

Rapid Fire!

Get Ready for the
Firehose Effect!



Kim Peterson

 Dynamics Connections

Thank you

1. Follow up Survey:
<https://tinyurl.com/y4bjvdsu>
2. “ISV Check List” or survey emailed to you.
3. Place a ✓ by the names of interest
4. A follow up survey will follow, complete, we’ll share the Slides and Recording



| Checklist | Company | Product |
|-----------|-------------------------------|---|
| | Aatrix | Aatrix State & Fed Payroll Reports, Payments, and eFiling |
| | Dynamic Budgets | Dynamic Budgets |
| | DynamicPoint | Customer, Vendor & Employee Portals |
| | enChoice (ImageTag) | EasyAP365 |
| | Encore Business | KwikPayables |
| | Envisage | Bank Reconciliation Tools - Account and Auto Reconciler |
| | EthoTech, Inc | Post Master Enterprise |
| | Gorilla Expense | Exchange Rate Feed |
| | Greenshades | Commission Plan |
| | ICAN Software | Gorilla Expense T&E Expense Reporting Solution |
| | JAT Computer Consulting, Inc. | Greenshades Online Employee Portal |
| | JAT Computer Consulting, Inc. | Mass Apply for AR and AP |
| | Jovaco | JAT Benefits Connect |
| | Liaison Software | JAT Payroll Interface |
| | Metafile | Jovaco Project for Professional Service Automation |
| | MSX Group | Liaison Messenger EDD |
| | Netstock | MetaViewer Paperless Automation from Metafile |
| | Nodus | Prospero |
| | Nolan Business Solutions | NETSTOCK |
| | Sierra Workforce Solutions | ePay Advantage |
| | Solver | Nolan GP InterCompany Posting |
| | StockIQ | Nolan GP TimeMaster Suite of Time & Attendance Solutions |
| | True Sky | Sierra's TimeMaster Suite - Demand Planning |
| | TrueCommerce | StockIQ's Supply Chain Planning Suite |
| | Vertex | True Sky |
| | Vivid Reports | TrueCommerce, Commerce Network |
| | Winthrop Dev. Consultants | Sales and Use Tax Automation Solution |
| | | Vivid Reports - Financial & Budgeting Software |
| | | GP Power Tools |

Purpose:
To educate
you about
Dynamics
GP ISV
solutions.



PROSPERO

A New Day for Financial Reporting & Budgeting

Auto-Expand Summary Rows

Add Customized Segments/Dimensions

Change Drill-down Order on the Fly

Toggle between Reports and Charts

Budget HR, Capital, Revenue and Line Item Details

Secure all Segments by User or Group



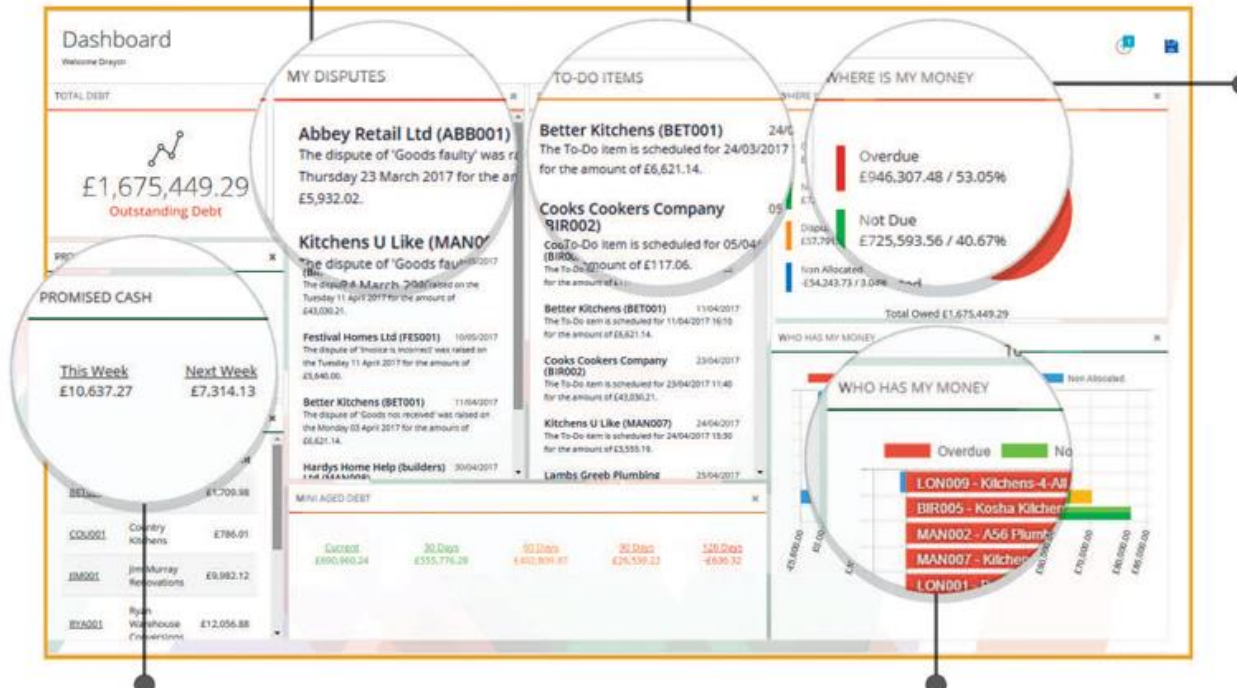
The Credit Hound for Dynamics dashboard



My disputes

My To-Do items

Where is my money



Promised cash

Who has my money

Automated workflows & collections paths

Each Customer group can have a tailored collection path;

- Phone Calls
- Emails
- Account on Hold
- Set Group/Category

Example company:

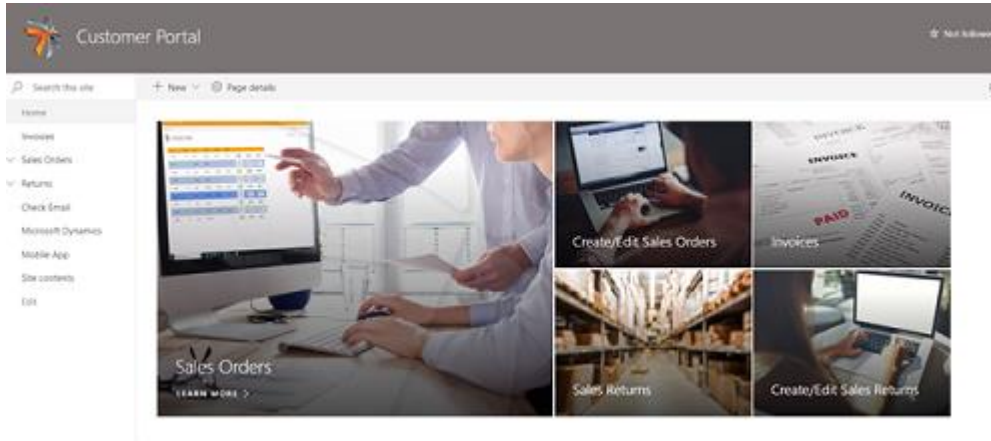
- **\$5 Million** annual turnover
- **\$800,000** outstanding debt
- **58 DSO** (days sales outstanding)
- **3%** bad debt written off
- **150** chasing letters sent per year

Within 3 months of using Credit Hound:

- **39 days** DSO
- **2%** bad debt written off
- **\$260,000** annual cash flow benefit
- **\$18,000** annual savings on interest
- **\$50,000** annual savings on written off bad debt
- **\$2,000** annual savings on postage

Total annual saving of \$70,000

Customer, Vendor Employee Portal with Office 365



| No | Status | PO No | Order Date | Requested D... | Promised Date | | |
|--------|----------|------------|------------|----------------|---------------|------|-------|
| ▶ 1008 | Released | 34523 | 2/28/2018 | | | View | Print |
| ▶ 1011 | Released | RBS0101018 | 3/28/2018 | | | View | Print |
| ▶ 1014 | Released | | 3/26/2018 | | | View | Print |
| ▶ 1015 | Open | | 3/26/2018 | 2/21/2018 | | View | Print |

Want 24x7 Self-Service
for customers, vendors
and your employees?



ROLL REPORTS AND PAYMENTS FOR cs GP

in the US and Canada.

and billions in **Payments** annually.

MMENDED

ners say they
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
ments, filing statuses, and filing history.

SUPPORT GROUP to call for answers and assistance
when eFiling to any federal or state agency.

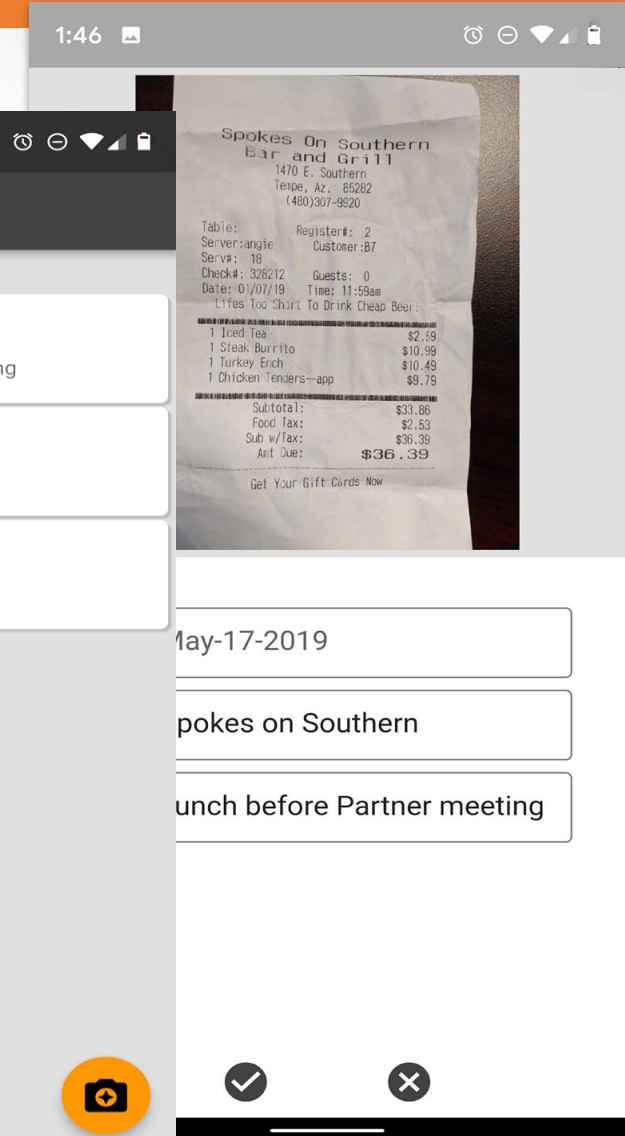
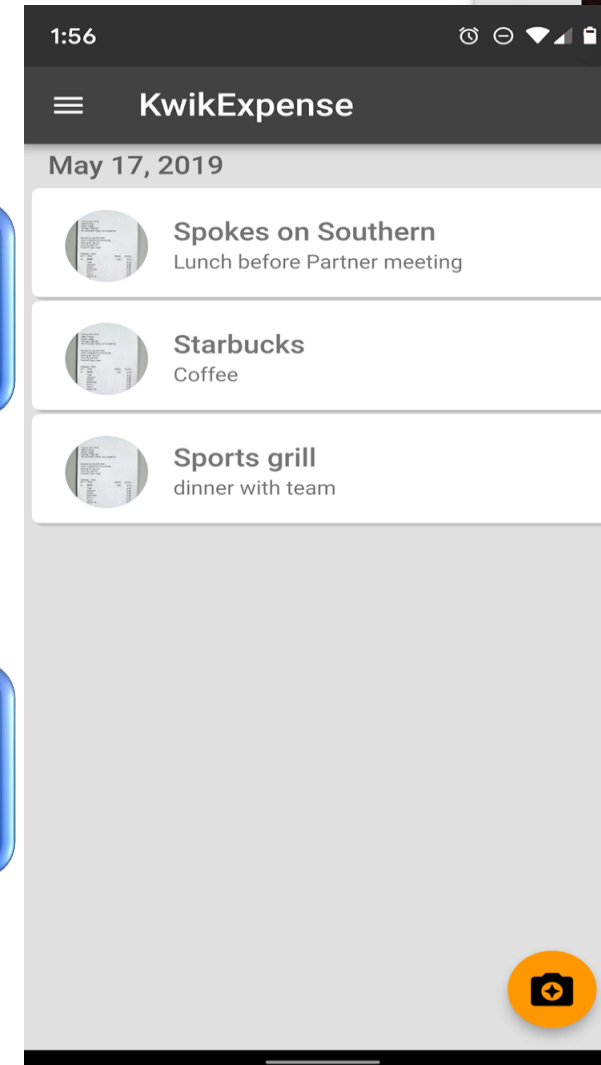
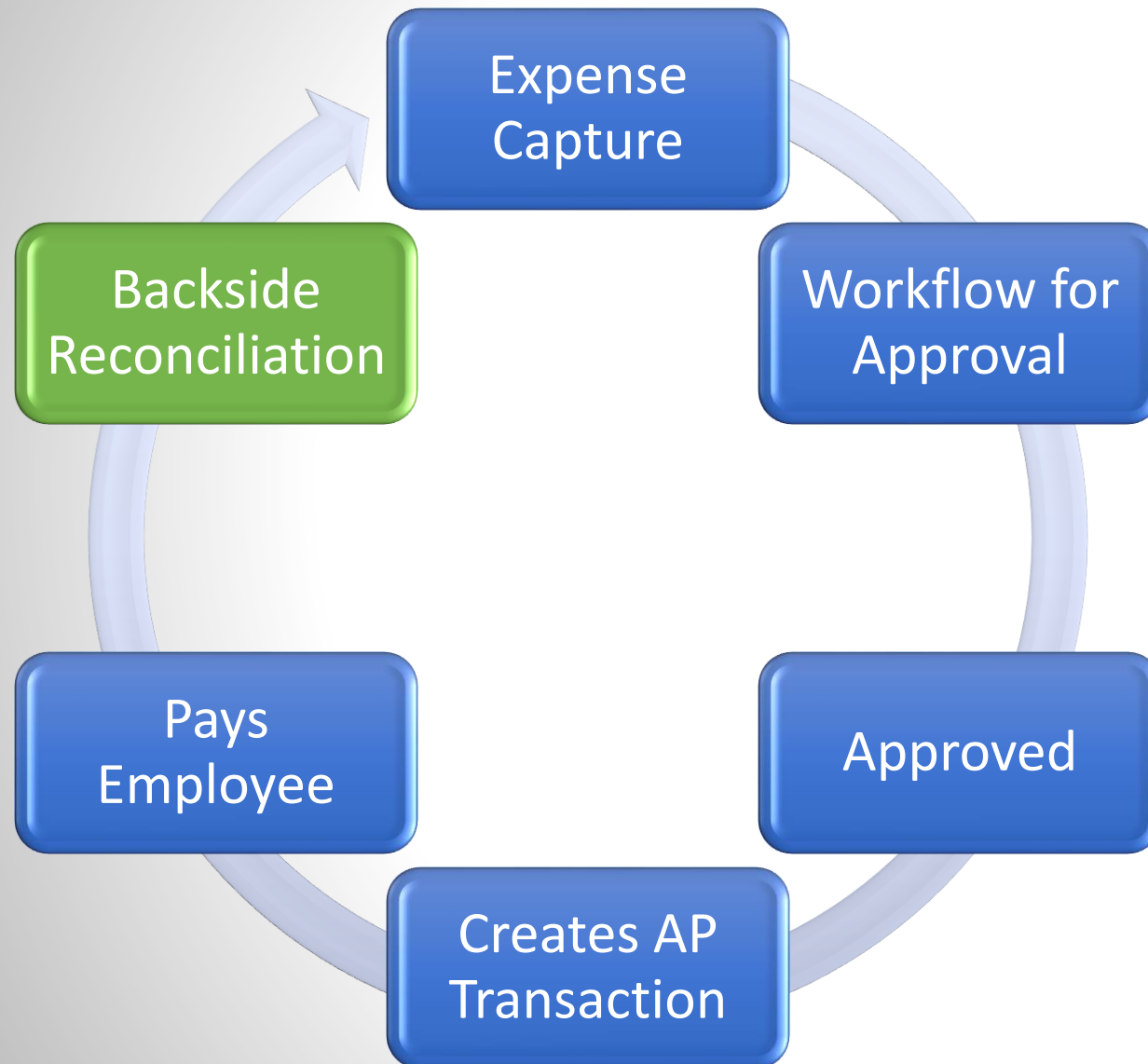


Download the **FREE** demo software at
partner.aatrix.com/msdynamicsgp

or call
800-426-0854



■ KwikExpense – Complete Expense Management



Olympic Systems Project Cost
powered by Rockton Software



Process all transaction types in
standard GP forms with fewer keystrokes
& errors

Manage use of **custom reports** without
administrative rights or server access

Intuitive **project management**

Simplify your workflow!



Work Simpler & Easier®

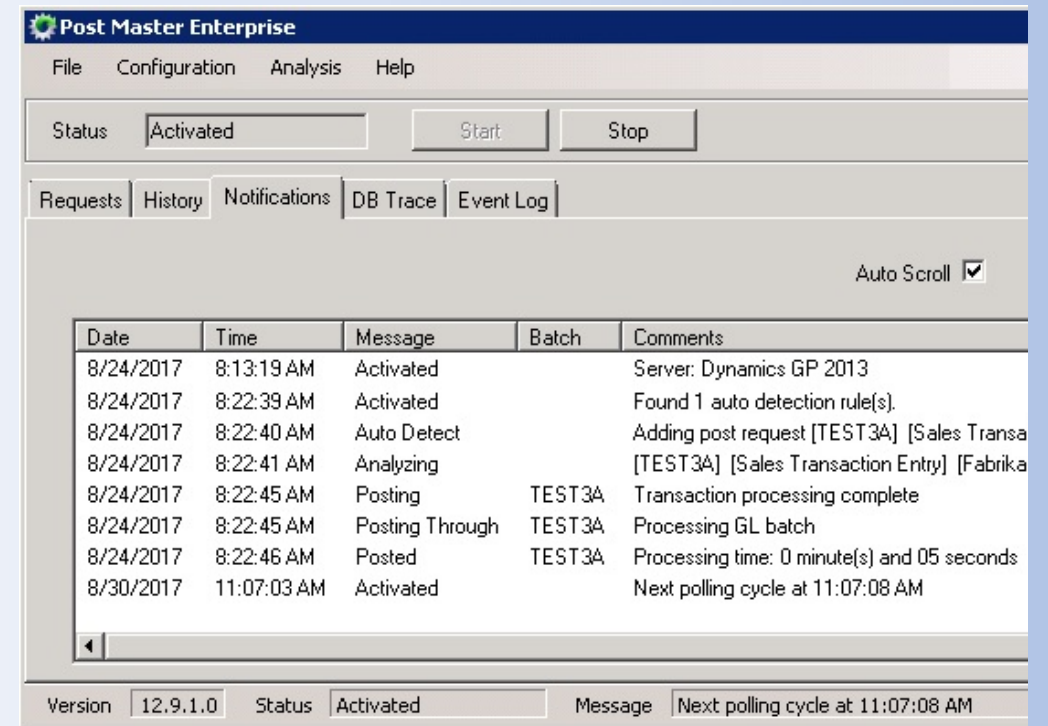
sales@rocktonsoftware.com
www.rocktonsoftware.com



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



GP Power Tools – Developer Tools

GP Power Tools – Developer Tools module provides Dexterity, SQL, C# & VB.Net scripting inside Dynamics GP.

- **Create** - Customizations, Fixes, Automate & Self Service Scripts
- **Easy** - Easy to develop and maintain, without needing to exit GP
- **Simple** - No extra deployment steps or upgrade steps required
- **Flexible** - Use multiple languages, use the best tool for the job

Build 28 adds many features. Replaces VBA. Works on Web Client.

For information and lots of Script examples: <http://WinthropDC.com/GPPT>



encore

Bank Reconciliation Tools

Account Reconciler & Auto Reconciler

Improves your bottom-line by saving time!



FREE 30 day trial
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

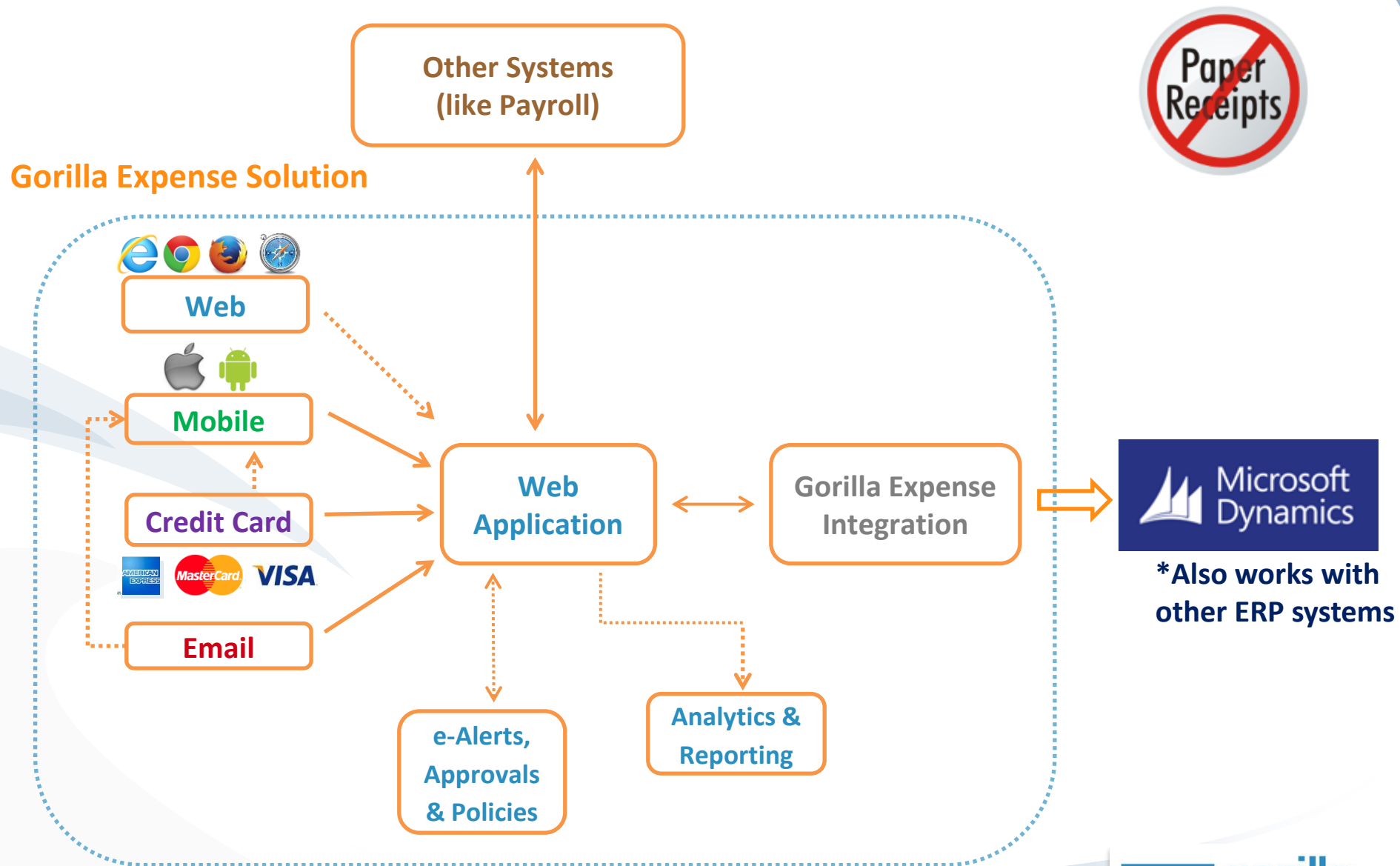
Extending the Power of Dynamics GP with Nolan's Intercompany Series



Gorilla
Expense

T&E
Expense
Solution

T&E Automation Done Right!



***Also works with
other ERP systems**

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 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

Rockton Pricing Management



Automated Dynamic Pricing

Simply establish any pricing scenario one time and RPM does all the calculations and hard work behind the scenes.

Simplified Price Lists

Create, organize, filter and search all your price lists super fast.

Rebates, Commission, Offsets, and Other Adjustments

Track special pricing adjustments and make sure someone gets paid for it downstream.

Date Driven Pricing

Assign valid date ranges to your price lists in RPM and you will automatically get the right one - on *your* schedule.



Work Simpler & Easier®

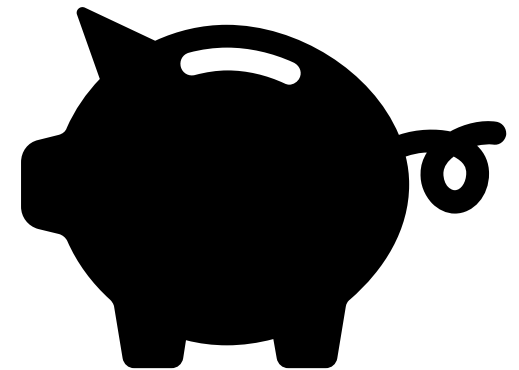
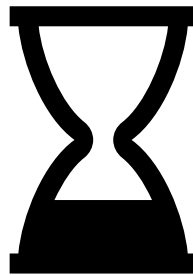
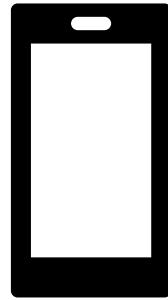
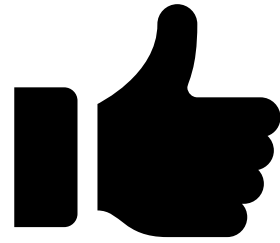
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Time & Expense

for Projects, Billing, and Payroll

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CONNECT ACROSS THE SUPPLY CHAIN

TrueCommerce™

Do business in every direction



TRADING



COLLABORATION



COMMERCE



INVENTORY



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 |



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?



Best-In-Class HRM Solution

JAT's Benefit Connect

Takes Benefit Data from GP HRM

Time Saver

Better and Faster Reporting

No More Missed Enrollments

Single Source of Data

Designed for Less Tasks & Errors





Prophix®



Established
in 1987 by finance
executives



Laser focused
on the Corporate
Management Software
(CPM) space



Prophix empowers
organizations to bring
together all data sources
on a single platform



More than
3500 customers in
over 100+ countries



Recognized by
Industry Analysts for superior
user experience



Headquarters:
Toronto, Canada area.
Other locations: UK, US,
South America, Denmark,
Germany

ServiceMASTER®
CANADA

Premise Health®



Port of
Tacoma



MATTRESSFIRM®

FEEDING
AMERICA

 Prophix®

LUSH
FRESH HANDMADE COSMETICS

Get your e-book!



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



Easy AP365



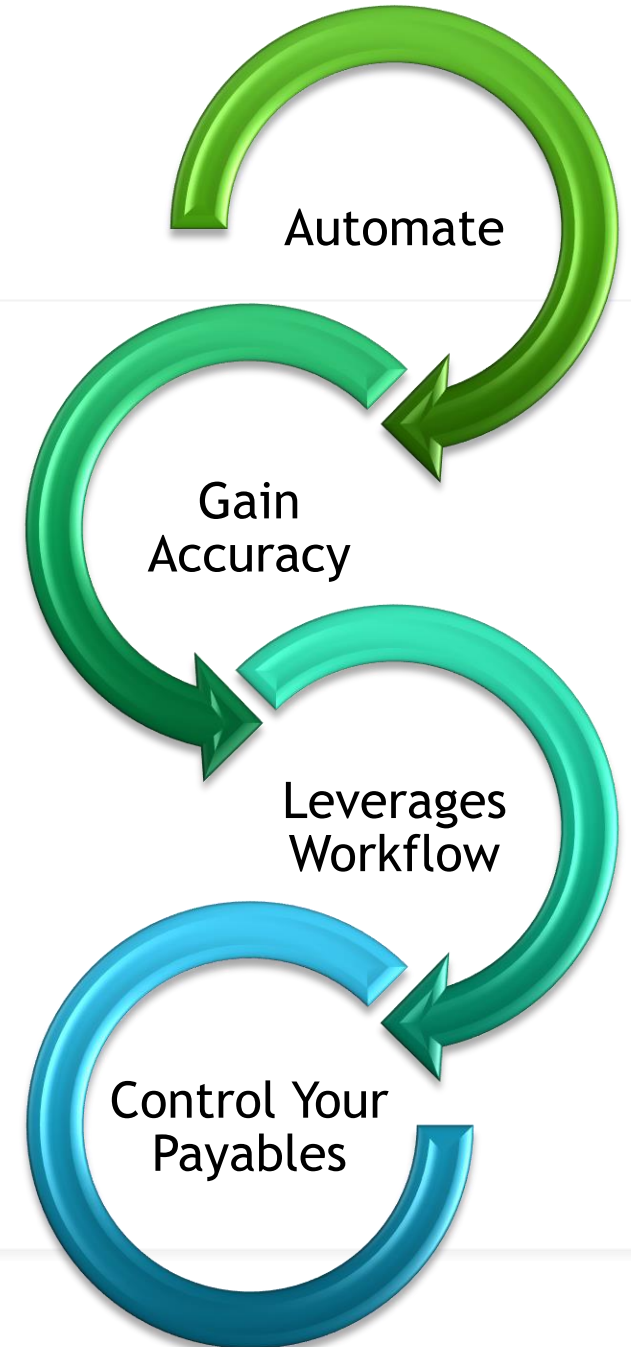
How EasyAP365 Offers More Functionality
at a Fraction of the Price



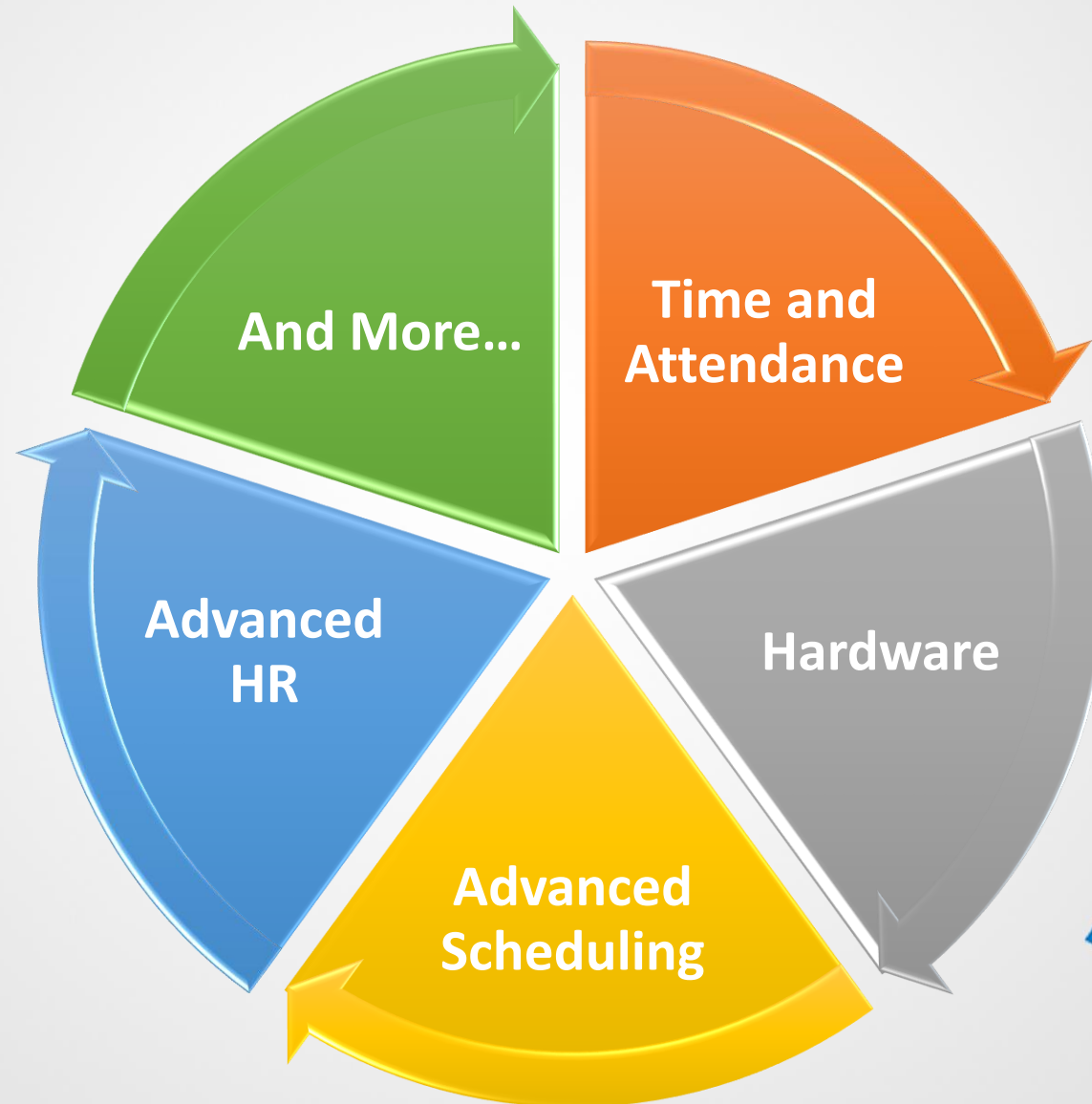
Parts of Invoice Automation
that must be provided



DynamicPoint leverages
Office365 while focusing on
ERP Integration



Sierra Workforce Solutions



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

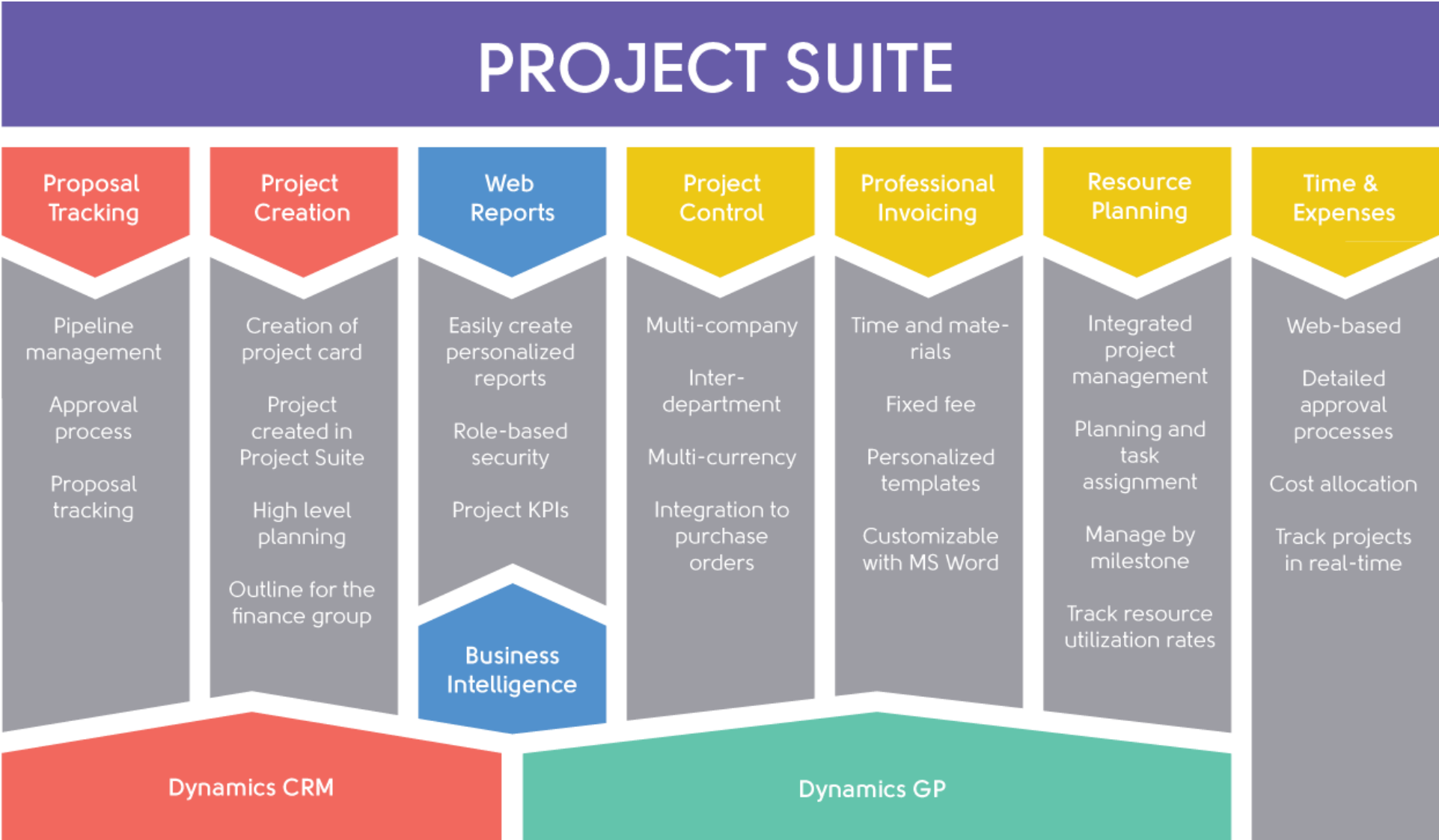
Improve Sales and Use Tax Compliance with Vertex

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



Best-In-Class HRM Solution

JAT Payroll Interface

**Control
Benefits Costs**

**Improve
Employee
Retention**

**Reduce Labor
Costs**

**Improve Tax &
Regulatory
Compliance**

**Reduce
Manual Tasks
& Errors with
Integration**

**Improve Profit
Through
Efficiencies**

Automating AP and more with Robotic Process Automation

- **Capture and Extract**

- Watched email box
- 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

Solution Expansion:

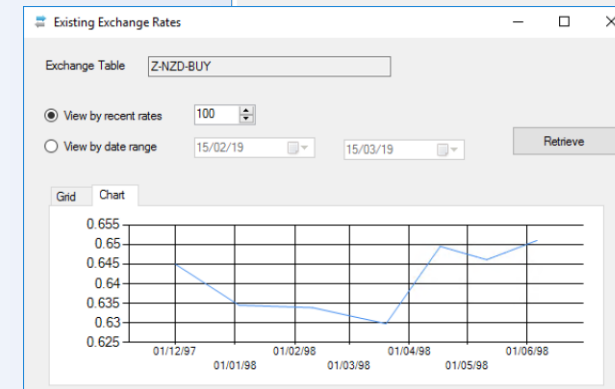
- Enterprise expansion: AR, HR and Legal
- Adding New Vendor Workflow
- Auditor Searching
- Payment Batch Approval
- Contracts
- Customer Specific Needs
- Expense Report Workflow
- Journal Entry and Workflow
- Packing Slip Receiving
- Requisition Approval Workflow
- Touchless Invoice Processing

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

| Exchange Table | Description | From | To | Updated | At |
|----------------|-------------------|------|-----|----------------------|-------|
| Z-AUD-BUY | Australian-Buy | AUD | USD | Week days | 04 PM |
| Z-EURO-BUY | European Euro-Buy | EUR | USD | Every week on Monday | 03 AM |
| Z-NZD-BUY | New Zealand-Buy | NZD | USD | First day of month | 01 AM |





- Flexible Auditing
- Easy Reporting
- Track Security Changes
- Define Segregation of Duties
- Electronically Sign Documents

**Track It. Audit It. Authorize It.
Report It.**



Work Simpler & Easier®

sales@rocktonsoftware.com
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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



Focus on High-Value Items Rather Than the Drudgery of Budget Preparation



Leverage
Excel

Empower
Finance
Group

Facilitate
Knowledge

BUDGETING PLANNING FORECASTING REPORTING

NODUS[®]

A division of **EV³**

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



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 "Drill Across" window is open, showing a table of transactions for the year 2022. 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 | \$38,937.00 |
| 2022 - BUDGET | \$35,904.30 | \$37,591.50 | \$36,530.35 | \$37,884.10 | \$35,904.30 |
| 2021 - Actual | \$34,802.10 | \$36,060.30 | \$35,012.70 | \$34,929.90 | \$34,802.10 |

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 data points. The data points are as follows:

| Month | Value |
|-------|-------------|
| 1 | \$34,802.10 |
| 2 | \$36,060.30 |
| 3 | \$35,012.70 |
| 4 | \$37,840.00 |
| 5 | \$36,530.35 |
| 6 | \$37,884.10 |
| 7 | \$38,937.00 |
| 8 | \$38,004.00 |
| 9 | \$37,591.50 |
| 10 | \$36,060.30 |
| 11 | \$35,904.30 |
| 12 | \$34,929.90 |

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 | Amount | YTD Amount |
|------------------|-------------------|--------------------|
| Hourly | \$1,300.00 | \$17,000.00 |
| Overpayment | \$0.00 | \$0.00 |
| Floating Holiday | \$0.00 | \$0.00 |
| Hourly | \$0.00 | \$0.00 |
| Post Time Off | \$0.00 | \$0.00 |
| Total | \$1,300.00 | \$17,000.00 |

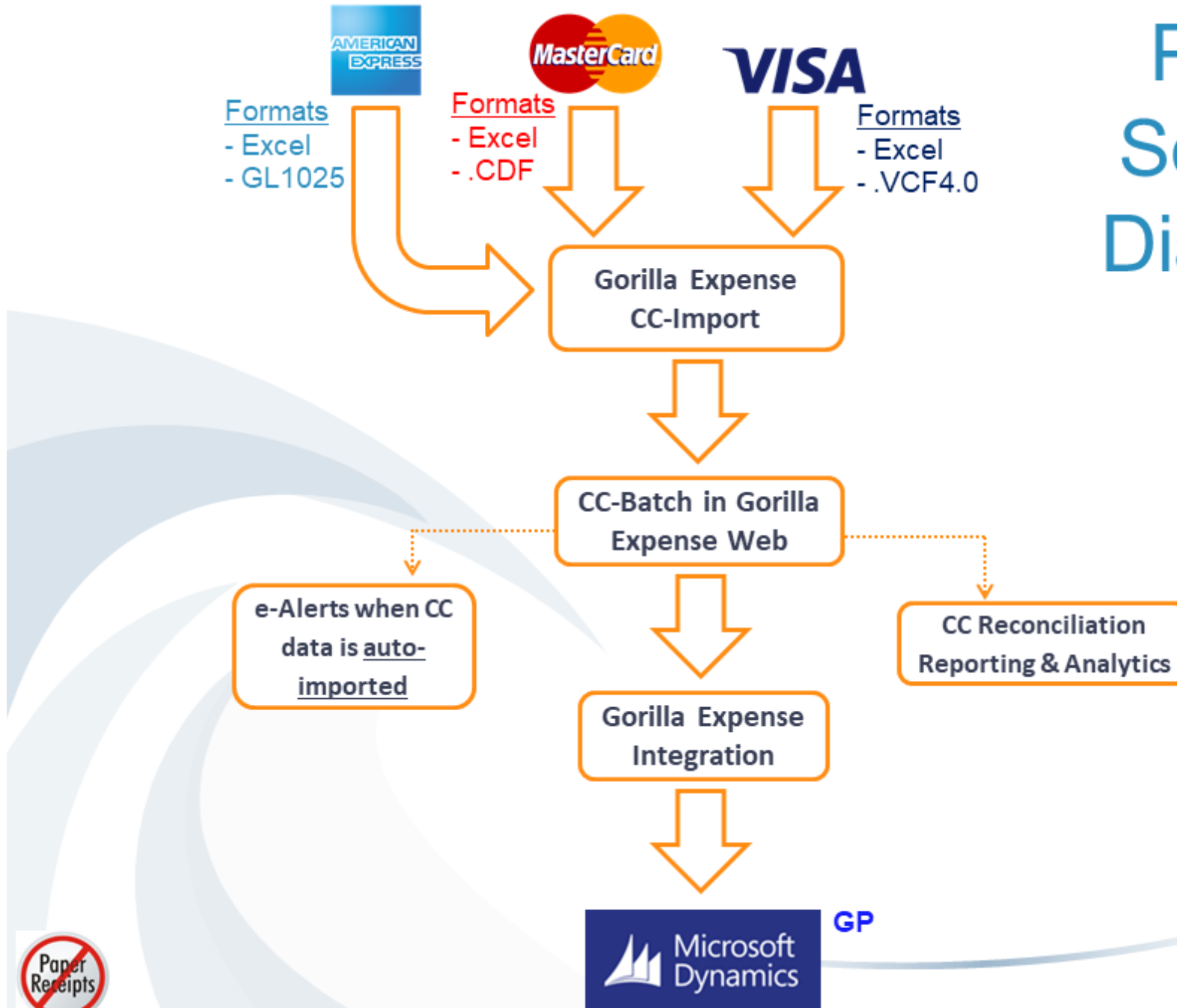
| Payroll Deductions | Amount | YTD Amount |
|--------------------|----------|------------|
| 401K | \$104.14 | \$2,047.21 |
| 401K | \$104.14 | \$2,047.21 |
| 401K | \$104.14 | \$2,047.21 |
| 401K | \$104.14 | \$2,047.21 |

| Taxes | Amount | YTD Amount |
|-------|----------|------------|
| FED | \$104.14 | \$2,047.21 |
| STATE | \$104.14 | \$2,047.21 |
| CITY | \$104.14 | \$2,047.21 |
| LOCAL | \$104.14 | \$2,047.21 |

Gorilla
Expense

PCard
Solution

P-Card Solution Diagram



Questions?

Next Steps

Kim@DynamicsConnections.com

