GP
OPTIMIZER
MAGAZINE

Making Receivables
Easier To Manage

Improvement
in Quality
Improves the Economy

Managing Long-Term
Investment Assets
in Microsoft Dynamics GP

Welcome to the 2nd edition of GP Optimizer. Our commitment is to create a publication containing articles, which are focused on how to make your investment in Microsoft Dynamics GP more worthwhile through solving an issue that you might have encountered; each article is written by our fellow Channel Partners.
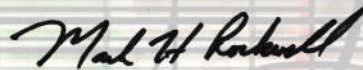
Rockton Software has been in the Microsoft Dynamics GP channel for nearly 14 years. You may have seen us at Convergence dressed up as bartenders, pirates, Vikings, or cavemen. Regardless of our crazy costumes, we have established ourselves as fervent supporters of the greater GP channel, and we want you to excel in business by leveraging other tools and knowledge from our friends in the community.

GP Optimizer shares industry expertise, with perspectives from Independent Software Vendors (ISVs) on how to solve problems many Microsoft Dynamics GP Users face in their businesses. Over the years, I have heard of many requests for a solution catalog that lets GP customers know about "what is out there" to solve real business problems.

We want to thank all participating ISVs for their help in producing the content that is accumulated in this issue of GP Optimizer, as well as their commitment to the Microsoft Dynamics GP channel.

So take a look and let my team know what you think—candid thoughts welcome.

Enjoy!

Mark H Rockwell

Mark Rockwell
President, Rockton Software

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GP Optimizer **Sponsors**

Cover photo by Photos.com/Stockbyte

Add dimension to your projects

JOVACO Project Suite is fully integrated to Microsoft Dynamics GP to offer you a solution with advanced features for project-based companies. Keep your project on time and on budget by receiving real time costs and project updates through an automated report distribution.

Robust Project Accounting Features

- Fully integrated to Microsoft Dynamics GP
- Multi-company and inter-departmental capabilities
- Advanced integrations to Sales & Purchasing Order Processing
- Detailed organizational work breakdown structures

Flexible Billing Capabilities

- Meet diverse client billing requirements
- Establish and automate invoice generation
- Customize different invoice templates using Microsoft Word
- Mix and match various invoicing methods (Milestone, Lump sum, etc.)

Intuitive Timesheet

- Web-based timesheet built in Silverlight
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Beyond Fraud:
Why Auditing is So Important

Written By the Sales & Marketing Team of **Rockton Software**

When people think about auditing Microsoft Dynamics GP, many customers picture FBI-style interrogators searching the audit logs to point out all ill-intended crooks who are stealing money from their company. In our experience, fraud prevention and detection might be a good starting point to implement an auditing tool; however, there is much more to be gained from auditing.

Auditing Software provides four other key tangible benefits:

Data Backup

Have you ever hit your keyboard on accident and wiped out some field? Imagine you are in Microsoft Dynamics GP, you have a transaction window open, receiving a phone call, and bumping your keyboard along the way. After your call, you come back to Microsoft Dynamics GP and close the transaction window...what do you get? A message saying, Do you want to Save or Delete this Transaction? Your only reasonable option is to hit Save, even though you weren't editing something in the first place. Fast forward a few days...you discover that your transaction has gibberish in a key field! If you have an auditing tool in place, you can visit your audit log to restore your information.

One of our customers in the healthcare industry, with locations in 15 different states, notes that the number one reason they use Rockton Software's Auditor is to "track changes deemed high risk areas."

User ID	Date	Time	Record Key	Table Name	Window Name	Field Name	Old Field Value	New Field Value	Note	Company Nam
Audits										
sa	11/16/2012	8:07:46 AM	STDINV2274-3	Sales Transactio...		Customer Name		dddddddddddddd		Fabrikam, Inc.
sa	11/16/2012	8:07:46 AM	STDINV2274-3	Sales Transactio...		Document Amo...		534.95000		Fabrikam, Inc.
sa	11/16/2012	8:07:46 AM	STDINV2274-3	Sales Transactio...		Document Date		4/12/2017		Fabrikam, Inc.
sa	11/16/2012	8:07:46 AM	STDINV2274-3	Sales Transactio...		Markdown Amo...		0.00000		Fabrikam, Inc.

Procedural Clarification

At Rockton Software, we ran across two employees scratching their heads on why the Customer Contact in Microsoft Dynamics GP kept changing. Adrienne was complaining that she changed the company's contact every other day, and she did not understand why the save hadn't been working. We were able to check the audit logs, thus, realizing Diane, our Internal Account, was changing it back. We had a good laugh because we had the audit log to show that Diane and Adrienne kept undoing each other's work, toggling the contact name back and forth. Ultimately, we were able to have the two of them talk about why they were making the changes, then they came up with an improved procedure on what our system data means and how to use it.

User ID	Date	Time	Record Key	Table Name	Window Name	Field Name	Old Field Value	New Field Value	Note	Company Nam
Audits										
Diane	11/16/2012	9:14:36 AM	AARONFIT0001	RM Customer M...		Contact Person	Jon Doe	Jennifer Rossini		Fabrikam, Inc.
Adrienne	11/16/2012	9:26:26 AM	AARONFIT0001	RM Customer M...		Contact Person	Jennifer Rossini	Jon Doe		Fabrikam, Inc.
Diane	11/17/2012	9:29:50 AM	AARONFIT0001	RM Customer M...		Contact Person	Jon Doe	Jennifer Rossini		Fabrikam, Inc.
Adrienne	11/18/2012	9:32:29 AM	AARONFIT0001	RM Customer M...		Contact Person	Jennifer Rossini	Jon Doe		Fabrikam, Inc.
Diane	11/19/2012	9:33:29 AM	AARONFIT0001	RM Customer M...		Contact Person	Jon Doe	Jennifer Rossini		Fabrikam, Inc.

Performance Evaluation

Here is a clever idea. Ever wonder how productive a certain employee is? With Auditor you can audit one person and track how many new transactions they make. You are able to view your audit log on a daily basis.

Troubleshooting

Time and again we run into customers who have customizations that are behaving irrationally. Auditing can do wonders for tracking when and where there is a problem occurring. In the case of bad data, you can email or alert a system admin istrator with a pop-up message; the system administrator can go to a person's computer right away and ask them what steps they took to create the issue.
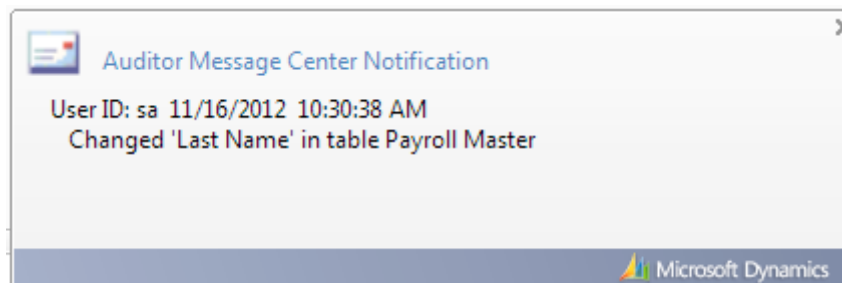
If you haven't considered auditing before, you should consider giving Auditor a chance. Not only do we track changes to data, we have alerting systems to notify when audits happen, and the ability to selectively audit specific people or companies. It is easy to configure and provides many added benefits.

Dennis L. Day, LKA's Chief Consultant, described Auditor as "very intuitive to setup, however, the ease of reporting is the most important thing to our clients. Since Auditor uses SmartList reporting, our clients are able to quickly analyze the data changes needed for their organization whether it is information on new hires, changes to employee's pay, who added a new chart of accounts, or who added or modified a vendor account."

Take the Audit Challenge!

Rockton Software is offering FREE trials of Auditor. Contact us to see what it can do or challenge your existing auditing program side-by-side. To receive FREE trial keys, email sales@ rocktonsoftware.com or call us at 877-476-2586. Mention the Audit Challenge and Offer Code: GPOMWIN and we'll send you a free gift! GP

Manufacturing Orders:
Tracking MOs Efficiently and Accurately

By **Business Computer Software, Inc.**

Is your work day wasted on data entry for Microsoft Dynamics GP Manufacturing? Do you have designated employees spending countless hours entering your employees' hours on manufacturing orders and still making mistakes? If so, you need a better way to record the labor hours of a product and determine the costs. Fortunately, there is a product out there that can save you time and employee salary costs! The Time Matrix Time Clock can greatly reduce your data entry and increase your accuracy. As a time clock that records employees work hours, the product is also able to allow employees to simply select a Manufacturing Order (MO) when they clock in. Hours for the MO are recorded and integrated for all employees working on the specific product. As an employee changes working on an MO during the day, they can return to the Time Clock and select the next MO they will be working on. Having employees select the MO's they are working on eliminates the need for time entries to be manually entered.

For all employees working on a specific MO, time entries are transferred (posted) to Microsoft Dynamics GP Manufacturing Time Card Entry. Microsoft Dynamics GP Manufacturing then processes these hours to the specific Manufacturing Order.

Not only does the Time Matrix Time Clock eliminate entering manufacturing times, it also eliminates entering Payroll transactions, whether, payroll is done in-house with Microsoft Dynamics GP Payroll or by an external payroll service—payroll transaction data entry is eliminated. This occurs because time entries are transferred (posted) to Microsoft Dynamics GP Payroll or exported to a Payroll service and subsequently processed by Microsoft Dynamics GP Payroll or the Payroll service.

The Time Matrix Time Clock not only tracks time for employees when they clock in and clock out, but accurately tracks time worked on specific Manufacturing Orders and supports Payroll transactions. As a company or business, the efficiency of employees' time and labor are critical, and Time Matrix Time Clock can help you eliminate employee data entry and free up your employees for more important tasks. GP

Making Receivables
Easier To Manage

By **ICAN Software**

Microsoft Dynamics GP users who deal with a large volume of receivables know the pain of having to apply a large number of credit documents like payments, returns, or credit memos against debit documents like invoices.

One Microsoft Dynamics GP user often has to apply a payment against thousands of invoices. Mass Apply Receivables allows them to import in a CSV file that they created from Excel with all of the apply details. They then can run a routine that allows them to preview and process all of those applies with one click.

Other users of Microsoft Dynamics GP often have many leftover payments, returns, or credit memos with amounts remaining that they wish to auto apply purely based on document date (rather than the GP auto apply logic which applies by document type first, then by due date or number). Mass Apply Receivables allows them to auto apply across a range of customers and document date, and provides the ability to restrict on customer class and a maximum credit document amount threshold.

When customers have to deal with multicurrency payments, they are forced to use the manual apply window which can be time-consuming and tedious. Mass Apply Receivables allows for automation of the apply process in these cases saving users time and effort.

And when customers would like to have returns automatically applied to the correct invoice, they can make this happen by using another feature of Mass Apply Receivables. If the invoice number, to which the return should be applied, is stored in the Customer PO Number field on the return, then Mass Apply Receivables can be run to automatically apply all such returns with one click.

Mass Apply Receivables is just one of many great products from ICAN Software Solutions. We make solutions that turn hours into minutes…

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Reduce Your Number of Manual Transactions

with Multi-Company Project Structures

By Jonatan Coutu, General Manager at **JOVACO Solutions**

As a company expands, Microsoft Dynamics GP is well positioned to help you support your business growth. With this growth, your company structures become more complex. One of the challenges with project-based companies is when more than one division of their organization is involved within the same project. It only makes sense that these organizations bring together their various specializations in order for the process to seem seamless to the customer and in turn to offer the best services.

Difficulties arise when these organizations want to track the cost and revenue within the appropriate companies; therefore, inter-company billing becomes a necessity. Since many companies have different entities that represent their business on either a vertical or horizontal market, an inter-company billing process is required to facilitate the lending and sharing of resources across their organization.

This complexity only continues to multiply when there are several projects with different combinations of companies involved. As the number of transactions increase, the challenge becomes how to properly account for all of these tasks and transactions. Corporations want to maintain their visibility into the health of a particular company, but still preserve a substantial amount of detail at the project level to be able to evaluate the project's ongoing or final level of profitability.

Many companies currently manage these cross-company projects through distinct company setups in Microsoft Dynamics GP, but require constant manual interactions between them to maintain up-to-date information.

This is typically a time-consuming task for the accounting department to decipher the different activities and mark-ups within a project, and to properly report them to the different business units and within a consolidated statement.

From our experience, we believe that the project's database should be the basis of your structure and should be available across all your companies participating in that project. This would eliminate the requirement for multiple manual inter-company transactions. This type of structure will allow you to easily lend resources like employees, suppliers, inventory, and equipment to each other in order to reduce your administrative time creating these transactions and increase the synergies between your different organizations.

A way that JOVACO reduces this level of complexity is with a multi-company project database setup. You can create an automated process of inter-company entries and even inter-company invoicing to streamline the flow of your business activities. This process will auto-

matically create and associate the appropriate Accounts Payables and Receivables for each of the companies associated within the project, therefore, eliminating the manual transactions and also allowing your organization to include related discounts and markups related to a particular project.

In general, if you can set up a multi-company project within Microsoft Dynamics GP, you will then have the possibility for drilldowns and reporting specific to a particular company. With a well thought out multi-company project structure, which supports your projects across all your companies, profit centers, and business units, your organization will have the insight it needs to have a better overview on the health of your different companies and projects while easing the burden of inter-company invoicing. GP

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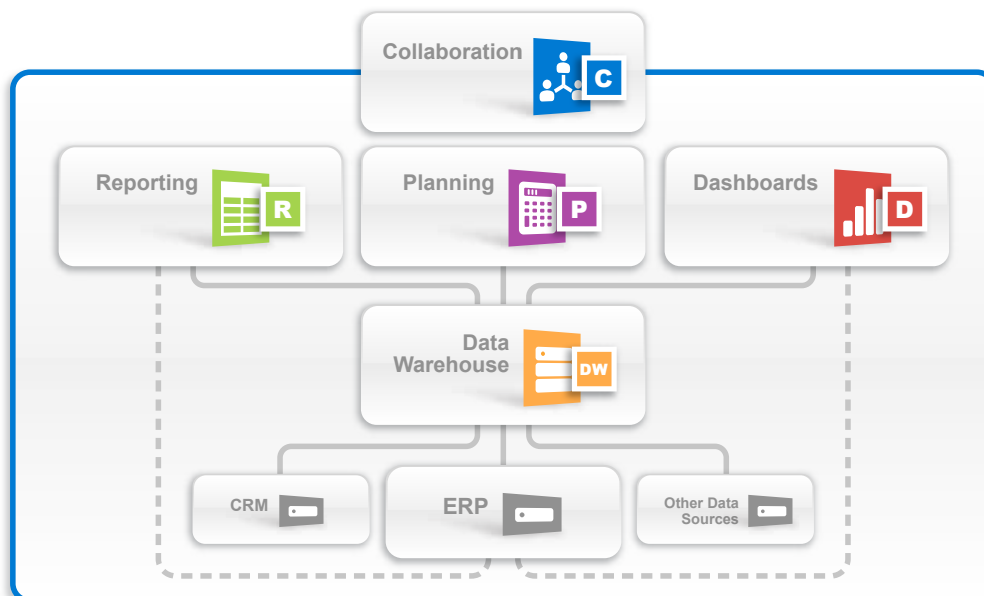
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Improvement in Quality
Improves the Economy

By Frances Donnelly, C.Q.P.A., Director Product Development and Sales <u>Horizons International</u>

The encouragement of quality habits in organizations is typically founded on either regulatory requirements, meaning we do it because we have to, or individualized company initiatives based frequently on the desire for competitive advantage.

But what if we were to discover that quality improvement processes could be directly tied to higher GDP, more revenue from corporate taxes and significant decreases in unemployment? In the face of such data could we, in our individual entities, continue to find it reasonable to not fully embrace formal quality improvement tools?

It has often been difficult in both regulated and non-regulated sectors for organizations to maintain momentum for continuous and increasing investment in quality improvement processes. Our internal tools for measurement and evaluation tend to more frequently shed light on the cost of issues rather than on the rewards earned by eliminating those same issues. We often fail to see the true ROI of our efforts. Trends towards decreasing investment in the quality function are further exacerbated in economic times like the present where entities are focused on rationing resources to ensure continuation of activities until some future point.

We understand at an instinctual or gut level that Deming's chain reaction process (figure 1) is valid, and that efforts towards quality improvement will generate increases in margins. But, because we do not seem to be able define measurement of that value in such a way that it can be understood and accepted across all entities we struggle to maintain the momentum we need to keep investing.

Perhaps the struggle for such universally accepted and understood data is over.
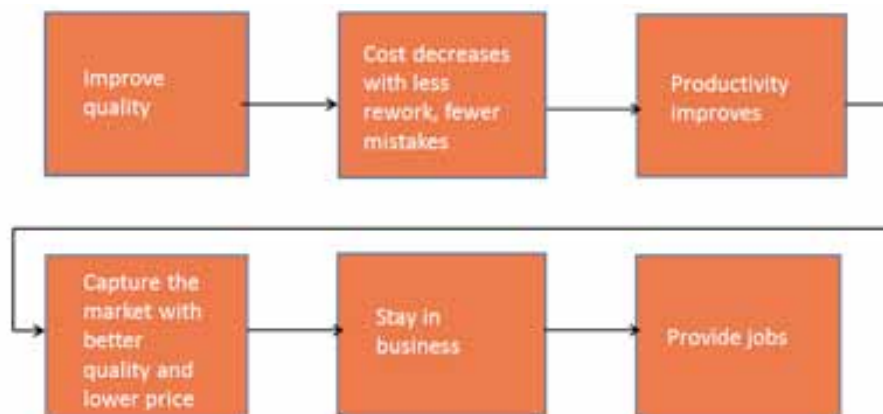
Deming chain reaction

Figure 1

Recently a report, researched and written by CEBR (Center for Economic and Business Research), a UK based organization, identified the impact of quality improvement processes across three aggregate national measures of performance. These measurable points, all related to UK based values, were GDP, revenues to treasury from corporate taxes and the unemployment rate. In each of these data points the model showed a demonstrable improvement in aggregate outcomes based on there being a quality management system in use in each of the examined entities.

The research results were achieved by aggregating data across eight diverse sectors of the economy, seven of which represented over 80% of GDP in the UK. The actual activities of the examined sectors differed, for example manufacturing versus health and social work, so the definition of what comprises a quality management system was necessarily broadly based, but it was required that the systems be formal.

It is true that the systems of taxation, corporate governance and industrial entities in this research are not identical in all respects to our North American based environment. Still, there is valuable information to be gleaned from this research specifically because the results are presented through universally understood economic metrics. Readers interested in more details will find an overview of the research and investigative methods documented in the November 2012 issue of Quality Progress magazine.

One can argue that achieving similar economic benefits is as simple as adding labor to the workforce. But, what we have experienced globally in the last few years is that entities, in the face of lack of confidence about the health of the economy overall, are not willing to add labor to payrolls. Therefore if we want to see improvements in hiring we have to find a justification for adding labor other than the historic 'confidence in revenue growth' model. This is where the UK based research can substantiate an alternate approach.

Effective use of the data from quality improvement systems could be the impetus for increased hiring in this environment where 'confidence' has failed us. Such systems can quantify for entities how or where added labor will create benefits by reducing errors and waste while also helping to maintain focus on those improvements. Conse-

quently margin gains can be estimated so that hiring can be justified, encouraging entities to disregard top line revenue growth as the only immediate measurable to justify hiring and instead support decision making around other relevant values.

Organizations already invested in their formal quality systems will have immediately available to them methods and tools that help identify waste and errors. For those not yet engaged in formal quality improvement processes, beginning such an engagement could be as simple as starting to track non-conforming events or products with accompanying costs. Define a formal method for evaluating which non-conformances should process through to root cause analysis, so that the source of problems can be identified. Upon completion of root cause initiate and track projects for corrective action that eliminate these sources.

Many organizations successfully launch and manage these types of processes with Microsoft Office tools or with a low cost multi-user product such as the QA Action/Events module from Quality Essentials Suite. Key to success is that the tool set.

A. Support formal processes with date controls, status fields etc.

B. Be securely multi-user

C. Have capability for quickly and accurately charting and analyzing progress

D. Incorporate costing tools to measure impacts and target successes

Visit www.qualityessentialssuite.com for additional information or to view a product demonstration. You can also read the blog www.qa4erp.com to learn more about the other benefits of formal quality improvement processes. GP

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Managing Long-Term Investment Assets in Microsoft Dynamics GP

By **ICAN Software**

Microsoft Dynamics GP users who need to track holdings of long-term investment assets such as stocks, bonds, collateralized securities, gold, land, etc. know the difficulty of properly accounting for such holdings in accordance with Generally Accepted Accounting Principles (GAAP).

In many cases, organizations have been tracking such assets within complicated Excel spreadsheets manually maintained by accounting staff. A normal scenario is one where all purchases and sales are manually added to the worksheet and where staff regularly have to manually update the current market value of the investment holdings. We met with one organization whose usual procedure was to spend hours each evening looking up each investment's market value on Yahoo Finance and copying/pasting that value into each row of the spreadsheet. They would also spend days at the close of each month trying to reconcile the spreadsheet and identify the inevitable human errors introduced by the manual processes of maintaining the spreadsheet.

Investment Assets for Microsoft Dynamics GP provided them with a full sub-ledger module in Dynamics GP for tracking buys/sells of investment holdings within different trading accounts. And with one click of a button, Investment Assets downloads market values off the internet for all of the thousands of investments within their system. It allows them to import investment masters, buy/sell transactions, investment-related cash transactions like dividends and interest, and market values provided by their investment broker in a file format.

Other organizations spend time and effort tracking interest accruals and amortization of discount/premium on amortizable investments like bonds. Investment Assets automates interest accruals for interest-bearing investments and also automates the amortization of discount/premium of amortizable investments.

Family Office organizations that track investments for the members of high net worth families need to be able to track investments within trading accounts by the owners/beneficiaries of those trading accounts. Investment Assets tracks owner percentage of holdings, so that a report can be generated for each family member showing their percentage of the market value of investment holdings in accounts that they have a percentage ownership within.

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Enterprise Collaboration Portals. . . Should You Care?

By Nils Rasmussen, CEO of **Solver Inc.**

The social or enterprise collaboration wave is over us. Collaboration tools such as email and conference calls have been around a long time, but the new generation of solutions that have started to emerge in this genre of business software is set to change corporate cultures and drive efficiency and innovation on a whole other scale than the initial tools did.

As different collaboration solution vendors have emerged

Example: Traditional business versus business with enterprise collaboration solution

Traditional Business	Business with Enterprise Collaboration
100+ daily emails	50+ daily emails
10 meetings per week	5 meetings per week
3 hours per week spent looking for information	1 hour spent looking for information
Same information provided to team multiple times	Same info provided to team one time
Lack of access to other coworkers expertise	Easy access to other coworkers expertise

in the market, we see that some have had their core strengths in project management and knowledge management (e.g. storing and retrieving documents), while others have focused on creating a social layer for employee communities, where discussions ("micro-blogging") flow freely around various topics. As the solutions mature, we will likely see that all of the above areas will converge and become core features that each vendor will include in their product. We will also see a growing number of vertical collaboration solutions appear in various industries as the marketplace for the generic solutions gets crowded with vendors.

Enterprise Collaboration Portal as Knowledge Database
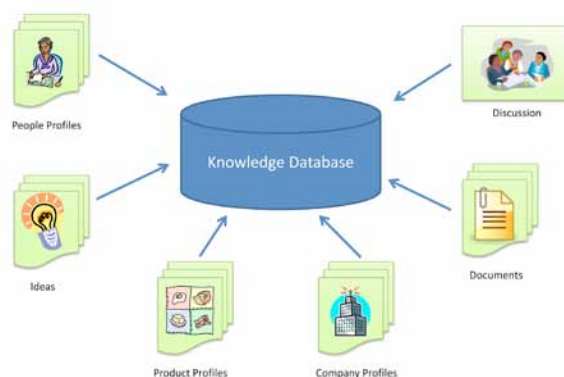
Enterprise collaboration portals will become a major software category over the next few years, and executives need to pay attention to this trend. Opportunities for efficiency gains across an organization are rampant; there are numerous other advantages as well. (**Download** a Collaboration research paper here to learn more). For organizations doing full scale, executive supported deployments, the question should not be: "Do you think this can help us?" It should be: "How can we use this technology to increase our bottom line from 5-10% to 15-25%?"

Check out information about the BI360 Insight collaboration portal **here** and learn how Collaboration is becoming the "last mile" of Business Intelligence. GP

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Optimize your online efficiency with an ERP or accounting software integration

see list below

SEO & e-Marketing Tools
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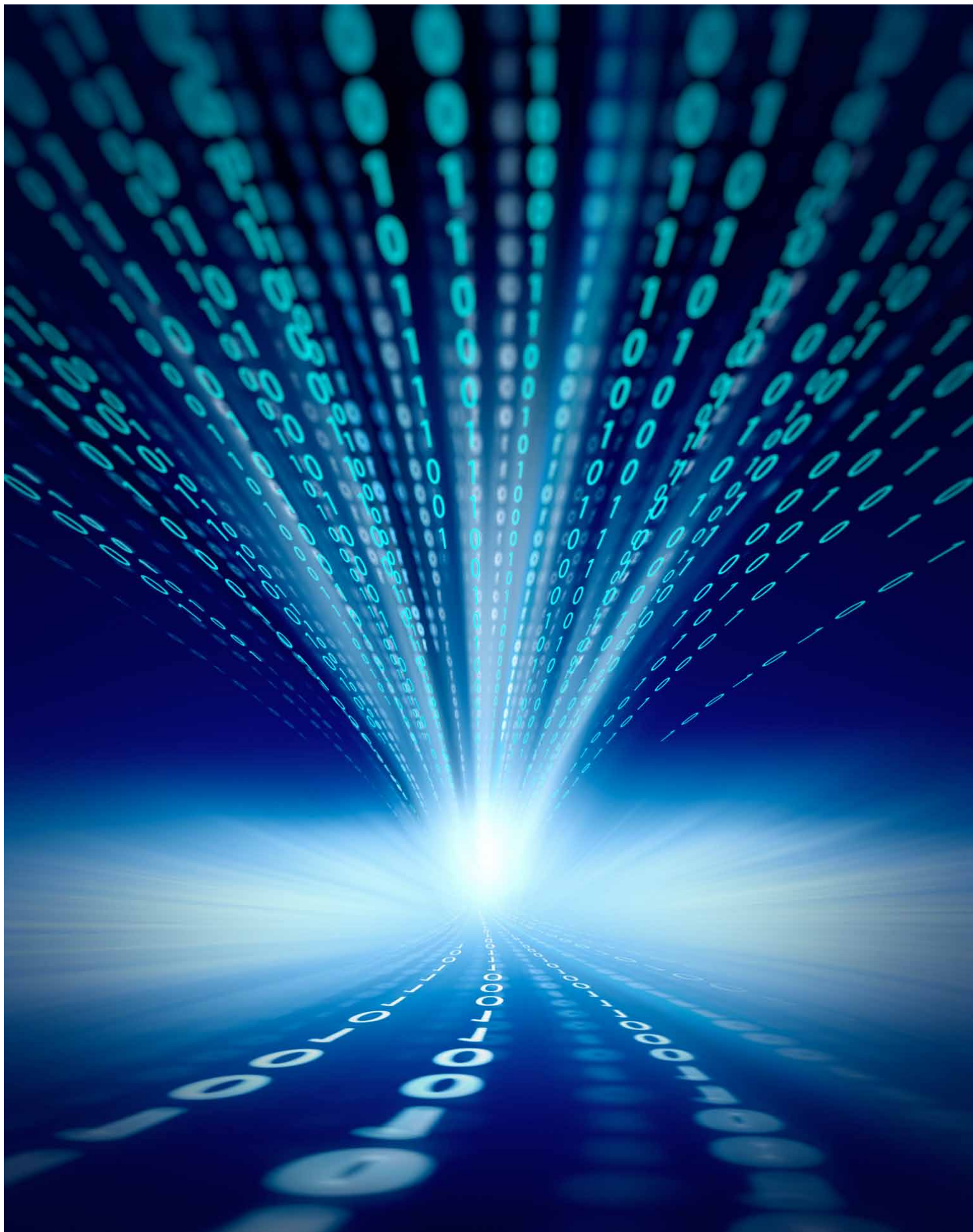
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New GP Platform, New Year Ring in New Trends in EDI
for Microsoft Dynamics® GP

Must-have Questions to Identify Which EDI Solution Is Right For Your Business

Written By **Data Masons Software**

With the year starting off with Microsoft Dynamics GP 2013 on the market, the stage is set for huge opportunities for the Dynamics community, whether it be an evaluation, implementation, or upgrade to the new platform. For months prior to the release, the community gained insight into some of the 125+ new features and functions coming out with GP 2013 thanks to the Microsoft Dynamics GP 2013 Feature of the Day Series. However, the opportunities don't reside just within the ERP, but also with the ISV solutions that Microsoft relies on to extend the power of its latest GP platform, as well as those before it.

2013 Trends in EDI

Regardless of where your business is with Dynamics GP–evaluating, using, contemplating an upgrade–it's critical that you not only look at the features and functions of the ERP, but also consider the features and benefits of the supporting ISV solutions, specifically Integrated EDI. And while you may not be ringing in the New Year with any new EDI requirements, isn't it the perfect time to resolve how you meet them to increase the cost-savings and competitive advantage for your business?

When considering how you manage EDI integration and compliance, take into account what's trending in Dynamics GP EDI:

#1 – End to end automation

Pushing a button to integrate a transaction used to be great as it saved time over manual entry. But now users are asking, "Why do I even have to push a button?" They want automation of key EDI process that gives them the flexibility and security they're looking for.

#2 – Manage EDI by exception

Microsoft Dynamics GP users don't want to deal with every transaction, only the issues that need attention. Managing by exception lets the transactions without discrepancies continue without interruption and eliminates unnecessary manual touch points.

#3 – Leverage standard Microsoft integration framework

Writing directly to tables and bypassing business logic is not best practice. By leveraging integration tools such as Microsoft's e-Connect, users can avoid custom routines that populate data and bypass standard business logic.

#4 – Deeper and broader integrations

Partner mandates and lean initiatives are driving more integrations, such as sales order updates, or handling advanced three-way matching logic when integrating purchase order invoices. Integrating new partner relationships such as transportation logistics, banks, buying groups, brokers and suppliers are increasingly becoming "must haves".

#5 – Avoid transaction fees

EDI data is a lot like email – would you pay to send an email? Right, then why pay for moving transactions when you don't need to, especially when your trading partners support direct connect?

#6 – Transaction Auditing

Too many companies complain about the lack of tools available that can identify issues before they become problems. They wonder why they can't find out that an invoice was not transmitted and/or received by a partner before it is overdue or identify sales orders that "fell through the cracks." They want to be alerted a document has failed somewhere during the process.

#7 – Guaranteed end-to-end support

In the world of EDI, where delays and errors in transacting data can result in unnecessary and costly expense, organizations don't have the flexibility of waiting for support responses. Having a single source provider that manages the entire flow including Dynamics integration is becoming a luxury that companies refuse to do without.

The Next Step with EDI

Knowing these trends, it is possible to find an EDI solution that supports your business objectives and technology investments. While all EDI solutions may seem to offer the same features and benefits as the next, just like not all businesses are the same, neither are the EDI solutions that are needed to support them.

That's why when it comes to selecting an EDI solution you have to know what questions to ask in order to differentiate between all of the available technology options. The EDI for Microsoft Dynamics GP Evaluation Check List is designed to take you beyond the product data sheet and software demonstration to uncover the distinguishing factors of each solution so that you can make the right choice for your business. For example, do you know if the solution is flexible enough

to be deployed in the cloud or on-premise? If deployed in the cloud, is there any local software component? Does the solution provider offer a fully-outsourced compliance management service and the ability for you to manage your own mapping and compliance?

Microsoft Dynamics GP is starting off the year with exciting, new opportunities found in Microsoft Dynamics GP 2013, but opportunities abound elsewhere for those in the GP community resolving to improve their company's competiveness in the New Year. When it comes to Integrated EDI for Dynamics GP, knowing the trends and the must-ask questions for EDI solution providers will be key in keeping these resolutions. Get started and put EDI solution providers to the test! GP

Lead the way

Maximize Your Return

Are you maximizing the return on your Microsoft Dynamics® GP investment? Chances are that you're not – and you're not alone.

GPUG offers interactive, relevant, affordable training and provides your staff with endless opportunities to learn from and build on the success of other companies and users just like you.

Learn from Experts

Webinars and online training help all your users stay on top of the latest functionality. Best practices and add-on product information allows you to optimize Dynamics GP for your business.

Average GPUG training sessions per year

250 Webinars

61 Instructor-led GPUG Academy training classes

GPUG User Member Companies

3600+ Each icon represents 20 companies

Build Knowledge

Someone has already solved the issue you're struggling with today – learn from and build on their success. Connect with Dynamics GP users who share similar experiences, processes and challenges.

Receive access to the global membership directory to meet other users *

Additional Premium Membership Benefits

Regional Chapter Meetings *

Summit Discounts *

Academy Training Discounts *

Special Interest Groups *

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Stop Drowning in Paper and Get an Edge with a Transactional Content Management Solution

By Holly Condon, VP of Sales and Marketing, **Paper Save Pro**

What if these two separate, disparate operations could be completed using a single program? Wouldn't that make life easier? If ERP and Document Management systems converged to provide a single, unified system for individuals to perform practically any task, companies would likely be able to enhance efficiency throughout departments, giving them a competitive advantage over firms that have yet to embrace such a strategy.

Companies have relied on individual processes for decades. After all, it was the only thing they knew, as unified systems were not introduced to the private sector until only a few years ago. Today is different, however, and business can no longer waste time by performing singular tasks. The current private sector is incredibly fast paced and if an organization cannot keep up—it will face extinction.

For this reason, decision-makers are looking toward combining ERP and ECM systems into a single business management software solution.

ENTER TRANSACTIONAL CONTENT MANAGEMENT!

Transactional Content is defined by Forrester Research, an independent technology and market research company, as "content [that usually] originates outside an organization from external parties — customers or partners — and relies on workflow or business process management (BPM) to drive transactional, back-office business processes. In some cases, the content not only triggers internal processes, but is the basis for the transaction itself."

By leveraging a transactional content management solution, organizations can capture, analyze, store, and retrieve a wide variety of mission-critical paper and electronic documents through a single, unified platform. As a result, companies can streamline operations, reduce IT expenses, and enhance productivity in the workplace by eliminating the need to use multiple programs simultaneously.

There are a number of benefits associated with combining processes, including the ability to improve customer satisfaction and responsiveness. When operations are converged under a single roof, employees have easier access to client information, enabling them to make decisions more efficiently and precisely. As a result, organizations can more accurately manage customer queries, making clients happier with the firm's services.

Leveraging a unified solution also reduces the risk of jeopardizing sensitive data, which is becoming increasingly dangerous in today's fast-paced and highly digital business landscape. In the past, knowledge workers had to use separate applications for each task, which would increase the risk of exposing confidential information when taking it from one application and putting it into another. A single platform minimizes this possibility, as employees only need to open a single tool.

As the speed of doing business increases, paper documents and manual processes become burdensome, often creating bottlenecks. Productivity is slowed since only one person can handle a paper document at a time, unless the document is copied, thus, requiring more resources and negatively affecting efficiency.

Further, with regulatory compliance on the rise, paper can often pose a legal risk. Not being able to produce a document in response to a legal demand often bears financial penalties. In addition, the effort to reproduce a missing or lost document can be costly, both in time and resources.

Startling Facts about Paper Documents

1. Companies spend $20 in labor to file a document.
2. It costs $120 in labor to find a misfiled document.
3. 7.5 percent of all documents get lost.
4. The cost to reproduce a lost document is $220.

Source: AIIM – a non-profit community that provides education, research and best practices on information management.

Successful organizations are avoiding those pitfalls by streamlining and automating manual, time-consuming processes with Transactional Content Management (TCM). TCM leverages the power of a document management software solution, like PaperSavePro, and addresses the following important phases of a transactional system:

Capture - Incoming documents like electronic forms, paper (faxes and print streams which are then digitized), and emails are indexed and stored in a central repository. The more information that can be captured and stored electronically, the easier it is to automate business processes.

Process - Manual, paper-based processes are automated with Business Process Management (BPM).

Secure – With the appropriate controls, designated employees have on-demand access to content. Documents can be searched for, viewed and annotated as needed.

Archive – Generally there is a point in a transaction when a document is no longer active and should be locked or deleted.

To some, implementing a Transactional Content Management solution may seem complicated especially when trying to build a tight integration yourself! However, with experienced professionals helping you transform the way your organization captures, processes, provides access and archives transactional content while providing a seamlessly integrated solution, your organization can be on the forefront of realizing benefits, such as:

- Eliminating the inefficiency, cost, and risk associated with paper documents

- Improving customer service with faster and more complete responses

- Providing control for business processes and information throughout your organization

- Allowing a 360-degree view of customer data and business transactions

- Speed Monthly Close Cycles

Just like peanut butter and jelly, Dynamics GP and PaperSave are better when paired together to help you gain the competitive advantage over rival firms while reducing costs and increasing efficiency in yours. GP
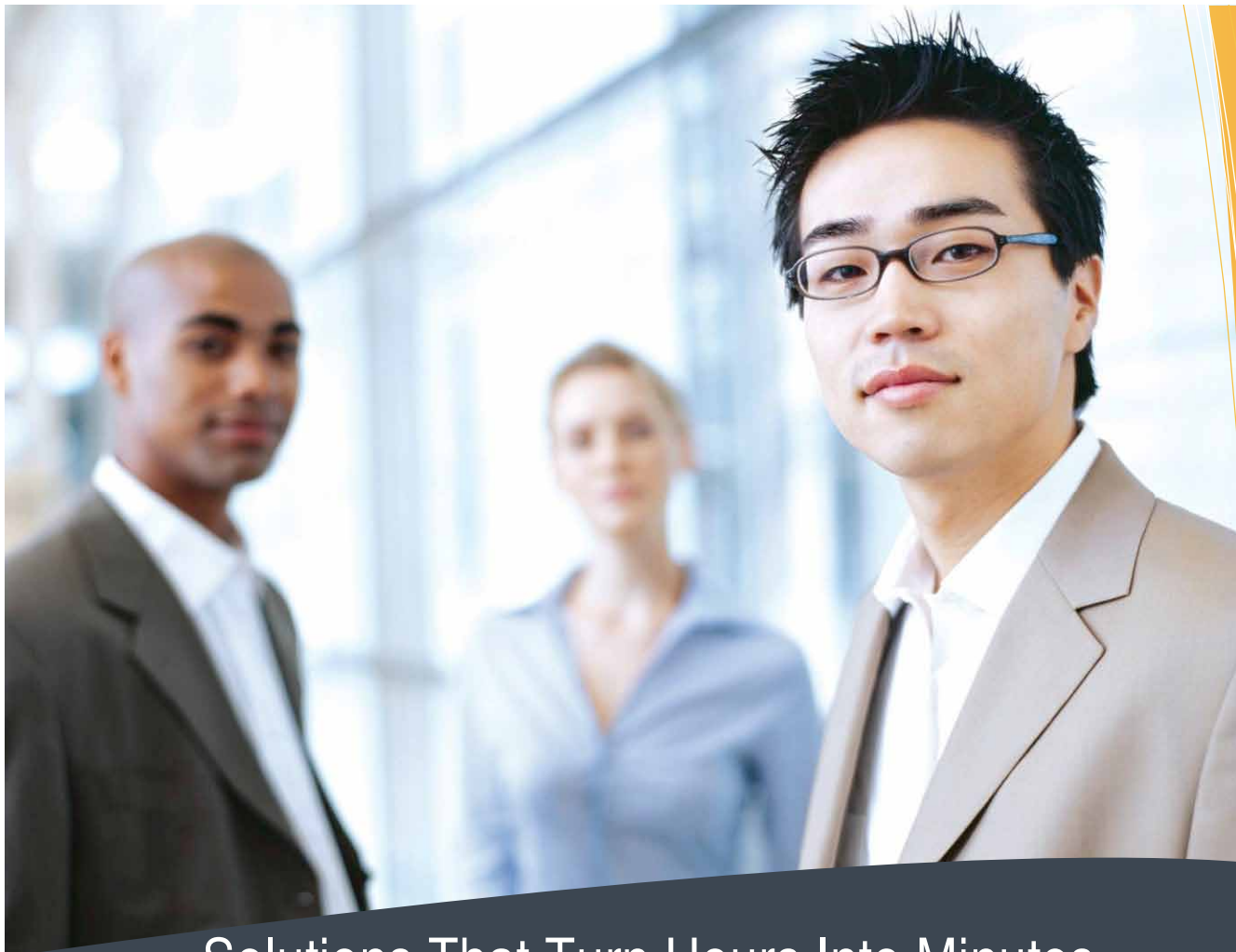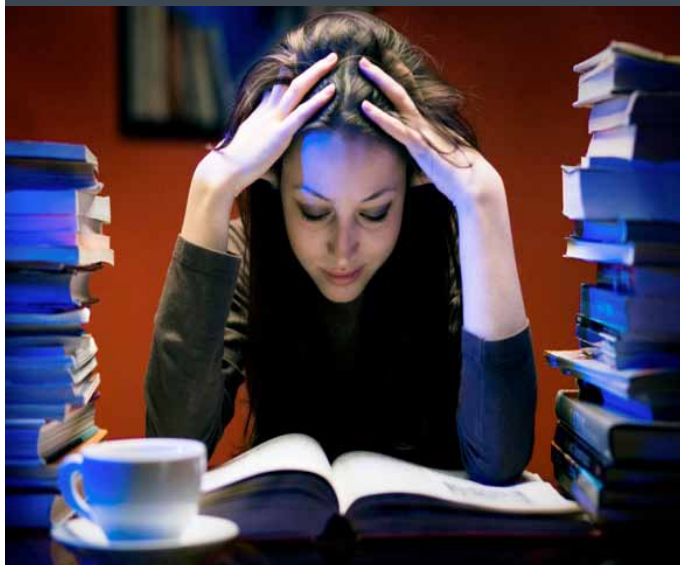
The Art of Making Money While Spending Less:
A Story about an Affordable eCommerce Solution

Written By Dominique Caron of **kCentric Technologies Inc.**

> **You've established a growth strategy for your business but don't have the resources to execute?**
>
> **A potential customer is interested in your products only if you have online ordering?**
>
> **Part of your revenue growth strategy is to increase the number of times a customer orders and increase the value of each order?**

Do you recall that general expression people often use to describe the way to achieve success, you have to spend money to make money? This way of thinking is out of date and definitely untrue in the ecommerce business. If you are still unsure, we hope this little story will convince you.

Picture a steadily growing company willing to increase its revenue. This business has established a growth strategy but doesn't have the necessary resources to execute the plan. This situation must be corrected.

The first step, of course, would be to hire more sales representatives to acquire potential new clients. Then, as the num-

ber of customers grow, so will the need for customer support, therefore, the company will also have to hire more customer support agents to provide the same quality of service. When we look at this scenario, we come up with two major conclusions. First of all, the company will have to spend enormous sums of money, mostly on human resources, in order to achieve more revenue. This may considerably lower the potential gains expected with the expansion. As many more people will be involved as the growth strategy will be put in effect, it will involve time and energy for training and supervising. It also increases the potential for human error.

K-eCommerce integrated to Dynamics GP, a kCentric Tech-

nologies Inc product, is an alternative option worth exploring to resolve the issue of a major investment in human capital. This online ordering solution integrated with Microsoft Dynamics GP is a fast and inexpensive way to develop new sales channels, market products and services, reduce customer service cost (internal and external) and optimize current business processes. You may wonder how a turn-key solution can do all those amazing features. This is easy to answer.

Quick deployment

k-eCommerce is ready to be deployed and connected to your Microsoft Dynamics GP in 24 hours. There are no delays, so no time is lost while waiting for it to be developed and integrated.

Inexpensive

k-eCommerce is an inexpensive out-of-the-box solution that requires no need for new hires. You will not need more sales representatives or customer service agents.

Develops new sales channels and markets products and services

k-eCommerce includes easy-to-use eMarketing tools that gives businesses the ability to promote for free. Remember, the possibilities are endless on the web: you can post videos, create discussion boards, send newsletters, and emails. The online store is also accessible from virtually anywhere on the planet, reaching clients a Brick and Mortar store never had the chance to do.

Reduce customer service cost

Because k-eCommerce is integrated with Microsoft Dynam-ics GP, the information regarding the product—price, availability, order and shipping status—can be accessed by the customer in real time through the online secure store. There is no need for new customer service agents. The use of the solution will even reduce the number of calls a company gets because it already answers the five most frequently asked questions by customers:

1. Do you have this product?
2. Is it available in stock?
3. At what price?
4. Can you take my order now?
5. When will it be processed and delivered?

Optimizes current business processes

The k-eCommerce solution is completely integrated with Microsoft Dynamics GP. It feeds real live data in both directions, making sure no new staff is required for retyping orders, adjusting inventory, and processing billing. It expands the power of your ERP to the online sales channel and increases any existing revenue growth strategy without doubling the work. The k-eCommerce solution is a great way to realize your growth strategies.

kCentric Technologies Inc. has developed its award winning integrated ecommerce solution to be used in B2B, B2C, or Sales Portal environments; it is an out-of-the-box, easy to use configurable solution that integrates easily with Microsoft Dynamics GP. It allows for increased revenues while keeping your costs down. The solution includes many advantages, too many to list here, so we invite you to contact us at 1-888-523-6874 or visit our website at www.k-ecommerce.com. GP

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GP on the Case: Achieving Awesome Productivity with Case Management

By Dave Duckworth, **ImageTag, Inc.**

Does your accounts payable department put the "AP" in "awesome productivity"? Your answer may depend upon how well they are able to keep up with the constant flow of documents that define your organization's purchasing process. While Microsoft Dynamics GP provides a great platform for managing your business operations from AP to AR to human resources and more, all too often it's the age old "paper problem" that can bring those operations to their knees. That problem is compounded by the fact that very few business transactions depend on a single piece of paper or electronic document. The majority of the time, multiple documents, multiple approval processes, and multiple internal and external stakeholders define how business gets done. Whether it's a matter of going from procurement to payment in AP or from recruiting to interviewing to hiring in HR, the path to greater productivity demands systems and tools that can pull all the data and documents together and deliver instant transparency and access to that knowledge.

From Managing Documents to Managing Business Processes

In today's world, the solution to the problem of managing and tracking all the documents that support a business process is referred to as case management. Case management is distinct from document management because it focuses first on the business process you want to manage. Then, it manages your documents in the context of that process. Case management systems present data, documents, and decisions in a way that portrays a clear picture of the entire process and every step along the way. As a result, your organization can eliminate bottlenecks, enforce compliance, and provide instant auditability to anyone, anywhere.

From an AP perspective, this means looking at each step in the procure-to-pay process and presenting the data, documents and decisions each step of the way. With a case management solution, your AP team can associate documents with the specific forms in GP that relate to their vendors, purchase orders, invoices, packing slips and any supporting correspondence. A case management system not only allows them to instantly associate and retrieve those documents from within GP, but it also automatically aggregates those documents to support their matching process.

What about those approvers and reviewers that don't use Microsoft Dynamics GP? An effective case management solution should give them instant access to the data and documents they need to review, using the systems and tools that they rely on daily. That may mean providing a Web-based interface where they can review documents and add necessary data like G/L codes, or it may mean providing the ability to review data and documents on the form of an email that can be reviewed and approved by PC or smart phone.

Take the example of your payment approval process today. Let's assume that you've already used your case management system to pull together scanned paper and electronic invoices that have been routed to approvers, who have digitally coded the documents and provided their approval. Your AP team has created their check batch in GP associated with those invoices. Next, rather than printing that check report or printing the individual checks to be signed, then paper clipping those documents to the printed invoices, your case management system can pull all of those documents together automatically and present them to your CFO for quick review and approval online.

A case management solution doesn't just serve up the documents to your CFO. It presents a dashboard that clearly illustrates how each step in the payables process has been met and instills confidence in the fact that no check will be presented for review/approval unless all of the necessary criteria.

Making the Business Case for Case Management

The great thing about case management solutions is that it's easy to quantify your return on investment (ROI)—and to demonstrate the potential to recapture your investment in as little as six months or less. Based on data collected from industry organizations like AIIM and from surveys sent to thousands of KwikTag case management users, ImageTag offers an online ROI calculator. This free, online tool can help you and your organization take the first steps in outlining your potential to inject awesome productivity into accounts payable, and anywhere else in your organization where documents drive your business process. Combined with the power of Microsoft Dynamics GP, case management solutions can drive greater productivity throughout your enterprise.

Visit www.imagetag.com or go directly to http://www.imagetag.com/ap-roi to calculate how quickly your organization can increase productivity, reduce costs and capitalize on your investment in case management. GP

Saving the World from Evil...
One Commission at a Time

Written By John Stulak, President of **EthoTech, Inc.**

The sirens howled and the lights were flashing DANGER throughout the command center. Commander Rice yelled, "OK people, we have less than 8 hours until all satellite systems are under his control!!! GET ME Chronos! NOW!"

Commander Rice was in charge of our utility company's Cyber Command Center in Bethesda, Maryland. He was solely responsible for synchronization of all electrical networks under our control. And right now, life as we know it was about to change, unless the Commander could stop Apoc.

Apoc was an infamous and dangerous hacker, but his most diabolical plan would soon affect every person on the planet. He was about to use a network of satellites to shut down all electricity everywhere at precisely 12:21:12 PM that very day. Apparently, Apoc's infatuation with the Mayan calendar haunted him.

"We need Chronos here, NOW," the Commander shouted as the vein on the side of his head came close to bursting. "Chronos was our only Agent that was able to stop Apoc from taking down the I.R.S. when the U.S. government needed our help."

I blinked...then took a deep breath as I prepared to give the Commander the bad news. "Commander, Sir! Agent Chronos is not happy with our behavior after the last time he helped us. He claims that he didn't receive his promised compensation for months after the I.R.S. fiasco, and then we sent him the wrong amount." I carefully chose my next words. "The calculations are extremely complex, we often make mistakes by using clunky Excel spreadsheets in conjunction with our outdated manual systems."

Just then, a text message pinged my phone. It was... Chronos!

Ping! Chronos' Text: **So I hear Rice needs me again . . .**

"Tell him to get here on the double," yelled the Commander.

Ping! Chronos' Replied: **Not so fast. I insist you calculate and schedule my payment NOW, so I'm not left hanging like last time.**

"Do it!" replied the Commander.

I ran into the compensation office and tripped over a pile of printed Excel spreadsheets, "Ugh! I'll never get this calculated in time . . ." I mumbled to myself.

Ping! Chronos' Text: **Laptop under desk.**

What? How does he know. As I opened the laptop that I found tucked under the desk, a message box popped up with a link. Then a Remote Desktop session opened directly to our Microsoft Dynamics GP system, yet something was different. There was a new program running called **Commission Plan**.

Ping! Chronos' Text: **Answer the phone.**

Sending a sudden shock to my senses, it rang. A pleasant voice said, "Hello, My name is Ethos. I've configured Commission Plan on your Microsoft Dynamics GP system, so you can accurately calculate Chronos' compensation in just minutes and wire it to him pronto."

Sure enough, it took me less than 5 minutes to calculate the proper sum that would be due to Chronos for stopping the nefarious plan underway by Apoc.

Ping! Chronos' Text: **Use Commission Plan from now on to keep your agents happy and avoid cyber-warfare.**

I texted back immediately: If that's all it takes to keep you happy, then we're on it.

I quickly wired the exact amount to Chronos that was calculated by Commission Plan. Frankly, I didn't know what was going to happen next.
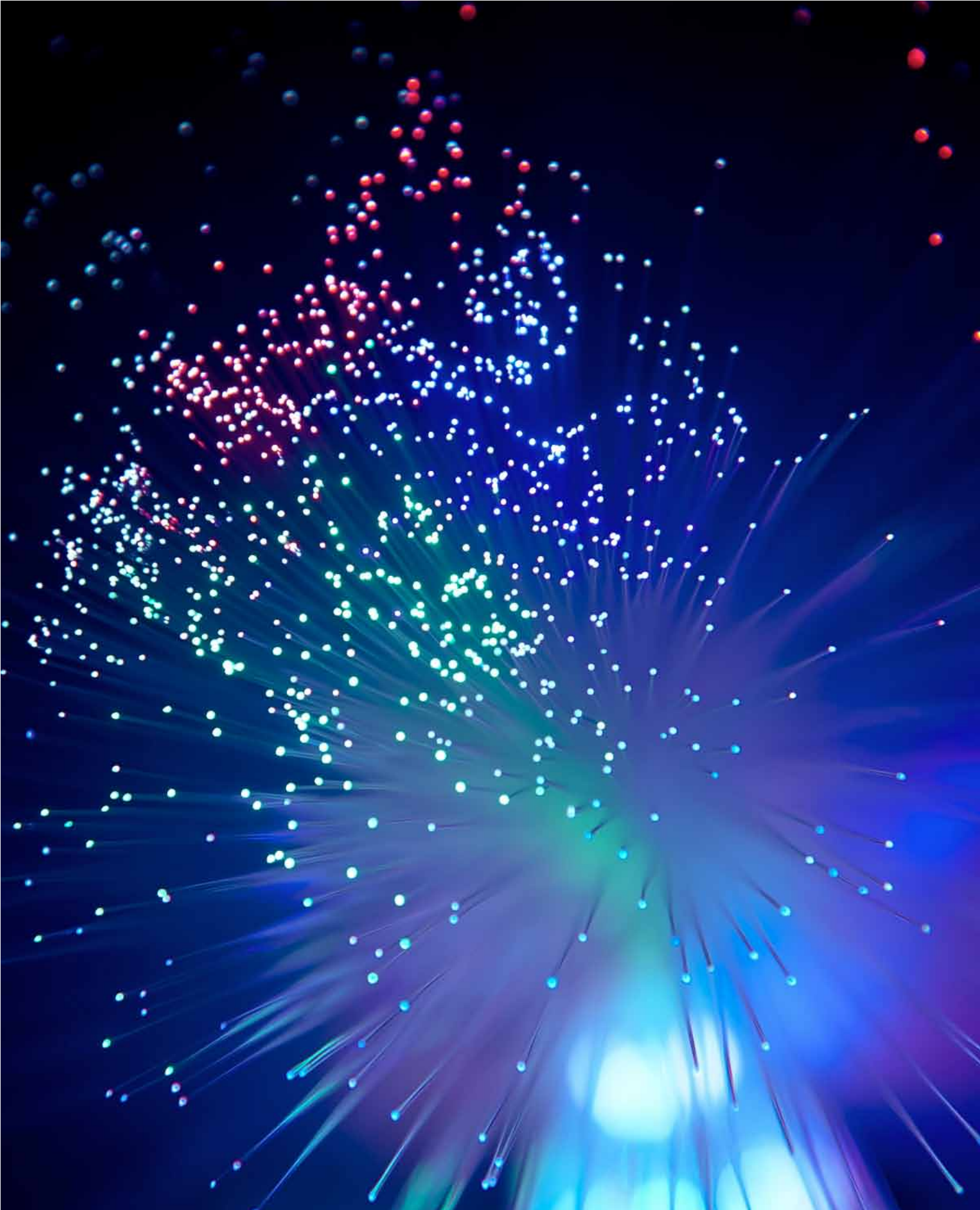
It took me just a few minutes to run back to the Command Center. To my surprise, I found everyone–including Commander Rice–high-fiving and congratulating each other. The Commander asked, "How did you do it?

"Did what?" I replied.

"Get Chronos to act so quickly."

"All I did was use Commission Plan from EthoTech to satisfy Agent Chronos. You mean Apoc's plan has been foiled already?"

"Apparently, upon receiving his payment, Chronos delivered a disabling software worm directly into Apoc's system," the Commander beamed, "Apoc's plans have been crushed... for now." GP

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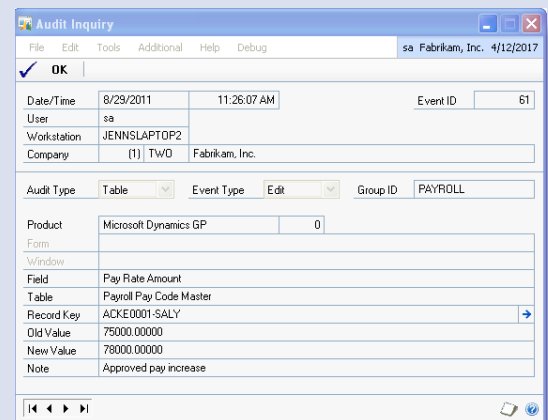
Click on image to view demo.

For more information regarding the *Audit Challenge*, or to receive *FREE Trial keys*, email sales@rocktonsoftware.com or call us at 877-476-2586. Mention the *Audit Challenge* and *Offer code: GPOMWIN and we'll send you a Free Gift!*

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