

Rever and Dynamics 365

Fifteen finance agents on your Dynamics 365 records over a read-only connection, with approved entries handed back as an import file your team loads.

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Dynamics 365 stays your system of record. Rever reads it over a read-only connection, maps the records into a canonical model of your books, and puts fifteen specialist agents, coordinated by Eve, to work on the transactions in scope. Rever never writes to Dynamics 365: your team approves each entry and loads it from an import file, and Dynamics 365 stays the place entries post.

How Rever connects to Dynamics 365

The connection is a direct, deterministic integration that reads and never writes, in place of an MCP server or an agent holding your Dynamics 365 credentials, so the agents can read only what the connection provides and your source data stays unchanged. Rever can also read from a common database you already maintain.

Microsoft sells more than one finance application under the Dynamics 365 name. Rever's product page lists Dynamics 365 as a connector; agree the application, the legal entities and the modules in scope at the first step of the Proof of Value, where your team and Rever settle which entity, which systems and which period.

What stays where

STAYS IN DYNAMICS 365	HAPPENS IN REVER
The general ledger, legal entities, vendors, customers and transactions	A mapped copy of the records in scope, reconciled back to the Dynamics 365 trial balance
Posting, period controls and your security roles	Findings, questions and approvals in the Inbox, each with its evidence
The bank reconciliation your team completes and posts in Dynamics 365	Matcher's continuous bank-to-book matching and Investigator's work on the differences
Any approved entry or invoice, once posted	Journal's preparation of it and the check that it posted once

Rever never writes to Dynamics 365: an entry your team approves comes back as an import file your team loads. Approval thresholds and dual approval for material amounts are yours to set.

Which agents work on Dynamics 365 records

USE CASE	LEAD AGENT	WHAT IT DOES WITH THE RECORDS
Accounts payable	Spend Guard, with Matcher and Sentinel	Ties each invoice to its order and receipt, screens payment runs for duplicates and price drift, and checks a changed vendor bank account against independent authorisation
Accounts receivable	Revenue Assurance and Deduction	Checks billing against delivery and contract terms and tests short payments
Bank reconciliation	Matcher	Reconciles bank, card and processor activity to the books as it lands
Balance reconciliation	Matcher, with Close Orchestrator	Agrees vendor, customer and intercompany balances and carries intercompany differences into the close
Period close	Close Orchestrator, with Journal and Flux Analyst	Tracks close readiness, prepares accruals and reversals, and explains movements
Inventory	Inventory	Reviews stock existence, movements, cut-off and valuation against supporting records
Audit readiness	Evidence, with Auditor	Keeps support linked to each entry and tests whether procedures were followed

The [bank reconciliation template](#) shows the layout your team reviews before signing in Dynamics 365. [Rever and your ERP](#) answers the questions your ERP admin, IT lead and auditor will ask.

What the zero-day scan does first

With read-only access in place and the mappings approved, the zero-day scan makes the first pass. It inventories the extracted populations, periods and source control totals for each entity in scope, compares source and landed journal counts and debit and credit totals by entity, period and account, and reconciles the Dynamics 365 trial balance to Rever's canonical book, with functional-currency checks where an entity reports in another currency.

The scan parks rejected or undecided records with a reason and an owner, and never infers an approval to get a clean tie-out. Connector failures go to Steward and accounting differences go to the responsible agent. The initial findings arrive with the evidence behind them.

Questions

Which Dynamics 365 applications does Rever connect to?

Rever's product page lists Dynamics 365. Confirm the application, entities and modules for your scope at the start of the Proof of Value.

Does Rever change our Dynamics 365 data?

No. Rever reads Dynamics 365 and never writes to it, so your source data stays unchanged; approved entries come back as an import file your team loads.

Which other systems does Rever connect to?

Rever connects to Dynamics 365, NetSuite, QuickBooks, Stripe, your banks and documents. See rever.ai/product, and the [NetSuite](#), [QuickBooks](#), [Stripe](#) and [banks](#) pages.

rever.ai/explore/integrations/dynamics-365