

AP AUTOMATION FOR MICROSOFT DYNAMICS 365



Reduce manual work and increase visibility across AP

Take control of your accounts payable (AP) processes, speed up the approval and posting of invoices and maintain visibility into your transactions with AP automation from Hyland. Leveraging industry-leading Brainware intelligent capture and OnBase technology, Hyland complements Microsoft Dynamics 365 for Finance and Operations to capture, manage and provide access to critical information alongside your AP records.

Hyland AP automation captures invoices at their source, whether they are scanned or delivered electronically. Intelligent capture automates the extraction of data contained in the invoices, making them available for processing quickly and without manual keying of

information. Documents and indexing values are fully integrated with the Dynamics 365 system, so that content is immediately available for users and invoices can be processed using Dynamics 365 processes or Hyland workflow automation as required.

REDUCE PAPER DEPENDENCY TO DECREASE MANUAL WORK EFFORT

When invoice documents are captured, Hyland uses advanced data collection (OCR) to find critical values. Lifted data from the invoice image is automatically validated against vendor and PO data from Dynamics 365. Not only does this validate the indexing values, but it also allows Hyland to leverage the existing data in Dynamics 365 to index and classify the imported document. This expedites the document processing and ensures that the data is complete even when the desired values are not readable, or even present, on the document.

Imaged invoices, as well as other related documents, are then securely stored in a digital library and can be accessed directly corresponding AP records. Staff no longer have to physically search for payment information. They quickly retrieve invoices, goods receipts, packing slips, check images, vendor contracts and even historical correspondence directly from the Dynamics 365 screen with a few mouse clicks. Users can then utilize document management features like built-in related document views, revision and version control, and detailed histories.

FLEXIBLE WORKFLOW OPTIONS

Workflows in either the Hyland solution or Dynamics 365 can be used to automatically route invoices for issue resolution, review and approval, notifying approvers via email or mobile where required. Hyland workflows are highly configurable, allowing organizations to create custom processes to fit their unique needs, or turn the process over to Dynamics 365 for approval and final processing.

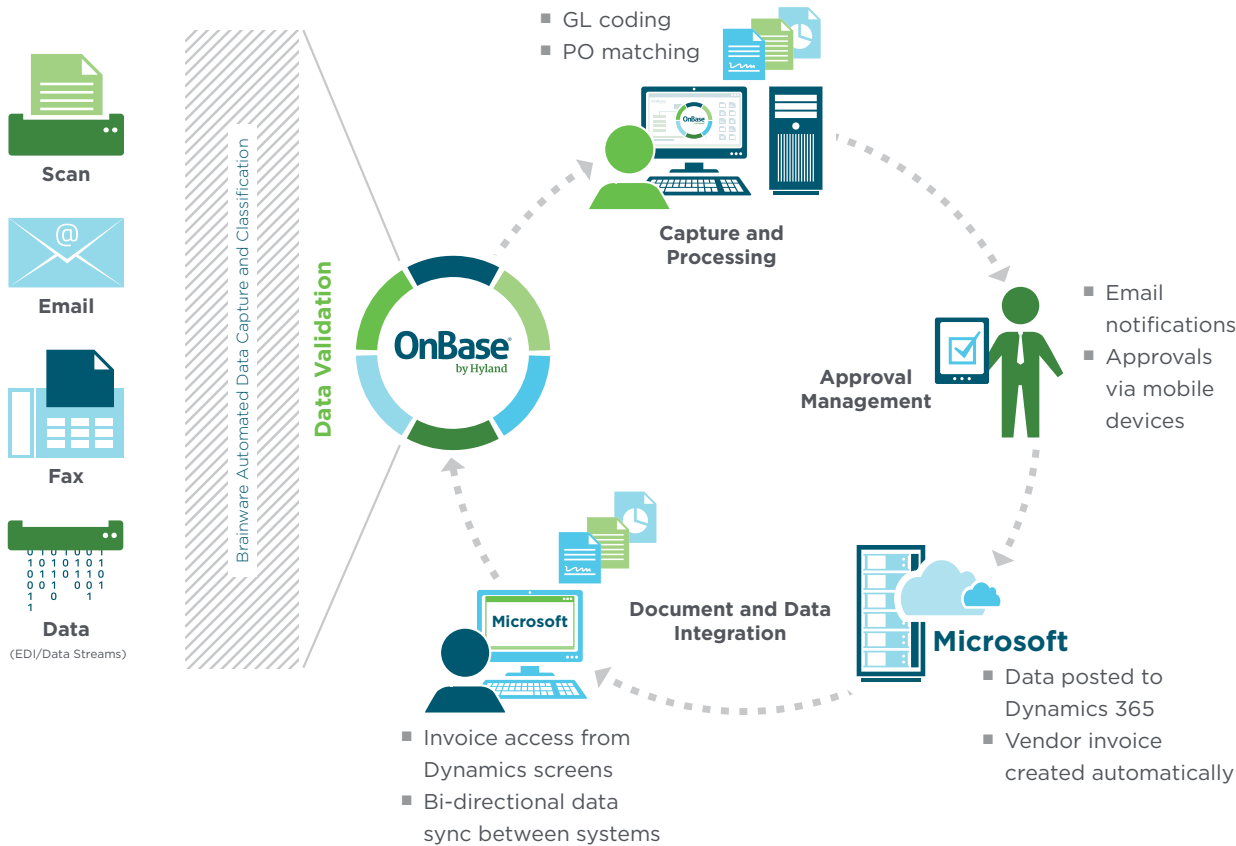
Providing choice and configurability ensures that the final process supports the highest level of automation for invoice processing. Reliable and secure, this solution automates predictable decisions throughout the transaction lifecycle, minimizes the number of touches per invoice, and increases AP process efficiency.

INCREASE VISIBILITY INTO PROCESSES AND DELIVER REAL-TIME INFORMATION

When integrated with Dynamics 365, Hyland provides greater visibility into the payables process. Real-time dashboards provide managers with insight into the current status of invoice processing, enabling them to identify bottlenecks and adjust workload distribution. With all documentation captured and stored electronically in one system, staff can surface the content they need directly from the Dynamics 365 interface. They can review, approve or even add information to their invoices and transactions.

The Hyland logo is displayed in white text on a green-to-blue gradient square background.

AP Automation for Microsoft Dynamics 365 is configurable to each organization's process, providing consistency and efficiency without forcing a change to operations.



UTILIZE CONSISTENT PROCESSES TO IMPROVE CONTROL AND TRACKING

The AP Automation for Dynamics 365 solution leverages well-defined approval hierarchies and tracks the complete approval history and approval delegations that occur for each invoice. The solution ensures consistent record keeping and guarantees the right information is available to the right people.

Document retention can also be automated within a secure system, providing consistent disposition and immediate response to exceptions and audit requests. With access to real-time information about the financial health of your organization, consistent processes and the ability to grant auditors web-based access to documentation, you also significantly reduce the time it takes to prepare for an audit.

LEVERAGE THE STRENGTHS OF DYNAMICS 365 AND ONBASE

With Dynamics 365 managing your key accounting data and AP transactions, and Hyland streamlining the capture and secure management of critical related content, your users will benefit from a complete view of their information with less manual effort. The result? More informed decision-making, faster processing, and significant time savings and cost reduction in your AP department.

