



Getting Outside the Box with Microsoft Dynamics GP

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RG Connect 2014 | Building Now for Your Future

Session Goal

- **To open you up to the possibilities our Development Team can provide**
- **To showcase examples of Cool Things we have done**
- **To answer questions – discuss pain points**

You dream it – we build it!

- **Why add an enhancement to GP?**
 - To make your users more efficient
 - Streamline processes
 - Improve data entry (or automate it)
 - Reporting needs
 - Add new business logic
 - To enforce your rules – reduce errors
 - Add to out of the box features

- Only rule? We do not break Microsoft Dynamics GP business rules!

Demo 1: Deferred Revenue

- **Business Need: to defer sales revenue**
 - Solution: use Revenue Expense Deferrals
- **Problem: VERY manual process**
 - Solution: Enhancement to automate adding deferrals to the Sales Invoice!
- **Highlights:**
 - Deferrals are automatically created when Invoice posted, edit list printed or with Batch Entry additional menu option
 - Sales Distributions at detail level, with Deferral profile in Distribution Reference field– this flows to GL
 - This solution can be tailored to apply your business rules
 - Error trapping provided to prevent invoice posted w/o deferral

Demo 2: Bulk Order

- **Business Need:** distribution customer needs to make changes to Sales Orders for specific items
- **Problem:** VERY manual process
- **Solution:** Enhancement to provide one window to edit orders based on Item Number!
- **Highlights:**
 - Allows user to change the QTY, delete the item from the order or substitute the item for a similar item
 - Provided one window to work over the QTY's and then push a single button to update many orders.
 - Huge time saver!

Demo 3: PO Mass Close

- **Business Need:** Distribution customer typically does not fully receive PO's
 - Solution: open each PO and cancel the remaining QTY
- **Problem:** VERY manual process
 - Solution: Enhancement to create a PO Mass Close utility
- **Highlights:**
 - Can restrict to Vendor and/or PO Number
 - PO Number – can show ALL lines not just those that were partially received
 - Will also change the PO Status if all lines are 'done'
 - Items not received >> Cancelled. Items partially received >> Received.

Demo 4: Item User Defined

- **Business Need: Ability to add user defined fields to anything in Microsoft GP**
 - Solution: ???
- **Problem: No easy way to do this**
 - Solution: Enhancement to create user defined fields
 - This can be applied to both "Master" and "Transaction" records
- **Highlights:**
 - Can be individualized or generic
 - Easy to report on – Smartlist Builder, ERB, etc
 - Easy to code = worth the price

Laura's demo....

EFT Functionality in GP is not sufficient to create the export file required by Wells Fargo.

How do you get your payment data from GP to Wells Fargo?

**That's where
THE RESOURCE GROUP
comes in.....**

Demo: Wells Fargo Payment Export

- **Business Need: Create payment export file that meets Wells Fargo requirements**
 - Solution: Develop a comprehensive solution in Dynamics GP.
- **Highlights:**
 - Configuration provided to handle specific requirements for Payment Manager, including add-on services.
 - Supports multiple payment types: ACH, Check, Wire. Domestic and international.
 - Assign payment type and checkbook to the vendor master record.
 - Automatically group Wells Fargo payments together in one batch with multiple payments types.
 - Print Check Override
 - Visibility to exported information after file is created.
 - Creates an export file that can be uploaded to Wells Fargo Payment Manager.

Brian's Demo....

- **Copy/Paste Tools**

Q & A

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The Resource Group Leaders
Marty Schillaci, CEO
Denise Schillaci, COO



Questions?

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