

Buyer's Guide

Assessing AP Automation Software

dooap

Choosing an Accounts Payable Automation solution for Microsoft Dynamics 365 Finance



Standard AP functionality isn't enough for today's modern finance operations and AP professionals need more than basic features provided in the standard ERP system. What type of AP automation solution is right for your business?

AP Solution Comparison

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

Type of AP Automation Solution	Pros	Cons
1. D365 Finance standard functionality	<ul style="list-style-type: none"> • One platform for all users • No integrations to 3rd party systems 	<ul style="list-style-type: none"> • Poor user experience and complex multi-click navigation • Manual data entry and lack of multi-company processing capabilities. • Complex architecture to build and maintain
2. AP automation tool embedded in D365 Finance	<ul style="list-style-type: none"> • One UI for AP users • Tight integration with D365 • Familiar logic and terminology for D365 users 	<ul style="list-style-type: none"> • Adds complexity and load to the D365 system • UI/UX tied to D365 framework • Version updates require D365 downtime
3. Generic external 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"> • Neglects business logic in D365 • Costly and risky integration to build and maintain
4. 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 logic in D365 out-of-box • Fast and responsive UX • Certified integration between AP tool and D365 	<ul style="list-style-type: none"> • No possibility to integrate with other ERPs than D365

Comparison table: Implementation aspects

Implementation Factor*	1. D365 standard	2. Embedded Solution	3. Generic External Solution	4. Dooap Solution ("Best of Both Worlds")
Integration work effort	● High	● Low	● High	● Low
Configurations in D365	● High	● High	● Low	● Low
Implementation timeline	● High	● Moderate	● High	● Low
IT/Dev involvement	● High	● Moderate	● High	● Low
User training needs	● Moderate	● Low	● Moderate	● Low
Implementation cost	● High	● Moderate	● High	● Low

Conclusion

When evaluating the one-time implementation factors of AP automation solutions with Dynamics 365 Finance, it is essential to consider technical compatibility, costs, and the effort required from your team. Solutions like Dooap that offer pre-built, certified integration provide a smoother, quicker path to value with less risk of overruns or disruptions.

Comparison table: Ongoing usage aspects

Ongoing usage aspect**	1. D365 standard	2. Embedded Solution	3. Generic External Solution	4. Dooap Solution ("Best of Both Worlds")
User Experience	● Poor	● Moderate	● Strong	● Strong
Data quality & process smoothness	● Poor	● Strong	● Variable	● Strong
Technical compatibility on D365 version upgrades	● Moderate	● Strong	● Uncertain	● Strong
Effort and cost involved in version upgrades	● Moderate	● Moderate	● Uncertain	● Low
Vendor support and responsiveness	● Variable	● Variable	● Variable	● Strong

Conclusion

Ongoing usage is a critical factor when choosing an AP automation solution for your Microsoft Dynamics 365 ERP. Generic external solutions offer a modern UI, with potential risks and challenges around data quality and upgrade costs. Embedded solutions, while tightly integrated, come with higher ongoing costs, significant team effort during upgrades, and a less specialized user interface. Dooap's external solution offers a significant advantage in terms of user experience, data quality, and minimal maintenance effort during upgrades.

AP Solution Comparison Worksheet

Now it's your turn! AP is not 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	Vendor: Dooap	Vendor:	Vendor:
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 tax calculation.		
Invoice automation	Automatic matching of PO invoices and easy coding of non-PO invoices.		
Ease of use	Automated processing and easy to route, code, review, approve, comment, archive invoices on a smartphone and/or browser.		
Onboarding/training	Technical setup requires minimal IT involvement. Personalized training always provided for key users.		
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		
Invoice capture	OCR capability included in the solution. Option for outsourced human validation.		
Microsoft certified solution	Certified by Microsoft.		
Pricing	Based on the number of invoices with no additional user or maintenance fees.		
Fun!	Simply swipe invoices off your to-do list. User-friendly UI motivates usage and fast adoption across the organization.		

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.

What to Look for in an AP Solution	Vendor: Dooap	Vendor:	Vendor:
AP workflows	Designed by AP professionals, for AP professionals. Meet compliance requirements with flexible workflows that can be easily created and modified.		
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.		
Desktop app	Browser-based app with intuitive UI with all the necessary data visible in a single view.		

Appendix

* Explanation of Implementation Factors

- **Integration work effort:** How much work is required to establish the integration between the AP automation solution and D365. If the solution is certified, this is just a few hours, not more.
- **Configurations in D365:** How much configurations/customization is needed in D365 to get the AP automation solution to work. This is something you or your Dynamics partner need to do.
- **Implementation timeline:** Calendar time needed from kick-off to go-live. This should be doable in weeks, not in months. Faster implementations lead to quicker value realization and increased excitement around process improvements.
- **IT/Dev involvement:** How much technical expertise and resources are needed from internal teams or Dynamics partner to support the implementation.
- **User training needs:** Considers how much training will be required for users to adopt the new solution. Solutions which focus solely on D365 have a familiar logic and terminology.
- **Implementation cost:** Level of one-time implementation costs. If the vendor is not willing to give you a fixed price, they are unsure of their part and see the risks.

** Explanation of Ongoing Usage Aspects

- **User experience:** How user-friendly and intuitive the solution is. Dedicated external solutions are optimized for user experience (UX), while embedded solutions are tied to the ERP interface, which is less streamlined for AP tasks.
- **Data quality & Process smoothness:** How well does the solution ensure accurate data flow and the level of run-time validation against the business logic & rules in the ERP.
- **Technical compatibility on D365 version upgrades:** How easily the solution remains compatible after ERP upgrades. If the AP solution is certified for Dynamics 365, the vendor is responsible for maintaining compatibility. In other cases, it is your own risk and responsibility.
- **Effort and cost involved in version upgrades:** How much internal IT or your Dynamics partner's effort is required in version upgrades. Generic external solutions can easily add new features to the cloud solution if the changes do not affect the ERP integration. With the embedded solution you cannot have any new features (or fixes) without having a service break in your ERP. With Dooap you get new features to the solution without touching the ERP and if the new feature requires changes in the ERP integration, you get a tested and compatible integration package, at no extra cost.
- **Vendor support and responsiveness:** Does the vendor have local direct support in your region? Is the vendor specialized in solely your ERP system and your business process (AP) or are they generalists for many ERPs and many solutions? This directly affects the customer experience you get in terms of speed and quality.