

Top 6 Tips for Digital Transformation while staying on Microsoft Dynamics GP

Organizations that are currently using Dynamics GP can achieve many of their Digital Transformation goals without the need to migrate to the cloud with Business Central.

GP

Microsoft
Dynamics

DIGITAL TRANSFORMATION AND BUSINESS TRANSFORMATION have been around for years. Best Practices suggest the use of digital technology and processes to accelerate repeatable tasks, facilitate decision matrices to automate and route more complex tasks, and to capture data for greater analytics and insights into OKRs (objectives and key results). Starting well before Y2K, companies have been trying to go paperless with the additional use of scanners to digitize documents, email to send digital documents, and automated data transfers between trusted partners, all in an attempt to improve productivity and reduce costs associated with manual processes.

A lot has matured over the past 30 years in both ERP software and business processes. Your original Dynamics GP install may have been implemented decades ago and thus in need of a refresh and optimization. In recent years, the emergence and maturity of cloud-based subscription software has allowed large third-party add-on applications, typically reserved for the large enterprise space, to become more affordable and repackaged for SMB and Mid-Market organizations, thus yielding a greater ROI for Dynamics GP users.

The Dynamics GP roadmap has been extended to the year 2028 and beyond. With continued investment in Dynamics GP and third-party applications, your current ERP platform can be extended and used as the foundation for Digital Transformation with these 6 tips:

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REVIEW YOUR BUSINESS PROCESSES

Back to the Basics – Individual process review and time studies.

The original use of time studies started during the beginning of the industrial revolution over 100 years ago. They focused on a worker's time spent on individual movements and tasks on a manufacturing line. Fast forward a century, there continues to be a number of back-office tasks that can be accelerated, automated, or even eliminated based on additional business process analysis.

WHAT TO LOOK FOR:

- Manual data entry or keying in data.
- Opening, viewing, routing, sorting, saving, reattaching documents.
- Switching between applications, screens, tabs.
- Exporting information into Excel for analysis or processing.
- Sending and receiving documents and approvals.

HOW TO RESOLVE:

- Start digital, stay digital – look at integration points between systems. Encourage customers and vendors to send digital copies rather than paper-based documents.
- Look for process optimization opportunities. Sometimes external experts are able to bring a fresh perspective to teams resistant to change.
- Use machine-based OCR reading of digital documents (Optical Character Recognition) to pre-populate fields with relevant data. Cost savings can range from \$1 to \$5 per invoice touched.
- Increase your adoption of built-in functions within Dynamics GP. Many of these functions have matured over the years and are worth being adopted. Additional Dynamics GP training may help to close gaps. Example EFT and other digital payments.



FURTHER AUTOMATE FINANCE PROCESSES

Follow the bouncing ball. Create a process map to follow key documents and touchpoints.

Take a special look at your financial processes, including your Order-to-Cash and Procure-to-Pay processes. Review and document how transactions are performed and what documents, decisions, audit trails, and data are captured. In addition to understanding the end-to-end process at a high level, it is recommended that an additional deeper analysis be conducted for scenarios that have higher volumes, or are more time-consuming, as these tasks often represent an opportunity for above-average savings.

Note, there is often a balance between security and controls vs convenience for users. The decisions around segregation of duties and division of labour may have been made in the past based on the individual needs or capabilities of previous staff members. By gaining additional data and visibility into these process flows, approval processes, and reporting inquiries, your Finance team should be able to identify common document flows that can be optimized.

WHAT TO LOOK FOR:

- Email requests for authorizations to order, to spend, to pay that are repetitive or predictable.
- Transactions that are consistent on a replenishment basis or subscription basis – for example certain utilities, office water cooler supplies and quarterly maintenance may align within pre-approval guardrails.
- Reporting and analytics related to month-end close that are repeated on a monthly basis.

HOW TO RESOLVE:

- Change and optimize finance processes, business rules, and reporting to create a greater level of consistency and repeatability. Think of the 80-20 rule for capturing the majority of tasks.
- Consolidate reports so that end-users can quickly filter the reports for their personalized needs, rather than requiring a custom report or ad-hoc analysis and manual modification.
- Review and create new decision trees, approval thresholds and variance calculations related to approvals, requests for process visibility, and provide automated alerts on an exception basis. A monthly or even quarterly summary may suffice, rather than daily or weekly approvals for common transactions.
- Dynamics GP workflow automation includes a variety of mature tools included as no-charge within Dynamics GP. These functions have been enhanced and updated over each of the past 4-5 releases.



DESIGN & BUILD ADDITIONAL LINE OF BUSINESS METRICS

Review of business value and value-added functions – OKRs.

The need for analysis and metrics extends far wider than just the Finance team. True digital transformation looks at areas outside of finance that can automate other work processes. Sometimes there are apps and automation unique to specific departments and may require an additional focus or more technical review of data models. Often data capture and analytics are key skills that the Finance team can share with other operational teams.

Setting goals for desired Outcomes and Key Results (OKRs), formerly known as Key Performance Indicators (KPIs) can set some key measures for success. Some may be proactive and focus on unique value-added efforts, while others can be more reactive supporting accountability to specific performance expectations.

WHAT TO LOOK FOR:

- Departmental apps, forms, and reports that the Finance and IT teams can help to create and automate. Can any of these processes be integrated with Dynamics GP as an input or trigger for other processes?
- Administrative tasks within departments that could be centralized or automated.
- Measurable outputs and metrics on a departmental basis that other teams rely on. Map out a value chain of interconnected metrics that could be used as a scorecard.
- Are there key metrics from Dynamics GP that should be shared to support or validate the metrics used within other departmental OKRs.

HOW TO RESOLVE:

- Find opportunities for data and metrics within Dynamics GP to complement departmental dashboards to serve as trend-lines, leading indicators, or as benchmarks to validate trends and assumptions used when making business decisions.
- Work with departments to help automate tasks and reporting through cross-functional workshops building a shared understanding of process automation.
- Consider the Multi-entity Manager add-on for Dynamics GP to support a centralized approach in cases where there are multiple divisions or legal entities with common tasks that can be performed by a single shared-services team.
- IT teams can access the Microsoft Power Platform including PowerApps, PowerAutomate and Power BI to create forms, reports, dashboards, and simple workflow processes integrated with data found within Dynamics GP or SQL Server.



EXTEND SYSTEMS TO SUPPORT REMOTE SELF SERVICE

Set up integrated web portals and cloud apps for internal and external stakeholders.

Dynamics GP previously had a module called 'Business Portal' about a decade ago, but was since discontinued. This was in part due to other systems such as SharePoint that have portal functions that far surpassed the GP Business Portal making it redundant and obsolete. For many clients, similar remote user access for Purchase Requisitions, Time Entry and Expense Submissions were replaced primarily with direct access to Dynamics GP using the GP Limited User license, or via a third-party add-on, while others simply reverted back to a set of Excel sheets with manual input by the Finance team.

Aligning with the recommendations in GP Tip 1, to "Start digital/Stay digital", the adoption of self-serve portals can significantly reduce the manual data-entry needs of your Finance team while also saving others time on approvals, and responding to ad-hoc inquiries. New hybrid work-from-home strategies supporting a remote workforce has brought back to light the need for additional self-serve remote access for a wide range of functions and a broader user group than what has been seen in the past.

Software implementation costs, recurring annual subscriptions, and consumption-based fees should be factored into a business case for change, balanced with the value to both your finance team and end-user business community.

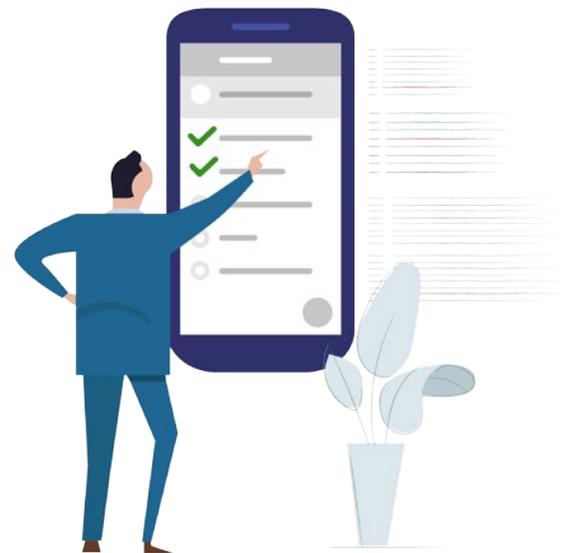
WHAT TO LOOK FOR:

- Explore options for remote submissions, self-service reporting and remote approvals. The behind-the-scenes review and approval processes are often spread across a wide audience of managers and leaders whose time may be better spent on strategic priorities than on administrative tasks. Automating such processes can greatly improve not only morale but overall organizational performance assuming the time saved is spent on more value-added activities such as coaching, mentorship and strategic initiatives.
- For such activities, look at key processes and develop some assumptions around metrics for the time taken per task (ie. invoices per day) and the frequency and prevalence of such tasks being performed across your organization (for example, purchase requisitions, invoice approvals, employee expense management, report distribution, annual and quarterly budgeting processes, and resource management tasks such as time entry, leave tracking, individual performance plans and related approvals for each).
- Rather than re-creating the wheel and trying to uncover processes suitable for self-service, look to the mature and emerging cloud application providers with apps that are solving common and proven market needs.



HOW TO RESOLVE:

- There are a number of cloud-based point solutions that can be cost-effectively integrated with your on-premise Dynamics GP. Many of these focus on major workstreams that include mobile apps, portal self-service, and facilitate manager approval workflows.
 - Purchase Order requisition portal and PO approvals workflow
 - Invoice and Accounts Payable automation, OCR coding, and approvals workflow
 - Advanced AP matching with POs, contracts and recurring transactions
 - Online billing portal with payment processing and Collections Management reminders
 - Expense submission portal and mobile apps with approvals workflow
 - Time tracking portal and mobile apps with approvals workflow
 - Leave management/vacation tracking portal and mobile apps with approvals workflow
 - Budget and forecast portal, financial planning, dashboards, and approvals workflow
 - Cloud-based dashboard reporting, data visualization and report package deployment
- Some vendors are increasingly creating unified applications that encompass multiple workstreams thus leveraging common approvals workflow and a unified user experience (for example, automated matching of scanned PDF invoices from vendors with POs / Purchase requisitions created via an employee portal).
- The Dynamics GP HTML5 Web client released in 2016 and further enhanced in 2018 may be a viable stepping stone for remote self-service, allowing users to access core GP functions and workflow approvals within Dynamics GP remotely on a smartphone, tablet, or laptop when away from their desk.



CREATE AN EXPANDED FOCUS ON COMMUNICATIONS

Leverage digital communications tools internally and with customers.

Providing an exceptional customer experience has been the mantra for many top consumer-focused organizations and is increasingly important for B2B customers and vendors. Communications related to transactional items such as notices, order confirmations, surveys, quotes, and invoices can all be sent through Dynamics GP via integrated Office 365 email for an enriched customer experience.

Internal inter-departmental communications are also important to help facilitate the automation of internal business processes. Workflow triggers can be set up to automatically email individuals based on key field changes. These can be related to security changes, adding vendors, purchase requisitions, and payables approvals. Specific dollar thresholds can be set for when and who to send internal notices or approvals to, as well as designated or multi-step approvals triggered based on a defined approval chain.

WHAT TO LOOK FOR:

- Set up a quarterly cross-functional team tasked to come up with ideas to improve customer communications. Included may be sales, marketing and operational teams both at an executive level as well as those who have direct customer interactions.
- Review the types of communications that you receive from your vendors. These may be a good example for similar communications that you could send to your customers. Similarly, customer satisfaction surveys may be something to consider sending to your clients.
- Documents that are printed and sent in paper format can often be sent digitally on an automated basis. The digital version may or may not eliminate the paper version, but in most cases will be faster and appreciated by the receiving party – your customer or vendor.
- Follow the flow of paper that is sent internally and reviewed by others. Are there specific initials, signatures or approvals being captured? Or is the information merely for informative purposes?
- Beyond just the movement of paper, document retention and storage policies should also be reviewed. Often digital document storage is cheaper, more secure, and easier to retrieve when needed.

HOW TO RESOLVE:

- Email is an easy-to-use and common means of sending and receiving documents and other communications to individuals. Generic, shared email accounts can be set up with ease to represent key customer-facing teams such as AR, Finance and AP.
- Internal workflow approvals for documents can be sent via email on an automated basis. Using the Dynamics GP Doc Attach functions, additional documents can be included in the emails.
- Third-party ISV (Independent Software Vendor) applications are available via Endeavour for advanced email management, collections management, document drag & drop into GP, as well as more advanced process automation tools that often include a communications component such as budget workflow collaboration and approvals, and notes related to PO requisitions, invoice payments and expense submissions.



MAINTAIN AN UP-TO-DATE DYNAMICS GP PLATFORM

Accelerate your Dynamics GP upgrade cycle to every 1-2 years.

Dynamics GP is a mature application with annual releases and updates from Microsoft including features and functions most requested by end-users and professional services firms such as Endeavour representing client needs. [Microsoft Forum for GP User Requests](#) 

New functions released are designed to improve controls, end-user productivity, and improve security associated with Dynamics GP. Upgrading Dynamics GP on an annual basis, complemented with internal end-user refresher training, will help with user adoption and awareness of productivity-saving options while maintaining security and interoperability with other systems.

WHAT TO LOOK FOR:

- Annual updates are faster and cheaper than when multiple version updates are skipped. For example, most of the recent upgrades from Dynamics GP 18.3 (GP 2021) to Dynamics GP 18.4 (GP 2022) were completed in many organizations as an ‘in-place update’ often in under a week.
- Keep an eye out for any notices from Microsoft or Endeavour with updates on specific application life-cycle dates related to Dynamics GP, SQL Server and Microsoft Windows Server, which are each needed for running Dynamics GP.
- Look for specific dates for the end of Mainstream Support for a specific version. Although Endeavour will still support you, some clients have seen increased ISV costs, and risk exposure for maintaining older systems.
- Previous guidance and practices have been to upgrade every 2-4 years based on the Dynamics GP fixed-term life cycle, with the new Modern Lifecycle and rate of change within the industry it is recommended that Dynamics GP upgrades be performed more frequently.

HOW TO RESOLVE:

- Plan and schedule an annual upgrade of your Dynamics GP ERP, Management Reporter, and ISV add-on applications. Application infrastructure, database, and operating system should be every 2-4 years.
- Get an upgrade quote from Endeavour to budget ahead of time for cost and resource allocation.
- Endeavour’s recommended upgrade process for larger upgrades follows a two-step process with an upgrade and testing within a test environment, before upgrading the Live production environment. Smaller annual updates between versions are quicker and less costly than GP upgrades that skip a few versions. Certain larger more complex installs required additional effort and time given past customizations.
- Be sure to subscribe to Endeavour’s monthly GP Insights Newsletter and mailing list for important notices and alerts. Subscribe by emailing support@gpsupportnorth.com.

View Endeavour’s overview of “What’s New” in Dynamics GP at:

<https://www.gpsupportnorth.com/gp/the-new-gp>



CONCLUSION | DYNAMICS GP IN SUPPORT OF YOUR DIGITAL TRANSFORMATION

GP

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Dynamics GP is here to stay. We have confidence in the stability of the platform. There are opportunities for process re-design and expansion of technology through built-in and integrated third-party systems to support your Digital Transformation. For all clients using Dynamics GP there are options. Options to stay, options to improve, options to expand and even options to change platforms. Trust in Endeavour's team of ERP experts to work with you side by side to review a business case for investing in your future. Endeavour's consultants have the unique perspective of actively supporting both Dynamics GP and Business Central, and are here to help you make your business better.

Contact Endeavour for assistance with your process review and software selection process as you continue along your Digital Transformation journey.

Dynamics GP Upgrade:

<https://www.gpsupportnorth.com/gp>

Business Central Overview:

<https://www.endeavoursolutions.ca/businesscentral>



www.endeavoursolutions.ca | www.gpsupportnorth.com

APPENDIX A | WHY ORGANIZATIONS SHOULD STAY ON DYNAMICS GP

- 1. Dynamics GP has an updated roadmap to 2028 and beyond.** The platform is used by tens of thousands of small and mid-sized organizations across North America and is expected to be supported both by Microsoft and a mature partner network for many years to come.
[Proof](#) and [Lifecycle](#)
- 2. Migration from GP to Business Central takes effort.** Although Microsoft Dynamics 365 Business Central is a viable cloud-based ERP worthy of consideration as a replacement to Dynamics GP, there are a number of costs related to business process changes, Chart of Account changes, reporting changes, integration changes, and new end-user training that may become cost-prohibitive. Overall, a migration from Microsoft Dynamics GP to Business Central using Endeavour's specialized migration tools and methodology will be around 60%+ of the cost of a new ERP implementation (\$40,000+).
- 3. Dynamics GP provides visibility to Debits and Credits on-screen** for information relating to transactions and GL distributions. Within Business Central, such balancing entries are done behind the scenes in sub-ledgers. For many long-time Dynamics GP users, this lack of instant visibility requires additional training and change management as a significant shift in mindset may be needed before they become comfortable and proficient in a new system.
- 4. Microsoft Dynamics 365 Business Central is based on Dynamics NAV (Navision), a completely separate ERP architecture from Dynamics GP** (Great Plains). Dynamics GP uses account strings and a strong Chart of Accounts. In contrast, the Business Central platform uses reporting dimensions for reporting across modules. The flexibility within these dimensions also poses a risk if misconfigured resulting in inconsistent reporting and analysis.
- 5. Dynamics GP has a rich ecosystem** of embedded and add-on third-party applications for additional functions unique to specific industries or business processes. Business Central follows a similar model of supporting third-party add-on applications with many of the Dynamics GP and Dynamics NAV ISV application providers creating similar versions for Business Central. Although some of these add-ons are from proven providers, the add-ons themselves are typically less than 3 years old given the 2019 re-architecture of Business Central for the cloud.
- 6. Dynamics GP upgrades** are recommended every year or so to stay on the most current version, however, there is flexibility for clients to delay upgrades for 2 years or longer. Delayed upgrades provide a certain level of stability and consistency for users and business processes. This level of convenience needs to be balanced with the business's need for security updates and interoperability (integration) requirements. With Business Central as a SaaS Cloud ERP, many updates are released and pushed out monthly, with two major updates each year in April and October. Although updates can be applied automatically, it is recommended that each be tested within a sandbox environment prior to release to production to prevent any stoppage of customizations, end-user screen personalization, and third-party ISV add-ons.
- 7. Advanced automation is similar** between different ERP applications when using best of breed third-party cloud applications and portals. These apps often use a web-based user interface unique to their application with integration back into the ERP applications. The user experience, workflow approvals, and remote access are the same regardless of using Dynamics GP or another system. From an advanced automation perspective, there is no added benefit in considering other ERPs as they would potentially also leverage the same third-party systems. Examples include third-party applications for advanced Invoice and AP automation, Financial Planning & Analysis with budgeting workflow, Purchase Order automation, Expense Management, Online billing portals, AR automation, as well as eCommerce sites that can all be integrated to 'augment' Dynamics GP with additional cloud apps and capabilities.

8. **GP Cloud Hosting** is an option worth considering if your on-premise infrastructure is aging and your costs for monitoring and cyber security are continuing to escalate. GP Cloud Hosting is essentially a third-party datacenter where your users would access the Dynamics GP client app via Microsoft Remote Desktop Services. Recent versions of Dynamics GP also feature an enhanced HTML5 web client for remote users with access available via a smartphone, tablet or laptop when away from their office. For many organizations, this type of remote access via Remote Desktop or HTML5 web client, is the same approach used in supporting hybrid work from home and remote offices. [Video](#) ↗

9. **Dynamics GP Smart Lists and Management Reporter** are both licensed and included with Dynamics GP at no additional charge. Most GP clients rely on these applications for daily operations and analysis. Although there are third-party reporting tools available to replicate these valuable functions, they each require an additional purchase or software subscription for named users. The majority of Endeavour's clients who have moved from Dynamics GP to Business Central have elected to purchase additional third-party reporting tools to meet their needs.

10. **Endeavour Solutions and our GP Support North** teams are here to help support you and your team. We are continuing to invest and expand our support capabilities for Dynamics GP, providing consulting services for clients using Dynamics GP including upgrades, third-party applications, integration, training, and support. Be sure to subscribe to Endeavour's monthly GP Insights Newsletter and mailing list for important notices and alerts. Subscribe by emailing support@gpsupportnorth.com.

View Endeavour's overview of "What's New" in Dynamics GP at:
<https://www.gpsupportnorth.com/gp/the-new-gp>



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