



Your Ultimate Guide to Accounts Payable Automation

With Global Automation for
Dynamics 365 Business Central



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What to Expect from This Guide

This guide provides a detailed overview of how accounts payable automation can enhance your experience with Dynamics 365 Business Central. By eliminating data entry and bottlenecks while enhancing productivity, this guide will show you the powerful ROI AP automation provides.



The Current State of Accounts Payable Automation in Dynamics 365

Dynamics 365 Business Central is a strong ERP system for many businesses, but it comes with several challenges when managing accounts payable.



Data Entry

Information from emails, scanned documents, and other sources takes time to key into Dynamics.



Workflows & Routing

Dynamics is a powerful tool, but it lacks the workflow automation capabilities to streamline certain tasks.



Integrations

In the past, integrating with other solutions to meet these needs could be costly and disruptive.

Accounts payable automation platforms can provide solutions to these challenges, though, with no-code workflows, generative AI-powered document capture, and hands-off integrations that provide organizations with a fast, non-disruptive ROI.



Accounts Payable Automation Innovations for Business Central

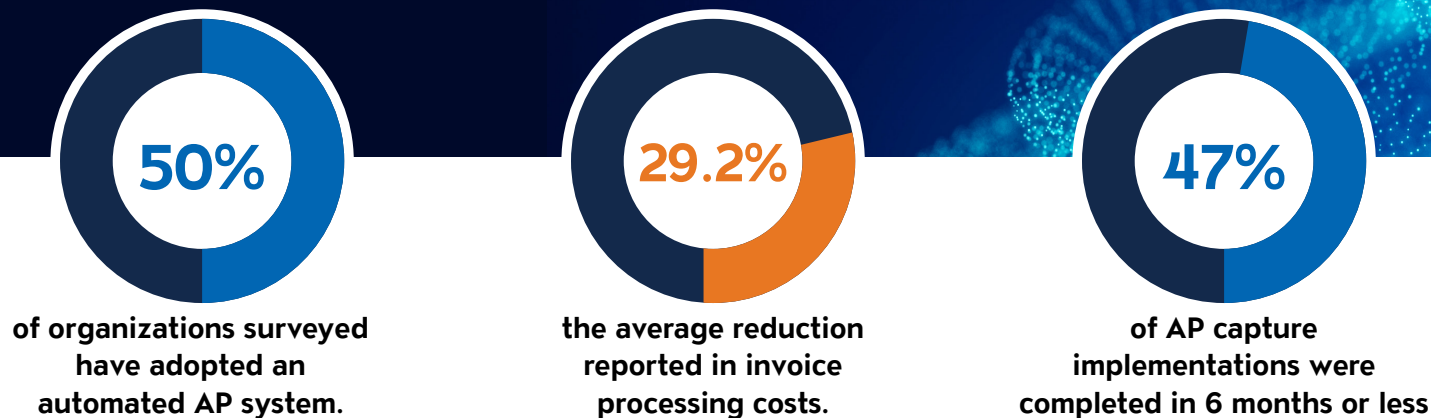
Generative AI Capture Automation: Generative AI accurately extracts data from any document, drastically reducing document capture setup, ongoing maintenance, and the need for technical expertise.

No-Code Workflows: Drag-and-drop configuration empowers teams to design approval and routing workflows faster and more cost-effectively to automate tasks and enhance productivity.

Effortless Integrations: With a simple addition to a no-code workflow, organizations can ensure an effortless, cost-effective, and disruption-free integration with platforms like Dynamics 365 Business Central.

Getting Into The Numbers

According to the Association for Intelligent Information Management (AIIM), the current state of the Accounts Payable automation market shows:



These statistics clearly show that organizations across industries are all transforming their processes with new technologies to meet a new standard for efficiency.

Source: [Automating Accounts Payable/Accounts Receivable Financial Processes](#) by AIIM

Why Automate Accounts Payable

Automating accounts payable within Dynamics has numerous benefits both for your payable processes and your organization at large. By feeding Dynamics with information from your documents, your business can automate:



Invoice Submission

Capturing invoices, purchase orders, receipts, and any other document through email, scanned PDF, or even handwritten forms. Invoices are automatically routed and processed as they arrive.



General Ledger Coding

Adding General Ledger or Dimensional coding into your workflow to ensure accurate assignment of costs to your accounts.



Invoice Payables Creation

Seamlessly flowing information for the automated creation of invoice payables without a single keystroke.

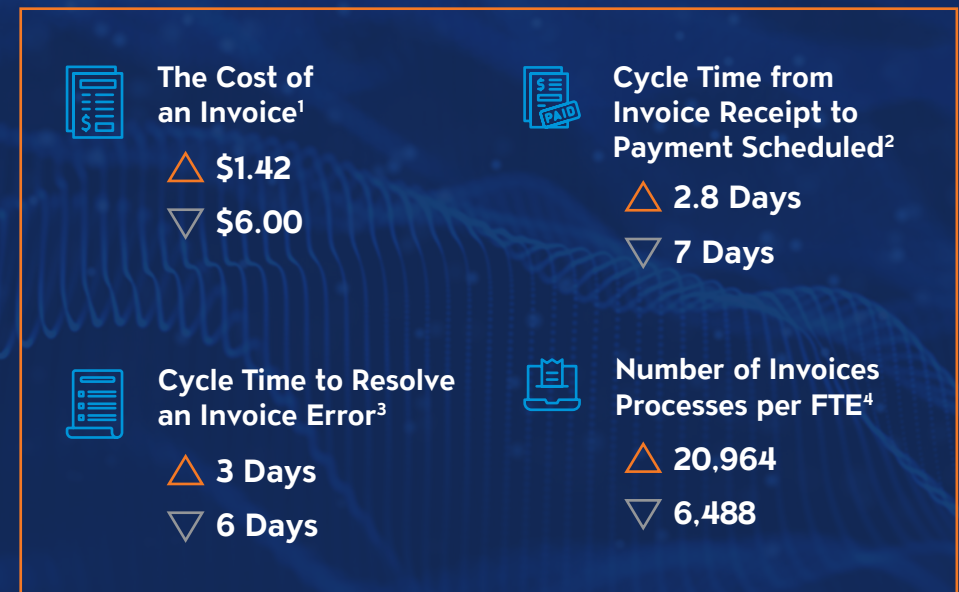


Benefits of Accounts Payable Automation

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Convenient Information Access: With searchable, indexed documents residing in an Enterprise Content Management system, organizations can access records quickly and easily from anywhere. This means your Accounts Payable staff can quickly investigate vendor questions while providing backup that can only be found in the source document.
- 
Reduced Process Completion Times: With less time spent referencing files and completing tasks such as invoice approvals and data entry, organizations can drastically shorten the paid hours it takes to complete accounts payable processes and use those hours on opportunities that will better aid your business.
- 
Early Payment Discounts: With the time saved on invoice processing, routing, and data entry, organizations can reduce costs by taking advantage of early payment discounts.
- 
Eliminated Errors: With index data now automatically captured and financial data now shared with applications like Dynamics 365 Business Central, employees can focus their efforts on data validation rather than spending time keying it in by hand.
- 
Enhanced Inventory Management: With line item data capture, organizations with inventory can keep track of what's in stock and manage costs for an entirely data-driven inventory management strategy.

The Stats Speak for Themselves

While the advantages of automation are apparent on their own, several statistics from The American Productivity and Quality Center fully illustrate the difference AP automation makes. These stats highlight some key metrics from the top and bottom performers in the accounts payable industry.



Statistics from The American Productivity and Quality Center, 2022-2023 ([Source 1](#), [Source 2](#), [Source 3](#), [Source 4](#))

Common Accounts Payable Challenges

Accounts payable departments frequently face bottlenecks, data entry errors, and backlogs in an incredibly high volume of work. These common challenges are one of the main reasons why so many organizations choose accounts payable automation as one of their initial solution investments.



From Chaos to Clarity

Effortlessly manage information from invoices, purchase orders, receipts, and other financial documents and route it throughout the payable process.



Simplified Processes

Invoice Matching - The tedious process of matching invoices with purchase orders and packing slips is now as easy as searching a single field and pulling up these records side-by-side.

Invoice Routing - Bottlenecked handoffs and email exchanges are replaced with instantly routed digital records. Approvals even come with automatic reminders and escalations.

Manual Data Entry - Lengthy manual keystrokes are a thing of the past as generative AI captures information from any document with unprecedented accuracy.



Early Payment Discounts

With so much time saved on accounts payable-related processes, organizations can build better vendor relationships, taking advantage of early payment discounts and other offerings.

Five Steps for Accounts Payable Efficiency with Business Central

The accounts payable process is multifaceted and often requires the efforts and input of multiple individuals and departments. As such, automating this process from end to end accounts for many factors and may even require communication between multiple digital solutions. By implementing these five steps into your accounts payable automation process, you can ensure efficiency throughout all accounts payable facets and fuel Business Central with valuable data without any manual entry.



Image Transformation: Any successful Accounts Payable process starts with the transformation of invoices into usable information. Whether it is a paper document, a scanned image, or a PDF email attachment, your system should support a dynamic process for accurate data extraction. Most recently, this has been achieved through AI-driven data extraction, which eliminates the need for rules or proximity-based extraction models.



Data Validation: Pushing raw data into your financial system is never a good idea, so it's important to have a process in place for quality assurance. Some organizations will insist on 100% visual validation of the information before releasing it to Business Central, while others will sample the data based on confidence level reporting, which sets a threshold for accuracy. This is a critical step in the success of your project, so make sure you are comfortable with the information being shared between applications.



Five Steps for Accounts Payable Efficiency with Business Central

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Approval Routing: Upon assignment of approval, the manager must review the invoice, ensure that the goods or services were received, and let the Accounts Payable department know to release payment. While email notification is certainly a viable option for this process, there should also be safeguards in place to ensure that the transaction is not misplaced. Make sure your business process has reminder notifications or an escalation path enabled if there is no response. Another option is to have a work queue or web portal that allows managers to see their pending tasks.

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Payable Creation in Business Central: Once the data has been validated and the transaction approved for payment, the Accounts Payable team simply approves the release of the data to Business Central. Depending on your process, this may also require General Ledger coding to ensure the transaction is applied correctly. Upon release, the flow of information into Business Central creates the payable invoice without any need for manual data entry.

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Archiving the Image: Maintaining the vendor invoice source document is not only a good business practice, it's also mandated by the IRS. You should always have the source document as a point of reference should a question arise, but where you maintain it is up to you. You can archive the image in an IIM platform like Square 9's GlobalSearch or as an attachment in Business Central. Additional options also include Google Drive, Citrix Sharefile, or even an SFTP release to a file folder.

Critical Questions to Examine Within Your Organization

While considering the process of Account Payable Automation, there are key questions to ask yourself. Not every organization uses Business Central the same way, and understanding your specific needs will determine the correct approach to building your solution.

✓ How Does Your Information Flow Through Your Organization?

The days of passing an invoice from one desk to another for review and approval have gone in most organizations since hybrid workforces were introduced. Understanding your organizational flow, including responsibilities and contingencies for escalation, is essential before you begin to automate a process. Whether your organization requires single or multiple approvers and whether there are dollar thresholds to consider are all important factors to understand.

✓ How Many Vendors Do You Have and How Often Do You Onboard New Ones?

Most organizations begin their analysis of a return on investment calculation with invoice volume. Typically, if you have a low volume of vendors or if 80% of your invoices come from a select subset of vendors, your process for automation becomes less complicated because you have far fewer invoice formats to contend with. The larger your vendor volumes, the more invoice formats you need to manage, and this increases the need for tools like AI-driven data extraction that require little to no setup.



✓ How Will You Ensure the Integrity of Your Data?

Before you release extracted data to Business Central, you need to have a plan for how to ensure its accuracy. Many organizations will insist on 100% visual validation before a data release. Some products offer confidence-based reporting, allowing you only to route low-confidence transactions for review. Finally, some organizations will set thresholds on only releasing payable data for under a predetermined dollar amount. Understanding your needs and defining your strategy is a critical step before you get started.

✓ What Are Your Invoice Types: Inventory vs. Non-Inventory?

The type of invoices you manage is equally as important as the volume. Inventory invoices are typically entered using line item data, which increases the effort involved in coding them. Automating this process results in a far greater return on investment, but it also has a different set of requirements for extracting that information accurately. It's critical to ensure the solution you select supports this functionality and that it requires minimal to no setup to achieve.

✓ Who Owns The Responsibilities for General Ledger Coding?

An often overlooked aspect of your process is the responsibility for applying General Ledger Codes or departmental dimensions to an invoice. Is this the responsibility of the approving manager, or should it remain within the purview of your Accounts Payable team? Regardless of the answer, it's important to understand where this step falls within your process design.



Summary

With technological advances like AI-driven data extraction, the benefits of Accounts Payable automation are greater than ever. While a full process redesign that automates the flow of information provides the most benefits through greatly reduced labor costs, there are other ways to approach AP Automation. Whether you decide to start the process by automating specific tasks or elect to jump in with both feet, there is evidence to suggest that you can attain a solid return on investment with either approach.

At Square 9, we invite you to fully explore the myriad of opportunities before you before making any decisions. Educating yourself on the available technology while examining your own internal processes is the best way to properly assess your needs.

What is GlobalAutomation for Dynamics 365 Business Central?

GlobalAutomation combines generative AI-driven data extraction and Accounts Payable Automation to intelligently fuel Dynamics 365 Business Central with data and put it into motion.

- ✓ GlobalAutomation Dynamics 365 for Business Central delivers highly accurate generative AI extraction that captures any document, including invoices, purchase orders, contracts, and even hand-written forms.
- ✓ GlobalAutomation for Business Central uses a no-code integration platform that eliminates the need for disruptive, time-consuming implementations.
- ✓ GlobalAutomation for Business Central combines the best of Intelligent Information Management with Account Payable Automation, allowing your business to effortlessly and securely manage information while expanding into other processes.



Why Square 9

Square 9 Softworks is a generative AI-powered platform that removes the frustration of extracting data from documents, forms, and all external sources, so you can harness the full power of your information. Release your team from repetitive tasks while your work flows freely in areas like accounts payable, order processing, onboarding, contract management, and more. The Square 9 platform captures your unstructured content, transforms it into clean, searchable data, and securely shares it across your organization to accelerate your decisions and actions.

Contact Square 9 today to find out more about using Dynamics 365 GlobalAutomation for Business Central to manage your Accounts Payable Processes

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