

A blue and white Telmex Formula 1 car is shown on a racetrack. The car features the number 01 and various sponsor logos including Rolex, SunTex, Sunoco, BMW M Performance Parts, Bosch, and Continental. A large blue triangular graphic is overlaid on the left side of the image, containing the text "Rapid Start: 50 Products in 50 Minutes! GO!".

Rapid Start:
50 Products in 50
Minutes! GO!

Kim Peterson
d Dynamics Connections

Thank you

1. “ISV Check List” or survey emailed to you.

1. Place a ✓ by the names of interest

2. A follow up survey will follow, complete, we’ll share the Slides and Recording

Dynamics Connections

50 ISV Check List

Company	Product	Notes
Rodon Software	Auditor	
Aatrix	Aatrix State & Fed Payroll Reports, Payments, and Billing	
ehaoutier	ehaoutier	
True Sky	True Sky	
Blue Moon	Credit Card Processing	
Envisage	Post Master Enterprise	
Corporate Renaissance Group	CRG Company Combiner	
TurnOn Dynamics	HandiPrease	
Sierra Workforce Solutions	Sierra's TimeMaster Suite of Time & Attendance Solutions	
GPC Systems	Easy e-Bank Rec	
defacto Global	defacto Planning	
BroodIQ	BroodIQ's Supply Chain Planning Suite - Demand Planning	
ICall Software	Mass Apply for AR and AP	
Encore	Advanced EmailSuite	
Rodon Software	ToolBox	
GreenShades	GreenShades Online Employee Portal featuring Benefits and Advanced Time Entry	
Notus	ePay Advantage	
ETL Source LLC	Power BI - REPORT PACK for Dynamics GP	
ETL Source LLC	2nd slide	
Compass Technology	Matrix Inventory	
EmoTech, Inc	Commission Plan	
Express Information	PundVision	
Joosoftware	Penny - Canadian Payroll Self-Service Solution for Dynamics GP	
Vivid Reports	Vivid Reports - Financial & Budgeting Software	
ISortia Expense	ISortia Expense T&E Expense Reporting Solution	
GP Elements	CustomerIQ	
defacto Global	Intelligence AI	
High Jump	HighJump Collect for Microsoft Dynamics GP	
Dynamic Budgets	Dynamic Budgets	
enChoice (ImageTag)	KwikPayables	
Vertex	Sales and Use Tax Automation Solution	
JAT Software	JAT Payroll Interface (API)	
Winthrop Dev. Consultants	GP Power Tools	
Corporate Renaissance Group	CRG emPerform - Employee Performance Management Software	
True Commerce	TrueCommerce Commerce Network	
Joaxis	Joaxis Project for Professional Service Automation	
Lajson Software	Lajson Messenger BDD	
GP Elements	SalesIQ	
Melorma	Melorma Enhanced Electronic Payments	
Corporate Renaissance Group	Rapidoart - Budgeting & Planning Software for Dynamics GP Users	
Metatite	Metatite Powerless Automation from Metatite	
	METSTOCK	
	Advanced Bank Reconciliation	
	Penetration Testing & Asset Tracking	
	Penetration Testing & Advanced Analytics	



Purpose: To educate you on 50 solutions in 50 minutes.



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- Easy Reporting
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- Define Segregation of Duties
- Electronically Sign Documents

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ROLL REPORTS AND PAYMENTS FOR cs GP

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REND the solution to others

eFile Unemployment, Wage Withholding,
1099s, 1095s, Reports and Electronic Payments.

(efile.aatrix.com) to track all filings and
view confirmations and administer all agency
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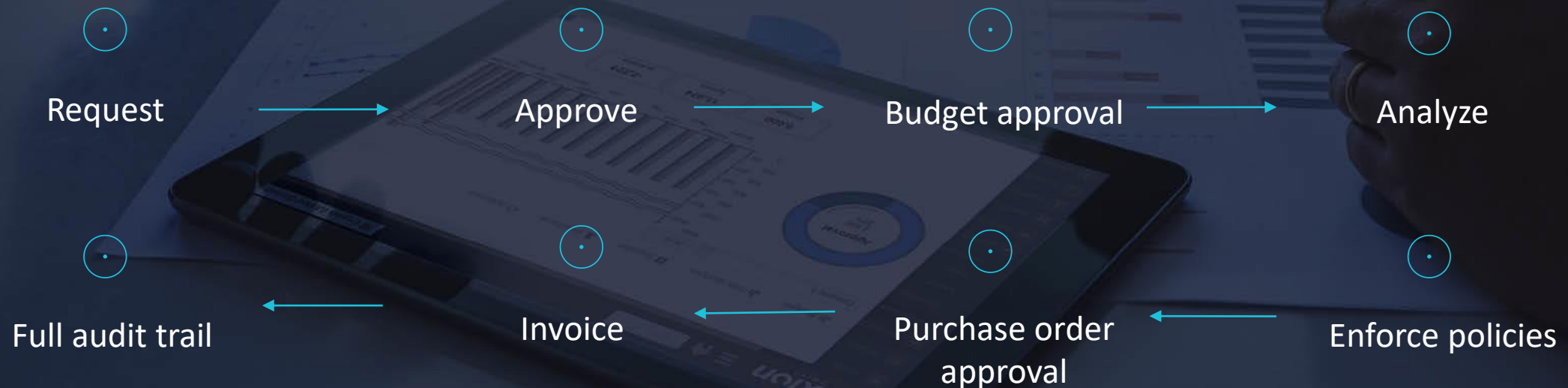
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or call
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CREDIT CARD PAYMENTS

Credit Card Payments adds credit card processing capability to Microsoft Dynamics® GP

FUNCTION

Credit Card Payments, adds credit card processing to Sales Order Processing and Receivables Management. All transactions are processed without a third-party gateway.

IMPACT

With *Credit Card Payments*, merchants have an efficient, embedded credit card capability that may be fully integrated for both back office and web site entered orders. The elimination of a third-party gateway often means reduced credit card fees, also.

FEATURES

- Support for Pre-authorization, Sales (capture), Adjust, Returns, Voids, Voice Authorization
- Address, ZIP, and CVV2 verification
- Ability to store multiple credit cards per customer, default cards by customer or customer location
- Allows multiple credit cards per sales document
- Tokenization allows pre-authorization of web orders and capture of funds in Dynamics GP after fulfillment
- Support for batch processing
- Integration with *SOP Auto Invoice*

Contact your Microsoft Dynamics GPTM partner and discover how *Credit Card Payments*, can work for your organization.



The screenshot displays the 'Credit Card Payment - TWO (us)' window. It includes a menu bar with 'Close', 'Clear', 'Process', 'File', 'Tools', and 'Help'. Below the menu is a toolbar with icons for 'Actions', 'File', 'Tools', and 'Help'. The main area is divided into sections: 'Transaction Type' (Pre-authorization Capture), 'Amount' (\$399.95), 'Document' (STCINV2263), 'Customer ID' (AMPCRM10001), 'Name' (Aman Fil Electrical), 'Cardholder' (Platinum Card), 'Card Number' (masked), 'Type' (New Card), 'Address ID' (PRBAPR), 'Name on Card' (Bob Pitt), 'Address' (One Microsoft Way), 'City' (Redmond), 'State' (WA), 'ZIP Code' (98072-6399), 'Country Code' (USA), 'Phone' (425) 585-0101, 'Email', and 'Origin' (Sales Transaction Entry). At the bottom, there is a table showing transaction details.

Document No.	Amount	Subtotal	Cardholder	Card Type	Card Number	Cardholder
STCINV2263	\$399.95	\$399.95	AMPCRM10001	Platinum Card	XXXXXXXXXXXX	XXXXXXXXXXXX

EXPAND THE BENEFITS AND CAPABILITIES OF
MICROSOFT DYNAMICS GP
A PROVEN AND TRUSTED SOURCE
DISTRIBUTION, ACCOUNTING, AND WAREHOUSE INTEGRATION EXPERTISE
SEAMLESS INTEGRATION WITH MICROSOFT DYNAMICS GP

Credit Card Payments

Sales Order Processing Cash Receipts.

Pre-authorization, Sales (capture), Adjustments, Returns, Voids, Voice Authorization

Tokenization

capture of funds after fulfillment

web site entered orders

Address, ZIP, and CVV2 verification

store multiple credit cards

default cards by location

multiple per sales document

ACH processing for Cash Receipts

batch processing

PA-DSS Certified

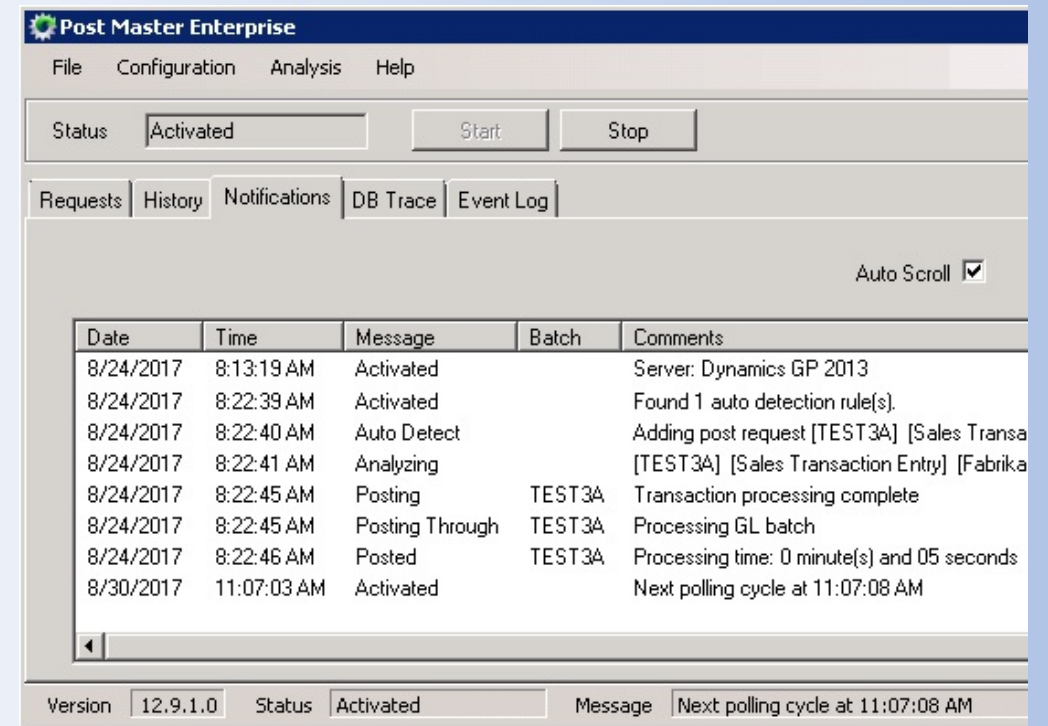
Processed by Vantiv Integrated Payments

– no third party gateway – no fees

Post Master

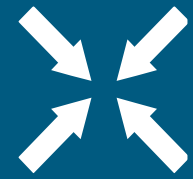
The leading *automated* batch posting solution for Dynamics GP

- Fully automated batch posting
- Eliminate repetitive posting tasks
- Setup Auto-Detection rules to determine which batches to post
- Schedule after-hours posting
- Runs as a Windows Service
- Dynamics GP client does not need to be running or logged in



NEED TO COMBINE MULTIPLE COMPANY DATABASES IN DYNAMICS™ GP?

Explore all CRGroup add-on solutions for Dynamics GP; including: Changer, Re-Formatter, AA Tools, Merger Series, and PA Cubes



CRG Company
Combiner™

"Using Company Combiner, we were able to consolidate our **FIFTY-FOUR GP DATABASES INTO ONE!** The change increased daily productivity & reduced our GP maintenance and upgrade time"

- Bobby Powers CoAdvantage



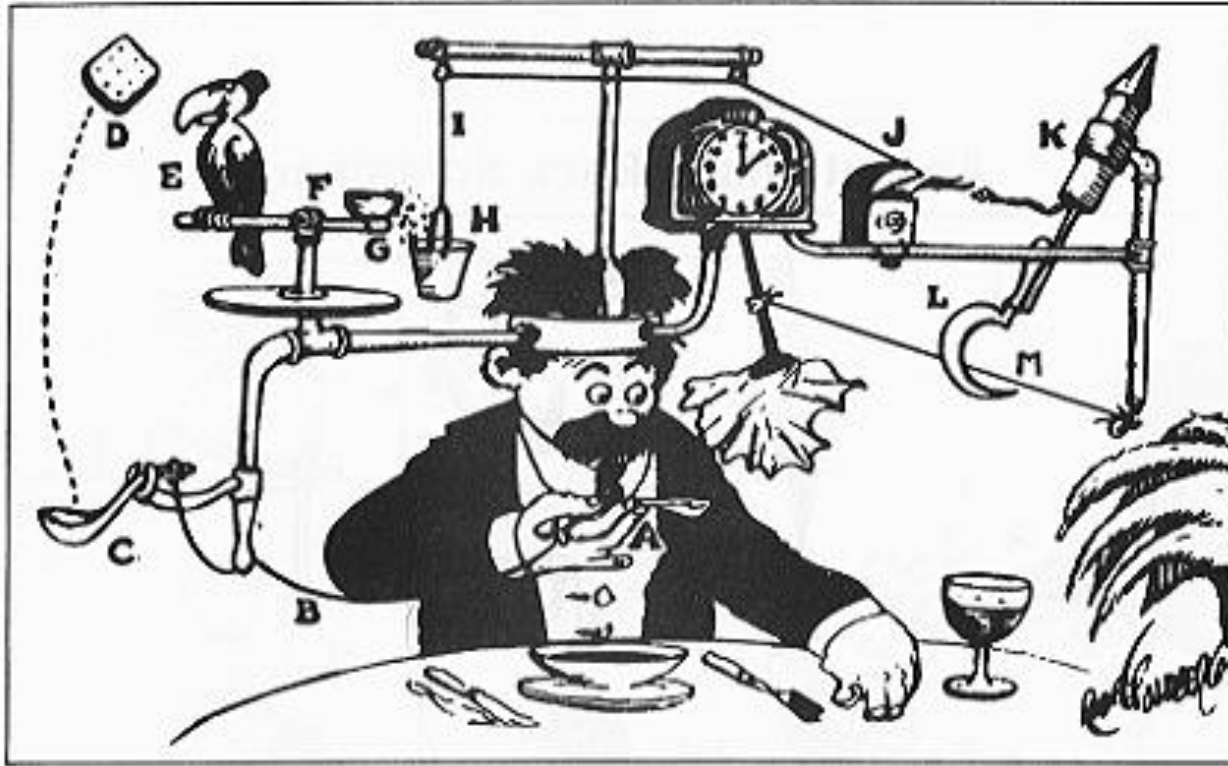
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Easy steps to Bank Rec success!

If you spend more than half-a-day **per month** matching, recording bank transactions and reconciling, do yourself a favor, check out Easy e-Bank Rec.

Record the Bank
Statement Balance

Import the Bank
File and Match
by Document #s

Preview All
Matched by
Amounts

Process
Automated
Transactions

Mark All Matches
as Reconciled

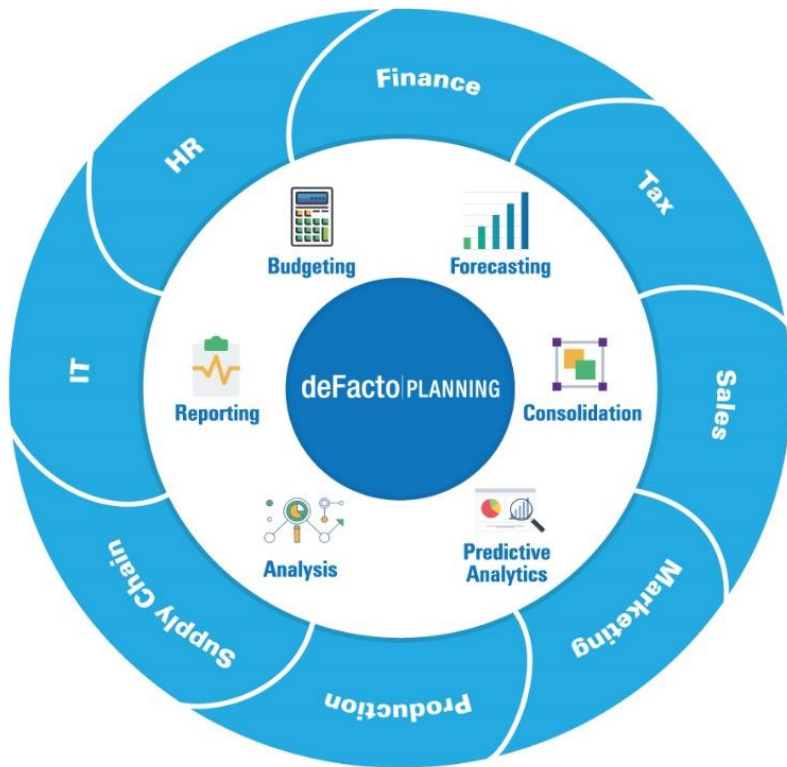
Reconcile Bank
Balance to the GL

Our product navigates through a series of steps from importing the bank statement to reconciling to the GL.

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Wholesale Distribution

- Multi location
- Transfers



Manufacturing

- BOMs
- Dependent demand



eCommerce

- Integrate eCommerce platforms
- Channel analysis



Food & Beverage

- Expiring Inventory Alerts
- Promotion Planning



Consumer Packaged Goods

- Customer Analysis
- Drop Ship PO's



Industrial Supply

- Vendor tracking



Third Party Logistics

- Shipper/Client Logins
- Warehouse Inventory Analysis



Retail

- SKU categorization
- Promo Planning



Demand Planning

Forecasting, seasonality, and hierarchies



Replenishment Planning

PO's, work orders, transfers



Supplier Planning

Lead times, variability & analysis



Inventory Planning

Analysis, dashboards, alerts & business intelligence



Promotion Planning

Analysis, optimization & monitoring

Mass Apply Suite

The leading *mass apply* solution for
Dynamics GP **Receivables and Payables**

3 modes of Mass Apply &
Preview

Short Pay processing
functionality

Import Customers/Vendors
& Transactions

Multi-Currency & National
Accounts

ICAN
Software Solutions

Mass Apply RM Credits - TWO18 (sa)

File Tools

Import Customers Import Receivables Documents Import Cash Receipts Import Apply Information

☐ Restrict Customers To Imported Valid Customers List Import Valid Customers

Customer Range Credit Document Date Range Debit Document Date Range Customer Class

From To From To From To Restrict by Customer Class

01/01/2000 12/31/2030 01/01/2000 12/31/2030 01/01/2000 12/31/2030

☐ Auto Apply Based On Doc Number Prefix Match? ☒ Credit Memos ☐ National Accounts Logic?

☐ Credit Doc Prefix From Comment or PO Number? ☒ Returns ☒ Apply Using User Date as Apply Date

☐ Length of Doc Number Prefix: ☒ Payments Max Amount 999,999,999,999.00

☒ Linked Docs Only Auto Create Credit Memos For Invoices Amount Remaining

☐ Use Imported Apply Information Populate CM Description With Payment & Invoice?

☐ Clear Out Imported Apply Information When Mass Apply Process Completes Derive Credit Memo Number From Invoice Number?

☐ Run Exception Reports on Preview (This will increase processing time) Credit Memo Suffix:

☒ Use Quick Post Apply Report Auto Create Debit Memos For Invoices Amount Remaining

☐ Remove Empty Cash Apply GL Entries Populate DM Description With Payment & Invoice?

☐ Include Fully Applied Documents For Negative Cash Receipt Apply Derive Debit Memo Number From Invoice Number?

☐ Auto Write Offs? Max Auto Write Off Amt Debit Memo Suffix:

☐ Override Offset Account? Memos Batch ID:

STATUS: Record Count of

Preview Mass Apply Mass Unapply



Advanced SmartList

Account Summary - *

Snapshot Excel XML Advanced SmartList

Year: 2013 Period ID: 5

Account Number	Account Description	Credit Amount	Debit Amount
000-110...	Cash - Operating Account	\$0.00	\$28,000.00
000-120...	Accounts Receivable	\$0.00	\$10,459.14
000-120...	Sales Discounts Available	\$0.00	\$4.20
000-130...	Inventory - Retail/Parts	(\$5,019.73)	\$1,432.50
000-210...	Accounts Payable	(\$1,529.45)	\$0.00
000-210...	Purchases Discounts Available	(\$12.40)	\$0.00
000-212...	Commissions Payable	(\$307.80)	\$0.00
000-230...	IL State Sales Tax Payable	(\$153.04)	\$0.00
000-231...	Chicago City Sales Tax Payable	(\$25.52)	\$0.00
000-232...	GST Collected-Canada	(\$25.20)	\$0.00
000-411...	US Sales - Retail/Parts	(\$198.70)	\$0.00
000-411...	US Sales - Finished Goods	(\$9,868.65)	\$0.00
000-414...	US Sales - Repair Charges	(\$192.23)	\$0.00
000-451...	Cost of Goods Sold - Retail/Parts	\$0.00	\$5,019.73
000-663...	IL State Sales Tax Expense	\$0.00	\$109.95
SUM=(\$17,332.72)		SUM=\$45,024.92	
SUM=(\$17,332.72)		SUM=\$45,024.92	

Year: 2014

SUM=\$48,287.82		SUM=\$73,857.54	
-----------------	--	-----------------	--

Year: 2015

SUM=\$63,295.50		SUM=\$59,113.78	
-----------------	--	-----------------	--

Year: 2016

SUM=\$37,511.29		SUM=\$33,960.69	
-----------------	--	-----------------	--

Year: 2017

SUM=\$35,558.51		SUM=\$32,272.39	
-----------------	--	-----------------	--

Year: 2018

SUM=\$32,888.38		SUM=\$29,290.21	
-----------------	--	-----------------	--

SUM=\$200,208.78 SUM=\$273,519.53

- Sits on top of GP SmartList Designer or SmartList Builder
- Sort, Filter and Group
- Save formatted queries as a new SmartList Favorite and assign who has access
- Summarize grouped data by adding sum, min, max, count, average (or none)
- Export grouped/summarized data in a variety of formats



Security

- Inactivity Timeout
- Security Manager
- User Lockout
- Password Policy Option
- Safe Login
- Redirect
- Security What If

Administration

- Version Pro
- Login Logging
- System Lockout
- Conditional Field Level Security

User Experience

- Mentor
- Inspector
- PopUps
- Widgets

Business Processes

- Batch Review
- Payment Approval
- Period Open/Close
- Reason for Hold
- DocSync
- Reset Batches
- Batch Review Window



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Greenshades Online Employee Services

With Advanced Time Entry and Benefits

Benefits

Benefit Packages | Benefits | Enrollment Events | Benefit Groups | Affordable Care Act

Healthcare Benefits + New Healthcare Benefit

There are 3 healthcare benefits with 4 options being offered to employees.

Name	Options	Description
Dental Insurance	1	This is the Dental Insurance that is offered to all employees.
Health Insurance Company	2	Health Insurance offering
Vision Insurance	1	Optional vision insurance

Retirement Plans + New Retirement Benefit

There are 2 retirement plans being offered to employees.

Name	Description
401k	This is the 401k option available to employees.
Roth 401K	Post tax 401K.

Life and Disability Insurance Benefits + New Life or Disability Insurance Benefit

There are 3 life and disability benefits being offered to employees.

Name	Description
Group Life Insurance	This is the life insurance benefit that is offered to employees.
Short Term Disability	Get paid to be out of work.
Supplemental Life Insurance	This policy requires a proof of insurability form to be completed.

The portal features:

- Time entry
- Paystub and year-end form access
- Human Resource document library
- Evaluations
- Streamline benefits enrollment experience
- And much more

Time Clock 10:25 AM ET

Clocked in to Hourly since 10:25 AM (0 hrs, 0 mins)

Enter optional comments about this clock out.

You are currently logged into the "Academic Services" department.

Time Entry 8:30 AM

Current Standard Time

Time Code:

Department:

Entry Management

Last 4 of SSN:

PIN:

Code: Hourly

Department: Accounting

Start Time: 07:29 - 8:00 AM

Lunch: ☐

Duration: 8 hours 0 minutes

Stop Time: 07:29 at 4:00 PM

Comments: (Enter a comment)

Paystubs

View: Direct Deposit for 8/26/2014

Direct Deposit Earnings Statement

Pay Date	Start Period	End Period
8/26/2014	8/19/2014	8/22/2014

Description	Rate	Hours	Amount	YTD Amount
Hourly	\$17.00	80.00	\$1,360.00	\$17,680.00
Overpayment	\$0.00	0.00	\$0.00	\$0.00
Floating Holiday	\$0.00	0.00	\$0.00	\$0.00
Hourly	\$0.00	0.00	\$0.00	\$0.00
Post Time Off	\$0.00	0.00	\$0.00	\$0.00
Total	80.00	\$1,360.00	\$17,680.00	

Payroll Deductions	Amount	Taxes	Amount
401K	\$134.14	FICA	\$2,047.11
401K	\$134.14	FICA	\$2,047.11
401K	\$134.14	FICA	\$2,047.11
401K	\$134.14	FICA	\$2,047.11

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ePay Advantage Customer Payment Portal



Automate invoice
and payment
payment collection,
and notifications



Credit card transactions
Real-time processed and
Level 2/3 processing
Dynamics

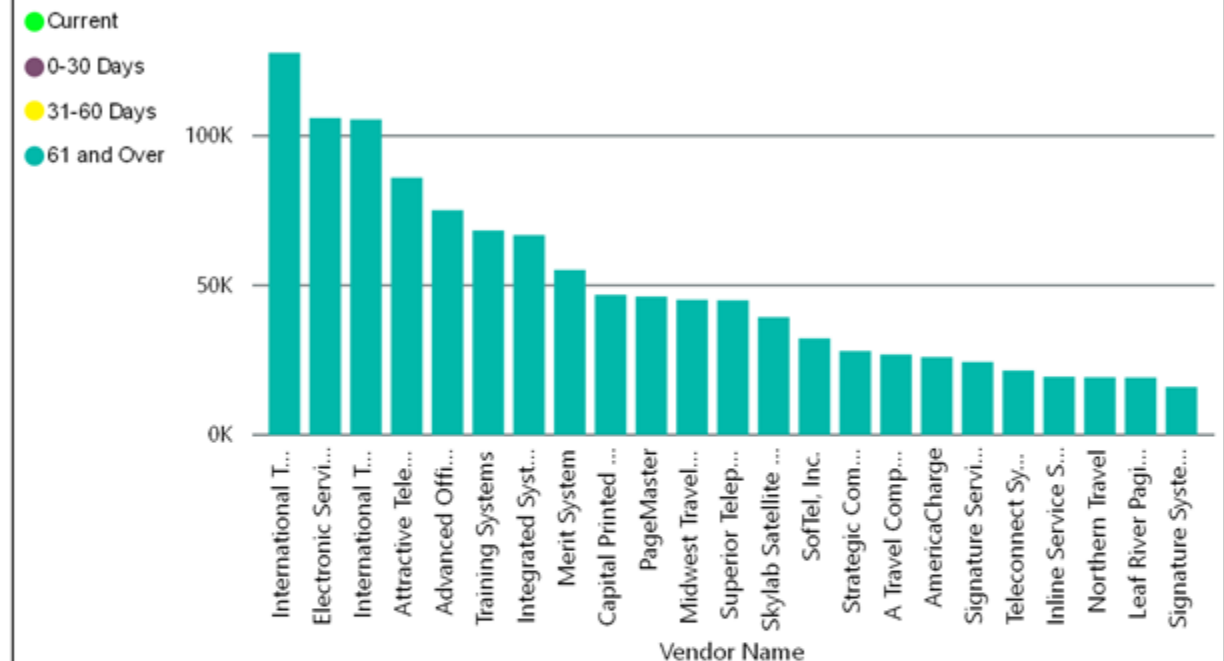


Flexible reporting
Email templates
Confirmation receipts
Audit for processing

Current Year AR Aging



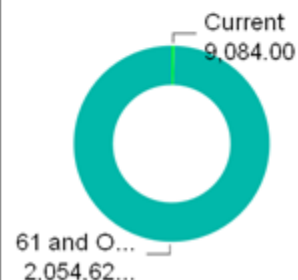
Current Year AP Aging



Top AR Customer Balances



Current Year AR



AR Balance KPI

2,063,712
AR Balance

AP Due KPI

1,330,135
AP Due

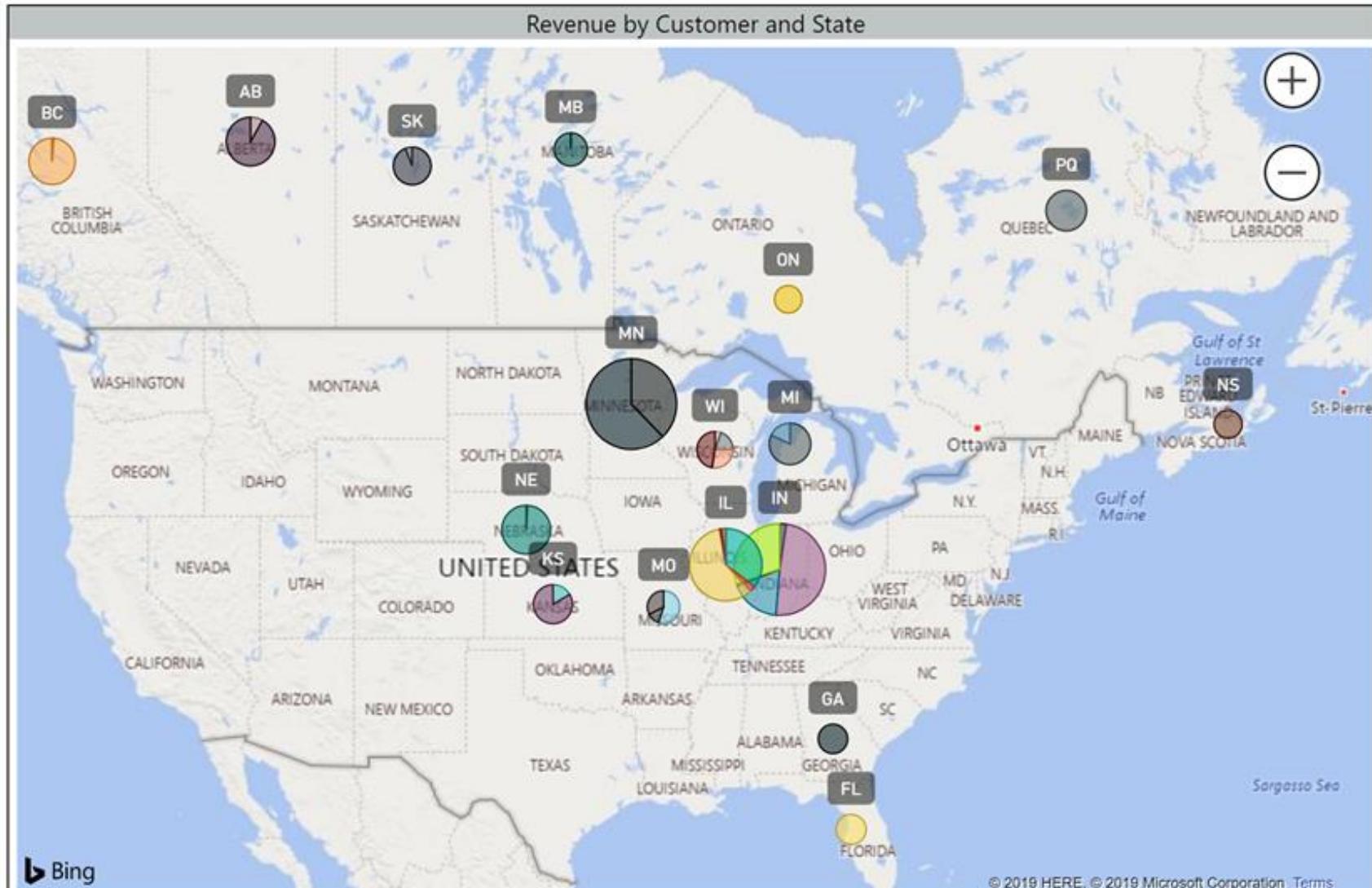
Current Year AP



Top AP Due to Vendors



Year	Month	Territory	Doc Type	Product Line	Item Class	Revenue KPI	Gross Margin KPI
2017	All	All	All	All	All	1,121,035 Extended Price	588,866 Gross Margin



Matrix Inventory for Microsoft Dynamics GP

Create individual SKUs and manage them.



- Inventory “*dimension management*” challenges?
- Inventory of different *size, color, width, etc.*?
- Want to sell in *pre-packs*?
- Dealing with *container management*?
- Every customer using GP’s inventory module can *benefit*



Commission Plan for Dynamics GP

1. Does your company spend time updating legacy commission systems?
2. Is it a chore to track, calculate and pay commissions?
3. Are you concerned about accuracy?
4. Does the CFO want better commission reporting?
5. Do you simply want better internal controls over your commission data?



Donor
Management

Non-Profits

Handles
Funds

Mini CRM

Manage
Campaigns

Events

"From the time and effort saved by importing data, to the accuracy and ease of working with the data, FundVision™ has made a huge impact on the day to day operations of our office."

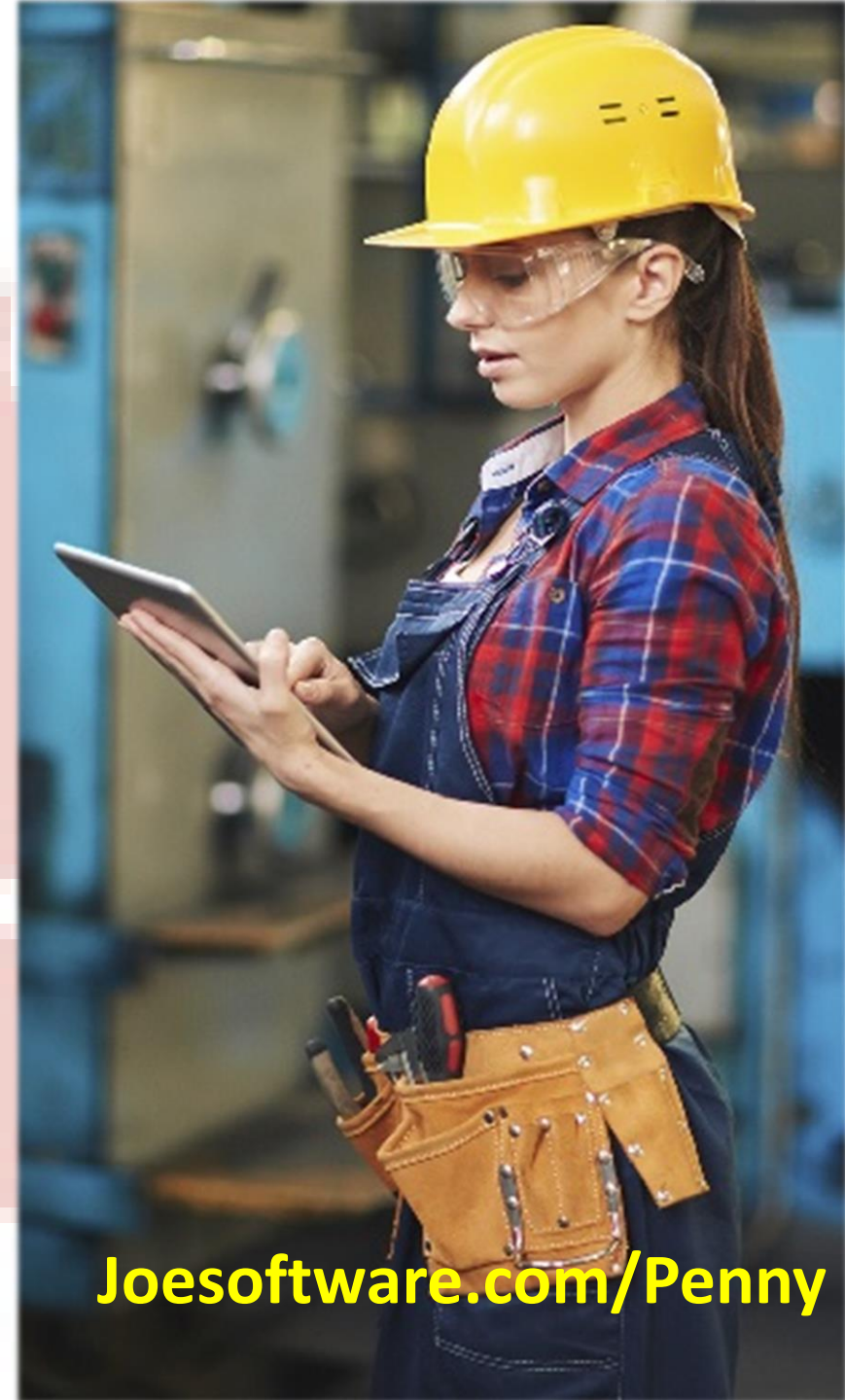
David Dommissie
Virginia United Methodist Conference

www.fundvisionsoftware.com

Penny For Canadian Payroll in GP

Employee Self-Serve Payroll Portal

- ✓ Web based portal that can be accessed anywhere
- ✓ Time and attendance tracking
- ✓ Works with punch clock systems
- ✓ Employee direct access to pay statements and T4's
- ✓ Time bank management
- ✓ CRA compliant
- ✓ Save payroll and approval staff hours every week!



Joesoftware.com/Penny



VIVID
REPORTS
Business Intelligence



CPM Reporting & Budgeting

- ✓ Dynamics GP integrated
- ✓ Replaces MR (Management Reporter)
- ✓ Numerous Drill Down features
- ✓ Simple Report Design – point and click
- ✓ Robust Security – user / role based
- ✓ Control Panels (Trees) – point and click
- ✓ Automation – allows reports to be scheduled

EASY IMPLEMENTATION

The screenshot displays the Vivid Reports software interface. The main window shows a financial report titled "Los Angeles Income Statement For the period ending July 31, 2022". The report includes a table with columns for "This Year", "Budget", "Variance", and "Last Year". The data is as follows:

	This Year	Budget	Variance	Last Year
Sales	38,791	37,472	1,319	34,720
Cost of Sales	15,394	15,168	226	13,690
Margin	23,397	22,304	1,093	21,030
Expenses:				
Selling Expense	13,657	12,574	1,083	12,060
General and Admin	7,810	7,800	10	6,980
Total Expenses	21,467	20,375	1,092	19,050
Operating Profit	1,930	1,929	1	1,970

A "Drill Down" window is open, showing a table of transactions for the year 2022. The table includes columns for "Year", "Account", "Description", and "Balance". The data is as follows:

Year	Account	Description	Balance
2022	50100-20-520	Plans <Los Angeles>	\$1,967.00
2022	50101-20-520	Blue Prints <Los Angeles>	\$4,486.00
2022	50102-20-520	Other <Los Angeles>	\$202.00
2022	50120-20-520	Engineering Consulting <Los Angeles>	\$376.00
2022	50130-20-520	Estimating Consulting <Los Angeles>	\$471.00
2022	50140-20-520	Surveying <Los Angeles>	\$69.00
2022	50160-20-520	Freight <Los Angeles>	\$166.00
2022	50161-20-520	Freight - long haul <Los Angeles>	\$211.00
2022	50201-20-520	Discounts <Los Angeles>	(\$159.00)
2022	50300-20-520	Const Rev - Homes <Los Angeles>	\$12,996.00
2022	50302-20-520	Const Rev - Apartments <Los Angeles>	\$6,571.00
2022	50303-20-520	Const Rev - Other <Los Angeles>	\$469.00
2022	50304-20-520	Const Rev - Other <Los Angeles>	\$4,870.00
2022	50305-20-520	Const Rev - Other <Los Angeles>	\$38,791.00

A "Transaction Count: 3" window is open, showing a table of transactions. The table includes columns for "Date", "Period", "Description", "Reference", "Document", "Journal", "Last User", "Credit Amount", and "Debit Amount". The data is as follows:

Date	Period	Description	Reference	Document	Journal	Last User	Credit Amount	Debit Amount
07/15/2022	7	SALEINV001043Daily Sales Journa	Daily Sales Journal	GJ	1217	James Briscoe	983.50000	0.00000
07/15/2022	7	SALEINV001042Daily Sales Journa	Daily Sales Journal	GJ	1216	James Briscoe	786.80000	0.00000
07/15/2022	7	SALEINV001041Daily Sales Journa	Daily Sales Journal	GJ	1215	James Briscoe	196.70000	0.00000

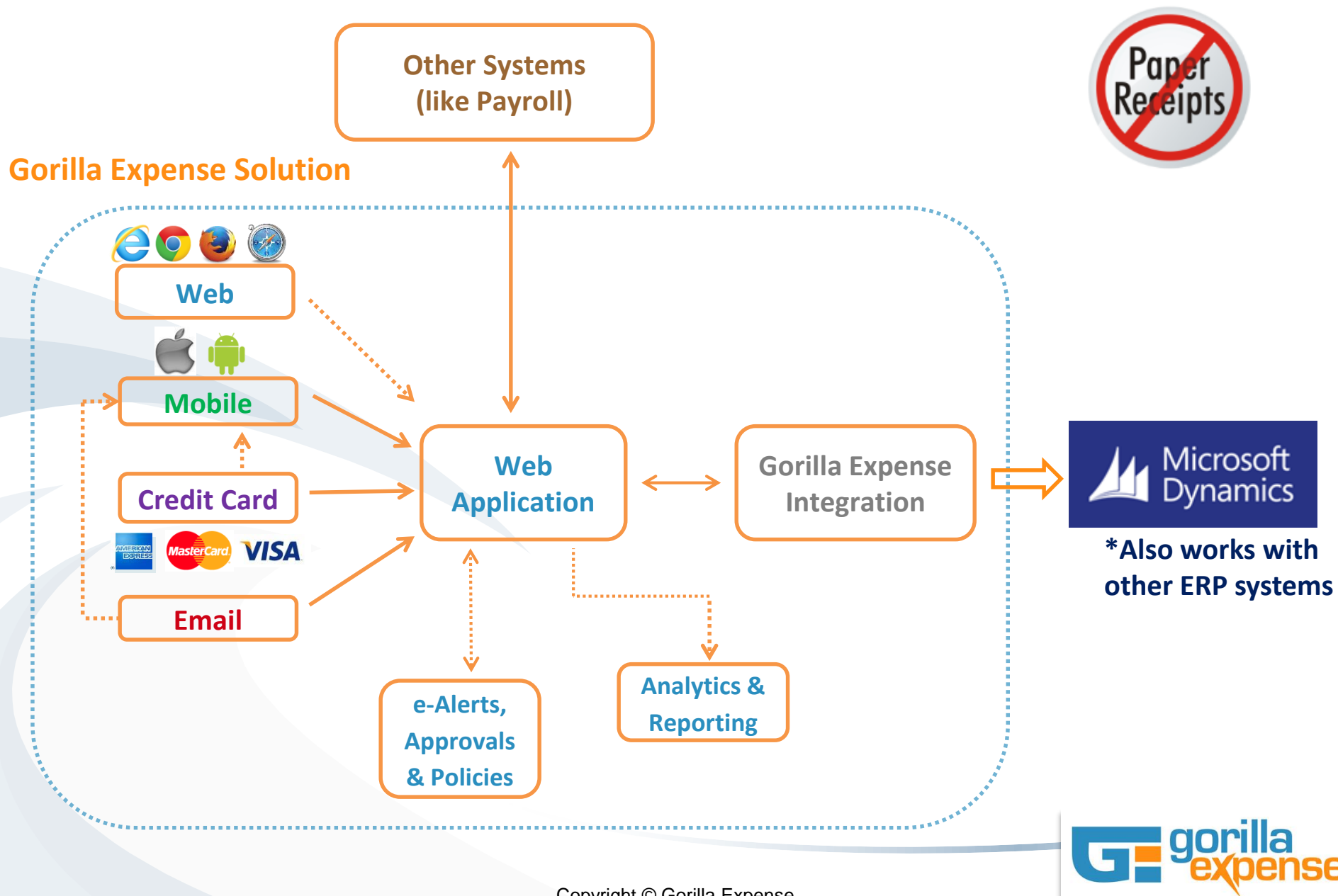
A "Drill Across" window is open, showing a table of fiscal sets. The table includes columns for "Fiscal Set", "1", "2", "3", "4", and "5". The data is as follows:

Fiscal Set	1	2	3	4	5
2022 - Actual	\$38,937.00	\$38,004.00	\$37,840.00	\$40,329.00	\$38,791.00
2022 - BUDGET	\$35,904.30	\$37,591.50	\$36,530.35	\$37,884.10	\$38,791.00
2021 - Actual	\$34,802.10	\$36,060.30	\$35,012.70	\$34,929.90	\$38,791.00

A line chart is displayed at the bottom, showing the trend of the data over time. The chart has a Y-axis ranging from \$34,000 to \$41,000 and an X-axis with 12 periods. The data points are as follows:

Period	Value
1	\$38,937.00
2	\$38,004.00
3	\$37,840.00
4	\$40,329.00
5	\$38,791.00
6	\$38,791.00
7	\$38,791.00
8	\$38,791.00
9	\$38,791.00
10	\$38,791.00
11	\$38,791.00
12	\$38,791.00

T&E Automation Done Right!



Provide your customers with secure access to their Dynamics GP receivables account data such as invoices, statements and transaction reports.

Aaron Fitz Electrical

Your Last Completed Sale INVS3008			Your Last Statement	
Date Placed	Order Value	Due Date	StatementDate	Balance
Sep 6, 2018	\$938.93	Oct 6, 2018	May 4, 2017	\$25,613.13

Account Details ⓘ

Debtor ID	AARONFIT0001	Credit Limit	\$35,000.00
Name	Aaron Fitz Electrical	Payment Terms	Net 30
Address	One Microsoft Way	Class ID	USA-ILMO-T1
County	WA	Salesperon ID	PAUL W.
Postcode	98052-6399	Territory	TERRITORY 1
Phone	425 555 0101	Email	
Mobile	086 554 2345		

Trading Information

[View Transactions](#)

Current Balance	\$25,018.39	Sales YTD	\$60,264.97
Current Month Transactions	\$0.00	Sales Last YTD	\$60,264.97

Balance Information

[View Statements](#)

Latest Aging Date	Apr 12, 2017					
Current	31 - 60 Days	61 - 90 Days	91 - 120 Days	121 - 150 Days	151 - 180 Days	181 and Over
\$4,373.02	\$0.00	\$0.00	\$746.33	\$0.00	\$0.00	\$19,899.04





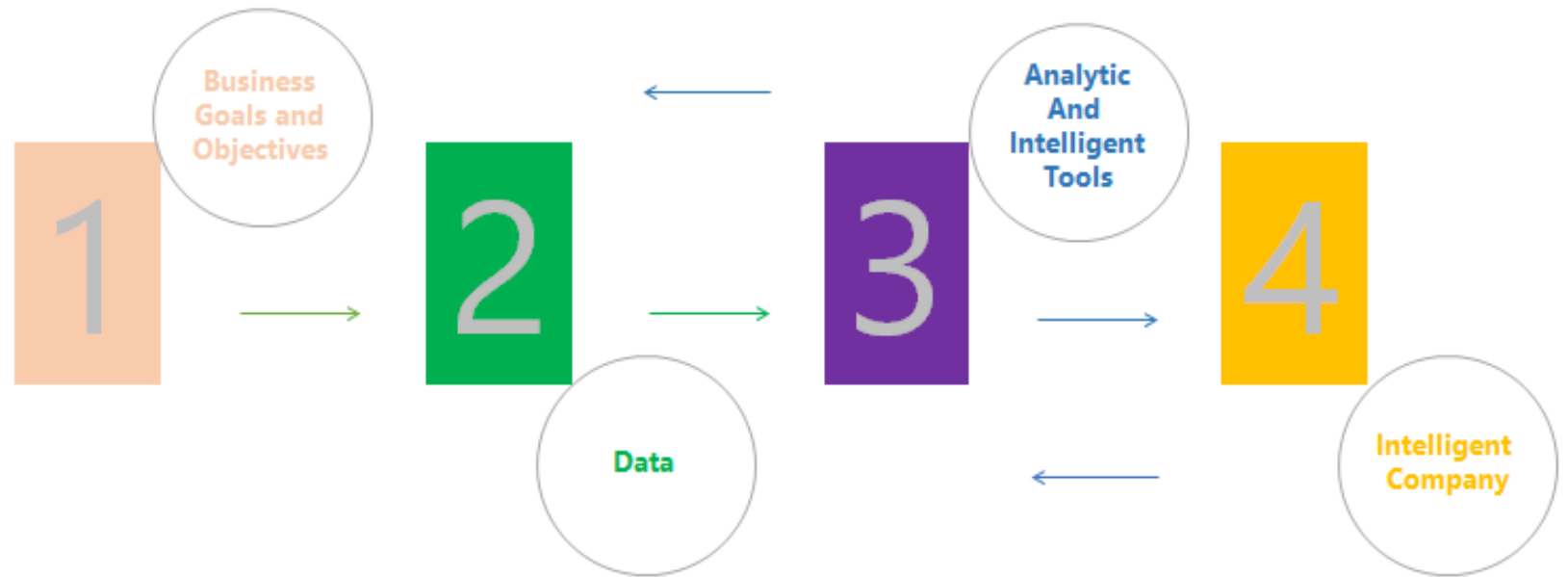
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Partner:**

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Building Intelligent Companies One Step at a Time







www.Intelligize.AI

Collect for Microsoft Dynamics GP

<https://dynamicsgpwms.highjump.com/>



Key Business Highlights

 ~\$1.2B* 2017 Revenue	 4,290 Global Customers
 HQ in Minneapolis, MN with 9 other NA locations	 612 New Customers
 66 Countries with HighJump customers	 98%+ Customer Retention

*As a part of the Körber Logistics business unit (of Körber Group, a \$2.6 Billion USD enterprise)

Embedded Features in GP

- Use mobile devices
- Integrated shipping / vendor compliance labelling
- Integration with GP Manufacturing
- ROI in less than one year



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Ready in 2 hours

POWERFUL BUDGETING MADE EASY



There's a better
way to budget



Developed by a GP customer
for GP Customers.

Because other budgeting
tools were too slow to
configure, too complex,
and too expensive!

Zubin Gidwani, Founder

That is so
much
easier!

Remember how
painful Budgets
were last year?



Budgeting

Forecasting

Reporting

Payroll

Allocations

Unlimited
users

sales@DynamicBudgets.com | 650-332-6651

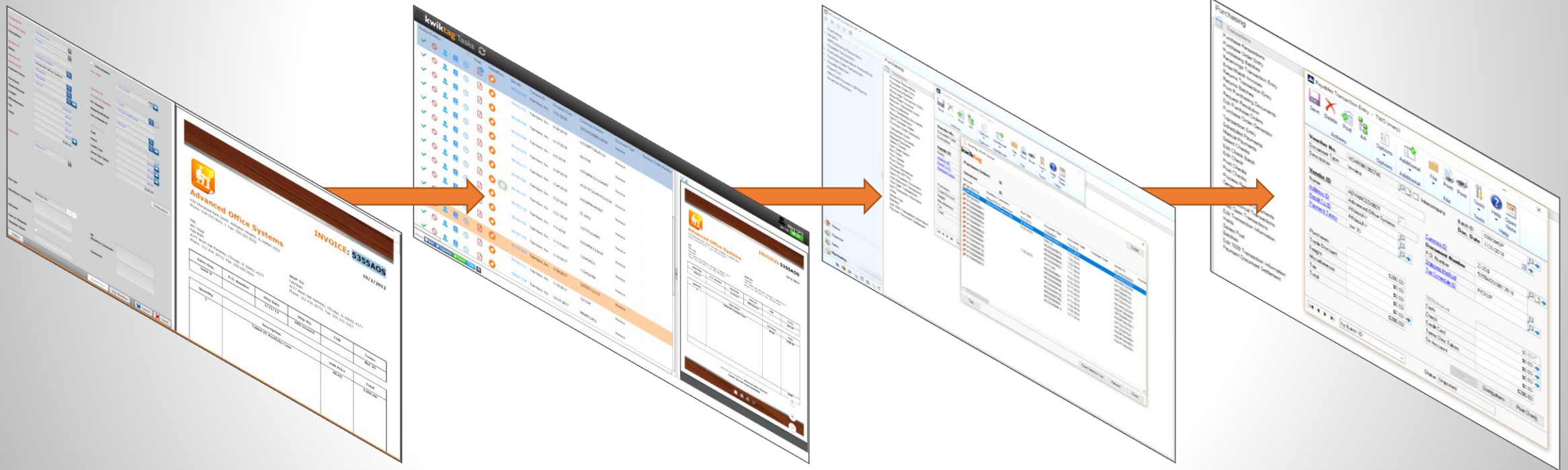
AP Automation with GP Integration & Complete Audit Trail

Simple AP Data Entry
Just Like ERP

Email Invoice Approval
Online Edit & Approval

Seamless Integration
With Dynamics GP

Payable Transaction Creation
w/Invoice Attached



Ask us how to manage receipts & expense reports too!

Vertex Sales and Use Tax Solution

Silver
Microsoft
Partner

Market Leader in transaction tax



Streamline,
automate, and
standardize taxability
and calculation on every
sales and purchase
transaction.

- ✓ Easy integration
- ✓ Scalable Solution
- ✓ Most trusted name in tax
- ✓ Quickly install, configure, and enable the connector for your ERP

Improve Sales and Use Tax Compliance with Vertex



Best-In-Class HRM Solution



&



Microsoft
Dynamics® GP

JAT's Payroll Interface can help you:

Control Benefits Costs

Improve Employee Retention

Reduce Labor Costs

Improve Tax & Regulatory Compliance

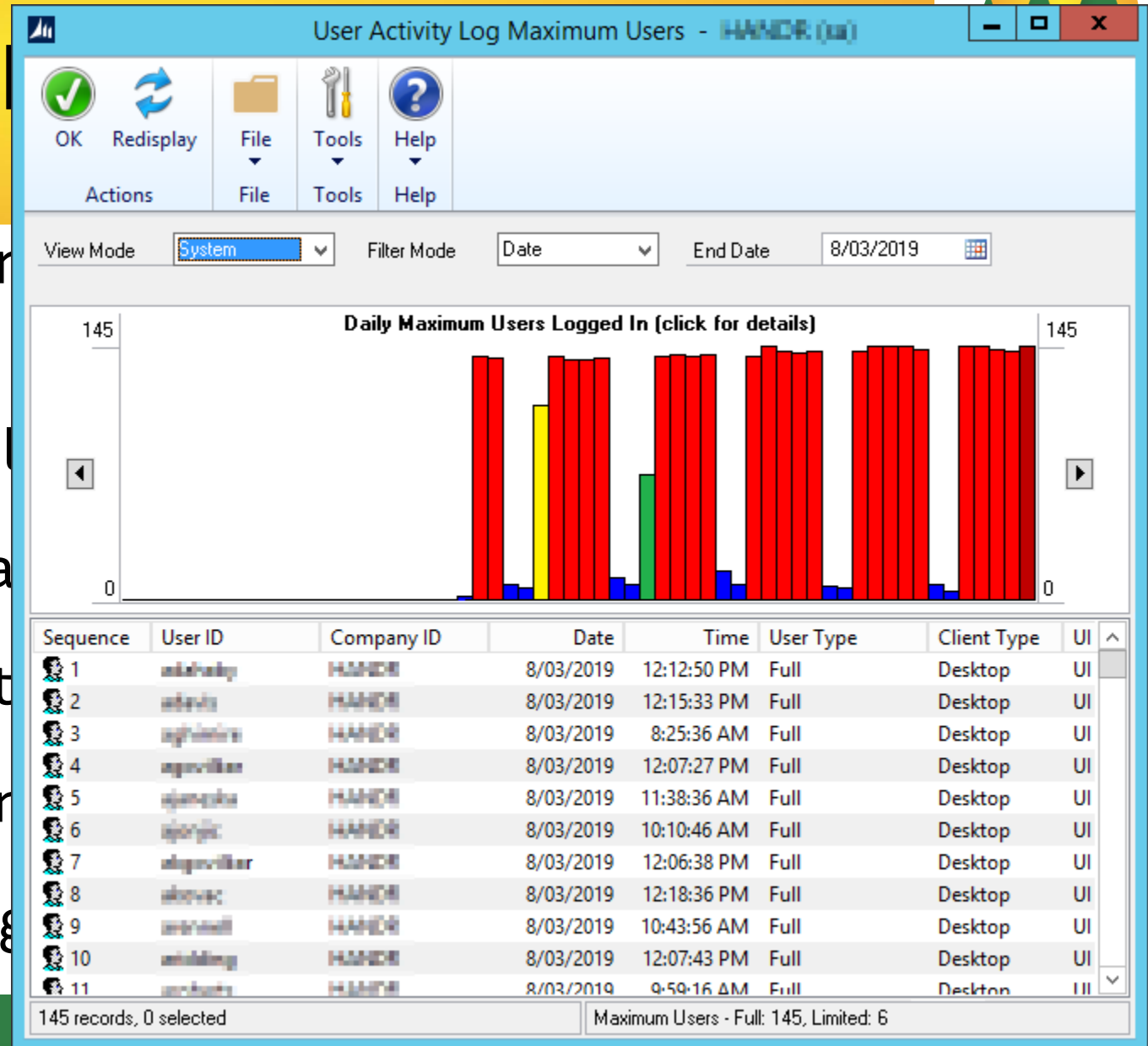
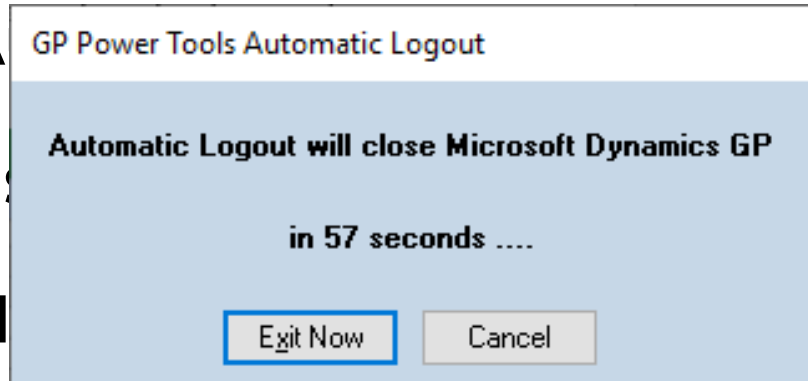
Reduce Manual Tasks & Errors with Integration

Improve Profit Through Efficiencies

GP Power Tools –

Build 26 introduces a suite of management:

- A GP Power Tools Automatic Logout
- User Activity Log
- Login Limits – To control how many users can log in at the same time
- Plus lots more... Update existing

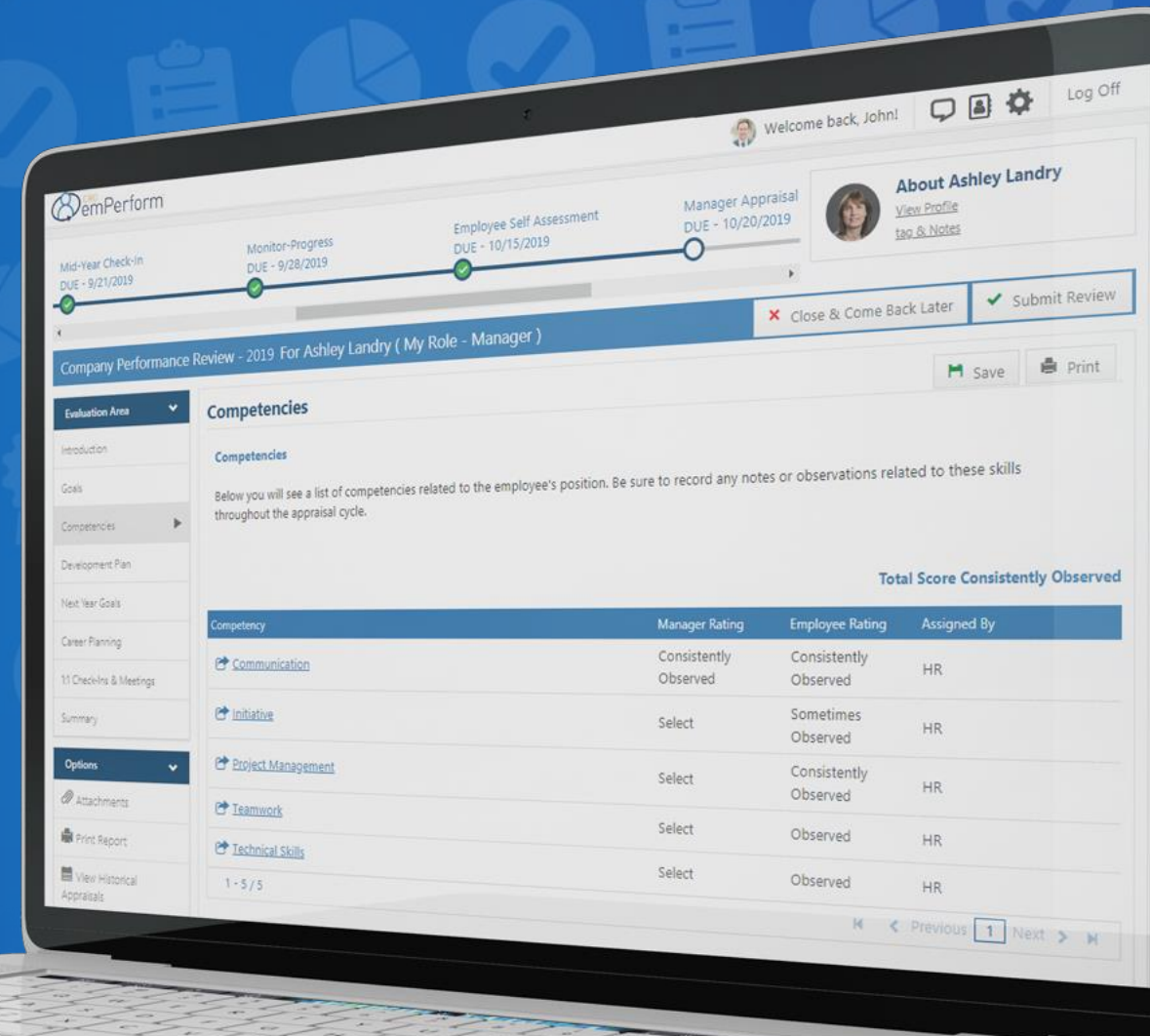


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FULFILLMENT

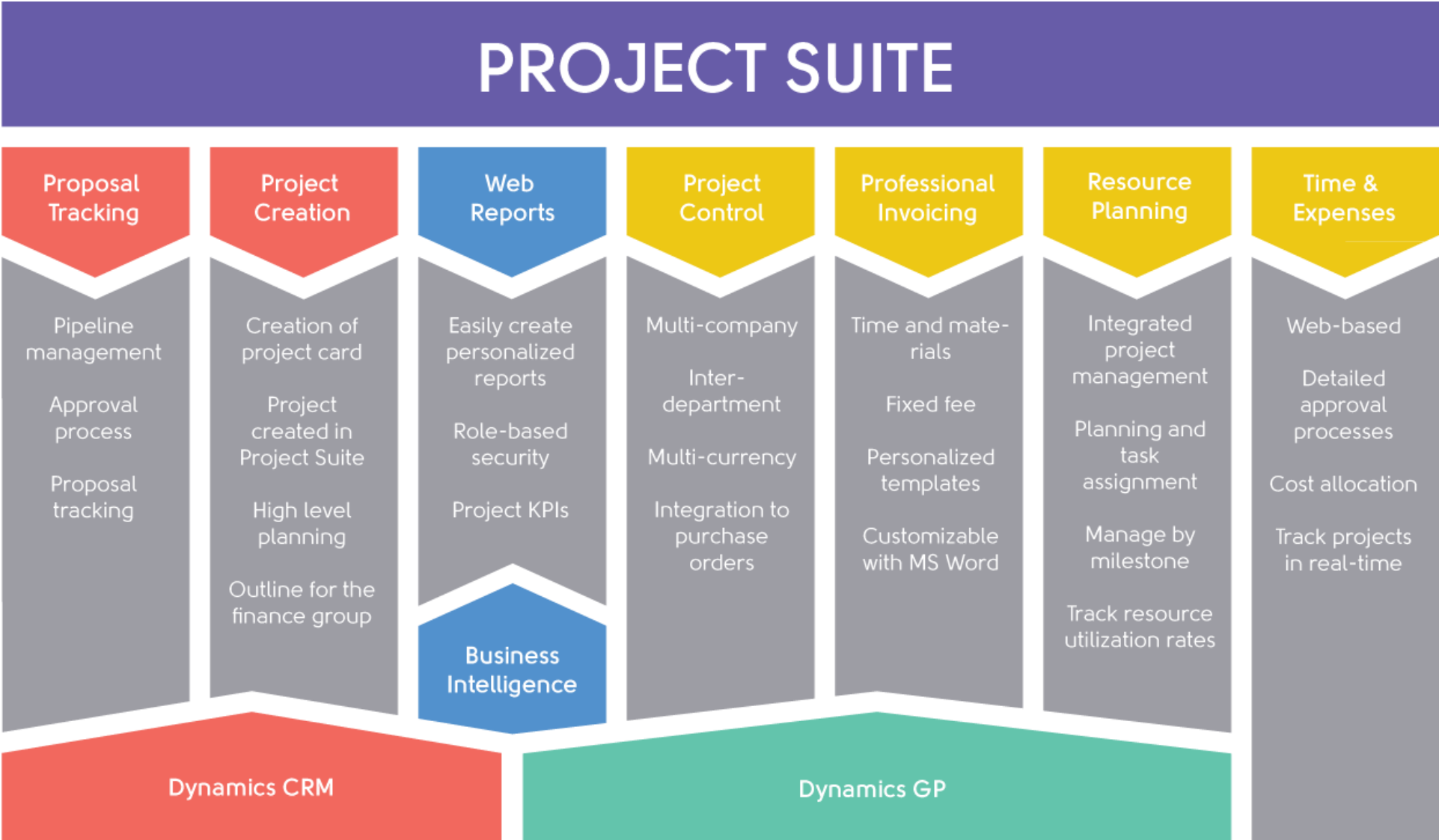
Trading Community Translation Service ERP Integrations Order Management	Procure to Pay Supplier Portal e-Invoicing DropShip	Storefronts Mobile POS Email Order Integration Marketplace Channels	PIM VMI Endless Aisle	Cartonization Packing Multi-carrier

JOVACO Project

for Professional Service Automation



From
proposal
to
invoicing
your
clients...



Liaison Messenger EDD

Automated business form and report distribution for Dynamics GP

Batch e-mailing & batch faxing

Attach supporting documentation

Use your existing print procedures

Use your existing reports

GP Report writer, SSRS, Crystal Reports, Word, excel, etc.

Send multiple documents for one recipient in a batch in one email

Archiving of all documents

Provide sales teams with the ability to generate quotes, enter orders and invoices and view transactions.

Choose a different customer

Adam Park Resort

View Account Summary

Customer ID	ADAMPARK0001	Credit Limit	\$40,000.00
Name	Adam Park Resort	Payment Terms	Net 30
Address	Suite 9876	Phone	31755501020000
	321 Chestnut Drive	Mobile	0000000000000000
City	Indianapolis		
County	IN		
Postcode	46206-1391		

Transactions

View or export your account transactions. You can also download documents in PDF format.

See More

Statements

View all of your statements from the last 2 years. You can also download your statements in PDF format.

See More

Reports

Up-to date reports of your transactions. You can also export the reports to Excel or PDF.

See More

Inventory

Check to see available inventory items. Confirm the quantity available.

See More

Price Lookup

Lookup and confirm current pricing of available inventory items.

See More

Quote Entry

Build and submit a quote from the available inventory items.

See More

Order Entry

Build and submit an order from available inventory items.

See More

Invoice Entry

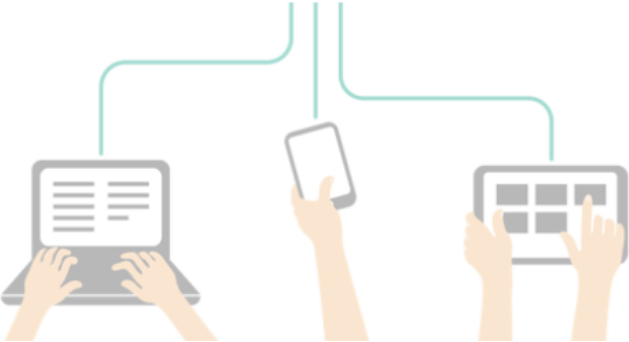
Build and submit an invoice from available inventory items.

See More

Add Prospect

Add a new prospect to the system. You can then create a quote for that prospect.

See More





Is your company interested in...



Converting vendors to electronic payments



Eliminating costs associated with paying vendors



Combining all payment types into one GP Payment Batch;
checks, EFT and more

Talk with your Partner today about
 **Enhanced Electronic Payments!**

Meet Rapidstart™

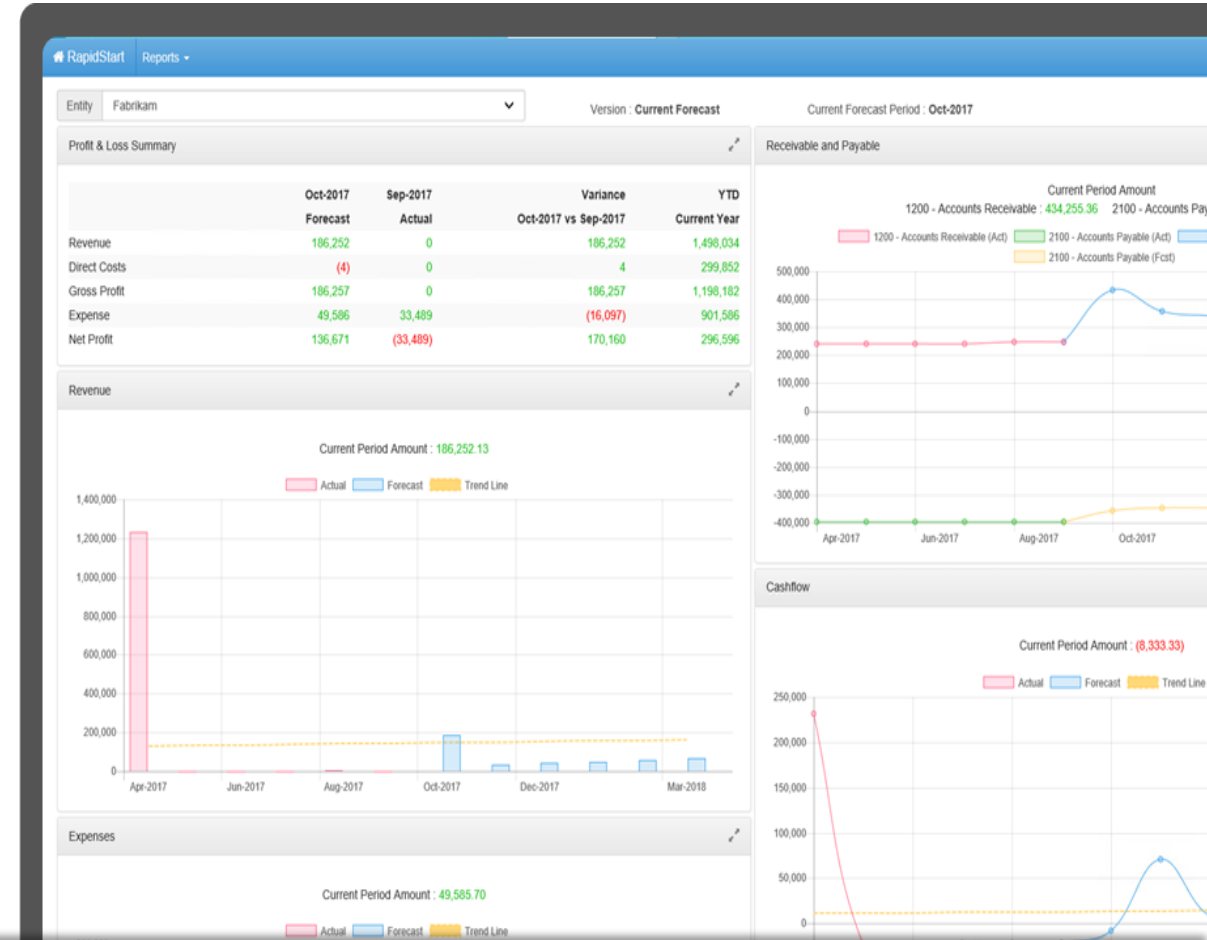
Budgeting & Planning Software for
\$3,150/year!

SIMPLE, AFFORDABLE & POWERFUL

Budgeting & planning tool that is easy to launch, and fits most of the needs faced by small-mid-sized businesses today.

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incorporating P&L, Balance Sheet, and Cashflow.**

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- Expenses
- Payroll
- CAPEX



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- Scanner or Multifunctional Copier
- Intelligent data extraction

- **Workflow**

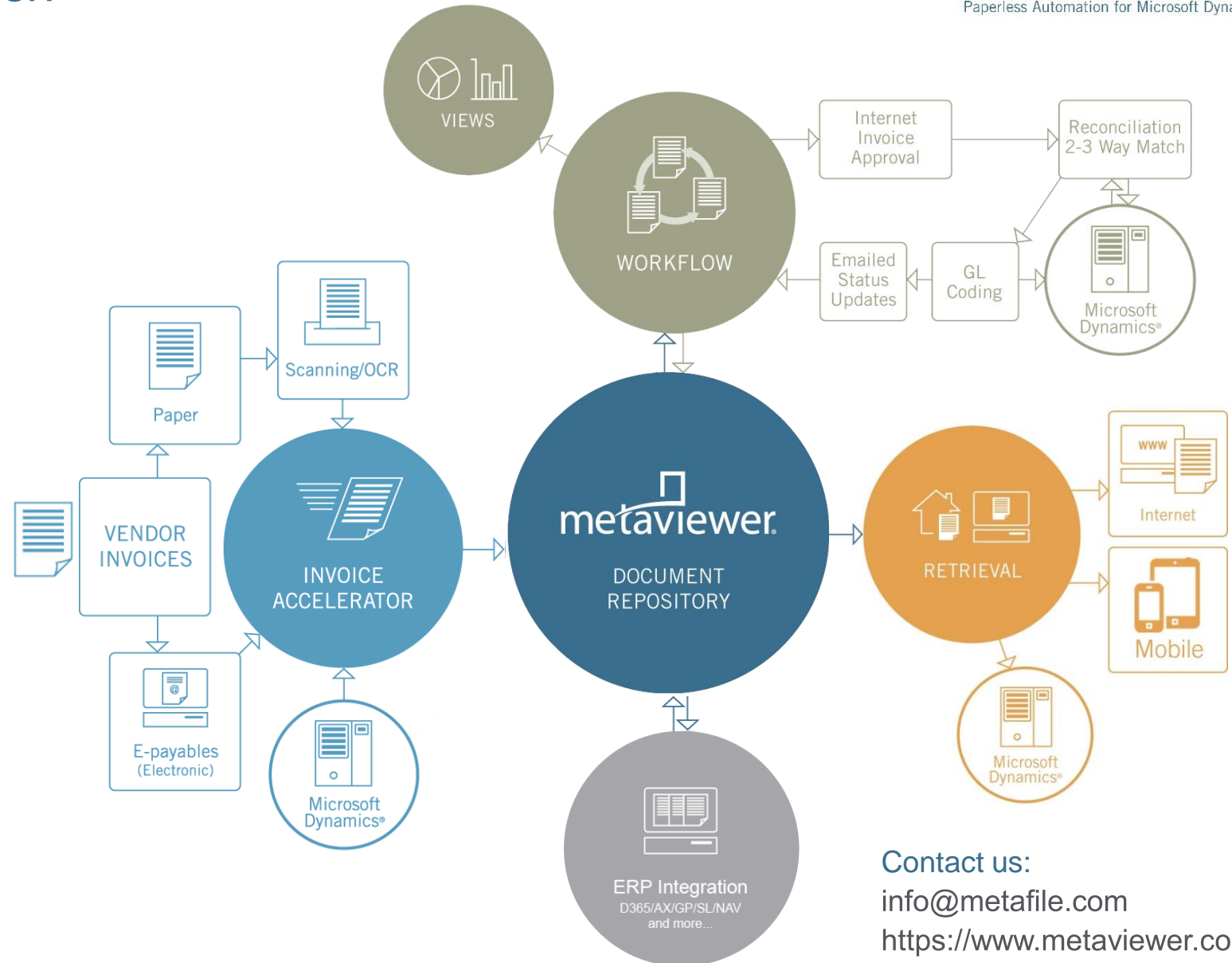
- Non-PO Approval and Coding
- PO Reconciliation
- Data Validation

- **ERP Integration**

- All Microsoft Dynamics ERPs and more

- **Retrieval**

- Standard browser interface
- Directly from Dynamics screens



Contact us:
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<https://www.metaviewer.com>



Data-based forecasts,
Smart safety stock policy,
Optimal purchase orders
for GP -- *all in the cloud.*

RESULTS:

- Cut costly excess stock
- Reduce stock-outs
- Create orders faster



Advanced Bank Reconciliation

FOR DYNAMICS GP



- ❶ **Auto-post Bank Transactions** — automatically create/post GL journals from your statement
- ❷ **Automatically Extract** GL transactions when you open the ABR reconcile window
- ❸ **Reconcile credit cards** and **Payment Gateways** in addition to your bank accounts
- ❹ **Reconcile rules** are defined either at the company or bank account level
- ❺ Supports **BAI** and **CSV** files
- ❻ Auto-group transactions using the **Deposit Groups** capability
- ❼ Print **historical reports**

Intelligent business solutions for growth

Kim Haythornthwaite
kimh@nolanbusinesssolutions.com
www.nolanbusinesssolutions.com

Administration

Configure

Inventory Trx

Label Jobs

Add Adjustments

Assemble

Associate Mfg Item

Convert Item

Generic Transaction

Item Bin Move

Move License Plate

Project Transfer

Receive Inventory

Replenishment

Remove Adjustment

RMA Receiving

Site Transfer

Spot Count

Stock Count

Transfer Request

Vendor Return

Inventory Settings

This page manages various lists used throughout inventory transactions. Most of the settings in these sections can be defined on a profile-level. Review general settings by feature and Define your configuration settings for inventory transactions. The default assignment is listed next to each setting name. An "" identifies if a profile has a different assignment from the default. Click the setting name link to make change

Expand All

General Inventory Settings

Setup for Lot Tracking

Setup for Serial Tracking

Setup for Multiple Bin Tracking

Setup for License Plate Features

Receiving Transaction Settings

Adjustment Transaction Settings

Site Transfer Transaction Settings

Inventory Count Settings

Vendor Return Transaction Settings

Stock Replenishment Transaction Settings

2:16

ZEBRA

Remove Inventory

Work Order: DEMO

Site	WAREHOUSE
Reason	DAMAGED
Item	04003207

Peanut M&Ms 1.74oz

Bin	A-10001
UOM	Each
Quantity	12

1 2 3 -

4 5 6

7 8 9

, 0 .

2:15

ZEBRA

PO Receiving

Vendor	ACETRAVE0001
PO #	2012-1
Vendor Doc #	030119
Item	
Item Description	
To Bin	
UOM	
Quantity	

Verticals Served

- ❖ Manufacturing & Distribution
- ❖ Life Science & Healthcare
- ❖ Utilities, HVAC & Engineering
- ❖ Banks & Casinos
- ❖ Non-Profits & Education

What's New?

- ❖ Competitive upgrade program
- ❖ New device options
- ❖ Camera-scanning for phones
- ❖ Q2 Fixed Asset promotion

Why Panatrack?

- ❖ Best-in-channel support
- ❖ Fast implementations
- ❖ Cloud-hosted or on-premise
- ❖ Dedicated GP expertise



encore

Project Tracking w/Advanced Analytics

A flexible and easy-to-use solution for Microsoft Dynamics GP

The screenshot displays the 'Payables Transaction Entry - TWO (sa)' window in the background and the 'Payables Transaction Entry Distribution - TWO (sa)' window in the foreground. The 'Payables Transaction Entry' window shows a voucher for \$750.00 from vendor ACETRAVE0001. The 'Payables Transaction Entry Distribution' window shows a distribution to GL account 400-6520-00 for \$750.00. A third window, 'Project Tracking Distribution - TWO (sa)', is also visible, showing a breakdown of the distribution by project and user-defined fields.

Co ID	Account	Type	Debit	Credit
TWO	400-6520-00	FURCH	\$750.00	\$0.00
TWO	000-2100-00	PAY	\$0.00	\$750.00

Project ID	GL Account	Amount Type	Breakdown	Amount
DIERKS BENTLEY	400-6520-00	ACTUAL COST LABOR	SECURITY	\$750.00
ALAN PETERS	MTS CENTRE	MUSIC		0.00

- Allows you to maintain a streamlined Chart of Accounts
- Tracks budget versus actual and reports on variances
- Quickly assign Dynamics GP transactions to projects at the time of transaction entry
- Quick to implement, flexible and easy to use



Advanced Budgeting & Reporting

BI360

Better, faster decisions



Advanced Budgeting & Reporting

www.solverglobal.com

Budgeting

- ✓ Data integration
- ✓ Parameter-driven models
- ✓ Web-based data entry
- ✓ Budget workflow
- ✓ Built-in comments & line items
- ✓ Dynamic forecasting & modeling

Reporting

- ✓ **ONE** database (DW)
- ✓ **ONE** reporting tool
- ✓ **ONE** user interface (portal)



Historian



Analyst

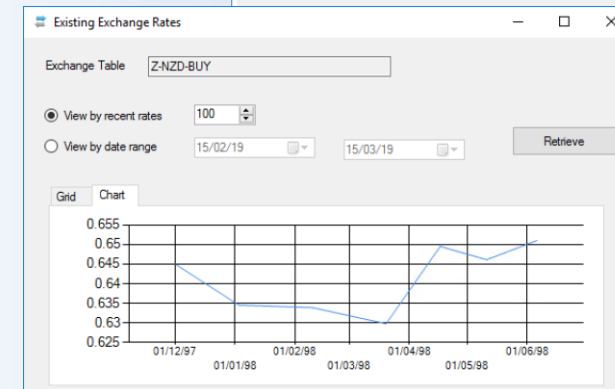
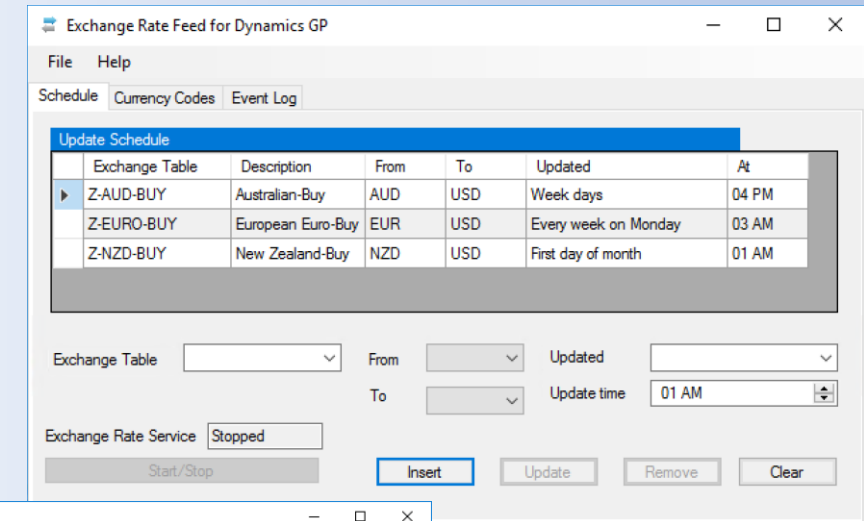


Futurist

Exchange Rate Feed

automated entry of exchange rates

- Eliminate repetitive entry of exchange rates
- Import rates from a selection of external sources (both free & subscription web services)
- View exchange rate graphs
- Runs as a background windows service





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GP Elementz Portal : PurchaseHQ



ISC Software

Extend your Dynamics GP system and allow users to manage purchasing.

The screenshot displays the PurchaseHQ interface. On the left, a mobile app interface is shown with buttons for 'Go to Order', 'Go to Order', 'Create Receipt', 'My Orders' (1 released orders), 'My Receipts' (1 orders awaiting receipt), and 'My Approvals' (19 documents awaiting approval). The main area shows an 'Invoice Approval' table with columns for Date, Invoice, and Company. A modal window titled 'Allenson Properties' is open, showing details for 'Invoice - 20109A'. The modal includes links for 'Supplier' and 'Invoice.pdf', a table of invoice details, a 'Reason' dropdown, a 'Comments' text area, and 'Approve' and 'Reject' buttons.

Date	Invoice	Company
02 Apr 2018	00101	4.20 Fabrikam, Inc.
02 Apr 2018	00102	4.55 Fabrikam, Inc.
02 Apr 2018	00103	8.46 Fabrikam, Inc.
0501		5.00 Fabrikam, Inc.
071		4.56 Fabrikam, Inc.
086		5.00 Fabrikam, Inc.
087		0.00 Fabrikam, Inc.
088		5.00 Fabrikam, Inc.
10100		0.00 Fabrikam, Inc.
10101		2.12 Fabrikam, Inc.
10102		2.35 Fabrikam, Inc.
10104		4.55 Fabrikam, Inc.
10109		\$ 143.40 Fabrikam, Inc.
10113		\$ 871.50 Fabrikam, Inc.
30 Apr 2018	20104	\$ 2,397.60 Fabrikam, Inc.
30 Apr 2018	20105	\$ 2,178.75 Fabrikam, Inc.

Allenson Properties

Invoice - 20109A

[Supplier](#)
[Invoice.pdf](#)

Date	30 Apr 2018	Subtotal	\$ 5,100.00
Vendor	ALLENSON0001	Trade Disc	\$ 0.00
Description	Down pmt - Edison Estates	Freight	\$ 0.00
		Misc	\$ 0.00
		Tax	\$ 0.00
		Total	\$ 5,100.00

Reason:
Choose Reason

Comments:

Approve
Reject



Inventory Cross Reference

Create unlimited *item number aliases* in Dynamics GP

Alternate Part Number	DISK DRIVE	🔍
Item Number	4-A3666A	🔍
Item Description		
Comment	External Disk Drive	

➤ *Your inventory can be managed with supplier UPC numbers or your own! Create and manage “alias” identifiers that mean something to you.*

Questions?

