

How MS Dynamics Users Can Unlock Effortless 3-Way Matching with Quadient AP

3-way matching is a vital part of the accounts payable (AP) process, protecting organizations from fraud and payment errors, while providing a clear audit trail. For AP teams, this process is no longer optional — it's an indispensable part of effective finance management.

WHAT IS 3-WAY MATCHING?

3-way matching - The process of comparing what was ordered, what was delivered, and the supplier's invoice to verify that an invoice is legitimate and ready to be paid.

As opposed to 2-way matching — which only compares a purchase order to its invoice — 3-way matching verifies that the product or service delivered by the vendor matches what was ordered by comparing both documents with the receiving values.

3-WAY MATCHING WITH MS DYNAMICS

MS Dynamics offers some matching capabilities, but it still requires a fair amount of manual intervention to resolve common exceptions, such as:



Incorrect total due



Incorrect quantity



Missing receipt or packing slip



Mismatched tax amounts



Duplicate invoice



Duplicate charges on multiple invoices

This manual intervention opens the door to potential errors and bottlenecks in the process.

MS Dynamics possesses rigid matching workflows that may not cover your organization's unique requirements, forcing you to undergo lengthy customizations. The system also has a complex setup and may require detailed configuration.



Using Optical Character Recognition (OCR), Quadient AP automatically captures invoice, PO, and receipt data with up to 99% accuracy and immediately matches the data extracted.



The software manages complex scenarios, like partial deliveries and variances.



Immediate action is taken when exceptions are discovered. Predefined rules can be set to automatically resolve exceptions, or they can be routed to the appropriate team member for review.

Quadient AP provides flexible matching workflows that are easily customizable to your organization's needs. To further accommodate your process, the software allows you to set an acceptable variance level before triggering exception protocols. All of this can be set up using the software's intuitive interface, which can be customized without technical knowledge or coding experience.

By cutting manual intervention, you eliminate the possibility of data entry errors, increase team efficiency, and protect your vendor relationships by providing prompt payment.

To discover more ways that Quadient AP unlocks the full potential of MS Dynamics, read our eBook AP Automation: The missing piece to maximize Microsoft Dynamics potential.

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