GP Essential Applications Everyone Should Own

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Objectives

Review 3rd Party ISV Products that
- ▸ Make GP easier to use
- ▸ Fill functional requirements not met by GP
- ▸ Make GP users more productive

Functional Areas of GP

- Payables
- Receivables
- Payroll
- Budgeting
- Financial Reporting
- GP System
- Project Accounting
- Document Management/Business Automation
- MAX

Payables Check Printing

What Kills Efficiency in your AP Process?

Creating Payment BATCHES

Pulling up each batch to PRINT and POST

GENERATING EFT and SafePay files for the bank

WAITING for payment approvals

Using the RIGHT check stock for each checkbook

AUDITING the payment process

Making COPIES of each check

Switching BETWEEN Companies

MANUALLY Signing Check

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Mekorma Micr

- Mekorma Micr has been the best-selling check enhancement for Dynamics GP for 20 years
- Print checks the Way You Want
- Customize Signature Security
- Control Passwords and Approvals

Expense Reporting

- Tedious
- Error Prone
- Lacks Control
- Not Timely
- Lacks visibility of spend types

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Gorilla Expense Sponsor

- No more hassles with expense reports
- Import transactions from credit cards
- Import from emailed receipts
- Submit receipts from mobile devices or computers
- Use workflow for supervisor approval
- Push into GP Payables with click of a button

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1099 Printing

▸ Time consuming at a busy time of the year

Greenshades Tax Filing Center

▶ Reads GP 1099 data
▶ Easily loads data to Tax Filing Center
▶ Validates data
▶ Mails 1099s to vendors
▶ E-files with federal and states

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Payment Processing

- MAX has no credit card processing functionality
- No cloud invoice payment functionality

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Nodus Technologies   Sponsor

▸ Credit Card Processing, Online Bill Pay

▸ Accept credit cards at the time of order entry without a GP license

▸ Enable customers to initiate ACH/eCheck payments or enter their own credit card information

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Receivables Apply

- Reduce clicks

ICAN Software Solutions

- Mass Apply Receivables
  - Applies credit memos and payments automatically
- Automatic Cash Receipts
  - Auto fills cash receipt window after scan or entry of invoice number

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Subscription or Recurring Billing

▸ Repetitive billing for service contracts
▸ Maintenance plans
▸ Bill directly from GP rather than MAX

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Binary Stream Subscription Billing

- Create billing schedules once
- Eliminate spreadsheets and other manual tracking
- If desired, provide a portal where customers can view their contract, update info, and pay
- Manage Revenue & Expense Deferrals

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Collections

▸ Chasing customers for payment is inefficient
▸ Requires manual processes
▸ Redundant reviewing of reports and notes

Professional Advantage Collections Mgmt

▸ Create custom email or letter templates or use standard letters
▸ See what is promised, disputed or needs attention
▸ Track the status for each invoice
▸ Automate collections workflows
▸ Centralize AR and contact details
▸ Accept credit card and ACH payments within Collections Mgmt
▸ Increase efficiency by automating processes
▸ Improve cash flow Reduce bad debt

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Payroll

▸ Many functions not met by GP

Integrity Data   Sponsor

- ACA Compliance
- Negative Payroll Transactions including Negative Deductions
- Emailed Direct Deposit Statements
- Emailed W2s
- Others

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Budgeting

- GP offers basic Excel based budgeting

Dynamic Budgets

- Easy to deploy and learn
- Drill downs to actual transactions
- Real time budget vs actuals
- No data warehousing
- Saves time

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Financial Reporting

- No further development for Management Reporter
- Mainstream support ends 2021

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Jet Reports   Sponsor

▸ Free out of the box reporting solution for GP
▸ Leverages Excel to create reports
▸ Read any table
▸ Jet Enterprise provides more comprehensive capabilities

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GP System

- Automate posting in GP

Envisage Software Post Master   Sponsor

- ▸ Schedule automated posting and eliminate manual posting
- ▸ Achieve near real-time information accuracy

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Document Management/Bus Automation

- In most organizations document control through processes is manual
- Data on the documents is manually entered

KwikTag   Sponsor

- ▸ Reduce manual data entry
- ▸ Gain control and visibility of processes
- ▸ Create workflows
- ▸ Save time and frustration

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Project Accounting

▸ Used when MAX clients provide services in addition to products
▸ Need to track time and expenses
▸ May need to track inventory usage

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Several Preferred Vendors

▸ Recommended vendor depends on requirements

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MAX Products to Aid GP

- ▸ MAX Toolbar for GP
- ▸ Document Manager for MAX
- ▸ Tax Coordinator

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MAX Toolbar for GP

▸ View full transaction detail from GP

▸ Maintain customers, vendors, payment terms, ship methods from GP

▸ Maintain MAX Default Posting Accounts from GP

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Document Manager for MAX

▸ Automate Document Distribution
▸ Create Alerts

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Tax Coordinator

▸ Import current tax rates into MAX and GP from a subscription service

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More Opportunities!

▸ February 19th – March 31st, 2018
▸ Software price only.

March 8 1:00	30 Tools in 50 Minutes
March 15 3:00	Data Collection
April 10 11:00	Announcing Shop Pulse VPoint—A New Graphical Production Monitoring and Scheduling Tool
April 19 1:00	The Fastest and Easiest Way to Import and Maintain your MAX Data
	GP Features and Functions - You Already Own but Didn't Know About
	Shop Pulse
	GP Essential Applications Everyone Should Own Plus A Few To Meet Unique Requirements
	Process Automation for Materials and Manufacturing
	Connecting MAX to the World - Automating Sales Order Processing Functions

Software Promotion

Educational Webinars

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Questions?

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