Your checklist: key questions to ask in your evaluation.

Use this comprehensive checklist when evaluating different stand-alone AP solutions to connect to your Dynamics 365 ERP.

- ☐ Is the AP solution available on Microsoft AppSource? Is the solution provider a certified Microsoft Partner?

- ☐ Is there a pre-packaged connector to Microsoft Dynamics 365 for Finance and Operations?

- ☐ Does the solution provider have a proven track record of connecting the solution to Dynamics 365 for organizations similar to yours?

- ☐ Does the connector include synchronization of master data?

- ☐ Do you get access to comprehensive technical documentation and templates?

- ☐ Does the solution provide regular and automatic product upgrades?

- ☐ Does the solution offer an intuitive user experience for easy onboarding and adoption?

- ☐ Does the solution offer a mobile solution for invoice approvals on the go?

- ☐ Is the mobile solution browser-based, eliminating the need for app downloads and updates?

- ☐ Does the solution include advanced invoice matching and automation capabilities?

- ☐ Does the solution provide you with comprehensive reporting to support the AP process improvements and month-end closings?

- ☐ Does the provider have an integrated payment solution to complete the invoice-to-pay process for full automation?

⦿ medius