

Microsoft Dynamics® AX and 365  
Forms and Reports Made Simple

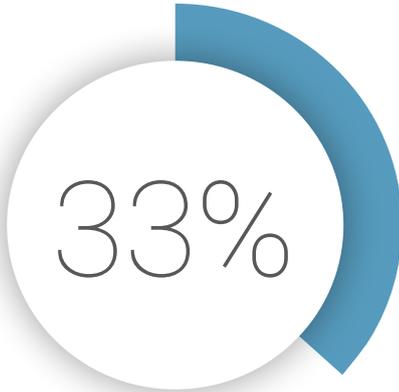
# Simple, Smarter, Secure Document Design and Output Management

According to a report on Microsoft Dynamics® AX implementations by PWC<sup>1</sup>, “75% had reporting issues due to poor data migration or not enough reporting focus early on in the project”.

Although many organisations choose to implement forms and reports after core project customisations have been implemented, this contrasts with the top benefits businesses expect when implementing their ERP systems, such as increasing response times (33%), improved interaction within their own companies (23%), with customers (12%) and suppliers (5%).

Organisations and implementation teams now recognise that documents are the lifeblood of any business, and planning how they will be created, delivered, stored and retrieved at the start of any Microsoft Dynamics project will yield substantial costs and efficiencies throughout your ERP's life.

<sup>1</sup> Source: PricewaterhouseCoopers LLP  
Report, The challenges of implementing  
Microsoft Dynamics AX, 2012



*Of organisations expect an increase in response times when implementing ERP systems.*

Specialist document management systems can be used to bridge the gap between business' communication expectations, and what can be achieved with standard ERP reporting tools allowing for:

- Fast and simple report or form creation and changes
- Branded quality communication
- Extending the capabilities of your ERP
- Ensuring regulatory compliance
- Secure and robust operating environments

#### **Fast and simple report and form creation and changes**

Standard ERP reporting tools have not kept pace with the growing need for agile output creation, so many companies opt for specialist output solutions to empower their IS departments. These no-code output solutions have modern intuitive graphical interfaces which allow less specialist staff to create reports and forms in hours instead of days.

This reduces dependency on specialist suppliers, allowing you to deliver more with your available resources. This increases responsiveness to your organisation's suppliers and customer's output needs, as well as reducing the dependency on SSRS programmers.

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## Days to Hours

Reduction in implementation and migration times

#### **Branded quality communication**

Today, businesses understand the importance of branding in that every customer touch-point is an opportunity for competitive differentiation. As well as making your invoices, shipping documents, communications instantly recognisable; presenting information in a clear, logical and well laid out manner shows professionalism, attention to detail and builds preference amongst business partners.

One size does not fit all, so specialist output management tools give you the flexibility to deliver documents and information based on individual preference. Paper, email, fax, PDF, phone, online or a specified format ARE all a possibility – helping you stand out from the crowd.



*AIIM research shows that eliminating paper from processes can improve efficiency by up to 300%<sup>2</sup>*

### **Extending the capabilities of your ERP**

There is an emerging trend to lock down core ERP functionality to provide a more robust operating environment, and eliminate the need to untangle customisations when upgrading your ERP to the latest versions. This is truer with Microsoft Dynamics 365 than any other mainstream ERP system. One common solution is to move many of the customer communications customisations into a Microsoft Lifecycle Services compliant document management solution like PrecisionForms, where customisations to customer communications can be implemented faster and better whilst also delivering futureproofing.

ERPs are extremely good at managing data and workflows amongst their users, but the cost of ERP licenses can prevent universal access; and the interaction with customers and suppliers can often require inefficient manual steps.

Document Output Management can extend workflows beyond your ERPs, by tracking electronic delivery and eSignatures. Enhanced workflows with powerful logic allow you to build more efficient business processes, distributing slicing data and delivering information to multiple destinations with a single report.

Specialist Output Management solutions also enhance your ERP with tools that simply allow you to do more. Barcode production becomes simple enabling many systems including production, quality control and logistics. Augmenting reports using information from third party systems is essential for manufacturing and business service organisations. Such functionality allows you to maximise the ROI from your ERP.

<sup>2</sup> Source: AIIM February 2012

## Maximise the ROI from your ERP

### Ensuring regulatory compliance

Document storage and retrieval requirements are tough. Whilst requirements vary between jurisdictions, failure to meet regulations may result in financial penalties and damage your business' reputation.

Workflows required for regulatory compliance and auditability must be automated and managed well, otherwise they can hinder business efficiency. Specialised document management will automate the storage, filing and retrieval of important documents enhancing your business efficiency and meeting legal requirements.

### The challenge: International offices

Through a recent acquisition, a consumer goods distributor added four offices located in Europe and Asia. At their first international facilities, the CFO wanted to standardise on corporate forms, but understood that they would need to localise for languages and paper size.

To solve the issue, the distributor empowered each office to design the forms to meet the corporate standards as well as local requirements. The process included:

- Implementation of PrecisionForms for Microsoft Dynamics® AX.
- Web-based training for two to three power users in each facility.
- A shared document repository for the offices to leverage the forms design work of each office.

With localised forms, the integration of the international locations was made significantly easier. The offices have forms that work, including local language, currency and paper size.

## Design and Deliver Custom Documents from Microsoft Dynamics® Output

Many organisations that have standardised on Microsoft Dynamics® have been able to dramatically increase the efficiency and cost effectiveness of their document based business processes through the use of Bottomline's advanced capabilities for transactional document automation.



Bottomline's award-winning solutions allow organisations to streamline business processes that rely heavily on paper based documents. By automating the routing, delivery and storage of transactional documents, users can quickly and easily increase the functionality of their document output while reducing costs.

And because the solutions integrate with industry leading ERP systems such as Microsoft Dynamics® users are able to protect their existing IT investments while easing ongoing ERP maintenance and upgrades.

Bottomline's PrecisionForms allows you to:

- Create more professional looking business documents, including invoices, purchase order, delivery notes and MICR checks
- Reduce implementation and migration times from days to hours.
- Make designing branded quality output simple
- Optimise business communications tailored to your customer needs
- Automatically distribute forms and reports to multiple locations with customised formatting for each device (print, fax, email, stored documents or mobile)
- Comply with document regulations by automating archiving and retrieval to SharePoint in real time
- Extend and support workflows beyond the boundaries of your ERP
- Provide a secure environment for your sensitive information

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*"The Bottomline forms solution belongs in every single Microsoft Dynamics® AX implementation. When customers discover the time they can save creating AX custom documents and implementing multi-channel delivery, the solution simply sells itself."*

– Darrell Smith, Microsoft Certified, Business Management Solutions, Specialist, Agility Business Solutions

## Be Secure and Robust

Poorly designed document management systems have the ability to punch holes through your ERP security. This is why Bottomline's PrecisionForms has become the Document Management System of choice for small and large organisations alike.

PrecisionForms has been specifically designed for use with Microsoft Dynamics and as part of our commitment to the Microsoft community, we are 100% Microsoft Lifecycle Services compliant. This both future proofs our document solutions and makes Bottomline an ISV you can trust.

For more information please contact us at 0870 081 8250 or email [emea-info@bottomline.com](mailto:emea-info@bottomline.com).

**CONTACT**

Segregation of duties is an important protective measure in a quality document management solution, which is why we allow you to separate administration, form and workflow design and report production functionality if you choose. This acts as a barrier against accidental distribution of sensitive information.

It is also important to support separate production, test, development and DR environments. This involves more than setting up separate environments. Therefore, PrecisionForms administrative tools check all required resources are available on your target server when migrating projects between environments.



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### About Bottomline Technologies

Bottomline Technologies (NASDAQ: EPAY) helps businesses pay and get paid. Businesses and banks rely on Bottomline for domestic and international payments, effective cash management tools, automated workflows for payment processing and bill review and state of the art fraud detection, behavioral analytics and regulatory compliance. More than 10,000 corporations, financial institutions, and banks benefit from Bottomline solutions. Headquartered in Portsmouth, New Hampshire, we delight our customers through offices across the United States, Europe, and Asia-Pacific.

For more information, visit [www.bottomline.com/uk](http://www.bottomline.com/uk).

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