



MICROSOFT DYNAMICS GP & DYNAMICS 365 BUSINESS CENTRAL

How 5 Dynamics GP Companies Eliminated Paper AP — and What It Saved Them

Five Microsoft Dynamics-powered organizations share how they replaced manual, paper-based finance work with automation — and what the results looked like.

Inside: The challenge, the implementation, and the results — for each organization.

PairSoft Case Study Collection | Microsoft Dynamics Partner

\$62K

Estimated annual savings

270 POs

Processed in just 10 days

5 for 5

Dynamics organizations automated

Albrecht Needed to Speed Up Two-Week Invoice Approvals

Albrecht, Incorporated has grown from a grocery store operator founded in 1932 into an owner of 2.5 million square feet of retail and 1.5 million square feet of industrial and office space in Northeast Ohio, running Microsoft Dynamics GP. Before automation, invoice approval was entirely manual.



No Formal Document Management System

Administrative staff, managers, and executives manually handled filing, data entry, routing, approval tracking, and payment processing.



Invoices Took Up to Two Weeks

Each of the more than 3,000 invoices processed monthly required almost three hours of handling before it could be paid.



Lease Documents Were Hard to Track

Staff spent hours tracking down paper invoices, and commercial lease documents were harder to track and occasionally went missing.



No Record of Who Reviewed What

There was no reliable record of who had seen each invoice and what action, if any, had been taken with it.

CFO LENS: Slow approvals delayed payments, and lease documentation was difficult to retrieve on demand.

AP MANAGER LENS: More than 3,000 invoices a month, each needing nearly three hours of manual handling.

Albrecht Automates AP and Lease Document Tracking

Albrecht, Incorporated implemented PairSoft ECM as its enterprise content management system, automating AP invoice entry, routing, and approval all the way through to transaction records in Dynamics GP.

01

Evaluate

Albrecht considered OnBase by Hyland Software but found it too complicated and costly, and chose PairSoft ECM instead.

02

Automate

PairSoft ECM automated invoice entry, routing, and approval, creating transaction records directly in the Dynamics GP ERP system.

03

Add OCR

Albrecht later added OCR software, converting text from scanned and digital documents into actionable, searchable data.

04

Expand

The AR team began scanning and uploading commercial lease documents into PairSoft, attaching them directly to customer cards. "PairSoft is an easy to implement document management system." — Kriss Hays, Director of Technology and Systems.

✓ ECM implemented

✓ OCR added

✓ AP automated end-to-end

✓ Lease docs digitized

Invoice Payments: Two Weeks to Two Days

2 Days

To pay invoices,
down from two
full weeks

Per Controller

75%

Of daily time
saved on payment
processing tasks

Per Controller

3,000+

Invoices sorted
and filed
automatically

Each Month

350+

Lease files
quickly retrieved
for review

Tracked in PairSoft

Key Results for the Albrecht Team

- ✓ Invoice payments now take two days, down from two weeks.
- ✓ More than 3,000 invoices are sorted, filed, and indexed automatically each month.
- ✓ Both accounting departments enjoy accurate automatic sorting and filing.
- ✓ The controller saves about 75% of her daily processing and tracking time.
- ✓ Over 350 client lease files are easy to find and never lost.
- ✓ Albrecht highly recommends PairSoft as an easy-to-implement document management system.

“It's an easy to implement document management system we highly recommend.” —Kriss Hays, Director of Technology and Systems, Albrecht, Incorporated

Answer Financial Needed to Fix Week-Long Approval Delays

Answer Financial, based in Encino, California with branches in Knoxville, Tennessee and Ogden, Utah, has helped clients in all 50 states insure more than 3.5 million vehicles and homes. Before automation, its five-person accounting team ran approvals entirely on paper.



Approval Stamps Were Hard to Get

Files went missing, signatures were unreadable, and staff sometimes waited in a director's doorway just to get an invoice approved.



Filing Cabinets Everywhere

Paper invoices piled up in filing cabinets and offsite storage boxes, and papers were regularly lost in the shuffle.



Slow Access for Audits

Self-audits and financial audits meant digging through boxes of paperwork instead of pulling records up instantly.



Manual Routing by Invoice Amount

Invoices had to be manually routed to different approvers depending on the total invoice amount, with no automated check.

CFO LENS: Compliance risk from unreadable signatures, plus no fast way to produce paperwork for audits.

AP MANAGER LENS: One AP staffer spent much of her week filing, printing, and tracking down paper invoices.

Answer Financial Builds a Paperless Approval Workflow

On the recommendation of its Dynamics GP partner, Technology Management Concepts, Answer Financial implemented PairSoft to build a streamlined, paperless approval workflow native to Dynamics GP.

01

Select

Answer Financial's GP partner, Technology Management Concepts, recommended PairSoft for its ease of use, strong Dynamics GP fit, and pricing.

02

Configure

PairSoft was configured to route invoices automatically to the correct approver based on each invoice's total amount.

03

Train

Consultants trained the team through conversion and install, and every manager received training by phone. It was an easy process.

04

Monitor

The team logs in daily, sending a reminder email if an invoice hasn't been approved within a couple of days. "It's effective, it's efficient and it saves time and money." —Inna Bass, Assistant Controller/Accounting.

✓ Fully paperless approvals

✓ Amount-based routing

✓ Storage eliminated

✓ Company-wide adoption

Approvals Now 70% Faster Company-Wide

2 Days

Approval time,
down from one
full week

Company-Wide

70%

Reduction in
approval
turnaround time

Since PairSoft

15%

Of the AP staffer's
week freed from
filing and searching

Per AP Staffer

Zero

Filing cabinets
or storage boxes
fully eliminated

Company-Wide

Key Results for the Answer Financial Team

- ✓ Approvals now take about two days, down from one full week.
- ✓ The AP staffer regained about 15% of her workweek from filing and searching.
- ✓ Self-audits and financial audits are now fast and simple to complete.
- ✓ Approval turnaround time dropped by about 70 percent company-wide.
- ✓ All filing cabinets and offsite storage boxes were eliminated entirely.
- ✓ Invoices route automatically to the correct approver by amount.

"It's effective, it's efficient and it saves time and money." —Inna Bass, Assistant Controller/Accounting, Answer Financial

TriOak Foods Needed to End Its Paper Invoice Backlog

TriOak Foods is the 15th-largest pork producer in the U.S., a feed manufacturer and grain marketer running Microsoft Dynamics GP across corporate offices in Iowa and additional sites in Oklahoma, Illinois, and Colorado. Before automation, every invoice meant paper.



Disorganized, Unstandardized Invoices

Mounds of invoices — many in poor condition and none standardized — were stuffed into file cabinets across multiple locations.



Backlogs and Late Fees

Invoices routinely fell behind schedule, and the resulting late fees added avoidable costs to the accounting department's budget.



Hours Lost Searching and Scanning

Staff spent hours tracking down paper invoices, then scanning and sending copies to outside auditors by hand.



Audits Demanding Electronic Records

TriOak's outside audit firm began requiring electronic documentation in recent years, adding pressure to an all-paper process.

CFO LENS: Late fees, audit stress, and no reliable way to prove records were complete.

AP MANAGER LENS: Hours every week spent hunting for, then scanning, paper invoices.

TriOak Foods Goes Fully Paperless in Weeks

TriOak Foods chose PairSoft AP Automation, PairSoft's AP automation and document management solution, integrated natively with Microsoft Dynamics GP to digitize and automate its accounting processes.

01

Select

TriOak met a PairSoft AP Automation representative at a Dynamics partner event and chose it for its functionality and strong customer service.

02

Train

PairSoft AP Automation for Dynamics GP was implemented and thoroughly trained across the accounting team's active users.

03

Digitize

The accounting department went completely electronic within weeks, with automated alerts for outstanding invoices awaiting approval.

04

Expand

TriOak later added automated entry and OCR, freeing up at least 2 hours a week. "This was the easiest thing I ever did." — Kerri Kronfeldt, Staff Accountant.

✓ Paperless within weeks

✓ Automated invoice alerts

✓ OCR & automated entry

✓ Responsive PairSoft support

Audit Prep, Cut From Weeks to Days

Days

Audit prep time,
down from two
full weeks

Per Staff Accountant

Seconds

To locate any
invoice or
document on file

Vs. hours before

2 Hours

Saved weekly
via automated
entry and OCR

Per Staff Accountant

Zero

Late fees
spend category

Late fees, gone

Key Results for the TriOak Foods Team

- ✓ Audit prep dropped from about two weeks to just a few days.
- ✓ Automated entry and OCR save at least two hours every week.
- ✓ The accounting department went fully paperless within weeks.
- ✓ Any invoice or document can now be found within seconds.
- ✓ Late fees have been eliminated as a spending category.
- ✓ Auditors were impressed enough to recommend PairSoft AP Automation to another client.

“The whole process of preparing for an audit used to take about 2 weeks, now it’s only a few days.” —Kerri Kronfeldt, Staff Accountant, TriOak Foods

Southwest Waste Services Needed Procurement Built to Scale

Southwest Waste Services (SWWS) is one of Florida's fastest-growing waste-hauling, recycling, disposal, and dumpster-rental companies, known for tech-forward service built on Microsoft Dynamics GP — and already a PairSoft AP Automation user.



Outgrown Native Procurement

The technology limitations of Dynamics GP's native procurement forced SWWS to look for a broader, more agile platform.



Manual Vendor Communication

There was no way to automatically transmit purchase order copies to vendor partners directly from the ERP.



Limited Approval Escalation

The team needed approval escalation at different levels to streamline purchase requests across the organization.



No Direct Procurement Platform

SWWS lacked custom catalogs, pricing, GL assignment, and part numbers in one connected purchasing system.

CFO LENS: No unified way to see committed spend versus approved budget in real time.

AP MANAGER LENS: Manually managing vendor communication and approvals outside the ERP.

One Platform for Requisitions, POs, and Vendor Management

Working alongside their existing PairSoft AP Automation, PairSoft Procurement now gives SWWS purchase requests, vendor communication, catalogs, and approval workflows in one connected system.

01

Adopt

Already a PairSoft AP Automation user, SWWS added PairSoft Procurement to close the gap in Dynamics GP's native purchasing tools.

02

Configure

Training, setup, and go-live ran across three stages in two and a half weeks, with data pulled directly from Dynamics GP and no migration required.

03

Launch

Seventeen Procurement users went live for comprehensive purchase-to-pay inside the existing Dynamics GP setup.

04

Monitor

“Being able to create catalogs, assign pricing, GLs, vendors, and part numbers — that's the right procurement.” —Yoan Gomez, Director of Purchasing, on PairSoft's continued feature rollouts.

✓ No data migration ✓ Live in 2.5 weeks ✓ 17 users onboarded ✓ Custom catalogs ✓ Add-on to existing AP Automation

270 Purchase Orders, Nearly Hands-Off

270

Purchase orders
processed in
just 10 days

Per Director of Purchasing

2.5 Wks

Training, setup,
and go-live,
start to finish

Three-stage rollout

17

Procurement users
live inside
Dynamics GP

Comprehensive purchase-to-pay

6

Manager check-ins
needed out of
270 orders

Nearly hands-off

Key Results for the Southwest Waste Services Team

- ✓ 270 purchase orders processed in just 10 days.
- ✓ Full visibility into every PO, invoice, and approval level in Dynamics GP.
- ✓ Live in two and a half weeks with simple training and user guides.
- ✓ Only six instances required the purchasing director's direct involvement.
- ✓ Custom catalogs give the team direct, self-service procurement.
- ✓ Procurement was added as a cost-effective extension of existing AP Automation.

"It speaks volumes where I had 270 orders released, but I only had maybe 6 instances of team members reaching out to me for guidance."

—Yoan Gomez, Director of Purchasing, SWWS

Comfort Research Needed a System Employees Would Use

Comfort Research, known nationwide for its beanbag chairs and molded furniture, more than doubled its revenue after taking on Walmart as a customer in 2013. Running Microsoft Dynamics GP, the company needed a content system that could keep pace.



Disconnected From Dynamics GP

Comfort Research's prior content management system wasn't connected to Dynamics GP, creating constant workflow problems.



Hours Lost in PDF Folders

A major client regularly disputed invoices, and the AR team spent hours digging through scanned PDFs stored in folders.



Office-Bound Approvals

Employees had to be physically in the office every day just to check whether a document approval was waiting on them.



Outdated Document Versions

Relying on email for approvals meant teams often didn't realize they were working from an outdated version of a document.

CFO LENS: Thousands of dollars lost each year to manual searching and disconnected systems.

AP MANAGER LENS: Constant invoice disputes and hours spent hunting through PDF folders.

Comfort Research Finds a System Built for Dynamics GP

A Dynamics GP consultant recommended PairSoft AP Automation, and Comfort Research's leadership team was on board after just one demo.

01

Select

Comfort Research bought PairSoft AP Automation just in time for the holiday season and began implementation right away.

02

Deploy

Purchase order requests, New Hire forms, and daily workflows moved into PairSoft AP Automation, attaching directly to Dynamics GP.

03

Expand

The company added the Forms Creator program, routing product and design changes through development, sales, finance, and commercialization for approval.

04

Adopt

Nearly the entire 150-employee company — shipping, accounting, sales, purchasing, inventory, and operations — now runs on PairSoft AP Automation daily.

✓ Connected to Dynamics GP ✓ Modifiable workflows ✓ Forms Creator add-on ✓ Company-wide adoption ✓ Access from anywhere

\$62,000 a Year, Company-Wide Adoption

\$62K

Estimated annual
savings from
eliminated searching

Per company ROI estimate

150

Employees now
using PairSoft
company-wide

Daily, across departments

3

Tall filing
cabinets removed
for good

Sustainability win

Zero

Written approvals
needed today,
paper eliminated

Huge reduction in paper

Key Results for the Comfort Research Team

- ✓ Estimated \$62,000 in annual savings from eliminated searching and approvals.
- ✓ Three tall filing cabinets were removed from the office for good.
- ✓ A full audit trail is visible at every step, in one place.
- ✓ All searching for items — even customer agreements — has been eliminated.
- ✓ Nearly the whole 150-person company now works inside PairSoft AP Automation daily.
- ✓ Anyone, anywhere can access documents in real time.

“When we did the ROI, we estimated a savings of \$62,000 each year just from people's time searching files and getting approvals.”

—Barb Shaffer, Controller, Comfort Research

For the CFO & Finance Leader

✓ Paper Has a Real Cost

From late fees to slow audits, all five companies traced hard costs directly to manual, paper-based processes — regardless of company size.

✓ Team Size Isn't the Barrier

A tech-forward waste hauler and a 150-person furniture manufacturer saw comparable results — automation scales down as easily as it scales up.

✓ Native Integration Matters

Every company pointed to seamless integration with Dynamics GP as key to fast adoption and accurate accounting.

✓ Results Compound Over Time

Faster record retrieval, faster audits, and reduced storage costs move straight to the bottom line, quarter after quarter.

For the AP Manager & Finance Team

✓ Questions Answered Instantly

What used to take hours or weeks of searching now takes seconds or days — a difference vendors, auditors, and customers feel right away.

✓ Less Paper, More Mission

No more chasing paper sign-offs from desk to desk. Late fees, filing hours, and office-bound approvals are no longer necessary.

✓ Training Doesn't Have to Hurt

Native plug-ins meant teams were productive within weeks, not months — with minimal disruption to daily work.

✓ You're Not Starting Over

PairSoft works with the Microsoft Dynamics tools your team already knows — Dynamics GP and Dynamics 365 Business Central.

Wherever Your Upgrade Path Leads, PairSoft Is Already There

Microsoft has set a clear runway for Dynamics GP: new subscription licenses stop in April 2026, enhancements and tax updates continue through December 31, 2029, and security updates run until April 30, 2031. Whatever your timeline, PairSoft's AP automation works on GP today and moves with you to whatever comes next.

TODAY

Stay on GP

Keep running PairSoft AP Automation on Dynamics GP exactly as it is today — no forced changes, no pressure to move before you're ready.

TOMORROW

Upgrade to Business Central

When you're ready, PairSoft reconnects to Dynamics 365 Business Central with the same workflows, suppliers, and approval history intact.

BEYOND

Move to Sage Intacct or NetSuite

If your roadmap leads elsewhere, PairSoft supports Sage Intacct and NetSuite too — your AP investment isn't tied to a single ERP.

ALWAYS

Keep What You've Built

Historical invoices, supplier records, approval workflows, and AI-driven automation all carry forward — no retraining, no lost history.

✓ No forced timeline ✓ Same AP platform before & after migration ✓ Historical data retained ✓ Works with GP, Business Central, Sage Intacct & NetSuite



Ready to See It Inside Your Dynamics GP or Business Central Environment?

PairSoft is a trusted Microsoft Dynamics partner with 20+ years of native ERP integration experience.

Schedule a personalized demo to see how PairSoft can bring these same results to your own Dynamics GP or Dynamics 365 Business Central environment.

Schedule Your Demo →

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Microsoft Dynamics Partner

SOC 2 Certified

ISO 27001 Certified

20+ Years of ERP Integration

Azure Cloud Platform