



# Simplified Bank Rec, Automated Requisitions and Invoice Approvals with AI-Enhanced Nolan Apps for BC



Nolan Bank Feeds



Automated Bank Reconciliation



eRequest



# Meet Your Hosts & Agenda



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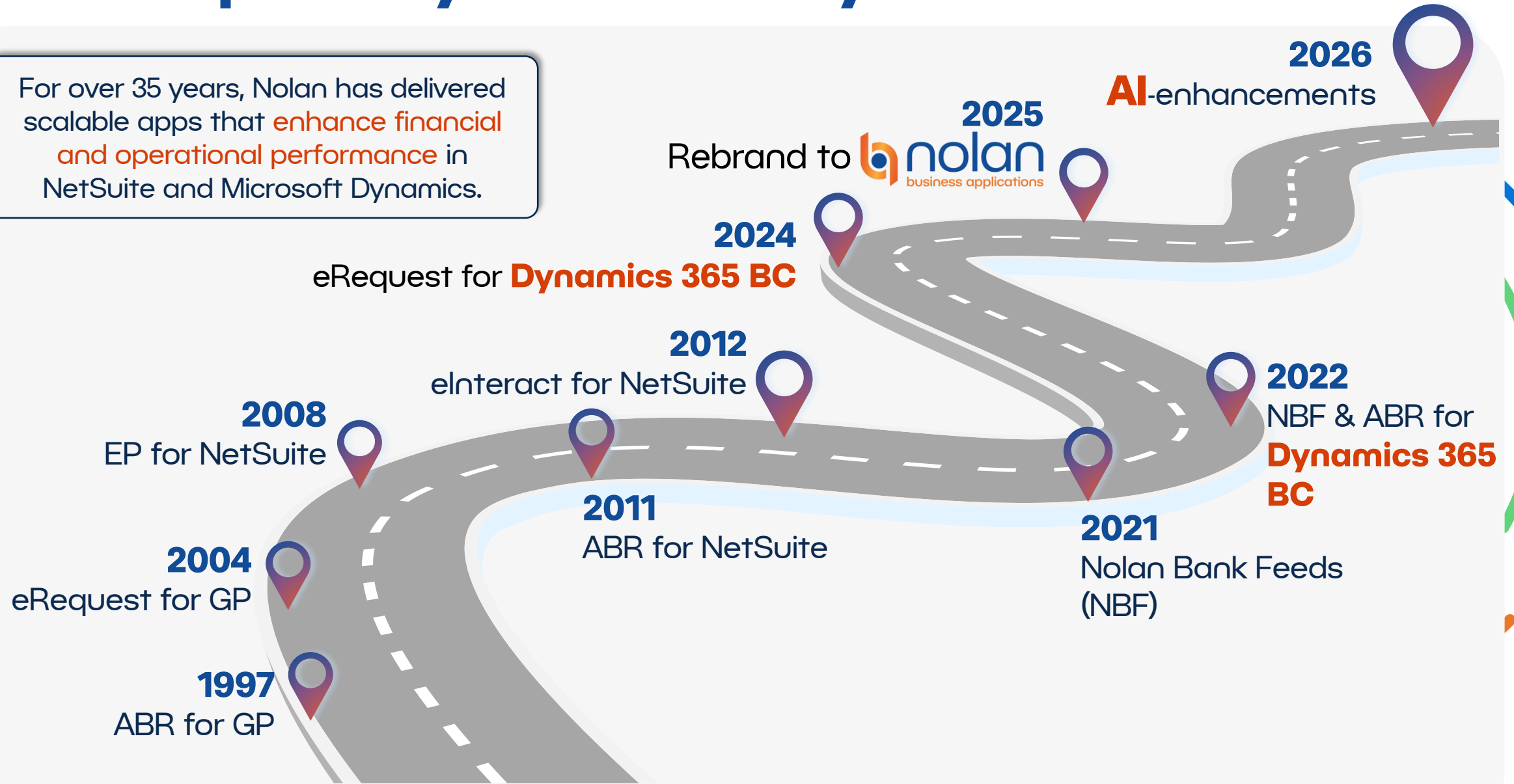
**Derek Beaupre**  
Channel  
Development Manager

- Accelerating cash reconciliation
- Modernizing purchase & invoice approvals
- Knowing when to step up from native BC
- Live product walkthroughs
- Customer Takeaways

A practical look at real-world BC finance scenarios teams face every day!

# Company History

For over 35 years, Nolan has delivered scalable apps that **enhance financial and operational performance** in NetSuite and Microsoft Dynamics.



# Accelerating Cash Reconciliation in Business Central

## Flexible Data Connectivity



### Nolan Bank Feeds

Connect to banks, credit cards and merchant gateways using multiple paths that adapt to different connectivity requirements

## Optimized Reconciliation Process



### Automated Bank Reconciliation

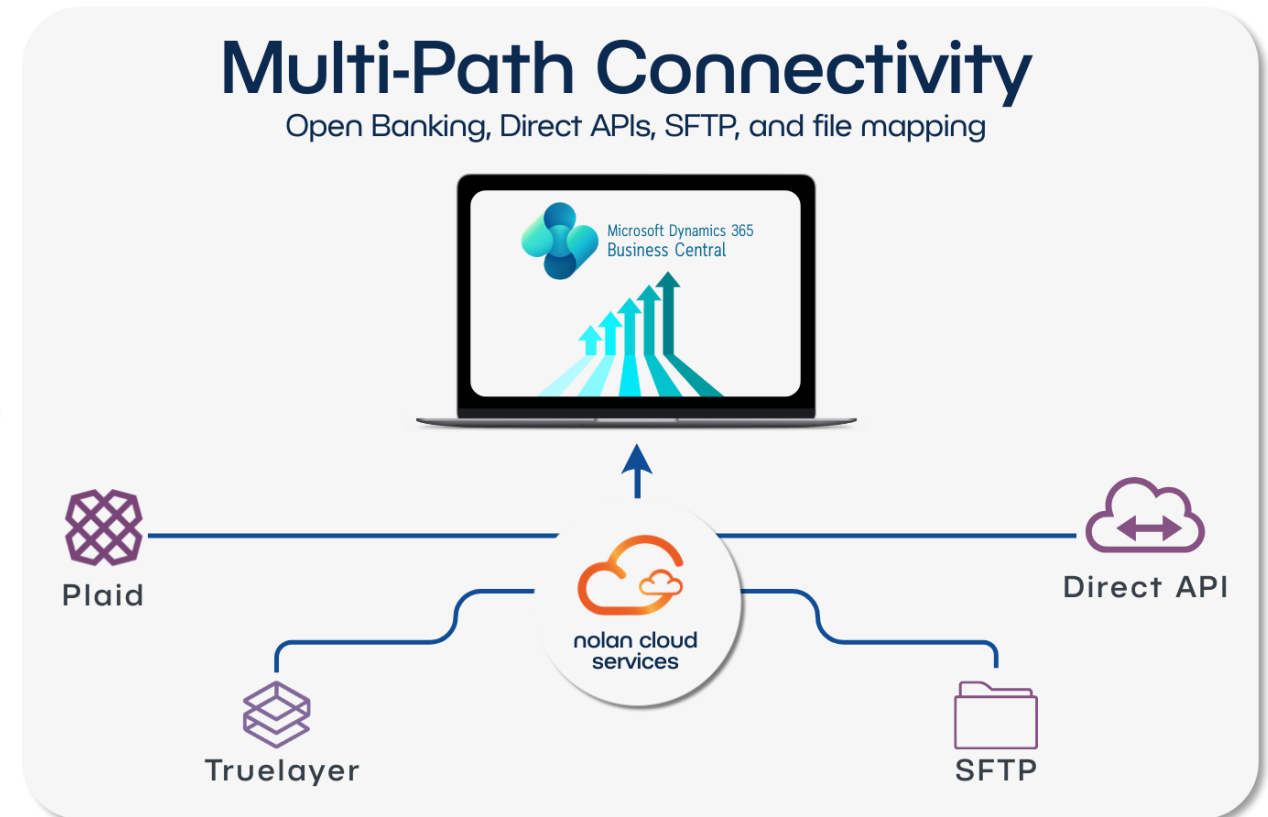
Streamline the reconciliation process with highly configurable transaction matching rules, auto-posting templates, and daily cash balance dashboards



One connectivity platform built to  
adapt as customer banking needs evolve

# Nolan Bank Feeds New and Improved

True multi-path connectivity  
for Business Central



# One Platform. Multiple Connection Paths.

## Open Banking Connections

Connect directly to banks via Open Banking

### Best for

Banks that support Open Banking APIs  
Customers looking for subscription-based connectivity  
Lightweight setup with strong automation

## Direct Bank API Integrations

Direct API connections for supported banks

### Best for

Corporate or regional banks  
Higher transaction volumes  
Customers with strict IT or security requirements

## Automated SFTP File Delivery

Secure SFTP file delivery from banks  
Supported formats include: BAI2 | MT940 / CAMT | CSV

### Best for

Corporate banking portals  
Global or multi-entity environments  
Banks without API or Open Banking support

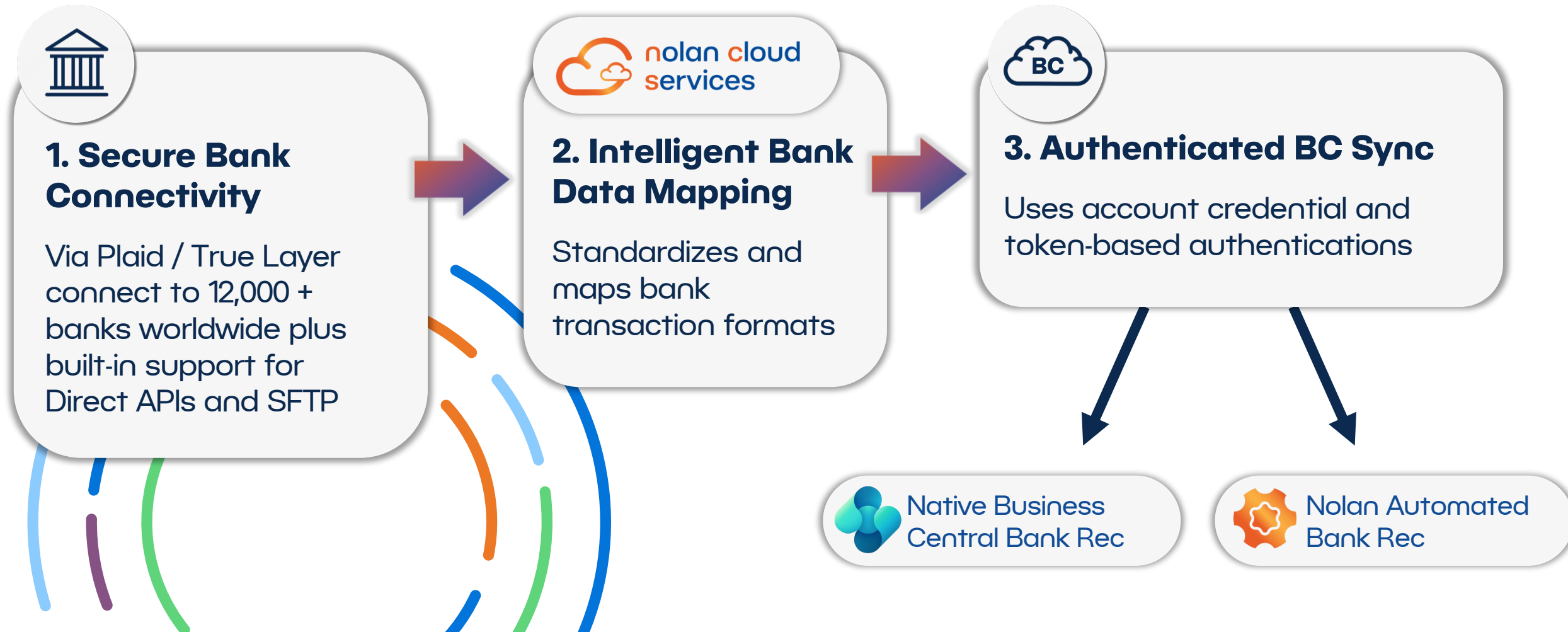
## Flexible File Imports

Mapped file imports when automation isn't available

### Best for

Edge cases without automation  
Temporary or transitional banking workflows  
Banks with limited digital or API access

# Fully Automated , End-to-End Bank Data Flow





# Automated Bank Reconciliation

## Choosing the Right Reconciliation Approach in BC



### Native BC Bank Reconciliation

**Best fit for**

Simple volumes  
Straightforward matching  
Basic reconciliation



### Nolan Automated Bank Reconciliation

**Best fit for**

High volumes  
Complex & batched payments  
Automated matching & posting  
True end-to-end reconciliation automation



**Nolan Bank Feeds supports both approaches, giving your team flexibility as needs evolve.**



## Where Reconciliation Breaks Down & How Nolan ABR Fixes It

### Reconciliation Challenge

### How Nolan ABR Fixes It

Check Number Matching	→	Auto-match checks using relevant criteria
High Transaction Volumes	→	Rule-driven matching, grouping, and tolerances
Complex Payment Batches	→	Auto-group ACH, cards, and gateway deposits
Recurring Bank Transactions	→	Auto-create and post missing cash entries
Lack of Matching Transparency	→	See exactly why every transaction matches
Fraud & Financial Control	→	Rules you control. Exceptions you can trust

**Rule-driven intelligence with full automation – not black-box AI.**



Nolan Bank  
Feeds



Automated Bank  
Reconciliation

## Live Walkthrough

From Bank Data to Reconciled Transactions



# AI-Driven Enhancements – Coming Next



## Automated Bank Reconciliation

### AI-Assisted Rule Setup

Select transactions – AI suggest the matching criteria to turn your selection into a reusable rule.

### Explain Match Logic

AI explains why the transactions matched – in plain English.

### Build rules in Plain English

Describe the match you need – AI generates the rule criteria and clauses.

*Currently in development. Subject to change.*



# Modernizing Purchase & Invoice Approvals

Faster approvals. Stronger spend control. Better visibility.

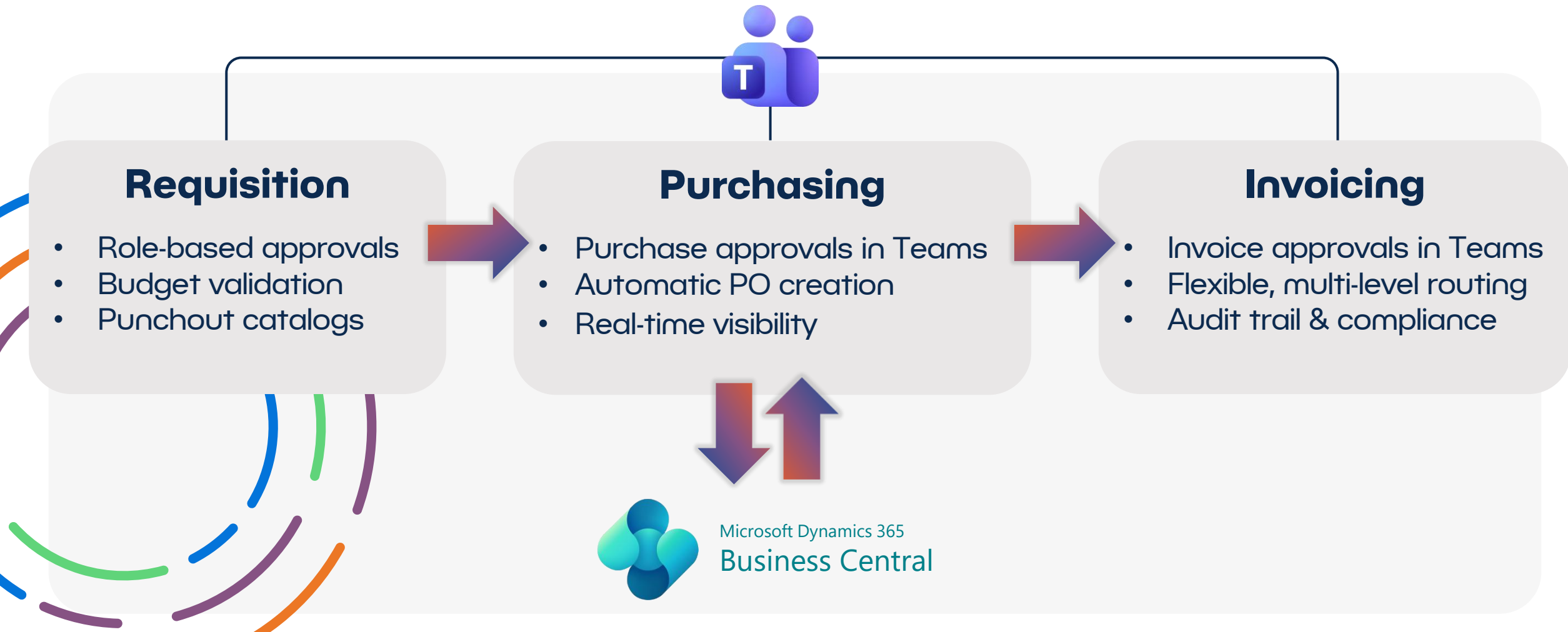


Eliminate manual purchase requests and approval bottlenecks with Nolan eRequest—a Microsoft Teams app designed for faster buying, stronger employee spend control, and better visibility.





## From Requisition to Invoice Powered by Nolan eRequest in Microsoft Teams





## Where Purchase & Invoice Approvals Breaks Down And How Nolan eRequest Fixes It

### Approval Challenge

### How Nolan eRequest Fixes It

Lack of Visibility & Control	→	Centralized approvals with full audit trails
Budget Overspending	→	Budget checks before approval
Manual Processes & Errors	→	Automated workflows — no email chasing
Rigid, Linear Approval Routes	→	Flexible, multi-level approval by role, user, or item
Slow Approvals	→	One-click approvals in Microsoft Teams
Procurement Delays	→	POs created automatically after approval

**Helping finance teams remove friction from purchase and invoice approvals, and improve control without slowing people down.**



## Modernizing Purchase & Invoice Approvals

### Before

- ✗ Approval delays
- ✗ Email approval chains
- ✗ Rigid, linear processes
- ✗ Lack of visibility & budget control



eRequest



Microsoft Dynamics 365  
Business Central  
System of Record



### After

- ✓ Fast, Microsoft Teams approvals
- ✓ Flexible, multi-level routing
- ✓ Real-time visibility & budget checks
- ✓ Automatic PO creation after approval

**Nolan eRequest moves purchase requisition and invoice approvals into Microsoft Teams, while Business Central remains the system of record.**

# AI-Driven Enhancements – Coming Next



## eRequest

### AI-Assisted Invoice Validation

Create validation instructions in plain English - AI shows color-coded pass/fail results for each check.

### Invoice Line-Item Capture

Upload PDF/JPEG invoices – AI converts into structured line items for faster processing.

*Currently in development. Subject to change.*





eRequest

## Live Walkthrough

*Requisition → Purchasing → Invoicing*



# What's Next in the Nolan BC Suite



## Payments Direct

Secure, direct bank transmission of vendor payments

Eliminates manual file uploads and banking portals

Designed to extend the same control and automation principles shown today



# Key Takeaways

## **Flexible, Multi-path bank connectivity**

Meet your customers and their banks where they are — no one-size-fits-all model.

## **Choose the right cash reconciliation approach**

stay native in simpler scenarios or step up to Nolan ABR when volume/complexity grows.

## **ABR is rule-driven automation you can trust**

transparent “why/how it matched”.

## **Modernize purchase & invoice approval processes**

with direct connection back to Business Central.

**Practical ways to reduce manual effort, improve control, and close faster in Business Central.**

# Thank You!

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