

GP

Winter 2016

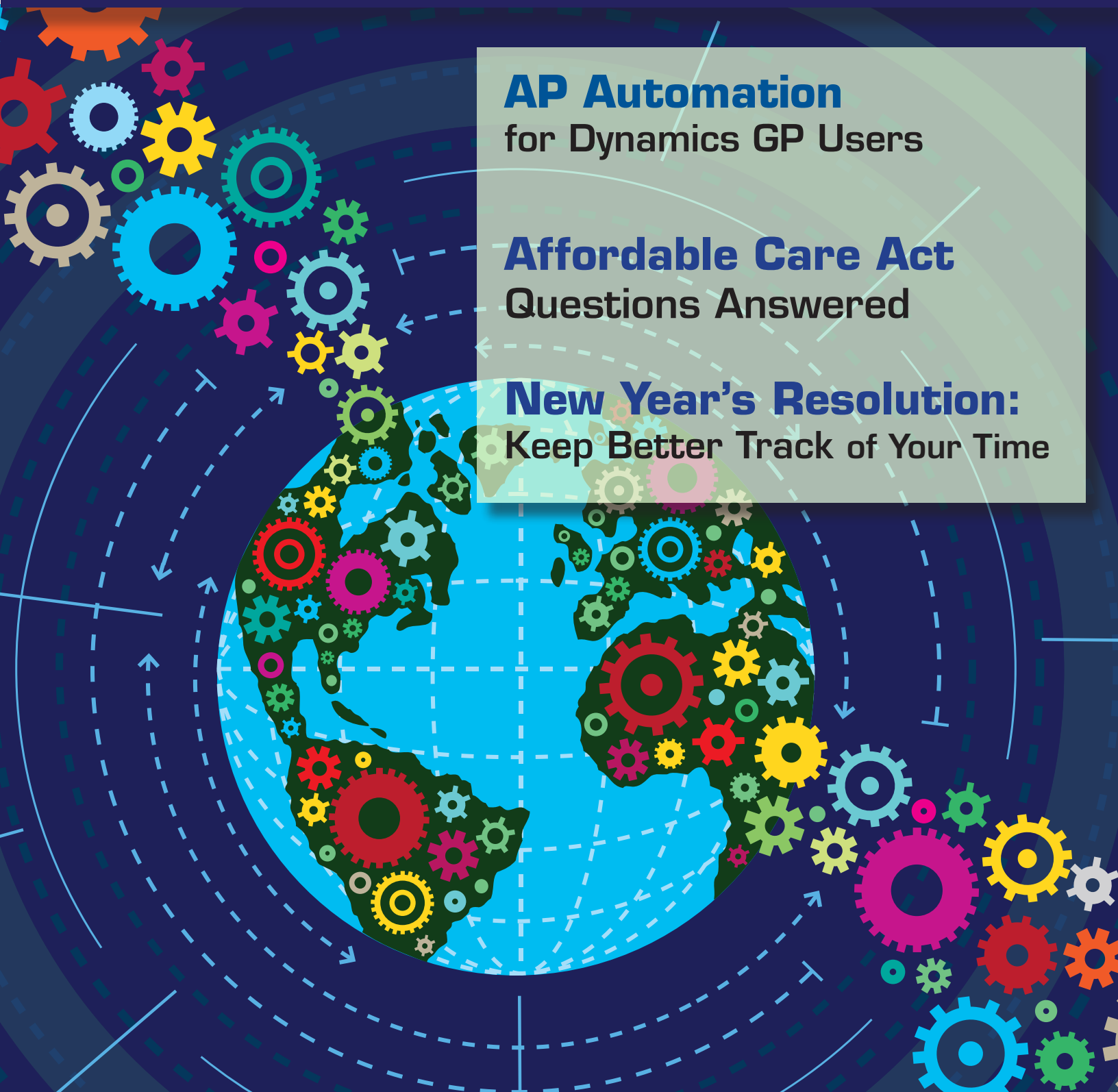
OPTIMIZER

MAGAZINE

AP Automation
for Dynamics GP Users

Affordable Care Act
Questions Answered

New Year's Resolution:
Keep Better Track of Your Time



GP OPTIMIZER MAGAZINE



Welcome to the 2016 Winter Edition of the GP Optimizer Magazine! The GP Optimizer Magazine is comprised of articles provided by Microsoft Dynamics GP Add-On Partners. Each article focuses on making your investment in Microsoft Dynamics GP more worthwhile by addressing issues that you may be experiencing.

Over the years, I have heard of many requests for a solution catalog that lets GP customers know “what is out there” to solve real business needs and here it is! The Independent Software Vendors (ISVs) that contributed articles to this edition use their industry expertise to highlight solutions to problems that GP users face in their day-to-day business.

Rockton Software has been in the Microsoft Dynamics GP Channel for over 15 years. We’ve 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.

We want to thank all participating ISVs—AvidXchange, GPUG, Greenshades Software, Horizons International, ICAN Software, Joesoftware, JOVACO Solutions, Metafile Information Systems, and Thomson Reuters—for their help in producing this great magazine, as well as their commitment and support to the Microsoft Dynamics GP Channel.

Take a look and let my team know what you think—candid thoughts welcome. Enjoy!

Mark Rockwell
President, Rockton Software

A handwritten signature in black ink that reads "Mark H. Rockwell".



www.rocktonsoftware.com • 877.476.2586

On the Cover

GP Optimizer Magazine

Published by **Rockton Software**
PO Box 921
Lafayette, CO 80026

Editor: Mark Rockwell
MarkR@rocktonsoftware.com

Design: Lori Hartmann, Feline Graphics
feline@sandpoint.net

Advertising Inquiries: Elise Rooney
EliseR@rocktonsoftware.com

Editorial Inquiries: Elise Rooney
EliseR@rocktonsoftware.com

The GP Optimizer Magazine is published by Rockton Software, with principal offices in Lafayette, CO. If you wish to receive this publication, please go to www.rocktonsoftware.com and click on the GP Optimizer Subscribe button. If you wish to be removed from the mailing list, please contact the ISV who sent you the publication.

The information provided in this publication of GP Optimizer Magazine is maintained by Rockton Software. It is intended as a general guide of information and products available for Microsoft Dynamics GP. The publisher makes no warranty or guarantee whatsoever of the effectiveness, or other characteristic of any methods or products described herein. Neither does the publisher assume any liability for information published in any Web site or other advertisements to which reference may be made herein.

7 **AP Automation** for Dynamics GP Users

11 **Affordable Care Act** Questions Answered



25 **New Year's Resolution:** Keep Better Track of Your Time

Table of Contents

- 5 The Benefit of Community in 2016
- 7 AP Automation for Dynamics GP Users
- 9 Easier Cash Receipts in Microsoft Dynamics GP
- 22 Prescribing AP Automation to Heal Invoicing Challenges



- 11 Affordable Care Act Questions Answered
- 15 Selecting Solutions for Manufacturing – What is changing?
- 17 Winter is Coming . . .
- 19 Why Microsoft Dynamics GP Customers Should Consider Adding an Indirect Tax Automation Solution
- 25 New Year's Resolution: Keep Better Track of Your Time
- 28 Investment Assets – Endowment Funds Management for Microsoft Dynamics GP
- 30 What Does ESS Mean and How Can it Benefit Your Organization?



GP Optimizer Sponsors

4 **GPUG**
www.gpugsummit.com

10 **Greenshades Software**
www.greenshades.com

13 **Rockton Software**
www.rocktonsoftware.com

14 **Metafile Information Systems**
www.metaviewer.com

18 **AvidXchange**
www.avidxchange.com

21 **JOVACO Solutions**
www.jovaco.com

24 **Horizons International**
www.hzs.com

27 **Joesoftware**
www.joesoftware.com

29 **Thomson Reuters**
www.thomsonreuters.com

32 **ICAN Software Solutions**
www.icansoftware.com

Join Your Peers in **GPUG**[®]

"Don't hesitate, the [GPUG] membership will pay back itself numerous times. Just think about how many times you had to open a support case with MS or your VAR and what it costed."

Béat Bucher, GPUG Member Since 2011



Join Today!

www.gpug.com/join

The Dynamics[®] GP User Group is a community of GP users committed to helping other users learn through valuable educational and networking opportunities. Learn more at www.gpug.com.

- 200+ educational webinars led by users each year
- Live networking at local chapter meetings
- Virtual support from other users through an online Q&A forum, Collaborate
- Annual user conference for GP Users, GPUG Summit, offering hundreds of GP-focused sessions and invaluable networking opportunities



The Benefit of Community in 2016

Written By Jenna Knoblauch, [Microsoft Dynamics® GP User Group \(GPUG\)](#)

The Microsoft Dynamics® GP User Group (GPUG) can be described as a “family” by many who are a part of this vibrant community. Members of GPUG truly understand the meaning of community and giving back. Many members have spent countless hours giving advice and solving business challenges for their peers, while others serve as subject matter experts and present educational webinars, and the community has recently rallied to support a member’s family who is going undergoing medical treatments.

The mission of GPUG is to help Dynamics GP customers maximize their investment in their Dynamics GP software solution. Over 23,000 fellow Dynamics GP users have already joined to take part in the online learning, access to discussion forums, discounts on deep-dive Academy learning, and networking at in-person meetings and events, like GPUG Summit.

Hear from a few of the GPUG All-Stars on why they’ve chosen to get involved with the user group.



GPUG All-Star: Bob McAdam

Involved in GPUG since: Day 2. GPUG’s inaugural launch was during Microsoft Convergence in March 2007 and I signed up to help the following day, opening the first Chapter (Central Florida) three months later.

What drew you to GPUG? I had always enjoyed training, which this would supplement, and I knew the vast presence

in North America that Dynamics GP already had. This idea could scale easily, and I knew it could find success. I wanted to be part of that.

What is your favorite benefit of your GPUG membership? Probably Chapters, which are multiplying quickly. Initially when the Chapter idea was new, garnering traction was a bit challenging but that isn’t the case any longer. GPUG Chapters have increased in meeting attendance, are in nearly every state now, and have both users and sponsors eager to present to members regularly. Besides managing GPUG Tampa Bay, I’ve had the privilege of presenting in Indianapolis, Nashville, New Orleans, Milwaukee, Fargo, and Birmingham over the years, with more places to visit (and perhaps help start up) planned for next year. Many of our Chapter leaders are honing their skills nicely too, via our Chapter Leader training program, making local meetings more fulfilling each and every time they’re held. It’s a membership benefit that’s only growing in stature!

How have you helped to solve a GPUG Member’s business challenge? My involvement in GPUG Academy has assisted many in the Dynamics GP community over the years, and some of the feedback I’ve read that students have submitted has truly floored me. It’s been a superb ride that supplements my ability to contribute to application education across my favorite areas of Dynamics GP.

What advice would you give to someone thinking about joining GPUG? The annual fee to join is a company-wide fee, not per person, so the entire end user community within one organization can get smarter on Dynamics GP. The more you put into it, the more of a value you’ll realize.



GPUG All-Star: Aaron Back

Involved in GPUG since: 2010

What drew you to GPUG? I was looking for a place to find answers to questions. I realized the value of the networking and helping others. This led me to get involved more and more over the years. Helping others realize their potential is

an awesome feeling.

What is your favorite benefit of your GPUG membership? The webinars and networking.

How has GPUG helped to solve one real-life business challenge? A real-life challenge that was solved was understanding the different add-ons to Dynamics GP. We were looking for an exchange rate add-on for international business. GPUG helped us in the decision process at the time.

What advice would you give to someone thinking about joining GPUG? Attend a webinar on a topic that you are struggling with. It may be Business Intelligence, or about upgrading Dynamics GP, or new to Dynamics GP, and you will find value for you and your company. The information provided goes farther than you realize.



GPUG All-Star: Béat Bucher

Involved in GPUG since: 2011

What drew you to GPUG? The community and the training benefits for employees.

What is your favorite benefit of your GPUG membership? The sheer amount of resources and available webinars.

How have you helped to solve a GPUG Member's business challenge? Almost every day I provide answers to other user's request on Collaborate. At the GPUG Summit 2015 I bumped into one of those users and she was standing there like a "groupie" in front of her pop-star, which was such an amazing experience for me.

What advice would you give to someone thinking about joining GPUG? Don't hesitate, the membership will pay back itself numerous times. Just think about how many times you had to open a support case with MS or your VAR and what it cost.

Are you looking for a place to solve business challenges, educate your employees, and connect with other Microsoft Dynamics GP users? Look no further than the Microsoft Dynamics GP User Group (GPUG) where you have access to:

- Unlimited access to live and on-demand educational webinars for all versions, job roles and level of users
- Access to discussion forums to get informative answers from GPUG All-Stars, Microsoft MVPs and other Dynamics GP Subject Matter Experts
- Local Chapter meetings where you can connect with your Dynamics GP peers
- Discounts on deep-dive Academy learning and conferences, like Summit where you can grow your skills

For more information regarding membership, please visit www.gpug.com/join. **GP**

AP Automation for Dynamics GP Users

Written By Adam Frazier, [AvidXchange](#)

As the market leader in accounts payable and payment automation solutions, AvidXchange helps Microsoft Dynamics GP users streamline invoice capture, intelligently route approvals, and automate payments.

Humphrey Management, a full-service residential property management firm, has used AvidInvoice and Dynamics GP since 2005, before document scanners were readily available.

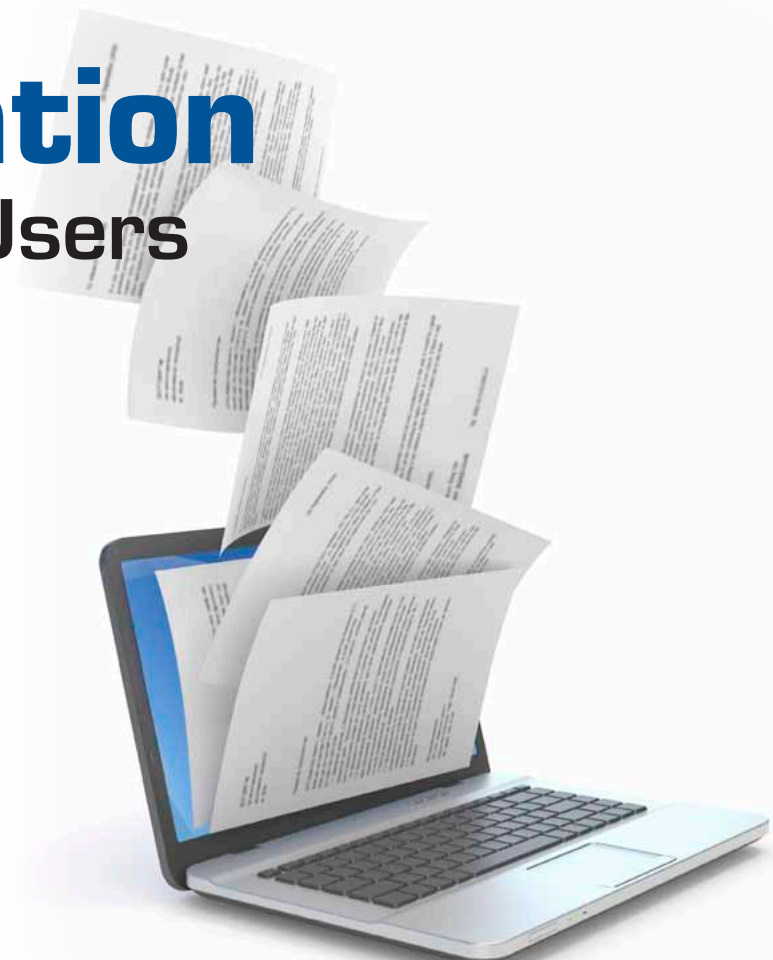
Case Study: AP Automation for Dynamics GP Users

Before Humphrey Management discovered AvidXchange, they manually processed over 4,500 paper invoices a month, for 70 communities across six different companies. Somehow, they accomplished this herculean task with a staff of four AP personnel and one AP Manager. Over 90 percent of the paper invoices were sent directly to the communities and then stamped, signed for approval, and sent to corporate for payment.

"With paper going back and forth between the offices, it was easy for things to get lost in the mail, and since there were so many steps in the process, approval timeframes were often exceptionally lengthy," said CFO Sheri McGowan.

"Our manual process was so inefficient that our community managers would occasionally have to take time out of their hectic schedules to actually drive the invoices to the corporate office in order to get them processed," McGowan added.

"Regional managers also had to go to the community to approve invoices anytime there was a turnover in staff at one of their properties, which added another task to their overbooked day."



The financial team at Humphrey Management knew that their manual, paper-based process was holding them back and that something had to change. In 2005, a hotel division within their management group identified AvidInvoice as a solution to their "paper problem." Later, when the hotel division was sold, McGowan and her team took advantage of the situation and kept the product and implemented AvidInvoice across the rest of their companies. Early adoption of AvidInvoice enabled them to transition to an automated AP process long before many of their competitors, which created a competitive edge for Humphrey Management. They were able to optimize their AP processes and realize a significant reduction in their operating expenses; savings were then allocated to other, more deserving, areas of their business.

Humphrey Management was able to reduce their AP staff by 50 percent, because the AP team no longer had to perform meaningless tasks, such as data entry, copying bills, filing, fielding calls from vendors, and searching for bills in filing




cabinets. This meant their AP team of four became an AP team of two, and has resulted in an average annual savings of \$70,000 in labor costs. Regional managers are also able to make better use of their time thanks to the new approval process because they can now approve invoices anytime, anywhere and simply redirect invoices to a different staff's online queue if they experience a staff turnover at a community. AvidInvoice also enables workers in the field to be self-sufficient because they can research the status of bills themselves and provide vendors with real-time information when they call with inquiries.

"When we bought the system I didn't realize just how beneficial it would be during budget season," said McGowan. "I used to spend so much time going back and

forth to the filing cabinets to look for an invoice when I wasn't quite sure what the bill was for, but now I can easily pull up the bills without leaving my desk."

Let 2016 Be the Year of Efficiency

Are you interested in significantly reducing the time and money spent on processing payables invoices and payments? AvidXchange integrations with Dynamics GP include a 45-day implementation guarantee. This means you're just 45 days away from removing the paper (and the clutter) from your AP process and enjoying a more efficient accounts payable experience.

To take a tour of our accounts payable and payment solutions, or to schedule a demo, visit our [website](#). 

Easier Cash Receipts in Microsoft Dynamics GP

Written By David Eichner, [ICAN Software](#)

Dynamics GP users who enter cash receipts that are to be applied to a single invoice often wish that they could just enter the invoice being paid and have the entire cash receipt entry done for them.

One such Dynamics user had modified their sales invoice document to include a barcode for the invoice number on the invoice stub that would be returned with payment. With Automatic Cash Receipts, they are now able to barcode read or manually enter the invoice number on a floating window above the cash receipt window, have the entire cash receipt window populated, and then apply it to the specific invoice automatically. They can change the cash receipt amount if full payment of the invoice was not received. Otherwise, they can simply hit ENTER key and move on to the next invoice being paid. This allows them to enter a large number of cash receipts in a very short period of time.

Other users of Dynamics GP need to be able to provide a cash receipt to customers when payment is received. Print Cash Receipts allows them to print a cash receipt document from the cash receipts window or from the AR transaction entry window. Users can also reprint cash receipt documents from the AR inquiry windows as well. The cash receipt document can be modified with Report Writer to include company logo or other changes necessary.

When entering a cash receipt for a large number of invoices, many Dynamics GP customers grow frustrated with the lag that occurs as each invoice is marked for apply. Mass Apply Receivables allows one customer to enter a cash receipt for a very large amount and then import the apply data for that payment against hundreds of thousands of invoices. Once imported, Mass Apply Receivables can be run in a mode that automatically applies the specific one-to-many apply records imported.

Many customers' record returns in Sales Order Processing need to be applied to a specific invoice. If they store the invoice in the Customer PO Number field, Mass Apply Receivables can be run in a mode that searches for and



automatically applies any payments, returns or credit memos that reference a specific invoice.

Other customers just want to run an auto apply process across a wide range of customers and document dates... without having to do it one customer at a time. Mass Apply Receivables can also be run in a mode that auto applies open documents for a range of customers and document dates. It also can be restricted by customer class if needed.

These products are just a few of the many great products from ICAN Software Solutions. We make solutions that turn hours into minutes...

We Work Late So You Won't Have To!

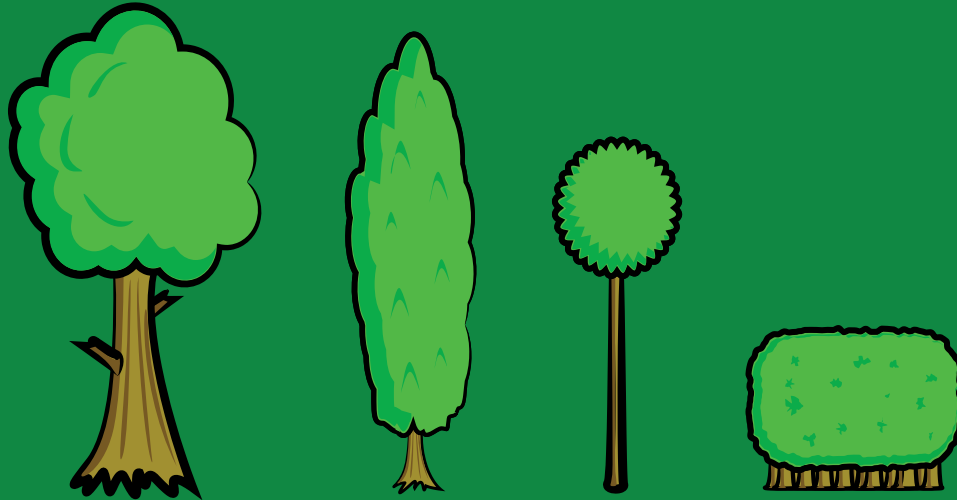
Want more information? Contact us for a demo of Vendor Price Matrix!

www.icansoftware.com

[Follow ICAN Software](#) - [Like ICAN Software](#)

[Email ICAN Software](#)

One Size Does **Not** Fit All!



Greenshades offers Affordable Care Act solutions that fit your business needs.

Find your **perfect** solution today!



 www.greenshades.com

 888-255-3815

 sales@greenshades.com



INSURANCE

Affordable Care Act Questions Answered

Written by Chris Hadden, CPP, Technical Sales Manager, [Greenshades Software](#)

I've never heard so many news stories before that directly relate back to what I talk about on a daily basis. The Affordable Care Act is no secret. ACA impacts everyone in an organization, but it presents significant challenges to these departments and takes team building to a new level. With so much data needed from so many departments and records, many running different systems and databases, ACA is a huge challenge for any business.

For the past 12 months I've been running a series of webinars and presentations geared around the Affordable Care Act, which has allowed me the opportunity to speak with hundreds of companies around the country, all of whom have varying levels of familiarity with the Affordable Care Act. If there wasn't enough fear in the heart of businesses around the country already, the IRS just kicked it up a notch by recently increasing the penalties for non-compliance. After talking with so many of these Dynamics users over the past year, I've seen a number of reoccurring questions.

Is it too late? What about historical information?

Any employee who works more than 30 hours of service per week or 130 hours of service per month over

the course of their measurement period is considered a full-time employee for the purposes of ACA, so historical data is essential. The form 1095-C issued to these employees also presents complications because a historical offer of coverage needs to be tracked continuously throughout the year to have a full scope of what to report on the form 1095-C at year end. It's important that any business react as soon as possible because this is no time to give up and hide. By pulling historical payroll and HR data from Microsoft Dynamics, Greenshades is able to calculate the full-time status for employees and capture historical coverage details, with minimal edits.

I want to go green. What electronic options does the IRS ACA offer?

The IRS offers various ways to go paperless; some voluntarily and some mandatory. Any business that is filing more than 250 1095-C records to the IRS must file the 1094-C transmittal electronically. Even if a business has less than 250 records they can optionally file electronically with the IRS. Please note, if you already have a Transmittal Control Code (TCC) for filing other 1099s electronically, in order to file the 1094/1095 electronically you must register for a new TCC with the Affordable Care Act Information Reporting (AIR) program. By using the

Greenshades applications however, you can avoid this registration process, giving you one less headache to deal with. The IRS also allows the 1095-C form to be issued electronically to the recipient so long as the recipient explicitly agrees to receive this form electronically. The Greenshades Year End Forms module will track this consent process for you, saving you both time and money this January by avoiding the need to print and mail paper 1095-Cs to recipients.

Our employees have enrolled in self-insured plans, can you help?

Self-insured coverage leads to some additional challenges with the Affordable Care Act, but nothing that cannot be tackled with the appropriate resources. Because self-insured companies will not have an insurance carrier to issue a form 1095-B to all covered individuals, an employer that offers health coverage through an employer-sponsored self-insured health plan must complete form 1095-C, Parts 1, 2, and 3, for any employee who enrolls in the health coverage, whether or not the employee is a full-time employee for any month of the calendar year. Part 3 includes information on which dependents were covered throughout the year. This means that a business must take additional steps in ensuring that dependent election data is collected and stored throughout the year. Coverage offered to non-employees must also be reported, however, this will be reported on form 1095-B.

An employer that offers employer-sponsored, self-insured health coverage but is not an applicable large employer subject to the employer shared responsibility provisions under section 4980H, should not file forms 1094-C and 1095-C, but should instead file forms 1094-B and 1095-B to report information for employees who enrolled in the employer-sponsored self-insured health coverage.

Greenshades has full support for employers with self-insured plans, and will support both the form 1094/1095-C, as well as the 1094/1095-B. Greenshades will also assist in tracking and storing the dependent elections throughout the year making completion of 1095-C Part 3 a breeze at year end.


I'm not processing Payroll in Dynamics. Is that a problem?

Many businesses who outsource their payroll have come to the unpleasant truth that their payroll providers may not be offering any support for the Affordable Care Act, unless they are prepared to use a large amount of financial and personnel resources to implement an entire Human



Resources suite. Not to worry, Greenshades can help. Greenshades offers an Excel template that can be used at year end for populating employee and coverage details, which will be used for populating form 1095-C or 1095-B in January. Greenshades will assist with the electronic reporting to the IRS as well.

The IRS tells me I'm part of an Aggregated ALE Group. Can Greenshades help with that?

As a business associated with an Aggregated ALE Group, it's key that employee level data is properly accessible and tracked throughout the year, especially if you have an employee who works across multiple employer groups. Any hours of service accumulated throughout the measurement period for the employee must be aggregated across all of the reporting companies. Just because the employee does not work more than 30 hours of service per week in any one particular company, it does not mean the employee is not a full-time employee. In addition to tracking employee hours across multiple companies, the companies in question must also work together for reporting the form 1095-C at year end to determine which company should be responsible for reporting in January. Greenshades provides businesses the ability to setup Aggregated ALE Groups to make employee tracking very manageable throughout the year and all required logic will be applied by Greenshades reporting at year end to keep you and your business in compliance. 

Did you hear? School is in session!

Rockton Software has put a new spin on our 2016 Webinar Series, introducing Rockton 101!

Alicia Weigel, our Rockton Software Professor & Technical Sales Team Lead, is prepped and ready for the first quarter of classes:

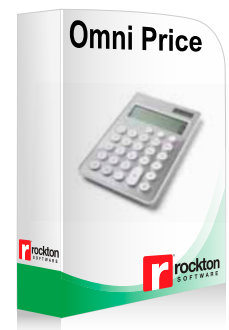
- ✓ **January:** SmartFill
- ✓ **February:** Payroll Pains
- ✓ **March:** Dynamics Report Manager



Click on the session links above to register!

Are you ready to work simpler & easier®?

Extend the power of Microsoft Dynamics GP with tools that will rock your world.



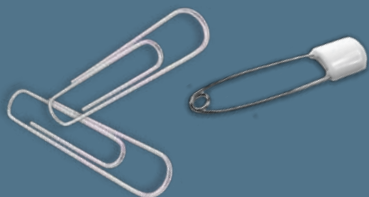
Is your paper-based process overdue for a change?



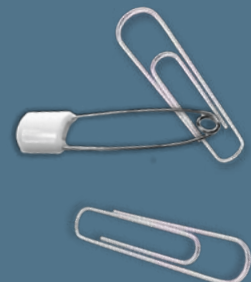
Let MetaViewer cleanse your accounting department currently soiled with paper.

MetaViewer's Fast Track solution will wipe away mounds of paper and quickly soothe the irritation caused by outdated paper-based transactions – Increase efficiency, eliminate errors, automate workflow, and achieve real-time visibility with full Microsoft Dynamics ERP integration. From AP to AR and HR to the CFO, everyone benefits from Paperless ERP.

Pitch The Paper Clips and get on the Fast Track with MetaViewer.




metaviewer
Paperless ERP for Microsoft Dynamics®
AX | GP | SL | NAV | CLOUD



Pitch The Paper Clips | www.metaviewer.com/for-Microsoft-Dynamics

Selecting Solutions for Manufacturing – What is changing?

By Frances Donnelly, C.Q.P.A., Director Sales and Product Development, [Horizons International](#)

When manufacturing processes evolve don't software needs change too?

About 60% of the manufacturers we speak with these days will be able to identify that they are seeking a discrete or process based manufacturing solution for their business. However we are finding that many of these manufacturers have a blend of discrete and process operations and would be better served with solutions for what we call mixed mode manufacturing. Our research suggests that almost 80% of all manufacturers now require some representation of both process and discrete functionality in their software solutions to achieve the most efficient support for their operations.

Why is it important to be aware of this blend of needs?

When you are shopping for a manufacturing software solution, if you don't understand the nature of your manufacturing style at the transactional level, you run the risk of selecting and implementing a software solution that is just not a good enough fit. Recognizing the individual instances of process versus discrete functions in your own manufacturing operations will allow you to select a manufacturing solution that meets your full range of needs. This will prevent your organization from incurring the on-going costs of having to "shoe horn" some of your processes into poorly fitting or inefficient transactions.

Why is this degree of detailed evaluation at the operation level so important in manufacturing?

The simple answer is because manufacturing operations are complex. But let me explain that with a practical example.

In the accounts payable department, no matter the industry or business vertical, there are only a limited number of possible transactions. The limit is so specific that no one



is finalizing their business software selection based on the needs of the accounts payable department.

By contrast, such consistency and limited needs are not widespread when applied to the operational events of a manufacturer. Certainly, there is an underlying aspect of manufacturing that is universal. All manufacturers take raw or component materials and apply effort to transform them into something else. However, the method of transformation is very important making each manufacturing industry unique.

As an example, consider how different manufacturers would use heat for transformation. Heat can be applied to melting ingot to pour castings or to making a kettle of soup or to welding the individual components of an assembly. In each case heat is common but the amount of material consumed and the quantity of output yielded has significantly different calculations that must occur to achieve accurate results for inventory count and value.

Another aspect of differentiation between manufacturers is in how they will count the materials they buy, store, consume and sell. For discrete manufacturing this count effort is most often found to be reliant on multiples of one, think of a light fixture or an automobile. Discrete manufacturing solutions are constrained by this quantity of one multiplier effect. On the other hand the process manufacturer most



frequently deals with volumes or measures of volume, which on the surface can appear to be multiples of one but more frequently require the application of units of measure with four or five decimal places like ounces, meters, feet etc.. Process manufacturing solutions therefore are specifically designed to support this variety of measurement.

Manufacturing value stream – process, discrete or something else?

When we take a detailed look at a value stream in manufacturing today, we are more likely to see constant shifts from process to discrete and from discrete to process operations. We find our discrete manufacturers, those who make products like light fixtures or automobiles, are often running sub processes that reflect traditionally process based manufacturing activities like painting or punching parts. On the other hand, process based manufacturers have a need to utilize discrete functionality for events like packaging their products or capacity planning.

Manufacturing software that is labeled mixed mode incorporates the functionality for both process and discrete needs in a single solution. This is why for many manufacturers mixed mode functionality would be a better fit than a purely process or discrete solution and why we see growing interest in such solutions.

Why is the need for mixed mode functionality growing?

The answer is pretty simple. More and more manufacturers as they drive to:

- a) Tighten control of their supply chain
- b) Shorten throughput time
- c) Lower the risk associated with inventory

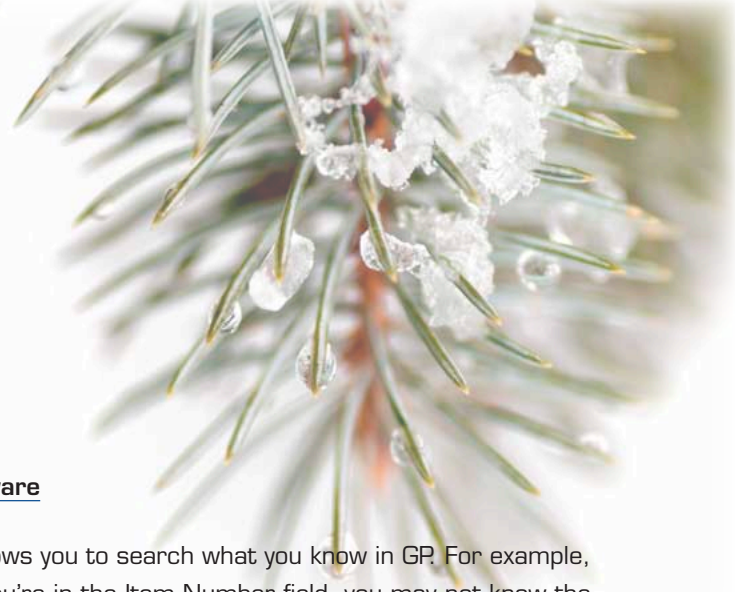
...can identify that their physical manufacturing processes contain elements of both discrete and process type activities. As part of their overall improvement and control strategies they seek software solutions to



support their operations with maximum efficiency and they find the purely discrete or process solutions inadequate for these goals.

This effort to identify and deploy the right software solution is met on the supplier side by increasingly affordable software licensing and configurations costs. Microsoft DynamicsGP in combination with Horizons Mixed Mode Manufacturing Essentials provides one of the few offerings of mixed mode manufacturing software available today for the mid-market. Each aspect of the solution is written in Dexterity, the native code base for DynamicsGP. This allows for deep integration which provides a consistent user experience across all business roles and ensures that cost and count data is generated and updated consistently across all functions.

In 2016, Horizons International will be recognizing 20 years of effort providing leading edge manufacturing functionality to the DynamicsGP marketplace. We have focused on remaining nimble and staying in touch with trends and developments in global manufacturing. Our dedication to delivering both discrete and process capabilities in a single software solution, as well as the release of our Quality Essentials Suite product line is a demonstration of that commitment. Please visit our website www.HZS.com to learn more about our products and to help you decide if mixed mode manufacturing software is the right solution for your organization. Our video Minimizing Inventory Risk can provide helpful explanations and product fit identifiers. 



Winter is Coming . . .

Written By Alicia Weigel, Technical Sales Team Lead at [Rockton Software](#)

No, we don't know if Jon Snow is coming back to life or not, but winter is still coming.

Winter. Time to bust out the snow blower, ice skates, and sleds. Not to mention your puffiest puffy coat. Wait, what? You don't have a puffy coat? Everyone has a puffy coat! You NEED a puffy coat!

You rush to the nearest sporting goods store where you can find the must have accessory of the season—the coat that makes you appear to be competing in a Michelin Man look-a-like contest and winning. You sprint to the racks, only to find there are zero puffy coats in stock! How did this happen!?

This store was clearly not using SmartFill to search their Microsoft Dynamics GP Inventory.

If they were using [SmartFill](#), they could've easily seen their inventory was zero on the season's hottest item: a puffy coat. Your inventory list can get quite large in Microsoft Dynamics GP, which can make it a daunting task when it comes to finding items in the system. As shown below, SmartFill can perform calculations to show you the quantity you have on hand as well as the quantity you have available letting you know it's time to get more product on the shelves. It offers the best searching functionality around and from nearly any window in Dynamics GP. So now when you are selling items, you can see exactly what your inventory looks like.

[SmartFill](#) can assist with more than just the puffy jacket inventory crisis! It

also allows you to search what you know in GP. For example, when you're in the Item Number field, you may not know the item number . . . but you can search on the description, short description, even Class ID to get your results. This is extremely helpful when your inventory items use an intricate numbering scheme to assign item numbers.

You can also customize your SmartFill Object to display additional information, such as your quantity on hand, quantity allocated, and even the quantity available. This way, when you look up your items, the information is at your fingertips.

Don't be left out in the cold this winter! [Contact the Rockton Software Sales team](#) for a free trial of SmartFill and see how easily you can manage and search records in your Microsoft Dynamics GP. [GP](#)

The screenshot displays two overlapping windows from Microsoft Dynamics GP. The background window is 'Sales Transaction Entry' for 'sa Fabrikam, Inc.' dated 4/12/2017. It shows transaction details like 'Type/Type ID: Invoice', 'Document No. STDINV2264', 'Customer ID ADAMPARK0001', and 'Customer Name Adam Park Resort'. The 'Line Items by Order Entered' table shows one item: 'PUFFY COAT01' with a quantity of 1 and a unit price of \$75.00.

The foreground window is 'Make a Selection', which is a search interface. It shows a search for 'PUJ' resulting in 10 items. The search results table is as follows:

Item Num...	Item Description	Item Class Code	Item Shor...	QTY Avail...	QTY on Hand	Text Field
COMPBOOK	Computers Explained		Comp Book	8	10	
COMPDUK	Standard Barebones ...	FG-STD		0	0	
COMPUTER	standard white com...	FG-ACT		0	0	
OM08570	Home Desktop Towe...	CATALOG	DesktopC...	0	0	
OM08575	Home Desktop Towe...	CATALOG	DesktopC...	0	0	
OM08580	Home Desktop Towe...	CATALOG	DesktopC...	0	0	
OM08600	Business Desktop PC 1	CATALOG	DesktopC...	0	0	
OM08605	Business Desktop PC 2	CATALOG	DesktopC...	0	0	
PRO1	Pro Computer		Computer	0	0	
PUFFY CO...	Black Puffy Coat		Blk Puffy	12	13	

Photo by Tanchic/iStock/Thinkstock.com



DYNAMICS DUO



AVIDXCHANGE IS THE COMPLETE AP & PAYMENT AUTOMATION SOLUTION FOR DYNAMICS



Our Automated AP Process:



Our clients' average time to process an invoice vs. an average of 28 days when using the manual process.



WHY SHOULD DYNAMICS USERS AUTOMATE WITH AVIDXCHANGE?



We integrated our first Dynamics GP client ten years ago and have welcomed hundreds more since then.



Our customer retention rate. We pride ourselves in keeping our clients happy and seeing them grow.



The average percentage of invoices our clients convert to electronic submission in the first year.



Why Microsoft Dynamics GP Customers Should Consider Adding an Indirect Tax Automation Solution

Written by: Mallory Jones, [Thomson Reuters](#)

The High Cost of Transaction Tax

In the Global 2000, for every \$1 billion in transactions, approximately \$6M is wasted in transaction tax costs annually. Small-to-mid-sized businesses average more than \$327K in annual costs to manage sales and use tax compliance.

Source: Independent survey by Tallman Insights and fielded by Mindwave Research

Like other areas of taxation, indirect taxes such as sales, use, and value-added taxes, are continually changing and increasing. Corporate tax rates are at an all-time high, as government agencies must solve their budget shortfalls. They look to increase indirect tax rates and audits for additional revenue sources. Simultaneously, auditors are becoming even more sophisticated at identifying errors and recovering taxes, putting an even greater strain on a company's revenue. Because of constantly changing indirect taxes, companies of every kind throughout the world are struggling to achieve compliance. Faced with this type of aggressive audit environment, tax departments are more focused now on reducing risk by increasing accuracy, streamlining end-to-end automation, and centralizing control of tax and compliance.

A Greater Return on Investment

Corporate IT departments want to increase performance

and scalability, yet finance departments do not want the added expense and demand lower overall costs. As a result, companies are looking for fully integrated solutions with a justifiable return on investment (ROI) that can drive true cost savings for finance.

Ideally, you will want to look for an indirect tax engine that delivers justifiable ROI and a truly automated solution that gives a consolidated, real-time view of transaction tax exposures. In the end, it is this engine that will determine your company's liability for sales tax, use tax, GST, VAT, excise tax, and other country specific taxes and you will want access to the most current tax rates and rules, ensuring timely, accurate, and cost-effective compliance. This should be possible no matter what business changes or tax law changes your company encounters.

A sales and use tax management solution integrated with Microsoft Dynamics® GP enables corporations to:

- Increase tax accuracy and compliance, including support for origin-based states and complex tax rules
- Simplify the tax reconciliation process
- Reduce the need for manual adjustments



To manage this ever changing and complex environment, an indirect tax management solution that automates compliance within your company's existing ERP framework makes more sense today than ever before. Thomson Reuters ONESOURCE™ Indirect Tax provides a simple, cloud-based tax automation solution that seamlessly integrates with Microsoft Dynamics GP to eliminate the burdens and complexities associated with calculating, collecting, reporting and remitting sales and use tax. As an end-to-end solution, ONESOURCE Indirect Tax does it all—from tax calculation to signature-ready returns—so Microsoft Dynamics GP users can say goodbye to manual work and focus on growing their business.

The ONESOURCE Indirect Tax solution offers a simplified approach to managing sales, use and value added tax compliance with fully supported Microsoft Dynamics GP and Microsoft Dynamics AX integrations, as well as custom integrations via our tax calculation web service. As the only patented, end-to-end solution on the market, ONESOURCE Indirect Tax provides business-critical tax decisions using timely tax content for the highest degree of accuracy – from transaction to remittance. Fully integrated into all your financial applications, ONESOURCE Indirect Tax enables the

passing of transaction data from the financial system to the tax engine, and returns transaction taxes in real time for fast, reliable, and accurate tax calculation. Companies can consolidate their global tax policy with a single, scalable instance of ONESOURCE Indirect Tax and still deliver business-specific tax policy across multiple-business systems. This comprehensive solution puts complete control into the hands of the preparer and allows companies to realize improved efficiency and accuracy, increased IT performance and scalability, and reduced costs of ownership.

Discover how your company can leverage the power of ONESOURCE Indirect Tax Integration for Microsoft Dynamics GP to align and automate your tax processes at every level of your business. [GP](#)

Want more information?

1-888-885-0206

indirecttax.cloud@thomsonreuters.com

tax.thomsonreuters.com/DynamicsTax

[Watch Demo](#)

Integrate your timesheet to Dynamics GP

Have a clear vision of your projects and effectively manage your resources

Timesheets are an integral part of any project-based organization. A web-based timesheet allows employees to enter their time and expenses from anywhere via the web and the information is directly entered into Microsoft Dynamics GP.



**ADDITIONAL
COMMENTS &
ATTACHMENTS**



**MULTIPLE
APPROVAL
WORKFLOWS**



**EASY
EXPENSE
ENTRY**



**INTEGRATED TO
PAYROLL &
PAYSIPS**



JOVACO

> jovaco.com ☎ +1 514 323-3535 +1 888 988-3535
7100 Jean-Talon E, Suite 1150, Montreal, (QC) H1M 3S3





Prescribing AP Automation to Heal Invoicing Challenges

Written by Alyssa Kadansky, [Metafile Information Systems, Inc.](#)

So many companies in multiple industries are transitioning to a paperless office in order to streamline financial processes, increase efficiency, eliminate manual data entry and save green by going green. The healthcare industry, specifically pharmaceutical companies, have seen great success in implementing [AP automation solutions](#). Without the help of a document management system, pharmaceutical companies encounter many challenges when it comes to processing invoices in a timely and efficient manner.

Challenge 1: Invoice processing when you're a chain with multiple subsidiaries in multiple locations. If you're a pharmacy with 15, 50 or hundreds of office locations, it can be difficult to nail down a process that assures that invoices are being sent to the right place, following company-specified approval rules and being turned around in a timely manner.

The Remedy: Document management to the rescue.

When pharmaceutical companies have trouble with the location differentiation process, a document management solution is often a good fix. AP automation can be customized to meet the specific needs of a pharmacy chain to help ensure that the correct location is receiving the correct invoices. Automating this process provides site managers at each site with more visibility into their specific location. They can see only pending invoices and approvals that need to be taken care of by them, and can go back and search invoices for their specific store when document management is integrated with their [Microsoft Dynamics GP](#) solution.

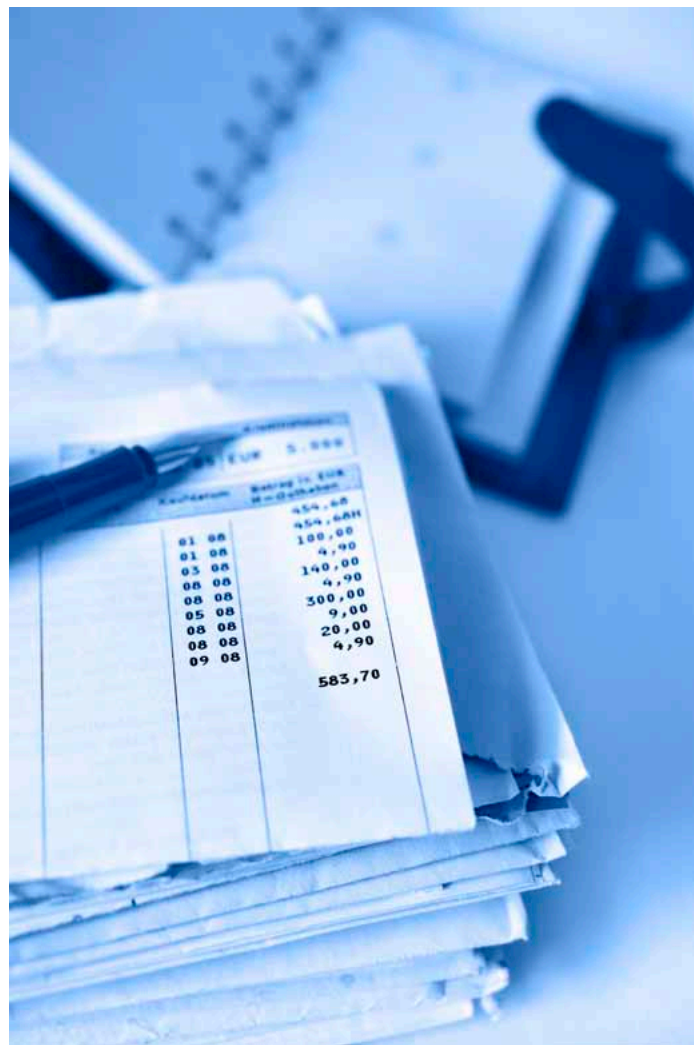
Challenge 2: Cumbersome manual processes. Whether your pharmacy has several locations or just one, odds are that your AP department has to go through a myriad of manual procedures to make sure invoices are processed. Whether this means scanning, printing, copying and filing documents, hand-delivering or emailing invoices to the proper approver, keying-in invoice information into a spreadsheet

or other system, or all of the above, manual processes slow you down; and in the healthcare industry, you can't afford to be inefficient!

The Antidote: Data entry, meet your match. AP automation does exactly what its name suggests: Automates. We talked with one pharmacy chain that went through not only manual, but undocumented manual procedures for invoicing. Invoices for more than \$500 were emailed to be approved by individual store managers. Invoices also had to be printed, scanned, emailed and filed, which decreased the AP department's efficiency and made it especially difficult for them to keep track of where invoices were in the invoicing process. Document management invokes hands-off and more efficient invoicing procedures, and this company found great success with it. When AP automation is implemented, AP employees can be trained on the new system, keeping procedures fluid and consistent. There's no longer a risk of documents literally getting lost in the shuffle, information being mis-keyed or invoices being sent to the wrong approver. A document management solution reads, processes and indexes documents automatically. And, when your AP employees aren't spending their days doing manual data entry, their new-found free time can be reallocated to more crucial tasks.

Challenge 3: Paper is pricey! Let's throw some numbers out there: It costs a company about \$25,000 to fill a filing cabinet, and approximately \$2,100 per year to maintain it. Frequent printing is equally expensive. The least expensive ink costs about \$13 per ounce, while the most expensive is about \$75. Toner can cost a company anywhere from \$75 to \$200. Even smaller, less expensive office supplies can add up quickly. Today, postage stamps cost 49 cents apiece, and any piece of mail that weighs more than one ounce is charged 22 cents per additional ounce. Depending on how much mailing you do, and the materials you're mailing out, this can get expensive. Also consider the cost of labor and the price you pay for increased payment times on invoices when your AP department can process invoices in a timely manner. Your expenses may be adding up without you even realizing it, but there's an opportunity to turn it around

The Cure: Document management is all about green - Spend some green to go green AND save green. Document management can be a large investment for your company, but you can be assured that it's well worth the cost. According to research from organizations like The Aberdeen Group, IOMA and PayStream Advisors, productivity gains of as much as 82 percent have been shown in companies that automate their AP processes. In addition, a survey by The Aberdeen Group found that respondents with workflow systems averaged 4.4 days to process an invoice, as compared



to the average 14.4 days. AP automation also helps your company reduce their environmental footprint. Every year in the U.S., one billion trees worth of paper is thrown away, and the average company produces 1.5 pounds of paper waste per employee per day. If you consider these numbers, it's simple to see where your company could help Mother Nature by reducing or eliminating paper use. Seem impossible? A large behavioral health pharmacy company was able to go 100 percent paperless in their accounts payable department, as well as completely paperless in the accounts payable department of the company that they merged with.

When inefficiencies and invoicing challenges have your AP employees feeling down and under-the-weather, it's time to turn to a remedy like AP automation. Once implemented with your company's Microsoft Dynamics ERP solution, document management can help pharmacy companies manage invoicing in multiple locations, eliminate manual processes, save money and go green. What ailments could your healthcare company heal with a little dose of document management? **GP**



Deliver Great Growth With Scalable Quality Management Solutions

Growth can be risky.

Especially if you are unsure how to scale your paper-based and manual systems.

But it doesn't have to be.

Try It. Pilot. Buy It. 30 Day Free Trial

Surprisingly affordable quality management for any industry.

QualityEssentialsSuite.com

1 (866) 949 9504 ext. 811

Plan. Collect. Analyze. ***Repeat.***

Quality Essentials Suite is an independent solution, or seamlessly integrates on any Great Plains platform.



New Year's Resolution: Keep Better Track of Your Time

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

Let's face it, no one likes filling out a timesheet or an expense report. They take time away from doing something that we consider more productive, and the notion of being accountable for every second of the day is just not fun. But, it's the reality in a lot of businesses—not just professional service firms.

A question that is often asked is: how can we get our staff member to enter their time? If this has made your list of goals for 2016, you should start by looking at your current timesheet application and evaluate if it is user-friendly for your resources to quickly and efficiently enter their time. The number one excuse that employees give as their reason for not completing their timesheet is that it is "too long to enter" or they "don't have time", so it is time to take that excuse away from them!

This is why we feel that it's important to have a timesheet that has the features to help make this process as painless as possible for all timesheet users. Let's be realistic, no one will ever be excited to fill it out, but if it takes less time,

people may be more likely to do so in a more timely fashion.

Here are some features that our users have said help their timesheet entry process go smoother:

The option for recurring lines that are automatically renewed every week

For users who are used to entering time to the same activity week after week, the particular activity code will already be available in every new timesheet, so they can directly enter time without having to go search for this information. Once that particular project/activity has been completed, they can simply remove that line and its recurrence. Although this may not seem like a big deal, these couple of minutes every day quickly add up!

Access to an additional comment box where they can include a longer description

Including comments can take more time when you need to be creative and fit everything you have to say in 50 characters or less. Having an unlimited text box as you code your

time enables you to capture all the details while it is still fresh in your mind. This way there is no need to go back into your emails and Outlook calendars at a later time to try and remember the specifics of that particular activity if someone asks for more details.

Automated email alerts and reminders for tardy employees

When we implemented this new feature in our timesheet application, we were surprised to see the impact it had on getting everyone to submit their timesheets in a shorter timeframe. By automating this process, the people who had to hunt down and remind (or sometimes nag!) the staff members who were late in submitting their timesheet appeared less as the “bad guys”.

This feature not only reduces the amount of time spent running around and sending emails to those who have not submitted their timesheets, it also speeds up the approval processes where these same alerts are used.

A real example of this: we had one firm with staff members that would typically take until the following Thursday to get all their timesheets submitted. Since the implementation of the automated alerts, all the timesheets are usually submitted by end of day Tuesday.

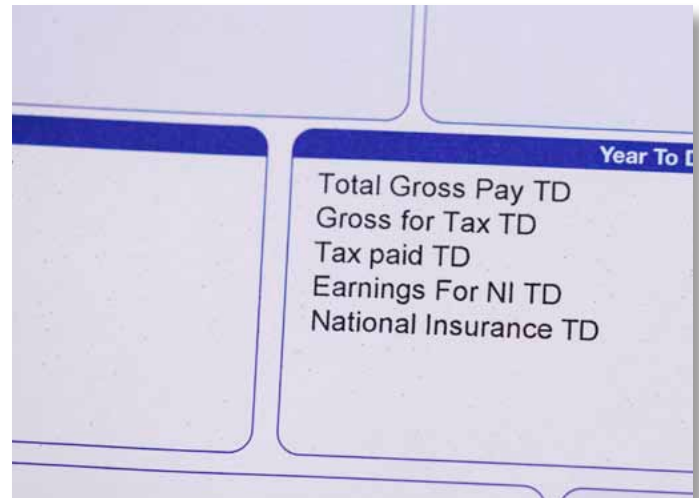
Everyone wins!

Everyone in your organization will be affected by these changes in a positive way: time will be entered sooner, managers can start approving faster, and by having project and administrative managers approving different lines at the same time, there is less back and forth between the different managers.

Staff members will grumble less since filling out their timesheet will be less painful and time-consuming.

Project managers will have a better visibility into how their projects are doing since time will be entered sooner. It will also allow them to more closely manage their projects as they can have their own line item approvals for projects specific to them.

The accounting department will also be happy since they can bill faster and more efficiently as more details concerning the work done, receipts, and attachments




	Year To Date
Total Gross Pay TD	
Gross for Tax TD	
Tax paid TD	
Earnings For NI TD	
National Insurance TD	

are automatically included with the invoices. There will be fewer adjustments as the time has already been modified and approved by the project managers, therefore the information is more likely to be coded to the appropriate project activity at this point in the process.

Management will be pleased to see a consistent increase in cash flow since there will be less billable time sitting in work in progress accounts and a greater percentage of invoices that will be paid in full. This can be attributed to the amount of additional information provided from the timesheet that will be included within the invoice, and the timeliness at which the invoices are being sent. These two factors will help reduce the number of questions and justifications required once the client has received the invoice, ultimately decreasing the potential number of write-offs and bad debt.

By utilizing JOVACO Project Suite's [web-based timesheet](#) as well as a [project accounting solution](#) fully integrated to Dynamics GP, the need for double entries will be eliminated and you can be assured that all information is transferred to Dynamics GP correctly. This application also has the ability to create complex business rules and charge-back rates depending on the project, level or task, allowing all the proper costs to flow to the appropriate projects, departments and, companies.

Ready to make time tracking a resolution you want to keep in 2016? [Contact us](#) or [sign up for an upcoming demonstration](#) on JOVACO's TEDI timesheet.

Follow JOVACO Solutions on [Twitter](#) and [LinkedIn](#) to stay up to date on the latest products and trends! 



For fewer hours
tracking hours,
Penny™ is your solution.

Everything employees need to know about their pay
and time. Security and ease for supervisors. Integrated with
Dynamics GP for Canadian Payroll & many third party add-ons.

Efficiency software for Microsoft® Dynamics GP



Direct access and simple payroll management

Employees can manage timesheet inputs directly or have delegates enter on their behalf and submit for approval.



Adaptable and customizable

Configure Penny to streamline HR workflows or integrate add-ons to suit your needs. Work with other tools? Penny works with Microsoft Dynamic ISVs like WennSoft, Diamond, Olympic and other punch clock systems and project accounting systems.



Seamless integration with Microsoft Dynamics GP

Built to work with Canadian Payroll for Microsoft Dynamics GP and meet Canada Revenue Agency standards.

Penny™ Software that gives Canadian employees fast, direct access to their payroll information through a convenient, simple, web based interface. No need to contact the HR department — employees can track their own hours, see pay stubs, and find other relevant information and records. 24/7, from anywhere in the world. At the same time, administrators have a direct route to update management information.

Find out more. Visit joesoftware.com/demo

"We've been using Penny™ since early in 2005. With some customization, Joesoftware was able to give us what we had been looking for for some time. The program integrates very well with Dynamics GP and that was what we were looking for. We continue to use it on a daily basis and staff find it very easy to use. The process of running a payroll has been made simpler and easier for us. We are very pleased with Penny and hope to continue using it for years to come."

EASTERN ONTARIO HEALTH UNIT

Contact Joesoftware today to inquire about our limited time offer of 15% off the purchase of Penny. Hurry, as this discount will expire February 15th, 2016!

Investment Assets – Endowment Funds Management for Microsoft Dynamics GP

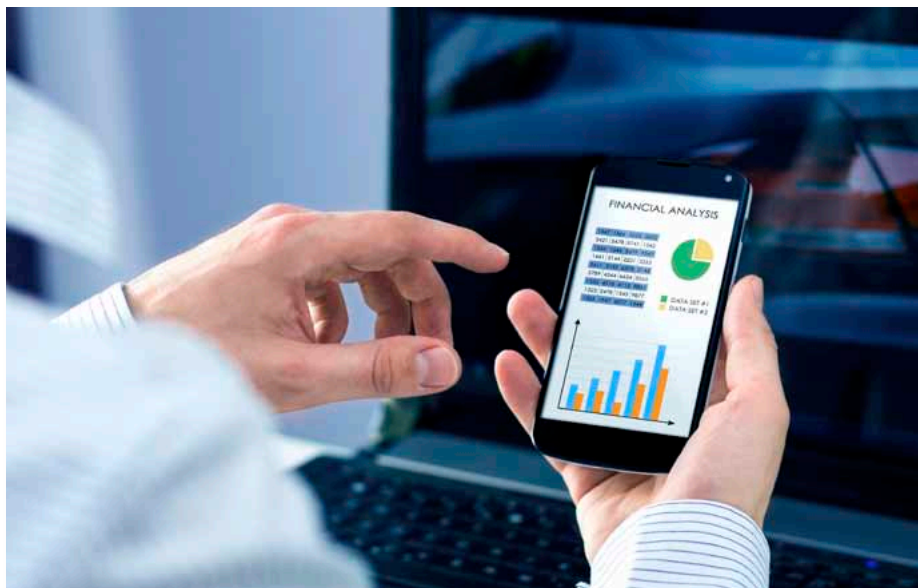
Written By David Eichner, [ICAN Software](#)

Inglewood Park Cemetery, an Endowment Care cemetery, is located in the state of California, and handles approximately \$70M in investments monies. Inglewood Park Cemetery, and its sister company, Park Lawn Cemetery, each have several funds in addition to the State required Endowment Care Fund, the earnings from which are used to maintain the cemetery grounds and facilities. The other funds include Commodities and Services purchased in advance by their clients, the earnings from which offset the price increases over time. Jacqueline Gonzalez, Vice President of Fund Management, works directly with the Companies' Investment Committee in managing these investments.

Inglewood Park Cemetery used to leverage AS400 CCMS software, which had a General Ledger (GL) package designed for cemeteries. This meant that any asset reporting had to be processed manually using Microsoft Excel spreadsheets. Jacqui recalls, "This worked fine in the '80s when we had just 4-5 investment managers and 10 investment portfolios, but we've grown into a well-diversified operation with thousands of investments, such as equities, real estate, fixed income, mortgage backed securities, and much more, across our 42 portfolios."

Their month-end and year-end processes became very tedious to get through. It used to take them a full month to get through month-end processing, reporting and reconciliations. They were also very prone to error when dealing with their manual processes. "What we put in, we got out, and too much of our time was dedicated to checking and reconciling reports." Jacqui shares.

The volume of work required to handle monthly amortizations and interest accruals made it necessary



for those entries to be captured on a year-end basis. Due to the manual reporting of investments, the preparation for the yearly audits was extremely time-consuming. Jacqui shares, "Our auditors needed to do more testing on our investment holdings to make sure the information we were using was accurate."

ICAN Software Solutions came to Inglewood Park Cemetery's aid and everything has since changed. The cemetery went live on Microsoft Dynamics GP with [ICAN Investment Assets](#) in 2012 and they now have complete and accurate tracking and history of each investment holding, complete with customizations specific to their industry and so much more.

Closing books each month is now accomplished in approximately 10 days. "We can pull monthly amortizations, interest, and income accruals. The reconciliation process is so smooth, it takes literally a push of a button to initiate a reconciliation report back to our statements." Jacqui continues, "I'm still amazed and still enjoy learning all the ways ICAN is able to help us." **GP**

THOMSON REUTERS

ONESOURCE™

SIMPLIFY SALES TAX AUTOMATION WITHIN MICROSOFT DYNAMICS GP

The Thomson Reuters ONESOURCE™ Indirect Tax integration with Microsoft Dynamics GP provides a powerful, cloud-based solution to help you seamlessly navigate the constantly evolving tax landscape. As an end-to-end solution, ONESOURCE Indirect Tax for Microsoft Dynamics GP does it all—from rate calculation and research to reporting and returns—so you can say goodbye to manual work and focus more on growing your business.



What Does ESS Mean and How Can it Benefit Your Organization?

Written by Sheila Read, [Joesoftware](#)

As an HR Manager or Payroll Supervisor, are you often interrupted by staff asking for copies of current and historical payslips? Do you have floods of leave requests and other employee related paperwork constantly coming over your desk? If so, maybe it's time to learn more about Employee Self-Serve and the benefits it will bring to your organization.

Employee Self-Serve (ESS) is an increasingly popular trend in Payroll and Human Resources management that allows employees to access personal information and payroll details through a web browser or company intranet and exports that information seamlessly into Dynamics GP or other ERP solution.

ESS also allows administrative tasks, such as applying for a leave, entering and approving timesheets, requesting overtime payment, viewing current and historical pay and T4 information, and submitting expenses to be managed online.

One of the biggest values that Employee Self-Serve brings to an organization is the relief from repetitive administrative tasks that come with working in the Payroll and Human Resources departments. Employees also become more accountable in performing various activities like timesheet submission. While the idea of opening up payroll information may be frightening at first, with proper training and data integrity assurance, your Employee Self-Serve solution can quickly become one of the most valuable tools an employer can provide.

When ESS has been successfully implemented, a company usually realizes immediate increases in productivity and efficiency. Managers and HR personnel save hours and frustration with a streamlined process for approving time-off requests and answering general inquiries about current and historical pay information. Employees can access this information from anywhere, at any time, which not only

saves employees time but can also boost feelings of employee empowerment.

Benefits: Saving Costs and Improving Employee Satisfaction

The benefits of Employee Self-Serve are the same, regardless of whether employees access their portal through a corporate intranet or the Internet. These mostly relate to both soft and hard cost savings. In terms of soft cost savings, the primary gain is in reduced costs for delivering human resource and payroll services to employees. When employees have access to self-serve solutions, they are able to answer many questions independently, lowering the number of inquiries to the HR and payroll departments. When employees and managers are able to submit their time and leave requests online, less money is spent on paper forms, printing documents and hardware replacement. As a result of these activities being entered electronically and sent to the appropriate approver, less time is spent processing employee transactions. There is no rekeying of data from paper forms and less risk of this important information becoming misplaced or even misfiled on someone's desk. All of the information entered into the ESS can be efficiently exported directly into [Dynamics GP](#) or other ERP solution.

Employee Self-Serve has a huge impact on eliminating paperwork. Managers simply become the approvers of information that the employees enter in the Employee Self-Serve module and that information can be seamlessly integrated to your Dynamics GP ERP or other solution. Employees experience improved quality of service and access to information which is available anywhere 24x7. It's an all-around win/win.

How can employees access the ESS solution?

A company can provide access to Employee Self-Serve in



two ways: through their corporate intranet or through the Intranet. Within a corporate intranet, employees access the self-serve features from computers connected to a shared network within the organization. Access from the “outside” world is restricted though security settings. Employees with desktop or laptop computers can access the self-serve solution from the comfort of their desks or where employees do not have computers, computer kiosks can be conveniently set up in locations throughout the organization.

If a company chooses to open access via the Internet, employees can access self-serve from anywhere in the world by using a computer, a browser or their smart phones. Companies with geographically dispersed employees find this a very economical way to communicate. Typically, these companies use a firewall to prevent intruders from accessing the network and many companies also implement strict security protocols to encrypt and protect confidential data.

Tips on Implementing Employee Self-Serve

The key points in making the transition to employees using Employee Self-Serve successful are to have buy-in from upper level management in the Payroll and Human Resources departments and buy-in and participation at the employee level to make sure employees are properly trained. Getting this buy-in from the top leaders and having them cheer employees on for following the new process is invaluable.

Be prepared to answer all kinds of questions about the Employee Self-Serve application and you may have to do some hand holding in the beginning to ensure that employees are comfortable that this is a value-added process for everyone.

When implemented successfully, Employee Self-Serve will benefit the entire organization in many different ways. Take your time to research the Partner you decide to purchase from and explore all integration options – it is important to ensure that your ESS integrates seamlessly with Dynamics GP or other ERP solution. Working with an experienced and trusted Employee Self-Serve Partner will give you the confidence you need to consider all areas such as change management for the transition to the new solution and to ensure a successful project.


Employee Self-Serve is:

- ✓ Empowerment for your people
- ✓ Direct access to information they own
- ✓ 24x7 availability to important information
- ✓ An automated attendant at your fingertips

Benefits for Employees:

- ✓ Easy access to all their Payroll/HR data
- ✓ YTD values
- ✓ Overtime, Banked Time Information at their fingertips
- ✓ Previous and current pay information
- ✓ Direct Deposit information
- ✓ Reminders for overdue timesheets

Benefits for Payroll/HR:

- ✓ Accurate, timely and consistent electronic submission of forms
- ✓ No duplication of entry
- ✓ Built-in approval processes
- ✓ Reduced printing with on-line Advice slips
- ✓ Reduced burden on HR/Payroll departments 



Solutions That Turn Hours Into Minutes...



- MASS APPLY RECEIVABLES
- MASS APPLY PAYABLES
- VENDOR PRICE MATRIX
- INVESTMENT ASSETS
- AUTOMATIC CASH RECEIPTS
- PRINT CASH RECEIPTS
- VENDOR COPY

We Work Late So You Won't Have To...

617 N. Stadium Way

Tacoma, WA 98403

253.777.0708

253.449.0542 fax

www.icancloudapps.com

sales@icansoftware.com