MSDW Solution Evaluation
TrinDocs



Document management, workflow automation, and AP automation for Dynamics 365 Business Central

Powered by AI

TrinDocs
Automation as Unique as You

MSDW
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INTRODUCTION

As businesses grow and expand, inefficient accounts payables processes can quickly become a pain point. AP automation solutions aim to solve this challenge by eliminating much of the manual work from typical payables processes, allowing the existing AP team to handle many more invoices at a fraction of the cost, and with better insights and agility around scheduling, vendor management, workflow best practices, and capturing incentives.

When Dynamics 365 Business Central customers and their partners look at AP automation or invoice management vendors, they want a solution that demonstrates both ROI and alignment with the organization's goals in terms of current processes and their growth outlook. They want to know that they will gain better control of their cost per invoice, but they also want to feel comfortable that the solution can evolve with them over time as they expand their product line, optimize their supply chain, or move into new markets.

AP automation is one sub-segment of the broader document automation solution space, and software firms that serve to automate invoice processing for Dynamics customers often have a broader story to tell, covering areas including payables, requisitions, collections and more. Business Central users may choose to look at individual workloads and evaluate AP automation software on its own merits, but they should also take notice of their vendor's story that goes into the broader document capture, document output, and business process automation business cases.

TrinDocs is the maker of tailored document management and workflow automation software, offering Dynamics 365 Business Central customers a highly configurable AP automation solution that aims to simplify user experiences, integrate with other enterprise systems, and work in a range of deployment models. While TrinDocs is an ERP-agnostic solution, they offer a direct Business Central integration that automates key points across the procure-to-pay story with a modular approach that can cover payables, payments, and requisitions.

To provide the Dynamics 365 Business Central ecosystem a detailed and objective perspective on TrinDocs and its suitability for typical customer and partner scenarios, their team has engaged with the MSDW Solution Evaluation program. The findings of the evaluation include key details of the TrinDocs solution and supporting resources, as well as feedback from an expert panel of independent evaluators from the Microsoft MVP (Business Applications) community who have spent time educating themselves on the solution, talking with experts from the TrinDocs team, and undertaking hands-on trials.

THE EVALUATORS

This report was created with the help of an evaluation team that worked with MSDW and TrinDocs to learn about the solution, ask questions, perform hands-on scenarios, and provide written and verbal feedback.



AJ Ansari – Microsoft MVP, COO and Partner, DSWi
AJ is a business leader and prolific public speaker who has delivered presentations and workshops at over 35 conferences worldwide since 2012. His expertise in business software systems paired with his passion for technology and knowledge sharing have earned him widespread recognition in the Microsoft Dynamics ecosystem, including the prestigious Microsoft MVP award, the Community Summit Legend award, the Dynamic Communities All-Star award, and the Directions North America Under-40 Excellence award.

Prior to stepping into his C-Suite executive role in 2018, AJ held practice leadership, presales and ERP consulting roles across prominent US-based Microsoft partner firms. He currently serves as the Vice President of the International Association of Microsoft Channel Partners (IAMCP) Americas Board, and on the national Board of Advisors for Dynamic Communities' Business Central User Group.

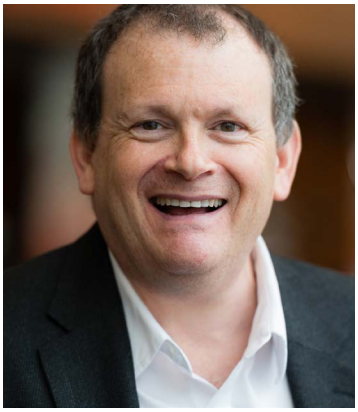
In his capacity as COO and co-owner at DSWi, AJ has played a pivotal role in the company's impressive year-over-year revenue growth. Under his leadership, DSWi has consistently been recognized with industry accolades, including being named one of the "Best Places to Work" by Houston Business Journals for four years in a row. In addition to his responsibilities at DSWi, AJ is an equity partner and co-founder of another consultancy firm.

AJ loves to live on the cutting edge of technology and is a strong supporter of adopting AI, process automation, and low-code/no-code tools to improve workplace efficiency. With his passion for innovation and dedication to excellence, AJ strives not only to propel his businesses forward, but to also make a lasting impact on the broader Microsoft ecosystem.

THE EVALUATORS

Steve Chinsky – Microsoft MVP, VP of Dynamics Practice, Accelerynt

Steve Chinsky is a Microsoft MVP and a Dynamics Credentialed Master Professional. He has 25+ year experience as a project manager, implementor, consultant, system architect, and advisor on Dynamics NAV and Dynamics 365 Business Central implementations. His areas of expertise include process improvement, accounting, audit, and financial reporting



Kim Dallefeld – Microsoft MVP, CEO, Dallefeld Consulting

As the CEO and Senior BC Consultant of Dallefeld Consulting LLC, I bring 29+ years of NAV/BC experience in business analysis, software architecture, systems implementation, program development and user support to the NAV community. I offer my services to end-users and partners, and I have a team of very senior NAV/BC consultants, developers and analysts that are ready and able to assist you.



THE SOLUTION EVALUATION GUIDE

This evaluation report, authored by MSDW, offers Microsoft Dynamics customers and partners a comprehensive overview of TrinDocs as an AP automation solution provider. It is based on three sources of data:

- Information provided directly by TrinDocs;
- Information supplied by third-party sources;
- Assessments from an independent panel of evaluators from the relevant Microsoft product community.

In an MSDW Solution Evaluation, the vendor provides the following elements:

- Information about the company, software, support model, and related details;
- Software and company briefings to evaluators;
- Technical resources for evaluators, including access to the technology for demonstration and testing and the availability of their experts to present information and demonstrations and provide technical support during the evaluation.

The vendor does not have editorial control over the evaluators' final feedback used by the MSDW team in writing this report. The evaluators provide assurances to MSDW of their independence from the vendor being evaluated and share any other disclosures before engaging in an evaluation.

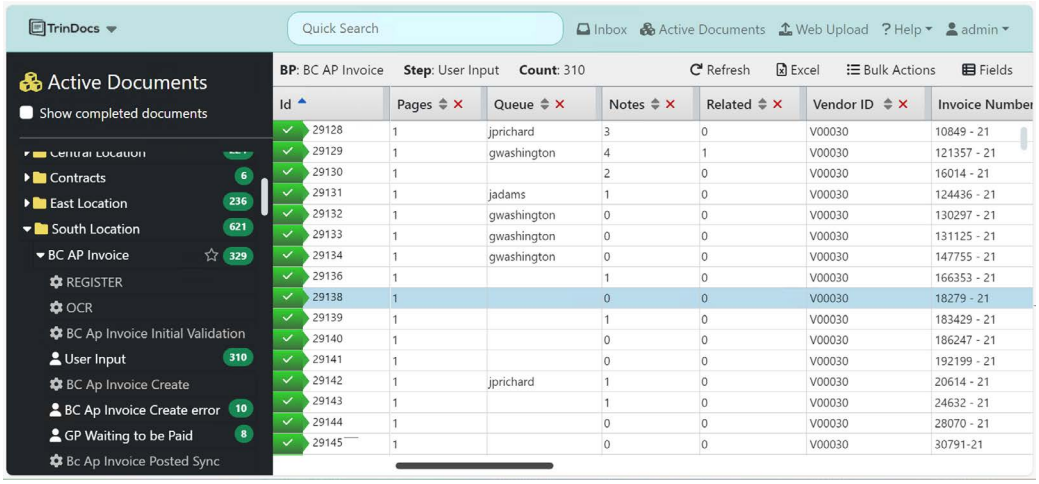
The evaluation report does not attempt to evaluate licensing of vendor solutions or provide guidance related to the relationship between licensing of a vendor solution and of Microsoft solutions. Organizations evaluating business applications should consult with their solution providers and service partners to understand these matters. For this report, each of the evaluators affirmed having no previous relationship with TrinDocs.

TRINDOCS

Overview
This section provides data and information provided by TrinDocs to educate readers on the fundamentals of the firm's solution and company characteristics.
TrinDocs was launched in 2010. It was created by technology consulting firm TrinSoft, which was founded in 1996. As its own company, TrinDocs has a lengthy history in the Microsoft Dynamics ERP space, first with Dynamics NAV and GP, and now with Dynamics 365 Business Central.

The company estimates that approximately 60 percent of their client base is on a Microsoft Dynamics ERP product, with the rest on other ERPs including Oracle NetSuite, Epicor, QuickBooks, Infor, Sage, Acumatica, SAP and others.
TrinDocs began with a focus on payables but today offers dozens of functions for a procure-to-pay automation solution covering AP automation, payments, and requisitions.

The software and the firm's deployment model are focused on providing a mix of out of the box and customized capabilities. They estimate that the average customer uses approximately 70 percent out-of-the-box core capabilities in the solution, with the other 30 percent tailored to meet a business' unique needs.



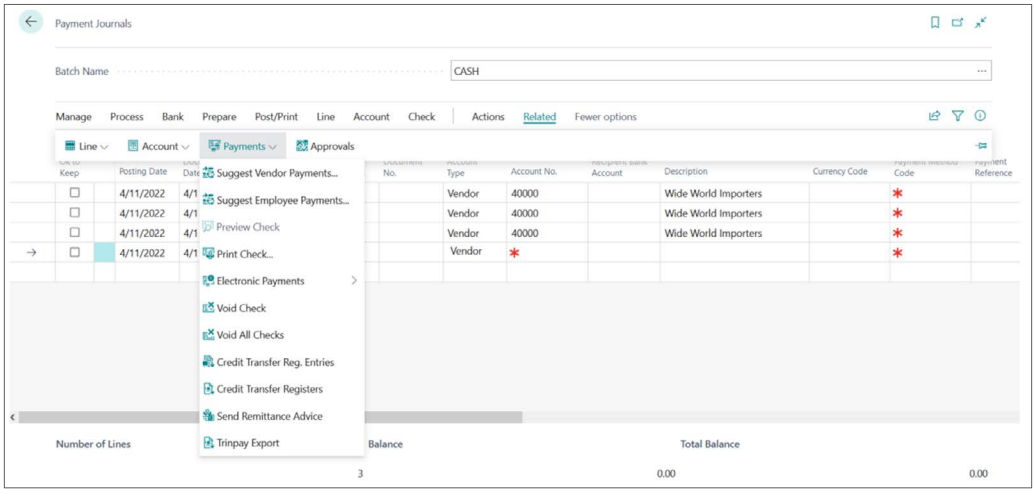
ABOUT TRINDOCS

Four Unique Factors
Beyond delivering truly tailored solutions, TrinDocs identifies four factors that make their product unique:

- **PO-Matching** – TrinDocs automatically does 3-way matching per each client's business rules and policies.
- **Cloud and On-Premises** – TrinDocs is web-based and hosted in either on Microsoft Azure, in a client cloud environment, or on the client's servers
- **Multi-currency** – TrinDocs helps multi-currency and multi-entity businesses, with support for USD, CAD, GBP, EUR, MXN, and more. While the software is English-only, they can process payables in a range of currencies. Customers can set currencies for vendors in TrinDocs before the invoice reaches Business Central.
- **Capture Floating Fields** – TrinDocs captures common data in uncommon fields like Freight, Taxes, Totals, and PO numbers.

Additional Strengths
Other strengths of the TrinDocs payables solution include:

- **Auto-GL coding** – TrinDocs automatically reads and populates invoice lines and codes GLs based on business rules.
- **Multi-invoice PDFs** –TrinDocs automatically reads and splits invoices from multi-invoice PDFs, creating unique invoices regardless of how many are in a single PDF.
- **Payments** – TrinDocs considers payments a pillar of their solution. They partner with Corpay for vendor payments, with each client responsible for establishing their own agreement with Corpay in order to set up an integration.



KEY CHARACTERISTICS

TrinDocs Facts & Figures	Over 10,000 active users Over 3 million annual transactions 28 years in business – TrinSoft was founded in 1996
Typical client characterisitcs	Supports a broad range of invoice volumes. Their largest clients process over 100,000 per month with as few as two AP clerks. There is no limit to daily invoice processing.
Microsoft Business Apps compatibility	TrinDocs works with Dynamics GP, D365 Business Central, and many other ERPs. In Business Central, the application uses real-time API connections using native extensions and native pages.
PO Invoice support	They support PO Invoices at the header and line-item level with three-way PO matching.
OCR Management	TrinDocs proprietary AI + ML automatically captures data and can capture/incorporate human patterns.
Support options	Email, phone, and chat from TrinDocs headquarters in Lexington, Kentucky.
Storage and access of client data	Data can be stored in Azure-based storage or in client on-premises servers depending on preferences.
User roles for the TrinDocs interface	User roles are locked down by groups. Different permissions allow users to see specific steps or the whole processes. The primary roles are: • Viewers – read only, can add notes, download PDFs, but cannot manipulate data • Approver - only see their inbox • Admin – Part of the AP team, they see across the business • System manager - full credentials • ALSO: Audit teams get free licenses to expose places they want to see. Every document has its own ID and its own audit trail.

KEY CHARACTERISTICS

Error handling	TrinDocs flags errors with detailed messages and automatically routes documents having errors into designated steps for users to review and correct. TrinDocs provides detailed error logs that are stored within TrinDocs and messages admins in the case of system issues or failures. If the API has an issue and fails, then TrinDocs will return a message to the document notifying the users.
Architecture	TrinDocs runs cloud instances in separate resource groups with no shared resources, but not in separate tenants. Additionally, TrinDocs provides no direct access for clients.
Capacity Considerations	None. The more invoices processed, the higher the ROI.
Privacy and compliance	The End User License Agreement accounts for all matters of confidentiality
Trials	TrinDocs offers paid trials with full payment applied to any signed agreements but does not offer free trials.
Learn more about TrinDocs	https://trindocs.com

DEPLOYMENT MODEL

TrinDocs can be deployed in three primary models—on a TrinDocs-hosted Azure instance, on a customer-hosted Azure instance, or as an on-premises application. With each implementation, TrinDocs engages in a design/process session to determine the fields to capture and the process for payables. User interface is configured based on the user's needs related to receiving, accounting, and administration.

PRICING

TrinDocs shares the overall cost options of going live with each customer. The services they perform to tailor the solution for each client are included in the price and are not billed by the hour.

TrinDocs pricing depends on two primary factors:

- Whether or not the customer wants PO matching
- Whether the solution is self-hosted or TrinDocs-hosted

TrinDocs only requires a one-year agreement but will provide a 3-year investment summary to help with apples-to-apples comparisons against vendors that require a minimum of a three-year agreement.

TrinDocs charges a flat fee, with no per-document costs or limits. The more documents that clients process, the higher the ROI.

There are several potential one-time add-on functions and additional licenses that sometimes come into play depending on the client's needs beyond standard capabilities.

RATINGS & REVIEWS OF TRINDOCS

Microsoft AppSource – TrinDocs has a 5 out of 5-star score based on two ratings and one highly favorable review.

Featured Customers – TrinDocs has a score of 4.8 out of 5 stars at the time of publication, with 179 reviews reported.

Vendor-collected reviews – Many more customer reviews can be found on TrinDocs own website.

NOTE: Information in this section is accurate at the time of publication.

EVALUATOR FEEDBACK

The information in this section is compiled based on feedback from our independent evaluators based on their review of the TrinDocs solution, training and documentation materials, and conversations with product experts.

Evaluators were provided with test accounts and sample data and documents in order to work with TrinDocs as part of the evaluation.

In one example, they submitted an invoice via email to see how the system reads the invoice, finds the receipt, and creates entries with no user interaction.

Evaluators were also able to see examples of invoices with and without POs, with scenarios including:

- Manually entering required fields after receiving an invoice that was missing data
- Handling an invoice total that doesn't match a PO and requires removing lines, adjusting quantities, or amounts, then approving.
- An invoice with a PO and everything is an exact match (total of PO lines + freight on the left). TrinDocs will create the invoice and add the freight line in BC from the amount in the header.

SOLUTION OBSERVATIONS

Evaluators learned that with each implementation, TrinDocs conducts a design/process session to determine the fields to capture and the process for payables. The user interface is configured based on the customer's needs around Receiving, Accounting, and Administration. Evaluators worked primarily in the administrator role, which has a full view of the system's operations.

They observed the following characteristics of the solution based on guidance from the TrinDocs team and their documentation.

The automatic flow of a document is

1. Email sent
2. Email received in TrinDocs
3. If all fields are populated, totals match (both quantity received and amounts), then the document is sent to Business Central and automatically posted.

In TrinDocs, a document is moved to a user step if it is missing the receipt, amounts don't match, etc. The document is moved to applicable group. Steps exist in TrinDocs for Amounts not Matched, Not Received and others. If any field is not populated, there is a Create Errors step for a user to make the necessary adjustments.

The Waiting to be Paid group is holds the invoices that will be paid in Business Central. The standard payment journal in Business Central is used to pay invoices via check or ACH. TrinPay is their solution to execute payments.

The manual flow of a document is

1. Email sent
2. Email received in TrinDocs
3. If all fields are populated and totals match (both quantity received and amounts), the document is moved to AP Ready to Process
4. From Ready to Process to Ready to Post
5. From Ready to Post to Sent to Business Central
6. Go to Business Central and manually post

Receiving and fixing receipts in TrinDocs was "super easy and understandable with a little training," according to one evaluator. If a user wants to see the invoice in Business Central and post manually, that is something that can be done. Once the users get comfortable, they should turn on the automation, the evaluator recommended.

OVERALL RECOMMENDATIONS

Evaluators identified key strengths and weaknesses during their evaluation of TrinDocs.

Strengths

- The interface is fast, and the product comes with extensive documentation, both written and video.
- It is a good option for organizations processing larger volumes of invoices.
- The ease with which the document populates the fields in TrinDocs. This is based on the installation setup. And if a new vendor requires an updated or new invoice template, clients have full control to create new templates, edit existing templates, and terminate the use of templates.
- It allows the AP personnel to work outside of BC.
- Good filtering abilities related to various steps.
- In some cases, AP personnel may not need to work in BC at all.

Areas for improvement

- One evaluator felt users will need to be carefully trained to make sure they understand the user interface.
- The process flow for users requires a thorough understanding of the interplay between the ERP and TrinDocs

USER EXPERIENCE

1. GUI / User experience is zippy (quick) and columns easy to add
2. Ease of Search by document number
3. They liked the concept of Quick Search, but it can still be improved.
4. In trial scenarios, some evaluators found it initially challenging to understand who emailed an invoice PDF, and to investigate how it arrived

SUPPORT & TRAINING

Evaluators liked the depth of online documentation and videos, which included both short- and long-form content. They suggested that TrinDocs continue to refine it with role-based learning paths.

OVERALL RECOMMENDATIONS

Evaluators described TrinDocs' fixed price model as a unique consideration for many of their typical cost-sensitive Business Central clients. They noted that customers are likely to compare TrinDocs to other vendors that offer a per-document, volume-based price. For organizations that process a few thousand invoices per month or less (perhaps less than the 1,000 to 4,000 range), evaluators believed that the raw monthly cost is likely to be higher for a TrinDocs solution.

In response to this feedback, TrinDocs noted that they serve customers at a range of sizes and invoice volumes, and advised that their price transparency, which they reveal in detail to each prospect can be a strength for growing businesses. They stated:

We have helped clients who do as few as a couple hundred invoices a month, all the way up to clients who do nearly 100,000 invoices per month.

TrinDocs' primary target market is SMB's. Since TrinDocs does not charge per document, generally SMB's who process at least 1000 invoices per month are the best fit...and those processing less than 1,000 documents per month seem to be better served by competitors who charge per document.

We've found that providing up-front transparency of knowing what AP Automation costs a SMB is important, especially since most of our clients are growing businesses who do more and more invoices year over year and don't want to pay more and more for the additional documents they're processing.

OTHER IMPRESSIONS

Evaluators were impressed with the depth of online documentation and video content and urged TrinDocs to go even further in connecting that guidance in context with the product. One evaluator suggested they add Tooltips or Business Central-style guided walkthroughs or tours to the product.

They noted that terminology in TrinDocs is not always aligned with that of Business Central documents, which requires additional attention in user adoption efforts.

CONCLUSIONS

"It's a good product, there is a lot that I liked," said one evaluator. Others agreed that, for the right organization, TrinDocs is a good choice. Client success with TrinDocs requires a degree of customization and configuration at the outset, but that work is done by the TrinDocs team for each new customer as part of their deployment to allow them to match the solution with their workflows, terminology, roles, and other business rules around AP. That work, combined with sufficient user adoption training, should result in a well-designed system that performs as expected.

The evaluators encouraged prospective buyers to do their own cost-benefit assessment. As one explained, "For the vast majority of my client base, [selecting an AP automation solution] is a cost decision." Still, TrinDocs has a broad customer base and a strong set of reviews and case studies that speak to their success in delivering document automation solutions at an attractive cost.

TrinDocs is a mature product from an organization with a deep financial management and ERP heritage and years of experience in the Dynamics channel. They have a clear vision of how to successfully deploy AP automation, including their expectation that each client will succeed by working with TrinDocs at the outset of an implementation to optimize the interface, processes, business rules, terminology, error messages, and more to make the solution fit their needs.

During the evaluation, the TrinDocs team demonstrated excellent working knowledge of both their own solution and its interaction with Business Central across various use cases, including typical decisions made during the implementation experience, fine-grained details of various integration processes, and ways in which Business Central customers can adapt TrinDocs to get the maximum value.

For prospective clients who have concluded they can benefit from serious AP automation, TrinDocs is worthy of a close look.