impressively easy to use.



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