GP OPTIMIZER LIVE

Do you Analyze Operational Details and Project Costs?

with special guest Zubin Gidwani

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Today's Agenda

- Introduction
- Overview
- Challenges in Dynamics GP
- Live Demo

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Introduction

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Overview

The Continuous Feedback Loop:

- Is it in practice today?
- Is it your goal?
- Is it a dream?

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Challenges in Dynamics GP

Common Challenges with Variance Reporting:

- Line item vs Summary comparisons
- Inconsistent coding
- Where to put a code
  - GL Accounts
  - Transaction Descriptions
  - AA, MDA, Encore Project Tracker, Rockton Project Cost, PA, Key2Act
  - Other systems

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Challenges in Dynamics GP

You Can't Store Descriptions in GP Budgets

- Period Values Only
- GP Budget maintenance is an administrative screen
- The is not suitable for field staff to enter data

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Challenges in Dynamics GP

GP's native import from Excel template doesn't give you any more options

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1								2014 Test									
2		Date Range	1/1/2014	to	12/31/2014												
3	Account	Description	BegBal	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Total
385	100-1205-00	Sales Discounts Available	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
386	100-1220-00	Credit Card Receivable	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
387	100-1260-00	Employee Advances	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
388	100-5100-00	Salaries and Wages - Administration	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
389	100-5110-00	Overtime Pay - Administration	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
390	100-5120-00	Bonuses - Administration	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
391	100-5140-00	Profit Sharing - Administration	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
392	100-5150-00	Employee Benefits - Administration	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

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Challenges in Dynamics GP

Senior financial analysts are reduced to Excel copy and paste jockeys for 3-12 weeks

- Create templates
- Distribute
- Collect
- Track Versions
- Verify
- Fix Broken Templates
- Consolidate
- Report
- Rinse and repeat until Board Approval

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Live Demo

- Powerful Budgeting Made Easy
- Detail to Detail variance reports
- Dimensional support
  - Customer, Vendor, AA, Project Codes
- Custom fields
- Native Project/Job Cost module

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