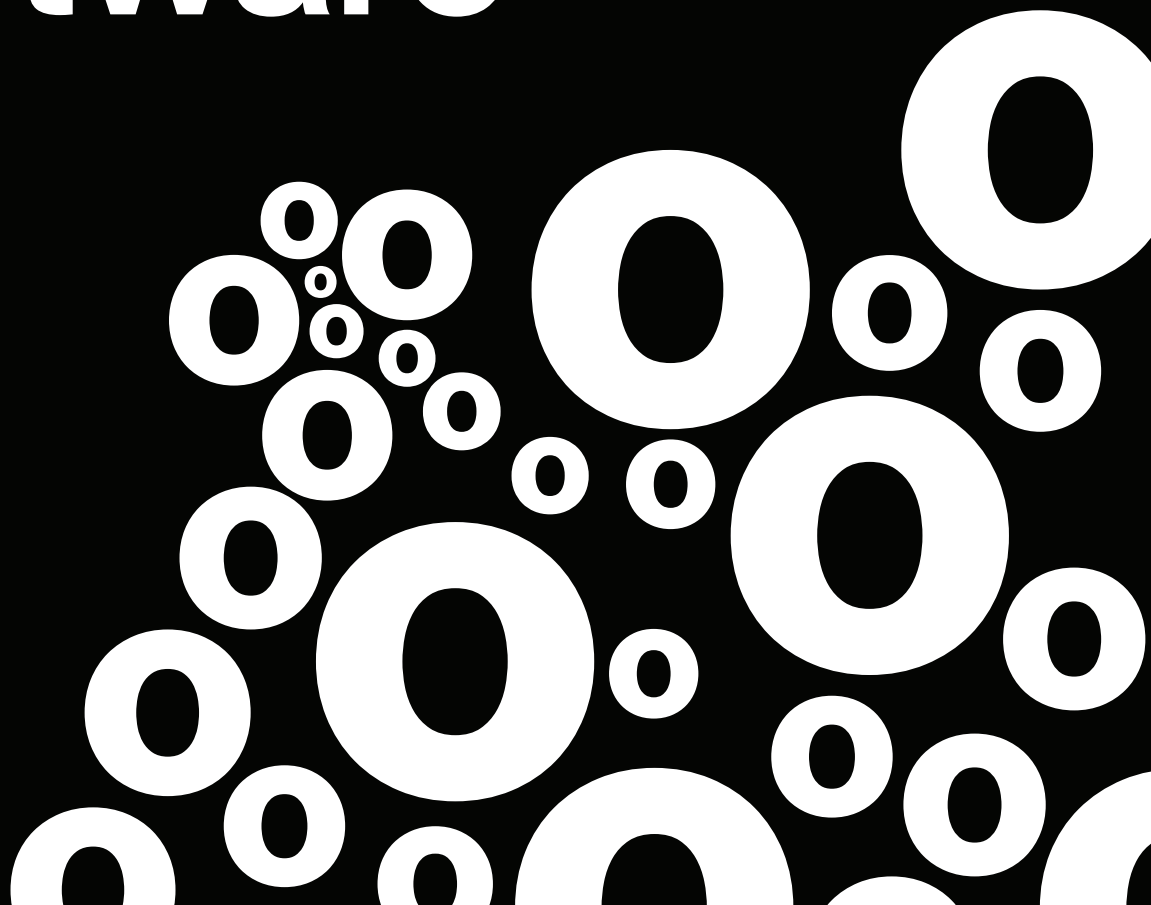


dooap

Guide:

Assessing AP Automation Software



Standard AP functionality isn't enough for today's modern finance operations. AP professionals need more than basic features provided in ERP systems such as D365 Finance. What type of AP automation solution is right for your business?

AP Solution Comparison

As a buyer, you're faced with lots of different approaches that can tie in your AP automation with your ERP. We've collected the key pros and cons of each philosophy for you to compare and help you make your choice.

Type of AP Automation Solutions	Pros	Cons
D365 Finance ERP Standard Functionality, without any additional automation	<ul style="list-style-type: none"> • One system for all users • No additional user interfaces or integrations to external systems • Integration to Microsoft Office 365 	<ul style="list-style-type: none"> • Not purpose-based UI and complex multi-click navigation • Manual data entry and routing of invoices, lacks AP automation features • Cannot manage all legal entities' invoices in one view
AP automation tool embedded in D365 Finance	<ul style="list-style-type: none"> • Only one UI for AP users • Tight integration with D365 • Familiar logic and terminology for D365 users 	<ul style="list-style-type: none"> • Limitations of standard D365 workflows • UI/UX is tied to D365 logic • Version updates dependent on D365 updates
Generic AP automation tool for any ERP (Integration required)	<ul style="list-style-type: none"> • Purpose-based UI for AP users • Flexible workflows • Independent version updates 	<ul style="list-style-type: none"> • Two separate UIs in end-to-end process • Neglects business logic in D365 • Integration needs to be updated and tested with every D365 update
AP automation tool seamlessly integrated with D365 Finance	<p>Same benefits as "AP tool for any ERP" +</p> <ul style="list-style-type: none"> • Utilizes master data and business rules within D365 • Similar terminology as D365 Finance • Secure integration between AP tool and D365 	<ul style="list-style-type: none"> • Two individual UIs • Requires additional training for learning new system

AP Solution Worksheet

AP isn't just a back office job. It helps support the entire business, so don't settle for a partial solution. Use the space below to compare the different options you may be considering.

What to Look for in an AP Solution	Dooap		
Integration with D365 Finance	Integrates seamlessly into D365 and connects in real time to obtain live data and business rules from the ERP system, like account structure validation and currency calculation.	<input type="checkbox"/>	<input type="checkbox"/>
Invoice automation	Automatic matching of PO invoices and easy coding of non-PO invoices.	<input type="checkbox"/>	<input type="checkbox"/>
Ease of use	Not tied to paper-based processes. Route, code, review, approve, comment, archive invoices on a smartphone and/or desktop.	<input type="checkbox"/>	<input type="checkbox"/>
Onboarding/training	Technical setup requires minimal IT involvement. System training always provided for main users and optional for end-users.	<input type="checkbox"/>	<input type="checkbox"/>
Software updates and security	SaaS-based web app is updated automatically and is independent from D365's update cycle. All data is stored securely in Microsoft's Azure Cloud	<input type="checkbox"/>	<input type="checkbox"/>
Invoice capture	Offers scan, capture, and validation as a service or can work alongside current solution (like OCR).	<input type="checkbox"/>	<input type="checkbox"/>
AppSource approved	Certified by Microsoft AppSource.	<input type="checkbox"/>	<input type="checkbox"/>
Pricing	Based on the number of invoices with no additional user or maintenance fees.	<input type="checkbox"/>	<input type="checkbox"/>
Fun!	Simply swipe invoices off your to-do list. User-friendly UI motivates usage and fast adoption across the organization.	<input type="checkbox"/>	<input type="checkbox"/>

AP Automation Solution UI/UX Features

In our daily lives, many of us use simple and thoughtfully designed apps – so we expect the same from tools in our work lives. Here are UI/UX features to focus on in AP automation solutions you’re considering.

UX/UI Feature	Dooap		
AP workflows	Designed by AP professionals, for AP professionals. Meet compliance requirements with flexible workflows that can be easily created and modified.	<input type="checkbox"/>	<input type="checkbox"/>
Mobile app	Native mobile app with intuitive UI. Includes all the necessary data and functionality to process invoices, and check them off your to-do list.	<input type="checkbox"/>	<input type="checkbox"/>
Desktop app	Browser-based app with intuitive UI with all the necessary data visible in a single view.	<input type="checkbox"/>	<input type="checkbox"/>