About Aptitude Software

Aptitude Software is a specialist provider of finance digitalization and subscription management solutions that allow businesses to do more with less while reimagining how to operate, perform, and scale.

Microsoft Business Applications focus

Dynamics 365 Finance

Industries

Banking, Healthcare, Insurance, Manufacturing, Media and Entertainment, Technology, Telecommunications

Headquarters

United Kingdom

Microsoft partner since

2022

Key customer outcomes

Faster, more efficient close process
Industry-specific IP and expertise reduces implementation costs
Comprehensive solution via seamless integration with Dynamics 365

Aptitude further automates financial consolidations, closes, and insights for Dynamics 365 customers

Fynapse connector offers comprehensive solution for complex enterprise-scale environments

Aptitude is an expert provider of finance management automation solutions that help enterprises with high volumes of financial transactions, such as banking, insurance, telecommunications, technology, media and entertainment companies, digitally transform their operations. Recently, Aptitude announced it has joined the Microsoft ISV Connect program and will be bringing its Fynapse solution to the Microsoft Cloud ecosystem, enabling it to run on Microsoft Azure and creating interoperability with Dynamics 365 Finance. "This partnership offers huge benefits to both Aptitude and Microsoft customers," said Jeremy Brown, SVP of Global Channel and Alliances at Aptitude. "Our accounting engine and subledger capabilities complement Dynamics 365 Finance, creating an even more comprehensive solution to address the critical needs of organizations with even the most complex finance architectures."

The new Fynapse connector for Dynamics 365 Finance will enable finance teams to be more efficient and focus on more strategic work. With a finance-focused user experience, automation to reduce manual tasks, and unified data businesses can rapidly respond to changing market conditions and regulations. "Large companies typically have complex architectures with financial transaction data stored across a variety of systems that can include mainframes, homegrown solutions, client/server systems, and SaaS solutions," said Brown. "Fynapse consolidates business-event level data from source systems and performs consistent accounting against it, making it directly available to finance users."

The connector provides a drill-back button within Dynamics 365 Finance that allows teams to immediately see this detail behind any balance within the general ledger (GL), including what transactions made up the balance and if changes or manual interventions occurred. "Finance teams have historically had to go all the way back to source systems to do this type of drill down," explained Carl Gern, Director of Global Strategic Alliances at Aptitude. "And because IT teams often lock down legacy systems, that means every time monthly, quarterly, or year-end close comes around you have to ask IT for access to each system where you need to hunt down details. This leads to hours and hours of manual work that can be eliminated with Fynapse."

Jordan Burke, Product Manager of Finance Digitalization at Aptitude, continues: "Our solution is very focused on improving the efficiency and efficacy of finance. Finance teams are empowered to use the solution themselves to streamline financial processes—such as clients' period close—and don't have to rely on IT."

Supporting needs of finance and IT

Aptitude made the decision to build its connector to help Dynamics 365 Finance clients handle the complexity that comes with highly distributed or high volumes of finance data before it reaches the GL. For example, a global insurance company that operates in over 120 countries had implemented Dynamics 365 Finance, but had a very lengthy and complicated close process because data was distributed across all of their source systems in each of its regions and lines of business. By adding Aptitude's accounting hub technology, the provider was able to establish a consolidated, single source of truth for financial data, increasing finance team efficiency and significantly accelerating the close process.

"This customer is a great example of how Microsoft and Aptitude can come together and help finance teams that are grappling with large, complex finance architectures," said Gern. "Both finance and IT teams are benefiting from the integration between the two solutions since manual requests for access to source systems are no longer necessary. This lets both groups refocus their energy on work that will help drive the business forward."

ISV Connect helps engagement with broader Microsoft ecosystem

A significant benefit of joining the Microsoft ISV Connect program is enabling Aptitude to reach new customers in the broader Microsoft ecosystem through engagement with the Microsoft field. "Microsoft has a reputation of being a flexible, strong partner in the enterprise resource planning (ERP) space," said Brown. "We're really looking forward to working with the Microsoft sales teams to provide a full-stack offering to the market, and ISV Connect gives us the roadmap we need to make co-selling a success."

Another important benefit of ISV Connect is building partner-to-partner (P2P) connections. Given the large role that global system integrators like KPMG, EY, and PwC play in the financial solutions market, Aptitude is looking forward to the opportunity to make further inroads with these partners. "While we already work with the financial practices of many of the largest system integrators, the Microsoft partnership provides us with access to new areas of these organizations," continued Brown. "We think that working with Microsoft and these P2P relationships are a great opportunity to make significant impact in addressing the challenges facing this market."

Strong foundation for growth

After the connector launches on Microsoft AppSource and the Azure Marketplace in the first half of this year, Aptitude sees continued opportunity for growth in the Microsoft ecosystem. "Our integration with Dynamics 365 is important because we're giving organizations even faster access to data to proactively pivot, in a finance-driven way, and help steer the business in the right direction," said Gern. "There is certainly opportunity for the trusted data that we serve up to be used in other ways. With the Microsoft Power Platform, for example, you can add in additional workflow or approval capabilities. The Microsoft Cloud is so flexible, customers will have so many more capabilities at their fingertips."