

Solution summary

# Microsoft Dynamics 365 Finance Pre-Built Integration

## Don't let ERP integration interfere with performance

The Esker Connectivity Suite offers seamless, plug-and-play and deep integration capabilities between Esker Accounts Payable and Microsoft Dynamics 365 Finance (D365). Beyond just acting as a connector, this ERP extension also enhances the user experience by adding ERP-specific mechanisms and rules to Esker solutions.

### Why automate with Esker?



**Plug & play integration**

The IT implementation effort is kept as small as possible with a ready-to-install integration.



**Reduce context switching**

The integration enables seamless and complete communications with D365, making invoice processing more efficient.



**Secure upward compatibility**

Maintenance, support and testing of the integration are ensured for all major D365 updates.



**Decrease operational costs**

Esker handles all support and maintenance costs of the integration.

### How it works

The pre-built integration can be installed with very little effort on all MS Dynamics 365 Finance cloud versions and utilises secured Microsoft Open Data Protocol (OData) standard web services.

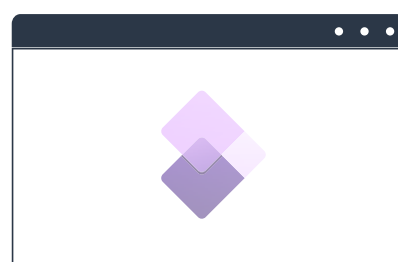
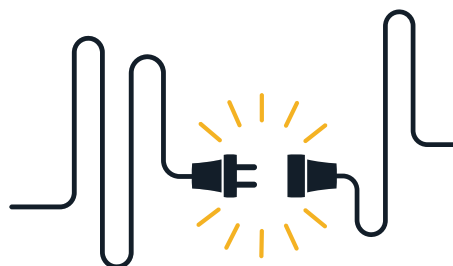
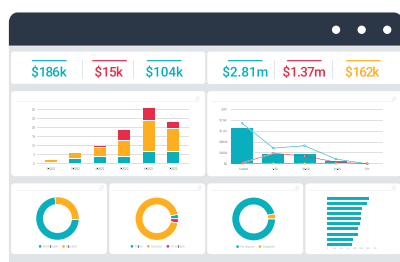
**Dedicated ERP extensions**

Esker solutions are augmented with dedicated extensions, ready to install, that offer ERP features natively within Esker, which provides easy accessibility for all business processes.

**Secure by design**

Authentication is performed using OAuth2.0 protocol on Azure and full control over permissions maintained. Real-time communications between the two systems occur without any need for third-party infrastructure.

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## Extension features

Esker's 40 years of experience and dedication to product development is key to our continued innovation. Below are some of the most prominent features powering the Microsoft Dynamics 365 Finance pre-built integration, which is part of the Esker Connectivity Suite:

### Real-time reference data browsing

Esker offers immediate information retrieval for data such as vendors, payment terms, payment methods, bank accounts, tax codes, purchase orders, goods and services receipts, currencies, GL accounts, financial dimensions (up to 10).

### Document creation & verification

Documents such as invoices are created in real time in D365. Associated voucher numbers or posting errors are immediately returned to Esker so that users have full control and visibility over the entire process.

### Supported versions

The Esker Connectivity Suite supports all D365 cloud versions.

### Accounts Payable

Esker Accounts Payable reduces invoicing costs and processing delays with AI-powered capabilities. The Esker Connectivity Suite features enable:

- PO invoice processing and posting
  - Support for multi-PO Invoices
  - Support for unplanned charges (fixed charge type)
- Support for planned charges (fixed, percent and Pcs categories)
- Goods and services receipt matching
- Non-PO invoice processing and posting
  - Up to 10 configurable financial dimensions (in addition to the GL account)
- Project-based invoice processing and posting
- Fixed asset based invoice processing and posting (non-PO invoices)
- Invoice posting simulation
- Payment blocking/unblocking
- D365 voucher number returned to Esker
- Posting error management (status and error messages returned from D365)
- Link to archived invoice and processing data from D365 applications
- Support of additional custom fields:
  - Invoice processing (PO invoice and non-PO invoice)
  - Configured by the respective solution integration team. Some limitations apply.