



# Microsoft Dynamics AP Automation

Preferred Partnership  
Ottimate AP Automation AI  
[For Microsoft Users](#)



## Ottimate's *always* talking with Microsoft.

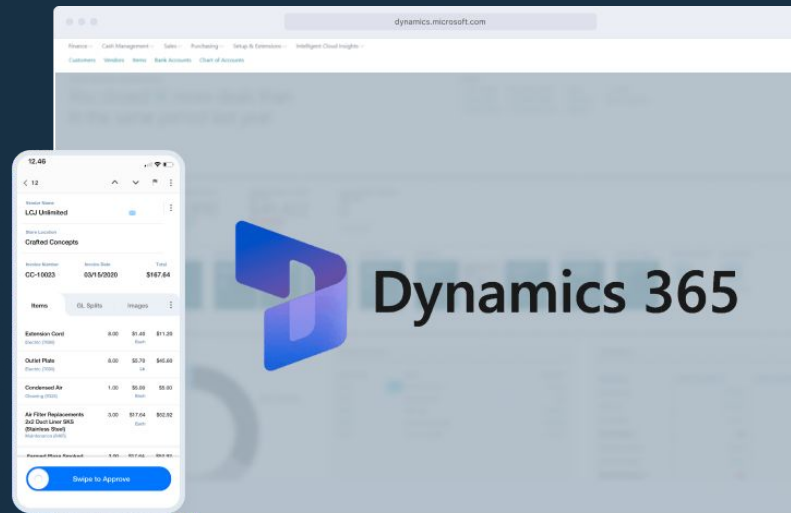
With an API integration connecting Microsoft and Ottimate, you can be sure that your systems are always in sync.

Never backfill an accounting or AP system again.

Providing:

- deep integration capabilities
- detailed mapping
- and source documentation links

Ottimate keeps everything up-to-date in both directions.



“Out of the four or five hundred invoices that we process weekly between all our brands, there may be 2 or 3 that need manual intervention. That success rate has really ensured that we have reliability in our data and consistency for our operators.”

Sarah Reed,  
BrainSell



## Agenda

How We Differentiate

AP Automation Overview

Capabilities Overview

VendorPay

Integrations

FAQs



# A Superior User Experience

Click Here: [Read The Case Studies](#)

We're an AP-user-first company

According to over 100+ G2 customer reviews, Ottimate offers:

- Industry-inclusive solutions
- Easiest admin & implementation
- Superior product support
- Seamless integrations
- Comprehensive feature updates
- Confidence in AP accuracy

Serving every industry:

Restaurants, Construction, Hospitality, Healthcare, Retail, Automotive, Manufacturing, Accounting & Bookkeeping & more.



# Better AP is our First Priority

## More than OCR: AI Powered AP

- AI powered machine learning
- Deeper, more intuitive automations

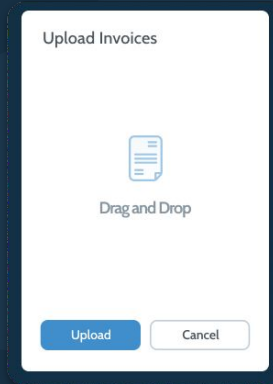
## In-Demand Features

- Three way PO matching
- Multi-entity management
- Instant capture
- Line-item accuracy
- VendorPay
- No charge for new users
- Learns your AP process and improves

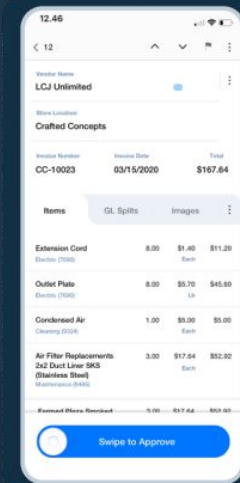
## Process Automation

- Automatic approval escalation
- Custom workflows
- Multiple dimensions
- Seamless Microsoft integration via API

### Upload



### Manage



### Sync



Simply upload, manage and sync invoices to Microsoft.

# VendorPay

## ACH Transfers

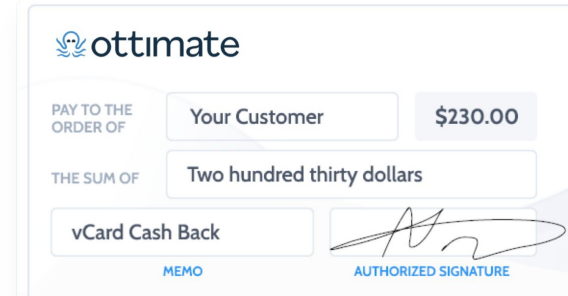
Send Payments electronically directly to your vendors' bank via standard or enhanced ACH

## Paper Checks

Stop manually handling checks Ottimate prints & sends checks on your behalf

## Virtual Cards

Pay your vendors seamlessly & earn cashback with vCards





## Frequently Asked Questions

**Q: Can Ottimate integrate with both Dynamics 365 and older versions?**

A: Ottimate is designed to integrate with Dynamics 365 and can be customized for compatibility with older versions of Microsoft Dynamics.

**Q: How does Ottimate handle Microsoft dimensions for detailed reporting?**

A: Ottimate fully supports Microsoft dimensions, allowing for detailed, dimension-based financial analysis and reporting.

**Q: Can custom transaction types be mapped?**

A: Absolutely. We will customize the integration based on your unique Dynamics transaction types, financial report structures, and more.

**Q: What about custom fields and data structures?**

A: Our flexible API can be customized to send, receive, and map details into your custom Microsoft fields and data configurations.

**Q: Does the integration work with add-on ISV solutions?**

A: Yes, any ISV add-ons or bundles installed on Dynamics will retain full functionality and data access with our Dynamics integration.

# Unlimited Customization. Unmatched Accounts Payable Processes.

## Approvals & Routing

Create approval workflows of any complexity, based on any dimension, with access to a complete audit history



## GL-Mapping

Map invoice items to your chart of accounts once, after that, Plate IQ will code them correctly to your GL



## AI & Machine Learning

Leverage smart technology that learns your business, with line-item digitization & predictive coding



## Instant Capture

Upload invoices & get header data & line-item details such as product, cost, & quantity digitized - instantly



## Multi-Entity Management

Gain oversight to multiple locations when it comes to invoice automation and management

## Digital Filing Cabinet

Access any invoice, payment, or approval with a searchable database of your AP history



## ERP Integration

Sync accurate & timely invoice & payment data directly to your ERP, saving teams an average of 450 hrs a year





# Don't Take Our Word For It.

## Hear it from our partners!

Recognizing the need to provide customers with invoice processing and AP solutions, we wanted to partner with a leader in this industry. Ottimate has a strong track record in this domain and through creating a distinctive, seamless integration between our two systems, we can guarantee that our customers benefit from superior software.”

**Co-Founder**  
opsi

From invoice automation to paying vendors, Ottimate makes it seamless, compliant and effortless. Our clients who use Ottimate grow larger businesses because they spend more time on the activities that keep customers coming back! I recommend it wholeheartedly if you are a start up or mature business.

**CEO**  
Franchise Consulting Group

“In our short time together so far we have all gotten on calls to work through our partnership agreement, deliver good demos, discuss incentives to close deals, discuss participating at trade shows,... You guys have been absolutely fantastic to work with and it has been a refreshing change from our other vendors.”

**Director**  
Acumen

