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*Joe Claxton, IT Manager,  
James M. Pleasants Company*



## James M. Pleasants Company Moves Full-Steer Ahead with Microsoft Dynamics® AX and Create!form®

### Company Profile

- James M. Pleasants Company was founded in 1958 as a manufacturer's representative for Bell & Gossett products.
- It's mission is to provide customers with products and solutions for energy-efficient water and stream-related systems.

### Challenge

Document output required costly custom ERP programing

### Solution

Create!form for Microsoft Dynamics AX

### Benefits

- Company is able to quickly transform Dynamics AX output
- Eliminates the high degree of manual intervention associated with customer invoicing
- Easy-to-use drag and drop functionality allows users to make changes to customer-centric information on the fly

The value associated with transactional documents has changed dramatically in recent years. Yet for many organizations, the creation and distribution of standard ERP output remains paper-based, and therefore costly and inefficient. Seeking to attain greater business value from its transactional documents without having to conduct complex custom programming, James M. Pleasants Company adopted a new approach to Microsoft Dynamics AX output with the use of Bottomline's Create!form solution.

A manufacturers' representative for commercial heating and cooling systems, Greensboro, NC-based James M. Pleasants Company had reached a technology crossroads. For years, the company's existing mainframe legacy system had proven functional as business expanded into South Carolina, Georgia, Alabama, Tennessee and Northern Florida. But with the continued growth of the organization, the mainframe system was no longer capable of supporting strategic objectives, and company executives made the decision to migrate to the Microsoft Dynamics AX platform.

Most ERP systems are capable of accommodating changes to standard output, but it comes at a cost. In order to change the look and feel of documents such as invoices, purchase orders or picking lists, for example, businesses must commit valuable resources to the customization of the ERP application, which is likely to result in document enhancements and process improvements that fall short of expectations.

Many organizations that have standardized on Microsoft Dynamics AX have been able to dramatically increase the efficiency and cost-effectiveness of their document-based business processes through the use of Bottomline's advanced capabilities for transactional document automation.

Bottomline's award-winning solutions allow organizations to streamline business processes that rely heavily on paper-based documents. By automating the routing, delivery and storage of transactional documents, users can quickly and easily increase the functionality of their document output while reducing costs. And because the solutions integrate with industry-leading ERP systems such as Microsoft Dynamics AX users are able to protect their existing IT investments while easing ongoing ERP maintenance and upgrades.



In conducting a thorough review of comparative products, several factors emerged that separated Bottomline's solution: its comprehensive feature set; ease-of-use and compatibility; scalability to support future business growth and needs; and documented success across the global Dynamics AX community.

With Bottomline's turn-key solution, James M. Pleasants Company has been able to leverage the company's services and software capabilities to quickly transform its Microsoft Dynamics AX output. Prior to implementing Bottomline's solution, for example, customer invoicing was especially difficult when business rules required the inclusion of variable information or when customers dictated changes.

Today, the high degree of manual intervention associated with customer invoicing has disappeared. The easy to use drag-and-drop functionality inherent in Bottomline's report design tool has allowed internal users to make changes to customer-centric information (i.e. corporate and/or mailing addresses) on the fly, and through the use of electronic workflow, automatically generate the requisite documentation based on the content of the invoice.

"While Microsoft Dynamics AX was the clear choice for our business as an ERP system, we quickly discovered we wanted more flexibility and control over our ability to create and distribute the transactional documents central to critical business functions" said Joe Claxton, IT Manager, James M. Pleasants Company.

In the future, Claxton anticipates expanding the company's use of Bottomline's solution into a number of new areas, including the integration of barcodes with purchase orders, which will open the door for the company to eliminate manual data entry.

"During our evaluation of potential ERP systems, Microsoft Dynamics AX emerged as the best fit for our organization based on its ability to support a unique business model and extensive expansion capabilities."

*Joe Claxton, IT Manager, James M. Pleasants Company*

"The way in which James M. Pleasants Company is leveraging our solution is a prototypical example of how organizations standardized on Microsoft Dynamics AX can build upon the platform's strengths to introduce new efficiency gains and reduce the costs commonly associated with transactional business documents," said Rick Bell, Senior Vice President and General Manager of Bottomline Technologies.

### About Bottomline Technologies

Bottomline Technologies (NASDAQ: EPAY) provides cloud-based payment, invoice and banking solutions to corporations, financial institutions and banks around the world. The company's solutions are used to streamline, automate and manage processes involving payments, invoicing, global cash management, supply chain finance and transactional documents. Organizations trust Bottomline to meet their needs for cost reduction, competitive differentiation and optimization of working capital. Headquartered in the United States, Bottomline also maintains offices in Europe and Asia-Pacific. For more information, visit [www.bottomline.com](http://www.bottomline.com).



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