

Microsoft Dynamics ERP Optimization Guide

Keep your biggest asset from
becoming your biggest liability

Microsoft
Partner

Gold Enterprise Resource Planning
Gold Application Development
Silver Customer Relationship Management
Silver Cloud Platform



encore

clientengagement@encorebusiness.com
www.encorebusiness.com

If the rate of change on the outside exceeds the rate of change on the inside the end is near.

-Jack Welch

INTRODUCTION

More than 47,000 small and mid-sized organizations around the world run their businesses on Microsoft Dynamics GP. This quick glance guide is designed to help those who have been using the product for several years understand the tools and services available to help them reinvent productivity and empower people to do more and achieve more.

Top Priorities for a Maturing Business

- Keep pace with the growing volume of data.
- Accurately interpret data to support strategic, confident and sustainable business decisions.
- Enable people to work where and how they want.
- Gain a trusted connection with customers.
- Consistently deliver personalized, positive experiences.
- Build the skills for sustainability.

With your stage of organizational maturity in mind, this guide is a compilation of recommendations of a variety of different service and product enhancement options to help you maintain the health and agility of your company. In addition, it has been purposefully crafted to showcase options that meet a broad range of price points to help you realize quick immediate gains while you explore and plan those longer term and more strategic investments.

Your Future with Microsoft Dynamics GP

Success is about more than growing your business in the near term. It's about the long term. Your industry is evolving as are your customers' needs and the way people work. The one thing however that hasn't changed is that Microsoft Dynamics continues to deliver the technology and support you need to get ahead of changing business conditions. The opportunities are endless and now is a perfect time to take control and transform your business.

SmartFill

Just like Google, SmartFill searches through your many years of records in Dynamics GP to find what you are looking for quickly. With over 3,700 predefined lookups, users will have what they need at their fingertips in a snap. Tremendous value at only \$290 Cdn per system user.

Company Data Archive

Do you really need all those years of history bogging down Dynamics GP? Improve system performance by quickly and easily moving historical information from your **live** company to another **archive** company with CDA. Pricing is based on number of registered Dynamics GP users.

PRODUCT ENHANCEMENTS

[LEARN MORE ABOUT THESE PRODUCT ENHANCEMENTS](#)

Email Remittance

A plugin tool that provides a fast & efficient method of delivering and storing remittance advices. Whether paying by cheque or EFT, a remittance advice can be sent electronically against a select batch or as individual documents against a select creditor. Remittances can be retrieved at any time to **re-send** or **re-print**.

Mass Update GP

If you are updating sales orders one at a time, order by order, line by line, stop! With TitaniumGP you can easily update over 45 different fields in the Dynamics GP Sales Transaction Entry Window. This tool applies to all master data too!

GP OPTIMIZATION SERVICES

Workflow

Set up approval processes to create consistent actions on how a document, record or batch should flow through the system with hierarchal approval and strict parameters. Create notification emails, review attachments and approve or reject the document directly within the email. A real time-saver!

[LEARN MORE](#)

Dashboards

Dynamics GP is equipped with the Business Analyzer dashboard that delivers role-specific insight across your business, so each member of your team can track key performance indicators, drill down to relevant details, collaborate with others, and take quick informed action right from their Dynamics GP home page.

[LET US GET YOU STARTED](#)

Report Optimization

Reporting in Dynamics GP is limitless. If the data is entered you can build a report. From ad hoc queries to full dashboards, there is a reporting tool for everything - including automating and refreshing Excel spreadsheets. Eliminate manual report development and take advantage of the 70% out of the box reporting tools.

[LEARN MORE](#)

SQL Optimization

As the backbone of Dynamics GP, optimizing and maintaining SQL is key. Techniques include tips and tricks about proper set up for backups, the importance of applying updates and how to leverage the performance analyzer. Best performance guaranteed.

[CURIOUS? LET'S CHAT](#)

Business System Strategy Review

Since initially implementing your current ERP solution things have changed □ technology, processes, competitors, personnel. Engage Encore to develop a common business solution blueprint to help you decide what building blocks are needed to take your organization into the future.

[READ THIS CUSTOMER SUCCESS STORY](#)

Data Visualization

Use Business Intelligence software to answer questions about your data as fast as you can think them! Drag and drop reporting, self-service business intelligence and interactive dashboards will have you looking at your data in ways you never thought possible.

[LET US SHOW YOU TABLEAU](#)

STRATEGIC INVESTMENTS

Customer Relationship Management (CRM)

Software that helps your team deliver amazing customer experiences from sales, marketing and service efforts. CRM is a hybrid business solution that can increase sales and marketing efficiency. Think of it as a powerful set of tools, apps, and platforms that in combination drive optimization of business intelligence, social insights, campaign management, and many other key customer relationship matters.

[READ THIS WHITEPAPER](#)

Go Paperless

Reduce storage fees, eliminate filing cabinets, and improve document workflow through your organization with a Document Management solution.

[WATCH THIS ON DEMAND WEBINAR](#)

FREE TOOLS AND RESOURCES



Professional Service Tools Library (PSTL) A selection of handy maintenance tools formerly available for purchase are now accessible for FREE for customers of GP2013 and GP2015. Chances are your operations have changed over the years and with it naming conventions for accounts, vendors, customers, items, territories, salespeople or perhaps you have duplicate records, need to change your fiscal periods or just need to do some general housekeeping. Start utilizing these tools, clean things up without losing any history and you'll feel like you have a brand new Dynamics GP installation. A fresh start so to speak! If you require assistance in activating the PSTL, [contact us](#).



MSDynamicsWorld.com Create a free account, login and gain access to a world of insight. This site is rich in content related to your specific Microsoft Dynamics solution from corporate news to product releases to customer successes to industry events. There is also a directory of solutions that you can search for products that have been developed to enhance the core functionality of your Microsoft solution. www.msdynamicworld.com



Encore Blog With 500 articles chock full of content and new contributions made weekly by over 50% of the Encore team, there is a ton of valuable information posted on the Encore Blog. Visit regularly to stay up to date on news, events, product features, tips, tricks, whitepapers and step by step guides on how to perform specific functions within your business application. blog.encorebusiness.com



Dynamics GP User Group Affectionately known as GPUG; the mission of this group is to engage every individual and company using Dynamics GP in value-added networking and knowledge sharing, and to be the single most important communication channel for Microsoft to see guidance on future development of Dynamics GP. You can participate in webinars, access recorded webinars on demand, join a Special Interest Group, register for in-depth, instructor-led training and work towards professional certificate programs. Subscriber membership is free and has limited benefits but you can sign up for a free 30 day trial and determine what membership level is right for your organization. www.gpug.com



Microsoft Connect You've used Microsoft Dynamics for years. For sure you have ideas on how it and many other Microsoft products can be improved. Visit MS Connect, browse to see what products Microsoft is currently accepting bugs and / or suggestions for. Submit your feedback and vote on suggestions made by others. To date over 154,000 bugs have been fixed and over 14,500 suggestions have been implemented. Make an impact; have your say. connect.microsoft.com