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Top 6 Tips for Digital Transformation while staying on Microsoft Dynamics GP



GP SUPPORT NORTH

Canada | United States | International

with **Scott Jorgens MBA,**
Director @ GP Support North



Proof: Long Live Dynamics GP

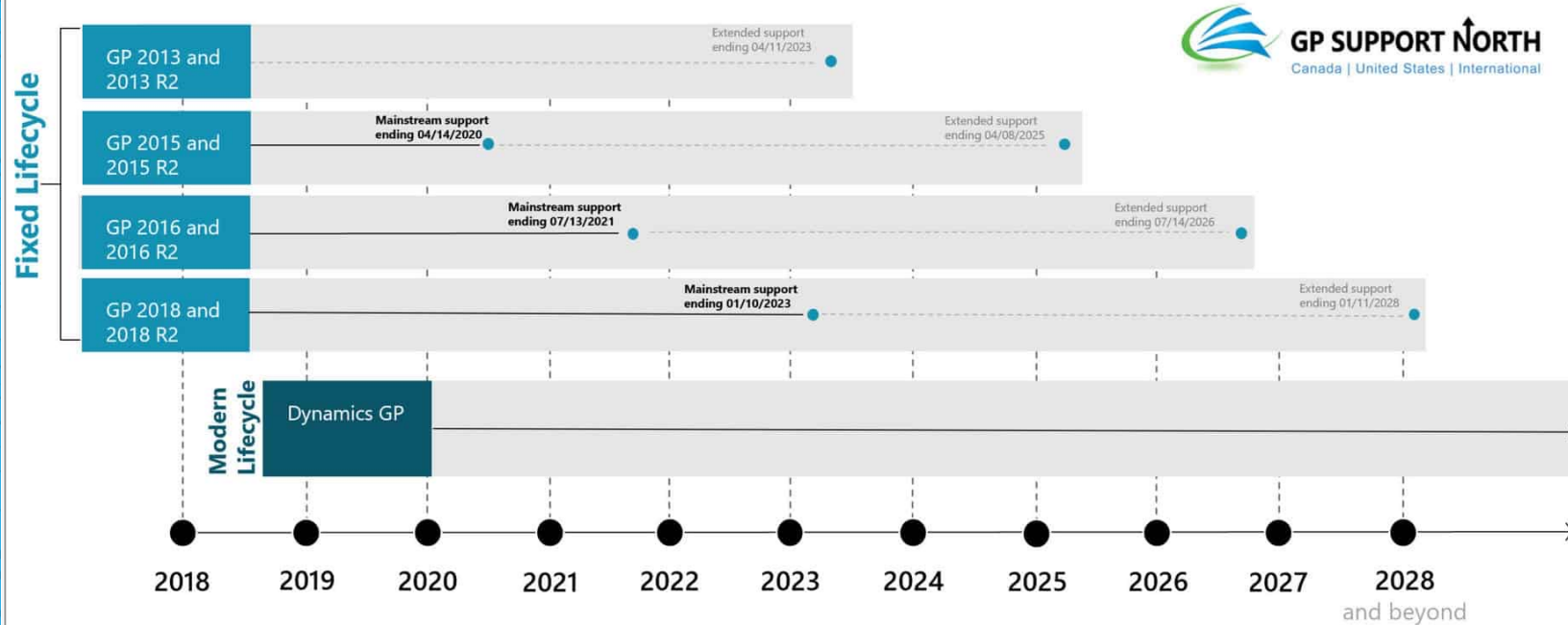
#GPStrong

- 1. Dynamics GP Roadmap to 2028+ and Beyond**
- 2. Dynamics GP 18.5 (latest version) released last October'22**
- 3. Multiple Learn.Microsoft.com posts & What's new**
 - Modern Lifecycle vs Fixed Lifecycle
- 4. Fall 2022 – Official Blog and Linked-In posts Oct 2022**
 - Terry Heley – Microsoft Sr Escalation Engineer
 - Mike Morton – Microsoft VP Dynamics 365
 - “microsoft-is-fully-committed-to-supporting-our-dynamics-gp-customers-for-years-to-come”



Proof: Long Live Dynamics GP

Dynamics GP versions governed by Fixed and Modern Lifecycle



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GP Tip 1 - REVIEW YOUR BUSINESS PROCESSES

- **Back to the Basics – Individual process review and time studies.**
- **What to Look for**
 - Manual data entry
 - Business processes – open, view, edit, send, sort, save, attach, close, export etc.
 - Approvals process – who, what, where, why, when etc.



GP Tip 1 - REVIEW YOUR BUSINESS PROCESSES

• How to Resolve

- Start digital, stay digital
- Look for process optimization opportunities
- Machine-based OCR (optical character recognition) has improved 10X with AI
- Look to increase your adoption of current advanced functions within Dynamics GP
- Look for new perspectives
 - Recent hires, user groups or external experts



GP Tip 2 - FURTHER AUTOMATE FINANCE PROCESSES

- Follow the bouncing ball. Create a process map to follow key documents and touchpoints.
- What to Look for
 - eMail request for authorization to spend/pay
 - Repetitive tasks
 - Transactions that are consistent and repeated – ie lease, utilities, or water cooler bill
 - Month-end reporting and close



GP Tip 2 - FURTHER AUTOMATE FINANCE PROCESSES

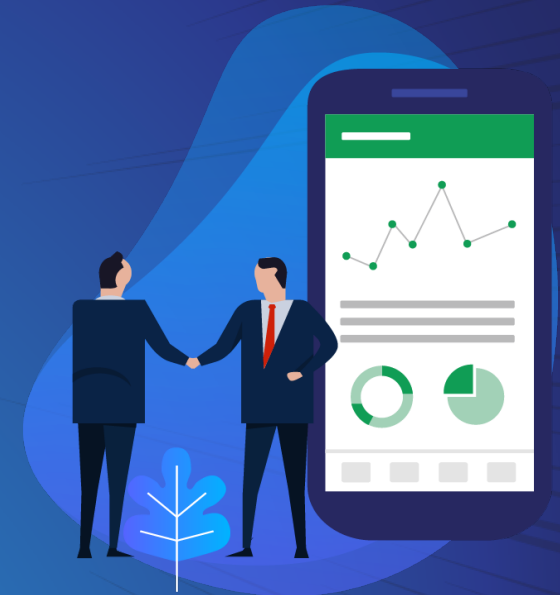
• How to Resolve

- Change and optimize finance processes (80-20)
- Consolidate reports and create self-serve reports
- Create decision trees
 - “Guard rails’ for auto approvals
 - Automated alerts focused on exceptions
 - Quarterly summary vs monthly
- Workflow automation
 - Built-in and enhanced within Dynamics GP
 - Or available 3rd party ISV



GP Tip 3 - DESIGN & BUILD ADDITIONAL LINE OF BUSINESS METRICS

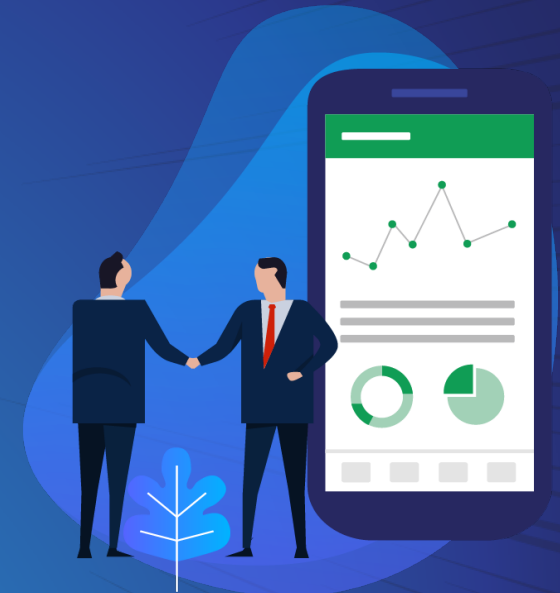
- Review of business value and value-added functions – OKRs.
- What to Look for
 - Departmental apps, forms and reports
 - Administrative tasks that could be automated
 - Measurable outputs – Map out value-chain
 - Are there ERP (GP) financial metrics that support of validate ORKs in line of business?



GP Tip 3 - DESIGN & BUILD ADDITIONAL LINE OF BUSINESS METRICS

• How to Resolve

- Find data and metrics that can help other departments create OKR/ KPI dashboards
- Automate tasks for line-of-business
- Cross-functional workshops
- Multi-entity manager for central shared-services
- IT and Business Analysts can build PowerApps, Power Automate, and PowerBI with Dynamics GP or SQL Server views



Top 6 Tips for Digital Transformation while staying on Microsoft Dynamics GP

6 TIPS

- 1 – Review Business Processes
- 2 – Automate Finance
- 3 – Design LoB Metrics
- 4 –
- 5 –
- 6 –



GP Tip 4 - EXTEND SYSTEMS TO SUPPORT REMOTE SELF SERVICE

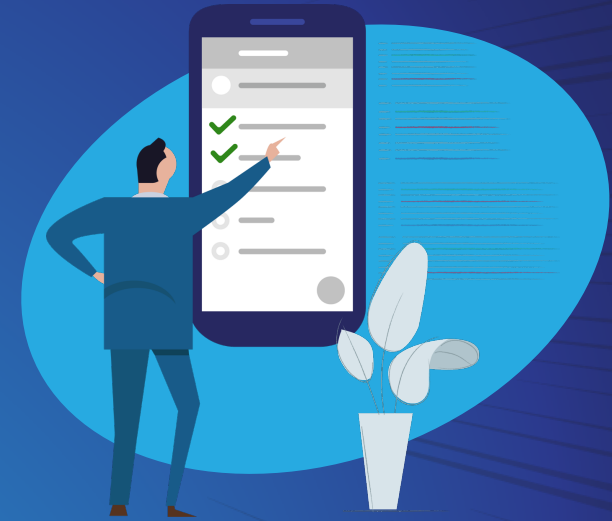
- Set up integrated web portals and cloud apps for internal and external stakeholders.
- What to Look for
 - Explore remote submissions, self-service reports, and remote approvals
 - Build some metrics on time taken per task, frequency and prevalence across each LoB
 - Inspiration from apps or providers serving common market needs. You are not alone.



GP Tip 4 - EXTEND SYSTEMS TO SUPPORT REMOTE SELF SERVICE

• How to Resolve

- There are a number of Cloud-based or on-premise options to complement GP
- PO requisition and approvals
- AP invoice, OCR, and approvals
- Online billing and payment processing
- Time & Expense management
- Leave / Vacation tracking and approvals
- Budget, forecast, scenario planning
- Report packages for period-end close



GP Tip 5 - CREATE AN EXPANDED FOCUS ON COMMUNICATIONS

- Leverage digital communications tools internally and with customers.
- What to Look for
 - Customer communications (sales, marketing, operations etc)
 - C-Sat surveys to customers and vendors
 - Eliminate paper, send digital and attachments
 - Review document retention, retrieval, and storage policies (especially for approvals)



GP Tip 5 - CREATE AN EXPANDED FOCUS ON COMMUNICATIONS

• How to Resolve

- eMail is easy and universal – Create share mailboxes for AR, Finance, AP etc
- Internal workflow approvals + Dynamics GP Doc Attach for contextual info needed
- Many ISV applications available
 - Billing and customer statements
 - Collections management
 - Budgeting workflow / collaboration
 - PO requests / approvals / collaboration
 - AP and expense approvals / collaboration



Top 6 Tips for Digital Transformation while staying on Microsoft Dynamics GP



6 TIPS

- 1 – Review Business Processes
- 2 – Automate Finance
- 3 – Design LoB Metrics
- 4 – Remote Self-Serve
- 5 – Communications
- 6 – and.....

GP Tip 6 - MAINTAIN AN UP-TO-DATE DYNAMICS GP PLATFORM

- Accelerate your Dynamics GP upgrade cycle to every 1-2 years.
- What to Look for
 - Annual modern lifecycle 'updates' are faster and cheaper than previous full GP upgrades
 - Move from every 2-4 years to 1-2 years
 - Key an eye out for notices from your GP partner and ISV add-ons for 'risk' of compatibility issues



GP Tip 6 - MAINTAIN AN UP-TO-DATE DYNAMICS GP PLATFORM

• How to Resolve

- Plan and scheduled annual updates
- Get quotes ahead of time
- Key an eye on age of hardware, OS and DB
- Two options
 - In-place update in live system
 - Two-step update/upgrade
 - Upgrade to “Test Environment”
Then
 - Upgrade to “Production Environment”



RECAP

**Top 6 Tips for Digital
Transformation
while staying on Microsoft
Dynamics GP**



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APPENDIX A: WHY ORGANIZATIONS SHOULD STAY ON DYNAMICS GP 11



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**GP 6-TIPS
White Paper**



THANK YOU



Questions

