

GP OPTIMIZER MAGAZINE

Winter 2020

Customers, Community, Collaborate



**Keeping people at the core of
your Project Management**

**Improving customer safety and
experience with regulation**

**What your customers go through
when you stock-out**

GP OPTIMIZER MAGAZINE



Welcome to the Winter 2020 Edition of the GP Optimizer Magazine! Not sure what you're reading? The GP Optimizer is a digital magazine 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 and providing ways to remedy them.

For this edition, we are kicking off the New Year, New Decade with one cohesive theme. This one is all about Customers, Community and Collaboration. Because you are what makes this magazine possible. We are all about helping our community and customers through collaboration.

As you'll soon read, each ISV has interpreted this theme with their own fun and flare. All three of these words are so important to success and we each have our own unique spin on it from company culture to Enneagrams. We hope this topic will provide solutions applicable to your current business and inspiration for future endeavors!

Rockton Software has some exciting news to share in this issue. We've established ourselves as fervent supporters of the greater Dynamics GP Channel, and we want you to excel in business by leveraging other tools and knowledge from our friends in the community. We are proud to continue offering this valuable resource to Dynamics GP users everywhere.

We want to thank all participating ISVs—Blue Moon Industries, Horizons International, ICAN Software, Integrity Data, JOVACO, Metafile, NETSTOCK, and Panatrack—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 are always welcome.

Enjoy!

A handwritten signature in black ink that reads "Mark H. Rockwell". The signature is fluid and cursive.

Mark Rockwell
President, Rockton Software



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On the Cover

GP Optimizer Magazine

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Every digital magazine needs a digital home! Check out www.gpoptimizer.com for additional content from our contributors, including extra Dynamics GP tips, info on our webinar series, view past editions, and more!



11 Keeping People at the Core of your Project Management

17 Improving customer safety and experience with regulation

24 What your customers go through when you stock-out

Table of Contents

- 5** Increase your influence: Four questions to ensure high quality and authentic customer engagement
- 21** Improving Customer Relationships AND Cash Flow Using Blue Moon's Electronic Payment Solutions
- 24** What your customers go through when you stock-out
- 8** Supporting Increasing Demand for Collaborative Quality Management Solutions: Is Your QMS ready?
- 11** Keeping People at the Core of your Project Management
- 14** Need to Track Long Term Investment Assets in Microsoft Dynamics GP?
- 17** Improving customer safety and experience with regulation
- 27** Digital Transformation: Why Company Culture Matters
- 30** Rockton is expanding
- 32** Control Inventory Item Prices & Costs in Microsoft Dynamics GP





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Increase your influence: Four questions to ensure high quality and authentic customer engagement

Written by Lindy Belley, [Integrity Data](#)

For many, the twenty first century feels fluffy. Increasing emphasis on Enneagram, Myers-Briggs and True Colors tests have turned us into a “find out who you are, find out who everyone else is, find a way to make everything harmonious” world. It feels good. It feels personal. We aren’t here to debate the legitimacy of personality tests, but the trend says something about our culture. (Fair warning, as a self-proclaimed people-person, my perspectives may be slightly skewed.) But it’s okay, keep reading.)

What is it these people want? Authenticity

Established business owners and even some employees have a difficult time wrapping business practices and processes around the “softer” approach. Applying the outside culture to the workplace, may come as a challenge and quite frankly, may not be a priority. After all, how is it practical or logical? Can we measure it? Will it attract and keep customers?

What is it people who are investing money want? Quality

Can't it be both Authenticity and Quality?

I think the first question to ask yourself is, “Who is my customer?”

Really. Deep down. Who is your customer?

Is he a newlywed college student living paycheck to paycheck, in a studio apartment downtown Chicago trying to get a decent job after graduation; but smart as a whip, knows how to compare shop in minutes to find the best quality product with the best ratings at the lowest price?

Is she a single mom who works for a supplier buying product off your line; but who's mind is consumed by whether she can get off work in time for her son's birthday party?

Is it the couple who has saved up for retirement; but decided to put all their money into a start up and now they need your products and services to get running?

I can promise something motivates each of these people in their day-to-day life and it isn't your product. Maybe you



can still reach them once you get to know them, but what is going to KEEP them?

Second question you need to ask is, “What is our community?”

Introverted or extroverted – we’re all surrounded by community. Community can be anything from the person you’re sharing an Uber with to work, colleagues and family. Or for some of us, work colleagues who become family. (I struck gold, there.)

What community have you built for your customers? What kind of community could they flourish in? At Integrity Data, I am proud to say that we hold online user groups for customers and prospective customers alike. It's not to upsell, it's to educate.

People feel engaged, they feel cared for, they feel validated as part of the community. Does the effort turn into revenue? Not right away, but at the right place and time, the hope is they'll know where they can turn when they have a need.

How can you encourage community among your customers? Social media is a great place to start. Show your personal side,



share real stories from other customers, educate the world on your authenticity. Get them to know, trust and like you.

Naturally expand your community by asking yourself, “Why collaborate?”

In this era of endless knowledge, literally at the command of your voice (insert “Alexa play my favorite music” here), there is almost too much information. Sometimes the best way to consume information is through experience, through the wisdom of others and collaboration. After all, someone else has been there first.

How can you collaborate? In the Microsoft Dynamics GP space alone, you can find common interests and ask questions of your fellow ERP users. Did you read an article in GP Optimizer that spoke to you? Reach out to the author directly or on LinkedIn. Are you needing technical advice for GP? Get a membership to Dynamic Communities GP User Group and join a Local GP User Group.

Surround yourself with individuals who can support you so you can support your customers with quality offerings. Don’t hesitate to reach out to a trusted VAR or ISV and ask for recommendations. We’re all in this together.

Now ask, “Who is my internal customer?”

You didn’t think I was going to end this article without plugging [Integrity Data](#), did you? (What can I say, I’m shameless.)

We believe your employees are your internal customers. Especially those who run payroll and manage your ACA compliance.

What value does an easy payroll process have on your wait staff? Not much, until their sick leave balance is incorrect on their pay stub, because your back office is manually tracking it in spreadsheets. How much value does smooth payroll have on your Payroll department? Find out for yourself, use [our no-strings-attached Solution Finder](#) to discover what Dynamics GP Payroll gaps we can immediately simplify.

Continue this new decade with a simple mind shift; quality and authenticity don’t need to be overly complicated, nor do they require a radical shift in your mindset. You don’t have to become the office Psychologist to be authentic to your customers and your community. Likewise, how you collaborate as an organization (while providing quality products, services and solutions), doesn’t need to be fluffy.

It starts with asking yourself a few simple questions and keeping those genuine answers at the forefront of your processes. Stay focused, stay relevant, stay true. [GP](#)

1 [46 Eye-Opening LinkedIn Statistics for 2020](#)

2 [GPUG Membership Benefits](#)



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Supporting Increasing Demand for Collaborative Quality Management Solutions: Is Your QMS ready?

Written by Frances Donnelly, C.Q.P.A., Director of Product Development, [Horizons International](#)

Quality Essentials Suite

Confidence in the quality of your products is a critical requirement for your customers.

Every department in your organization has a role to play in keeping customers engaged and confident, but one department carries the bulk of the responsibility: the quality department. They are the group that ensures product standards and safety goals are met, and they are the ones in charge of documenting and delivering that evidence to the customer.

Mostly likely, you have a defined set of policies, objectives, processes and goals that make up your quality management system. You offer that content to customers to demonstrate your desire to obtain and retain their confidence. Your system is probably modeled on standards such as ISO9001 or another industry specific regulation. You want your customers to know how the goals of quality will be achieved and what the corrective action and improvement tasks will be in the face of errors.

But is That Enough?

If your systems are still heavily paper-based, or you have to spend time migrating data from one silo to another, then the answer is that while they may work now, they won't work forever. Why is that? Increasingly, customers want to operate in a more collaborative manner. They are starting to see your data, as being... well... their data.

More importantly, they want that data now. For good reason:

As the supply chains shrink, and time to market gets shorter, there is a growing need for closer cooperation between both your internal teams and external partners. Everyone understands supply chain outcomes that include communications around quality expand responsiveness and enable competitive advantage. Your customers want to seamlessly meet their customers' needs for information-



without additional costs for data management and access. They look to you to furnish that data, but they also want it to be immediately useful in their own systems.

Your customers also want to know that your company is equipped to be highly responsive to concerns. Their costs are driven by how quickly you are able to identify negative trends or find errors or non-conformances. Customers realize that if you are busy transferring data from worksheet, to email, to analytic tools, then the delay in recognizing and responding to an issue is passed on as cost to them.

Knowing your company uses tools that digitally transform your processes, and allow for immediate access to data without the time wasted on additional migration or transcription, has become a critical evaluation point for customers when considering suppliers. They want to be confident that you'll know about any issues right away, and that you'll be able to handle them.

Legacy Systems and Paper Based Tools Lack the Digital Attributes to Support Collaboration

There is no requirement that the elements of your QMS be delivered or managed using software. Each organization is able to build and execute their QMS with the tools and resources that they deem most appropriate. For many



decades these systems have been paper-based and have been supported with incremental use of software, like spreadsheets or home grown solutions based on Access and other tools.

Now, as the [need for collaboration](#) extends beyond a single enterprise and into the supply chain, companies have a new reason to take a hard look at the resiliency and capability of their existing QMS systems. Customers want to feel confident with their supplier. They want proof that processes are in place to ensure product safety and reliability.

They also want punctuality.

Sadly, this is where most hybrid tools that are still heavily paper-based, fail. It takes time to transfer content from one set of documents to the tools needed to generate additional documents. In examining existing legacy systems, we find many lack the responsiveness needed to maintain competitive advantage and customer confidence.

[Quality Essentials Suite: A Solution for Real Time Collaboration Inside and Outside Your Organization](#)

The trust of your customers is paramount to success. Our software aims to provide you with an alternative to legacy systems. One that can affordably enable the collaboration activities your customers desire.

Our software solution supports data collection from all the potential functional sources in your operations. The collected data is managed in a Microsoft SQL database from which users can select data using a long list of tools and features.

Why does a database for your QMS enable easy collaboration?

A database provides secure data. In a database where inputs are governed by an application, data is validated during

entry, and audit trails to track changes can be engaged. User security can be robustly managed to ensure access only by authorized users.


A database also means that application features that have widespread, repeatable use can be relied upon across many, many transactions. Internal or external users will have their data needs met consistently, in a cost-effective and prompt manner, which is the goal of a collaborative QMS.

Why are unlimited user access and affordability so important for easy collaboration?

Many situations hinder easy collaboration. One of the most obvious constraints is available user licenses for data access. Most licensing restrictions are about cost. We believe this barrier should be eliminated in order to allow companies to be truly collaborative which is why our collaborative QMS comes with unlimited user access.

Let's face it, no matter how much we want to do a better job for our customers, or how beneficial the effort for digital transformation can be, if it is too costly, it won't get done. Solutions that do everything are expensive and their levels of integration can be a hindrance to responsiveness.

When processes are built around constraints like user licenses and cost, companies lose the freedom to build the most efficient processes possible. True collaboration means everyone should have appropriate access to the available data.

If you are ready to see what a [QMS built for collaboration](#), can do for you visit our web site to view our product demos or call sales at (866) 949 9504 ext. 811 and we will schedule one just for you. 



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Keeping People at the Core of your Project Management

Written by Tania Konczynski, Director Sales & Marketing, [JOVACO](#)

The success of an organization nowadays depends on its willingness to put people at the center of its processes. In an increasingly interconnected world, it's organizations with a people-centric approach that stand out. Prioritizing the three Cs—customers, community, and collaboration—in your processes can make a world of difference. But to get there, your tools and systems need to be able to reflect the core values of your organization.

A complete project accounting solution such as [JOVACO Project](#) not only lets you manage the entire lifecycle of your projects, it also allows you to connect people together: whether it's your customers, community, or your various teams and departments, JOVACO Project links all these components together into a greater whole.

Make customers the heart of your projects

Your customers should be at the core of your processes: after all, your business depends on them. Ensuring their satisfaction and long-term loyalty is crucial. Project-based firms have everything to gain from a solution that puts customers at the heart of their project management. Delivering customer projects on time and on budget will keep them coming back and earn you new customers through word of mouth.

JOVACO Project is fully integrated to Microsoft Dynamics solutions such as Microsoft Dynamics GP and Microsoft Dynamics 365 Customer Engagement so that you have every tool to do so. Advanced reporting tools display critical information such as project profitability by customer, and also provide better control of project costs and progress. With informed decisions and fast response time, your projects are always delivered on time, which in turn will keep your clients satisfied.

Be part of a thriving community

Having a project accounting solution integrated to your Microsoft Dynamics system also lets you be part of the large community that has developed around the Microsoft



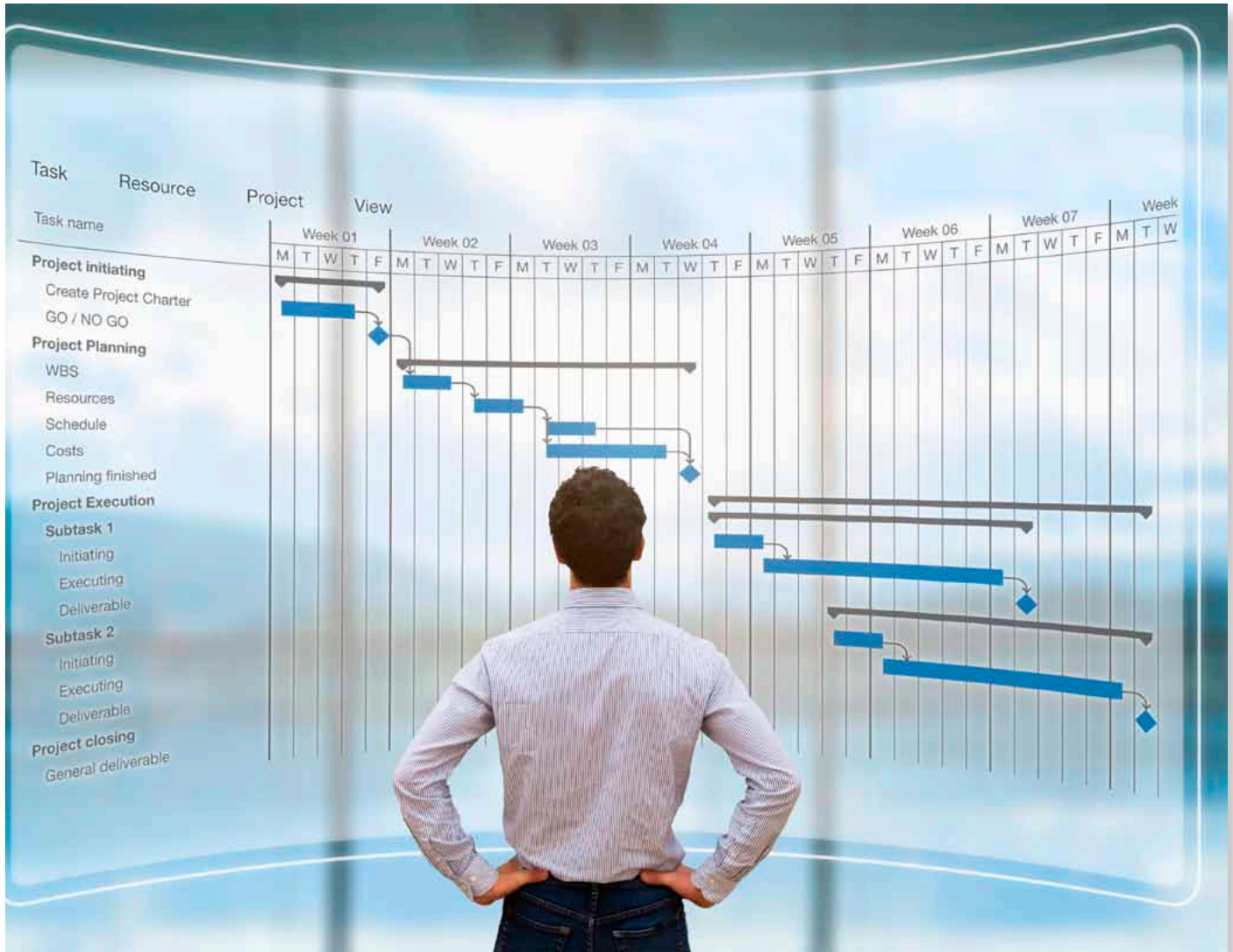
platform. Not only will you benefit from the technologies and products that Microsoft invests in, for example Microsoft Power BI and Power Apps, but numerous third-party solutions and industry-specific products are now at your disposal for you to leverage the full potential of your system.

Moreover, numerous events are organized all over the world for Microsoft Dynamics users and partners: this means that users and organizations can benefit from the support of local networks, training sessions, and other opportunities, ensuring that you use the full capabilities of your system and stay on top of industry and market trends.

Increase collaboration within your organization

JOVACO Project is also designed to offer all the tools needed to improve collaboration and the synergy between your various teams. On top of centralizing data and ensuring it is readily available to employees, the multicompany and inter-departmental functionality supports multidisciplinary teams and lets companies with complex business structures take part in joint projects.


Photo by AndreyPpov/iStock/Getty Images Plus.



In the professional services industry, firms often need to collaborate on projects, for example in the case of architecture or engineering consortiums. JOVACO Project provides the functionality needed to support projects that span multiple companies, and offers specialized reporting tools that reflect this reality. The time of silos is long over, and it's essential to have tools and systems that allow your various departments to collaborate and your organization to work with other companies when needed.

A people-centric approach to projects is now essential, and a complete project management solution such as JOVACO Project integrated to Microsoft Dynamics will provide all the tools needed for your organization to do this. By keeping your customers at the heart of your project management

processes, taking advantage of the existing community of partners and users, and increasing collaboration across your organization, you improve customer loyalty and empower your employees.

JOVACO Solutions is a specialist in the implementation and integration of project-based ERP and CRM systems with more than 35 years of experience. We offer Microsoft Dynamics business management solutions as well as project management and industry-specific solutions, along with a full range of related services from the initial system installation to its long-term maintenance. For more information about JOVACO and JOVACO Project, visit our [website](#) or [contact us](#). 



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Need to Track Long Term Investment Assets in Microsoft Dynamics GP?

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

Tracking investment holdings, generating unrealized gains/losses, processing interest accruals, amortizing bond discount/premiums, and recording short-term vs. long-term capital gains/losses can be much easier with InvestmentAssets from ICAN Software Solutions.

Inglewood Park Cemetery is located in the state of California, and handles approximately \$70M in investment assets. 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

Vendor Price Matrix - TWO18 (sa)

File Tools

Restrict Item Number:

ADVANCED0001

Vendor ID	Item Class ID	Item Number	Currency ID	Begin Qty	End Qty	Discount	Specific Unit Cost	Unit of Measure
ADVANCED0001		128 SDRAM	Z-US\$	1	9999999999999999	0.00000	700.00000	Case

Selected Record:

Vendor ID	Item Class ID	Item Number	Currency ID	Begin Qty	End Qty	Discount	Specific Unit Cost	U of M	Vendor Contract ID
ADVANCED0001		128 SDRAM	Z-US\$	1	9999999999999999	0.00000	700.00000	Case	TEST001

Vendor Quote ID: 1001 Contract Begin Date: 4/10/2027 Contract End Date: 12/31/2027

User Defined String 01: User Defined String 02: User Defined String 03: User Defined String 04: User Defined String 05:

UserDefDate01: 0/0/0000 UserDefDate02: 0/0/0000 UserDefDate03: 0/0/0000 UserDefDate04: 0/0/0000 UserDefDate05: 0/0/0000

UserDefCurr01: 0.00000 UserDefCurr02: 0.00000 UserDefCurr03: 0.00000 UserDefCurr04: 0.00000 UserDefCurr05: 0.00000

Contract Comments:

Investment Transactions Open Inquiry - TWO18 (sa)

File Tools

Account ID	Investment ID	Investment Description	Type	Date	Price	Cost	Adj Value	Original Qty	Qty Remaining
10000000	TEST	BOND003	Buy	4/12/2027	0.9555555555	0.9555555555	0.9555555555	1,000,000.00	1,000,000.00

Investment Assets 18012

Total Cost	Total Adjusted Value	Total Market Value	Qty Remaining
\$955,555.56	\$955,555.56	\$955,555.56	1,000,000

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.”

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.”

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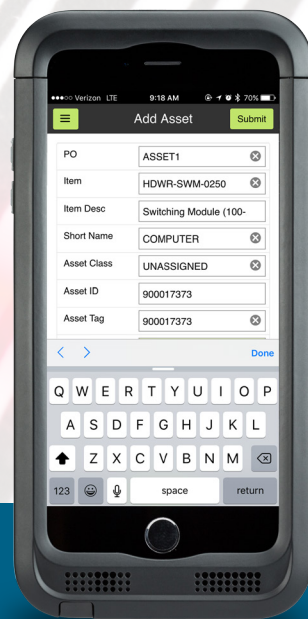
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Improving customer safety and experience with regulation

Meeting FDA requirements with barcoding

Written by Alex Rode, Solution Consultant, [Panatrack](#)

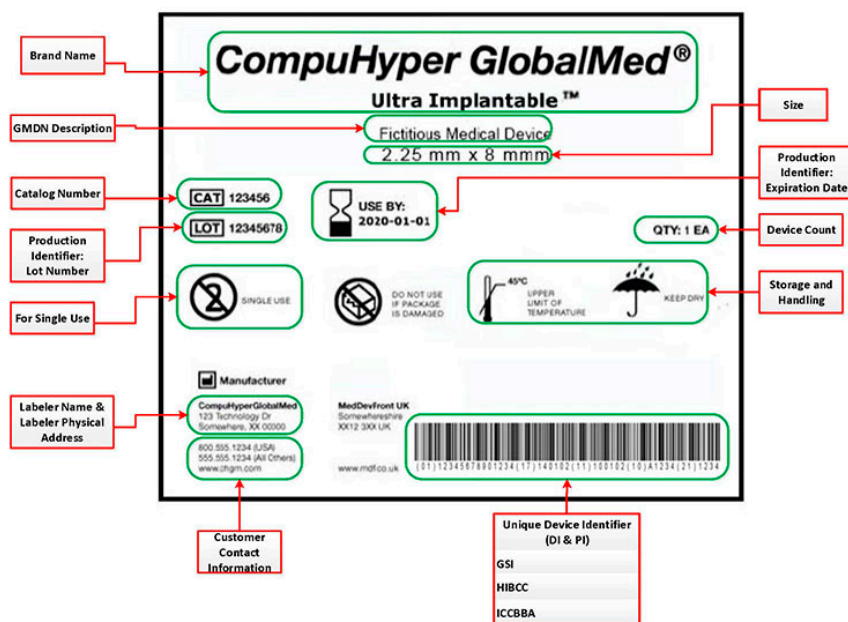
The medical device manufacturing industry is highly competitive and highly regulated. Manufacturing high-quality, life-saving products requires strict oversight of all aspects of production—from inventory to manufacturing and distribution to the end user. The Food and Drug Administration (FDA) has established a unique device identification (UDI) system to track medical devices with the end goals to improve patient safety, strengthen post-market surveillance, and improve the continued advancement of medical devices.

It is essential to confirm that there is an exact chain of custody and traceability for items such as a Pacemaker, dental implants, or even a replacement hip. This allows manufacturers, doctors, patients and the entire medical community to adhere to safety standards as well as provide proper care down the road. Making certain that every organization follows a single standard not only eases the acceptance and comprehension but simplifies the process for all parties involved in patient care.

According to “[UDI Basics](#)” and other information posted on FDA.gov, the UDI final rule was released in 2013 and established a system to identify certain medical devices through their distribution and use. While there is a phased approach to this system, labels on the devices and packaging will include information about the labeler, the specific model or version of the devices, and must be in a format that includes both plain-text and automatic identification and data capture (AIDC) technology. A production identifier (PI) must also be included in the labeling that identifies the lot or batch number within which

the device was manufactured, serial number, expiration data, date of manufacture and the identification code for human cell, tissue, or cellular and tissue-based product that is regulated as a device.

barcode parsing is important to support variations across different vendors. Panatrack has developed a highly flexible method to handle this UDI barcode format as part of our PanatrackerGP Inventory module.



Graph provided by FDA.gov

Compliance with Panatrack

With a single scan, a Panatrack barcode reader will decipher the entire UDI label and parse out the proper information. When a user in a warehouse picks items from the shelf they will scan once and capture information such as item



number, lot number, serial identifier, and anything else that Dynamics GP requires for their process. Within GP there is now a defined history of when an item was received, when it was manufactured, when it was sold and to whom. Should a manufacturer or a vendor encounter an issue; the lot and serial numbers can be used to retract product or initiate the proper recall proceedings with a very targeted campaign.

[PanatrackerGP](#) extends the functionality of Microsoft Dynamics GP to handheld computers with barcode scanners. You can track inventory from receiving, adjustments, site transfers or bin moves, and stock count with PanatrackerGP. Advanced features further strengthen inventory movement

with order fulfillment, pick and pack, label printing, assembly, direct transfer and shipping integration. Automating inventory tracking saves valuable time, improves productivity of your team and provides a higher level of control over the inventory and finished products, whether they are in your warehouse, in distribution, or being used by a customer.

The FDA's UDI system doesn't have to be complicated or time-consuming, especially when you have the right technology in place. Contact Panatrack for more information about improving UDI compliance with the support of PanatrackerGP. Learn more about [Inventory and Asset Management for Microsoft Dynamics GP](#). [GP](#)



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Improving Customer Relationships AND Cash Flow Using Blue Moon's Electronic Payment Solutions

Written by Janice Phelps, [Blue Moon](#)

It used to be that technology was something used by a few and feared by many – a mysterious combination of colored lights, beeping noises, and sometimes, “blue screens of death”. Now, it is just part of most people's everyday life. I like to think that we can use technology to make tasks easier and more efficient so that our workday is not as much of a grind, but an enjoyable event.

In creating our Electronic Payment Suite, we took these ideas to heart. There are four components to the suite, including Electronic (Customer) Payment Processing, which was formerly our Credit Card Payments product, Online Invoice Presentment, Payment by Statement, and Vendor Payment Automation.



Accepting credit cards and electronic payments is so common now, it is more a decision about the highest level of compliance, how easy it is to use and whether the rates are attractive enough to be worth it for you to accept credit cards. Having an automatic authorization process within your Dynamics GP system makes it as easy as processing a cash receipt today. If you process Sales Orders and need to



pre-authorize credit card orders to reserve the funds prior to shipment, that is also right within your Dynamics GP system, and after shipment, the credit card can automatically capture the funds as a sale when you transfer the order to an invoice. All of this makes the process a natural addition to what you are probably doing today. Combine that with on the fly printing of the credit card receipt, process holds and other notifications when transactions are declined, and transaction type security, and you have a complete credit card system.

If your customers prefer to be self-service with their payments (or maybe you prefer it), then our Online Invoice Presentment module will allow you to send the customer an email notification that their invoice is available to be paid (or downloaded or printed). Once they follow the link, they can set up a secure log in to your payment portal, access their invoices, see their outstanding balance, and pay their invoices, all right from the portal. They can have flexible payment methods (if you want to allow them), can track historical payments and print anything about their account that they may need. The portal itself is branded by you and can be tailored to send automatic email reminder notices and other important customer information. On top of it all, it




is fully integrated with Dynamics GP Sales Order Processing and Receivables Management modules.

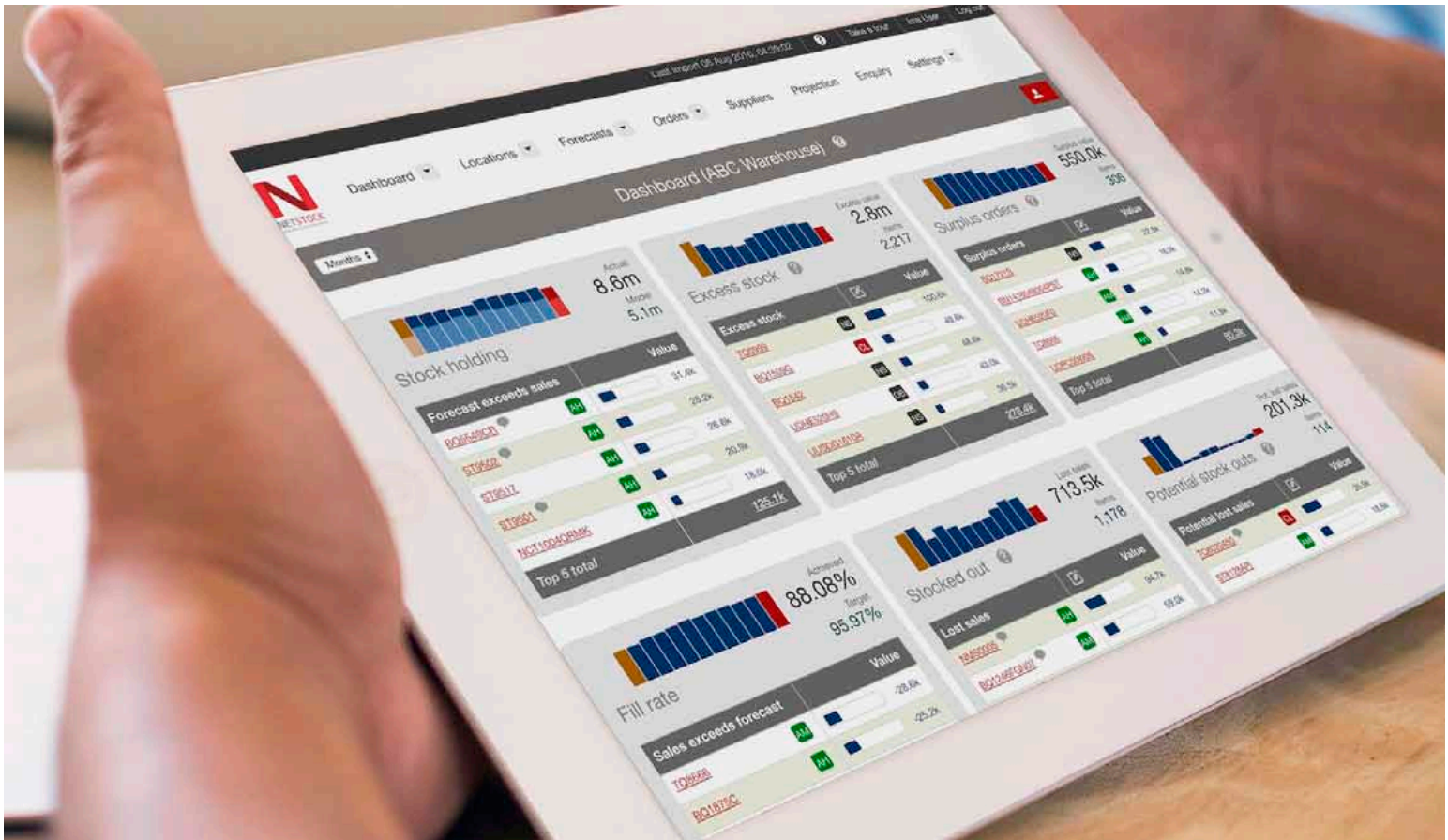
Customers using our Payment by Statement add on for Electronic Payment Processing are typically looking for a way to have their customers pay their balance for the month. Examples here include yacht clubs and other membership organizations, monthly donations to not-for-profit organizations, or anyone where it's more typical to pay an entire balance on a regular basis (ex: 5th of each month), rather than on a per invoice basis. There's a customer-specific scheduler function and an automatic apply capability as well.

On a different note, our Vendor Payment Automation module gives you the ability to automate paying your vendors from Accounts Payable. By automating this function, you use

virtual check, credit card or ACH payment options to easily pay vendors in a secure, paperless environment. Used in conjunction with our [Enhanced Voucher Selection](#) product, this add on takes the ease of vendor payments to a new level.

What all of this means is that by adding these tools to your Dynamics GP system you will streamline your internal operations and make your team more efficient. It also means that you can offer your customers more options to work with you in ways that allow them to create efficiencies in their own systems, and this collaboration may lead to faster collections, more business together, and an overall improved customer relationship. Click [here](#) to learn more about all of our solutions. 

MAKE BETTER INVENTORY DECISIONS



**Fewer Stock-outs | Better Forecasting
Reduced Excess | Faster Ordering**

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What your customers go through when you stock-out

Written by Eric Graf, Director of Marketing for [NETSTOCK](#)

It's conventional wisdom that gaining a new customer is more expensive than keeping an existing customer. Losing a customer hurts sales today and it shrinks the company's growth potential going forward.

A customer's expectations are a key factor to retention. Experiencing a stock-out on an item the customer expects to be available can be impactful, especially compared to an item where the customer expects a back order or other delays.

In either instance, though, the customer expects to be provided with a promised delivery date and that defines their expectation.

Generally speaking, customers have a certain amount of tolerance for something like this, and they may accept a stock-out once or twice from a business they frequent.

In some environments where there may not be any direct interaction with customers, inventory managers may be totally unaware of the situation. A mechanism to make these stock-outs visible within the company is an important first step.

How the customer might react

A customer who has been given a reasonable delivery date, even if it's a little bit later than they want, is more likely to be tolerant. However, if the promised delivery date is not met, the customer will be even more dissatisfied and it becomes even more likely that they will take their business elsewhere — potentially for good.

Poor customer service experiences are quickly spread nowadays via social media, as well as websites specifically created to post reviews and complaints. Businesses that don't respond to these complaints in a credible fashion further tarnish their reputation. One poor showing by a business creates the potential for a domino effect that reduces sales and hurts profits.

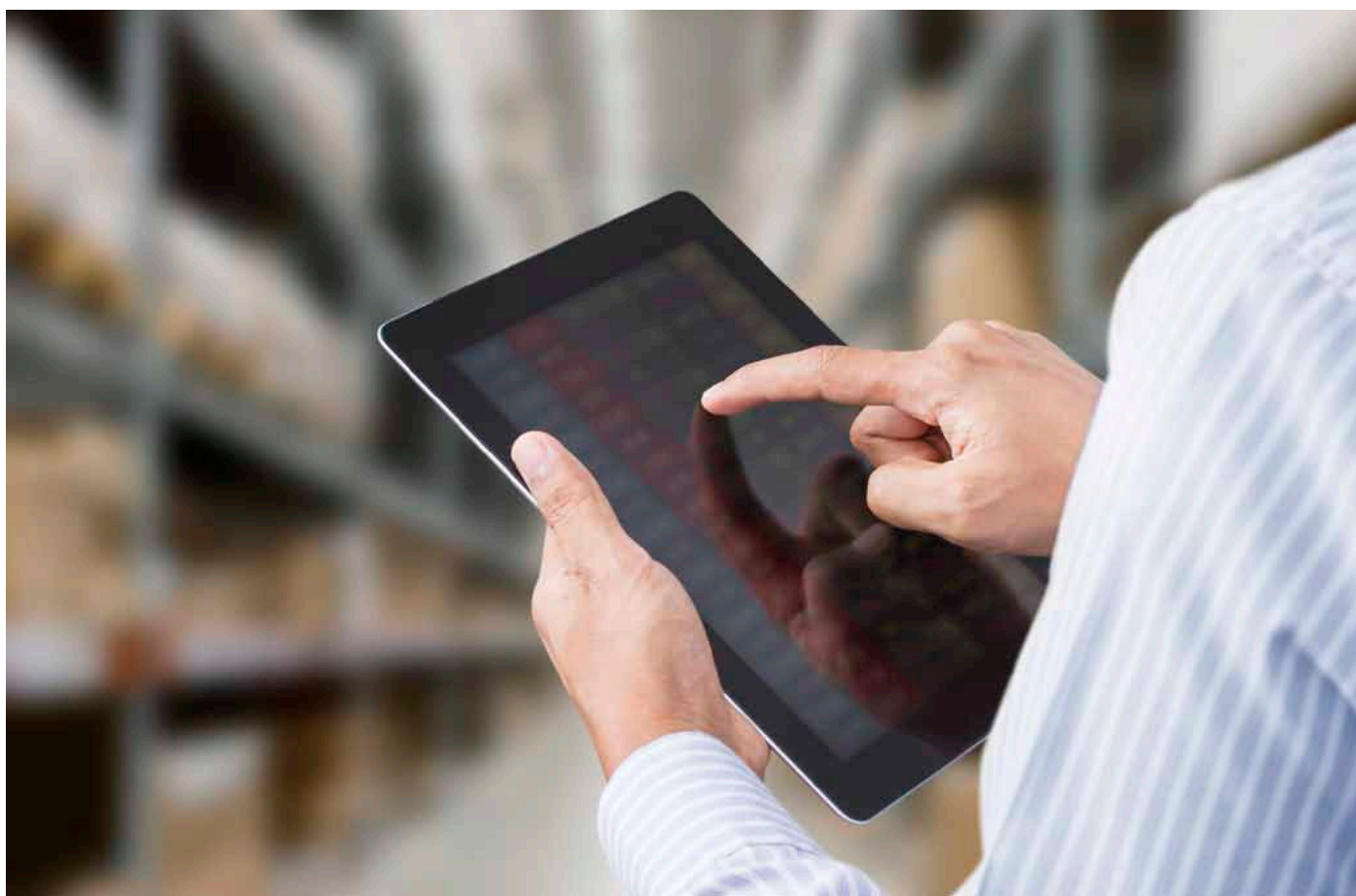
How to manage a stock-out

In an effort to avoid cranky customers and lost sales, here are a few ideas on how to manage a stock-out in order to



minimize a customer's frustrations and the harm it causes to the business:

- Prepare a simple written procedure on how to deal with a stock-out situation. Ideally, the team applying these procedures should be involved in the preparation of the document so that full buy-in is achieved.
- When there is direct interaction with customers, this procedure should include the following:
 - Offering the customer an alternative product
 - Transferring the product from a branch that does have stock on hand
 - Expediting existing orders on the supplier
 - Buying-out from an alternate supplier
 - Advising the customer when stock will be available
 - Committing to regular follow-ups with them on progress
- In environments where there is no direct interaction with customers, this procedure should include the following additional actions:



- An outreach or notification to let the customer know the issue is being handled
- Updating the notification to display the date on which stock will be available
- Delegating team members to frequently review the stock display racks to identify stocked out items and to take immediate action
- In the case of vendor-managed inventory, ensure the supply contract includes a service level clause defining the requirements regarding the resolution of stock-outs
- If items are sourced and procured by an in-house procurement division:
 - Set up an expediting team
 - Review the current inventory management system (IMS) tools — are there any in place to begin with? Are they using outdated tools, like a master spreadsheet?

Clearly, a stock-out is a painful process for customers and must be avoided. The amount of time and effort mistakes like this make can sink a business. Knowing what to do when these situations arise is absolutely critical to maintain positive customer relations.

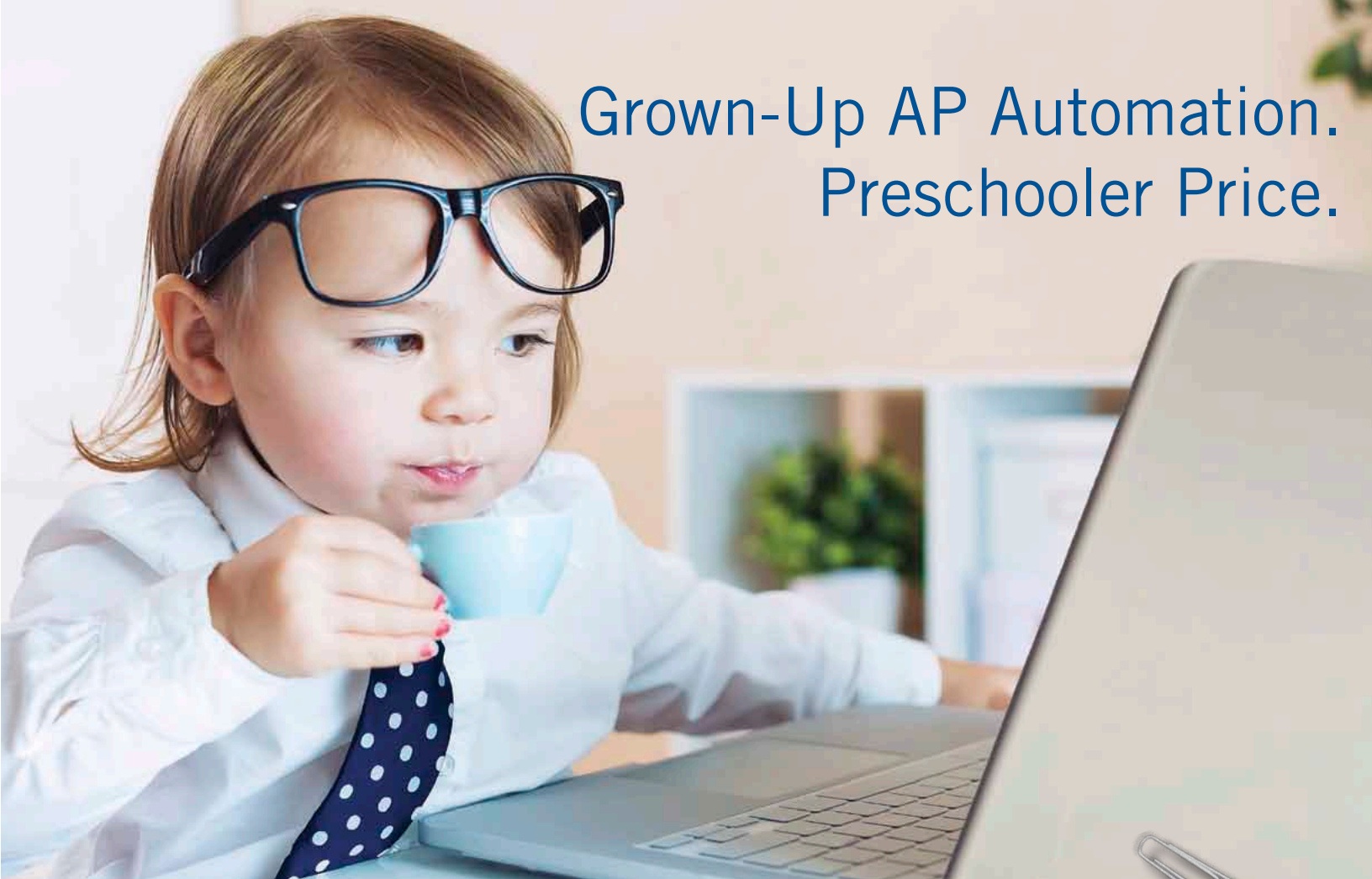
How to prevent stock-outs to begin with

There are more proactive steps a business should take to avoid this situation altogether. A smarter, more responsive replenishment process can help keep fill rates at impeccable levels, creating an environment to deliver incredible service to every customer on every order.

Outdated tools like spreadsheets don't provide the visibility or accountability required to keep the right amount of items on hand to properly service demand. There are better tools on the market that work in concert with your ERP to keep inventories in a state of balance.

Don't risk future sales and profit with weak processes that create stock-outs. Use data-based forecasts to stay ahead of demand to keep customers coming back and to keep the business growing. Visit www.netstock.co to learn more. GP

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Digital Transformation: Why Company Culture Matters

Written by Alyssa Putzer, Marketing and Communications Specialist for [MetaViewer from Metafile](#)

Digital transformation is more than just installing new software and pushing “Go”. It’s a changed mindset; a different way to look at how your business manages information and it’s a company culture focused on innovation and process improvement. Today’s organizations are using digital technology, like [robotic process automation \(RPA\)](#), to change how they process, capture, deliver and store information, which is driving digital transformation. In fact, the International Data Corporation predicts that organizations will spend nearly \$2 trillion on digital transformation in 2022.

Digital transformation is a big undertaking for organizations and embarking on a digital transformation journey involves more than just updating processes, procedures and technologies, it also must include a focus on company culture.

Carey Oven, a partner with Deloitte Risk and Financial Advisory at Deloitte & Touche LLP [stated that](#) “When organizations undertake digital transformation and focus only on technology at the expense of culture, that can hinder progress in many areas.” Transformation must also involve a shift in company culture in order to ensure a smooth and successful digital transformation.

An [article](#) on Forbes.com looked at how company culture drives digital transformation, and how organizations with strong leadership, collaborative teams, a customer-focused mindset and a willingness to embrace digital change succeed with digital transformation over companies that do not prioritize company culture. Further proof that company culture is essential for digital transformation is in a [McKinsey report](#), which found that “shortcomings in organizational culture are one of the main barriers to company success in the digital age.” In fact, more than one-third of respondents to the survey reported “Cultural and behavioral challenges” to be the most significant challenge. However, a lack of focus



on company culture can lead to issues like low morale and the inability to attract new talent.

There are a variety of areas a company can focus on when encouraging digital transformation to ensure that it is successful and accepted by employees.

Get leadership involved: You can’t make organizational changes if you don’t have leadership buy-in. And it’s important that your leadership doesn’t just put the stamp of approval on one new technology project but understands that it’s a step toward a bigger digital transformation initiative. Leadership should set the mood for digital transformation, and it’s essential that leadership communicate openly about changes that will be taking place, steps teams can make to assure a successful implementation, and the overall mission of the project. A clear vision and transparency will help assure teams that digital transformation will be positive and beneficial.

Gather a team: Digital transformation will not just affect one person – or one department – at your organization. Because of that, it’s important to gather a team with members from various departments and with a variety of skill sets

Photo by NicoElNino/iStock/Getty Images Plus.




who understand the goal of a wider digital transformation project and who will be initiators of change. Getting team members involved in the decision and implementation processes helps them feel involved and gives them a voice to help drive a successful digital transformation strategy and build a strong culture around it. Companies also benefit from enlisting the help of outside experts. Automation vendors have highly skilled teams of implementation specialists who guide teams to help them get the most out of their implementation to achieve the highest ROI. Bringing in experts to work with internal teams provides diversity in the skills and knowledge needed to achieve a successful digital transformation initiative.

Offer continued education: As your business processes evolve, it will be crucial to make sure that employees are learning new skills to keep up with it. Offering continued education opportunities, as well as incentives for employees to continue learning helps create a culture that embraces innovation and change. It also ensures that you attract more talent moving forward as future employees will feel that they have the ability to continue to develop their skills at your organization. A savvy company is one that people, especially millennial and Gen X workers, will want to work

for. Employees are also more likely to stick around longer when continued education and technological advancement is a priority.

According to Forbes, “Culture can be the biggest barrier to digital transformation, even for the most technologically advanced companies.” When company culture is not a priority in digital transformation initiatives, organizations run the risk of failed or incomplete projects. But by focusing on how technology aligns with the culture of your company, you can rest assured that you will have a support system, a group of allies and a successful digital transformation.

Author: Alyssa Putzer, Marketing Communications Specialist for MetaViewer Paperless Automation. MetaViewer is a paperless automation solution (RPA) that is constantly developing to offer the functionality needed to meet the needs of the modern business. Increasing ROI, effectiveness, visibility and precision, solution experts are always watching the trends to assure that the features included with this state-of-the-art document management system are what end-users are looking for in order to perform everyday tasks with greater efficiency and accuracy. Visit <https://www.metaviewer.com> for more information. 



ROCKTON SOFTWARE ACQUIRES OLYMPIC SYSTEMS

Erie, CO: Olympic Systems has been acquired by Rockton Software, effective 12/1/2019.

This is a milestone for both Rockton Software and Olympic Systems. We are pioneering a merger of ISV companies in the Microsoft Dynamics GP space, and setting an example of what's possible. What's most exciting about this acquisition is the upside for everyone; we have created a winning strategy where everyone, including each team member and owners from both companies, will benefit significantly from our shared energy.

"Olympic Systems has the best Project Costing system out there. Rockton has years of great support, service, and products, so it makes natural sense for us to bring the best-of-breed into our offerings. I believe with our sales and marketing strengths we can reach more GP customers to share with them other new ways to make their Dynamics GP experience Simpler and Easier™." (Mark Rockwell, Rockton Software)

"I have been in the Dynamics GP space for a very long time. It has been a wonderful ride but I am ready to take on the next chapter in my life. When choosing Rockton Software, longevity was a key component as well as reputation. I am confident that my customers, products, and employees are in good hands." (Jim Beers, Olympic Systems)

About Rockton Software: Rockton Software is a virtual company with employees in seven states and its headquarters in Erie, Colorado. Serving over 55,000 users worldwide, Rockton Software supports innovation by offering Microsoft Dynamics add-ons for all industries. Whether you're in need of auditing, pricing, searching, reporting, or general user enhancements, we've got the solution for you!

About Olympic Systems: Olympic Systems, Inc. was established in 1990. In 1992, Olympic Systems became one of the first Great Plains Dynamics Resellers in the Pacific Northwest. For seven years Olympic Systems specialized in custom application development by creating modules to satisfy a wide variety of customer operations management requirements. Olympic Systems is best known for its project costing solution, Olympic Project Cost.

Rockton is expanding

Written by Amiee Keenan, [Rockton Software](#)

Here at Rockton, we are all about making your Work Simpler & Easier® in Dynamics GP, but we can't do that without customers, community, and collaboration. These three words are so important to everyone's success.

Why?

Community

If you have been in the GP space since the good old days when it was called Great Plains and almost every event was in Fargo, then you know the importance of community. Getting together at events such as Convergence and Stampede was the pinnacle of bringing together partners, customers, and ISVs. These events are what made this channel as strong as it is today.

Dynamic Communities has taken it to a whole new level of growth and expansion and we are proud to be an avid supporter of the GPUG community. There is a reason why "community" is in the title.

Customers

Customers are the reason why our products exist. Our Dynamics GP products are the bread and butter of Rockton Software. It is a key component in our culture to put our customers first.

Our products and our support are top-notch and over the past 20 years, we have focused on filling important gaps in

Microsoft Dynamics GP capabilities while finding creative ways to provide additional features and enhancements that improve productivity and performance.

We've had customers and partners tell us they can't imagine using Microsoft Dynamics GP without us.

We continue to listen to our customers to ensure we are developing the most helpful, most valuable, and most relevant solutions for you. We always welcome your feedback.

Collaboration

The invaluable feedback of our customers and partners is why we now have two pricing solutions, [Omni Price](#) and [Rockton Pricing Management](#).

We listen to our customers' pain points, we collaborate with them on new features, enhancements, and solutions.

Pricing seems to be a huge pain point in Dynamics GP, both Omni Price and Rockton Pricing Management can each help you in their own way with the many different pricing scenarios that you have.

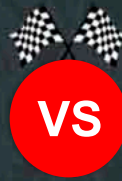
Whatever your pricing needs are, we've got you covered. No matter how simple or complex, Rockton has the right pricing tool for you.

Check out our infographic below to see the key differences in these two solutions. You can also join our webinar to learn more about these 2 amazing solutions as well on April 7. Register [here](#). [GP](#)

*I am **extremely impressed** with the support from Rockton. Techs are **knowledgeable and very helpful**. In my experience, Rockton provides the **best support that I have seen** in GP third party products (or any software product for that matter). Thank you for your **excellent service**.*



OMNI PRICE



ROCKTON
PRICING
MANAGEMENT

WHAT'S THE DIFFERENCE?

Pretty Fast



Lightning Fast

Shows you which
contract was used in
the calculation



Shows you a complete trail of the
calculations and decisions it made,
in detail

Allows for only one
discount on a line item



Allows you to track
multiple discounts, plus unlimited
rebates, commissions, taxes,
markdowns, specials, and royalties

Dynamics GP Only



ERP Agnostic

Does not handle
historical or volume
priced transactions



COMING SOON

Keep track of how many dollars,
pounds, gallons, units etc. that your
customer has purchased in a given
timeframe and include incentives and
discounts based on the volume
automatically

Control Inventory Item Prices & Costs in Microsoft Dynamics GP

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

When entering items on sales orders, salespeople sometimes like to lower the unit price so much that it actually is less than cost. Ever wish you could set a floor price so that they can't sell products at a loss?

Item Min/Max Pricing allows you to set a minimum and/or a maximum price that can be entered on the sales documents. This way you can ensure that salespeople never sell products at a loss ever again.

Do you need better control of the unit cost that defaults on purchase orders?

Vendor Price Matrix allows you to control unit costs on purchase orders by specific vendor, item, quantity range and currency. You can import vendor price lists easily and it can automatically create the vendor item record at the same time.

If your vendor gives you a percentage discount off manufacturers suggested list price for different items or item classes, you can import our VPM records based on that

instead of specific unit cost. In that scenario, you would just update the item list price as needed and the vendor item unit costs would always be correct.

Vendor Price Matrix also allows you to import vendor contracts ahead of time and have them automatically activate on their start date after archiving the previously existing contract.

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

Want more information? Check out **Item Min/Max Pricing** and **Vendor Price Matrix** as well as our other products like **Mass Apply Receivables**, **Mass Apply Payables**, **Print Cash Receipts**, **Automatic Cash Receipts**, and **Investment Assets** at www.icancloudapps.com.

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Vendor Price Matrix - TWO18 (sa)

File Tools

Restrict Item Number:

ADVANCED0001

Add Vendor Price Matrix Detail Edit Vendor Price Matrix Detail Open Vendor Contract

Vendor ID	Item Class ID	Item Number	Currency ID	Begin Qty	End Qty	Discount	Specific Unit Cost	Unit of Measure	Vendor Contract ID
ADVANCED0001	ADVANCED0001	128 SDRAM	Z-US\$	1	9999999999999999	0.00000	700.00000	Case	TEST001

Selected Record:

Vendor ID	Item Class ID	Item Number	Currency ID	Begin Qty	End Qty	Discount	Specific Unit Cost	U of M	Vendor Contract ID
ADVANCED0001		128 SDRAM	Z-US\$	1	9999999999999999	0.00000	700.00000	Case	TEST001
Vendor Quote ID	Contract Begin Date	Contract End Date	User Defined String 01	User Defined String 02	User Defined String 03	User Defined String 04	User Defined String 05		
1001	4/10/2027	12/31/2027							
UserDefDate01	UserDefDate02	UserDefDate03	UserDefDate04	UserDefDate05	UserDefCur01	UserDefCur02	UserDefCur03	UserDefCur04	UserDefCur05
0/0/0000	0/0/0000	0/0/0000	0/0/0000	0/0/0000	0.00000	0.00000	0.00000	0.00000	0.00000

Contract Comments: