

Seamless Invoice Management
that Accelerates AP Processing

Bottomline Invoice Automation for Microsoft Dynamics 365

According to the Institute of Finance and Management, only 25% of accounts payable departments describe their invoice processing as being “highly automated”. AP remains challenged by a blizzard of paper and document-based invoices handled with inefficient and manual processes that introduce risk and limit speed, accuracy, and controls critical to successful payables management.

In addition, most corporate AP functions need to maintain and regularly interface with an ERP for general ledger and budget management. The ideal solution not only delivers best-in-class invoice automation but also includes real-time ERP integration for an extremely immersive user experience versus siloed solutions.

Leverage Your Investment in Microsoft Dynamics 365

Bottomline Invoice Automation for Dynamics 365 enables organizations to replace their manual processes with a completely automated invoicing solution delivered within Dynamics 365. It provides AP departments with enhanced governance, automation, and operational visibility around PO and non-PO invoice processing.

Starting with a next generation image and data capture platform, Bottomline provides a seamless solution for the receipt, storage, and processing of both expense and inventory invoices from any authorized source. Validated invoices are stored within Dynamics 365 and presented for either automated PO line capture and matching, or automated non-PO general ledger coding and approval routing. Bottomline uniquely leverages the existing Microsoft Dynamics 365 for Finance and Operations cloud framework to evaluate rules and corporate governance, a marked contrast from competitive solutions that are built outside of the ERP.

From capture through payment, invoice events and related participants are audited for use within an actionable analytics and reporting experiences, including self-service document retrieval. The entire offering is immersive and employs real-time integration which allows licensed ERP users to work within their familiar Dynamics 365 screens and helps maintain a low ownership cost.

KEY BENEFITS



Immersive and
Real-Time Dynamics 365
Integration



Improve Visibility and
Control



Eliminate Paper Invoices
and Manual Processes



Maximize Straight-
Through Processing



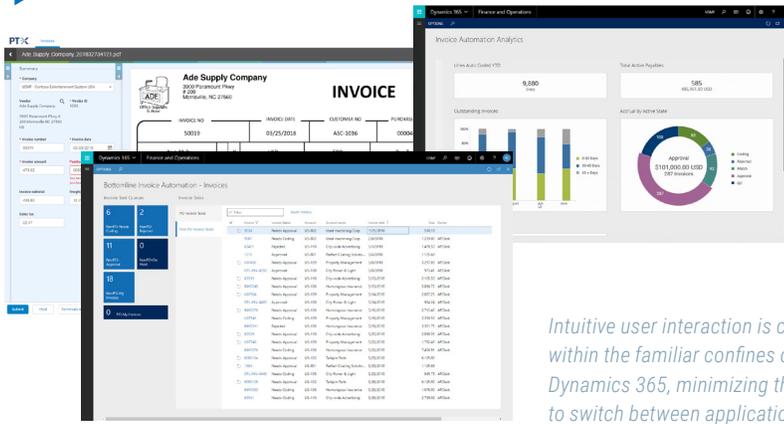
Quicker Approvals with
Mobile Support



Capitalize on Available
Early Payment Discounts



Reduce Costs, Errors,
and Risk



KEY CAPABILITIES

Captures and Stores Invoices:

- Receive and process paper and electronic invoices from any source, including D365 Collaboration Portal
- Digital mailroom manages invoices and supporting documents
- OCR, machine learning, and real-time validation reduces manual data entry
- Invoices and supporting documents accessible within and external to ERP

Automates Workflows and Approvals:

- Delivered within D365 to significantly extend the capabilities of your ERP
- Immersive user experience within familiar Dynamics 365 workspace
- Flexible approval workflow that is easily maintained by business users
- Automate 2-way and 3-way reconciliation with both PO header as well as line-item capture and matching
- Automate PO exception handling for resolution and approval
- Automate GL code entry and approval routing of non-PO invoices
- Flexible PO and non-PO approval workflows with notifications, reminders, and escalation visibility
- Mobile review and approvals

Operational Visibility:

- Audit trail of all activities, status updates, rule changes, and user comments
- Analytics and reporting provides KPI tracking to operational goals
- Timely accrual reporting at both summary and detail level
- Extensible PowerBI-based dashboards and reports

Why Bottomline?

As a global leader for nearly three decades in business payment automation technology, Bottomline has deep domain expertise and is a trusted advisor of AP and Microsoft Dynamics best practices.

Bottomline Invoice Automation for Microsoft Dynamics 365 provides several differentiating capabilities that fuel efficiencies and let you:

- Provide role-tailored experiences both within and outside of Dynamics 365
- Enhance classification of invoices and supporting documents with machine learning via digital mailroom
- Maximize accuracy by reconciling invoices with related receipts and purchase orders using automated line capture and intelligent data matching
- Drive efficiency gains with zero-touch scenarios for both PO and non-PO invoices due to innovative workflow and posting automation
- Get a real-time pulse of operational status and identify process improvement opportunities with interactive dashboard and reporting
- Enable mobile review and approval of invoices from any device
- Deploy rapidly via the cloud with quick time-to-value and no expensive customization or training required

Bottomline enables businesses to automate the end-to-end invoice to pay process. In addition to invoice automation, Bottomline also offers Paymode-X, a full-service integrated payables solution which combines a 400,000+ member network of vendors accepting electronic payments with comprehensive vendor onboarding services to enable businesses to accelerate check elimination, reduce costs, and earn rebates on virtual card and ACH spend.



Learn how Bottomline can help you overcome the cost, time, risk, and errors associated with paper documents and manual processes

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