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# 25 Brilliant Ideas to **Outsmart Your Competition** with Microsoft Dynamics® ERP





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The business world is a competitive place. You wouldn't want it any other way – keeps you on your toes.

Stay ahead of the competition. Stay ahead of your customers. Every day, you think about how you can take your business one step further.

## One step further

Whether you wake up each morning thinking about how to open new sales channels or what services customers might want, you know there are improvements you can make — improvements that will take you one step closer toward your vision.

The vision for your business — to be the best at what you do — depends on making the most of every resource that you have. That's what growing organizations do. They squeeze every drop of productivity from their systems to help their people do a better job. Better than the competition.

## Do a better job

The stories that follow are the real accounts of companies who weren't satisfied with status quo — they wanted to be the best at what they do. They gave their employees the tools to do a better job. They took one more step forward for their customers, constituents and patients.

How about you? Care to join them?

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“

Brilliance results when smart people join forces to solve the challenges they face. The ideas that follow are brought to you by the Microsoft Dynamics partners who work very hard to light up the businesses they serve.

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ERP Software Blog Editors  
[www.ERPSoftwareBlog.com](http://www.ERPSoftwareBlog.com)

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The [ERP Software Blog](#) is proud to bring you *The ERP PANEL PAPERS*. A straightforward series of white papers from an international panel of ERP software experts.



## #1. Fresh approach to inventory

When fresh vegetables are part of your supply chain, you can't let inventory sit on the shelf. Which was exactly the case for a food manufacturer who was expanding operations.

With multiple warehouses and shipping locations coming online they needed a way to easily transfer inventory from one location to another. Microsoft Dynamics NAV gave them the tools to track inventory levels by location and easily manage cross warehouse transfers.

The returns didn't stop there. Using a rate shopping tool, they can calculate which location offers the best shipping rate for finished goods shipments. To help them maintain the right inventory levels at each location, a forecasting tool gives the procurement team a powerful purchasing optimization solution.

The results from Microsoft Dynamics NAV? Not only do they handle transfers between multiple locations, **they lowered their landed costs, reduced shipping costs, increased inventory turns and improved their margins.** Talk about competitive advantage!

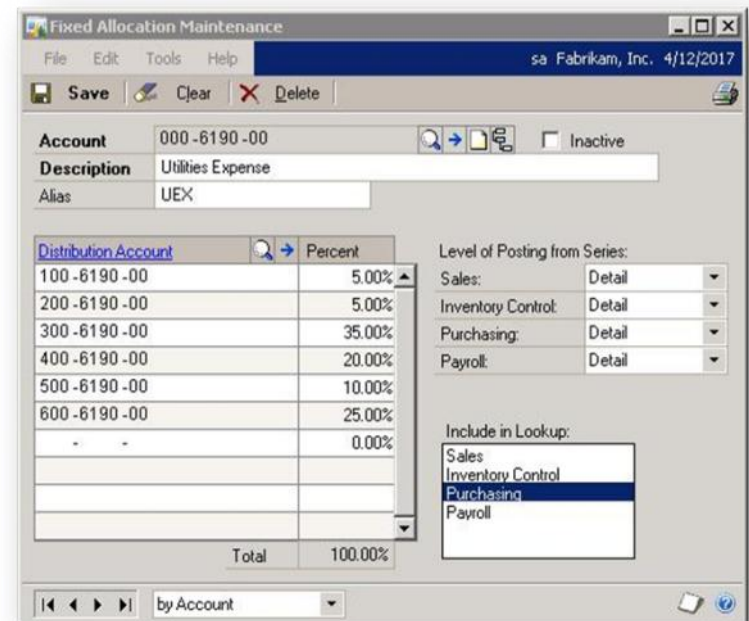


## #2. Prescription for healthcare

The burden of meeting state and regulatory reporting requirements stretches health care providers to the limit. A Milwaukee-based physician's clinic was spending hours and hours every month managing allocations and re-allocations in Excel — just to meet Wisconsin's Income Statement format requirement.

The prescription — with an unexpected side effect — came through Fixed Allocations in Microsoft Dynamics GP, which automatically makes the allocations when daily financial transactions are posted. The time savings were immediate and significant.

But then there was more. The **daily allocations are providing new insights into cost patterns and trends.** The clinic has a better understanding of where they need to spend more and where they can save. With the increased profits, they will be ready to add that new branch sooner than expected.



*Save time and report more accurately with automated cost allocation.*



### #3. No stress DCAA audits

Government contractors face a daunting number of compliance requirements in order to stand up to the scrutiny of an annual or surprise “floor check” audit. A highly motivating reason for a multi-discipline technology firm to use Microsoft Dynamics SL to manage their 100-plus government contracts.

Recently, when faced with an Accounting System Review the technology firm was confident because Microsoft Dynamics SL **allows them to segregate and detail cost information — direct, indirect and overhead expenses — associated with every item billed to the government.** Unallowable expenses are eliminated before invoices are sent. With indirect rate allocation methods and full expense audit trails the firm fulfills contract requirements and can report to exacting standards.

Working with the federal government and the Defense Contract Audit Agency (DCAA) requires clear understanding of the rigid requirements including the Federal Acquisition Regulations (FAR) and Cost Accounting Standards (CAS). Those contractors who can meet the challenge to take on an audit without sweating can spend more time winning new bids.



### #4. Exploding orders

A merchandising display distributor was suffering from success. As their customers had grown, branching out to every corner of the country, the distributor had to drop ship displays to an ever expanding number of stores. Great service for the customers, great sales for the distributor... but mighty tough on the shipping department.

Problem solved with Microsoft Dynamics NAV and exploding “Master Orders”. When a large customer places a single order that needs to be shipped to thousands of locations, the distributor creates a “Master Order” which the system explodes out into multiple sub-orders so the shipping department can process drop/direct shipments to each of the individual store locations.

By automating the shipping process, the **distributor has grown by 50%, now processing over 25,000 orders per month and saving \$1,000,000 in just the first year of deployment.**

Microsoft Dynamics NAV powers up distributors to take on the challenges of bigger customers and support explosive growth.



### #5. Budgeting for retirement

A continuing care retirement community with four campuses that house nursing homes, rehab, assisted and independent living facilities had a home-grown accounting system — and a big headache. Their annual budgeting process began every November, requiring two full time staff to manage the process until the final budget was presented to the board in February.

The process required printing out a huge paper budget, sending it through interoffice mail to each location. The managers then made handwritten corrections and sent it back through interoffice mail for manual updates by a data entry clerk. Painful and inefficient.

Since implementing Microsoft Dynamics GP with the Forecaster budgeting tool, the process has changed dramatically. Department managers are notified that the budget is available for review. Making their updates to the centralized budget data, managers can include electronic “post-it notes” to explain their entries. Through Forecaster’s security, department managers see only their own budget — creating a new level of comfort and ownership.

When budgets are submitted, the director has the option to approve or send back for edits. If multiple facilities request funding for the same product or service, management can see that and consolidate purchases to save money. Using Forecaster, the continuing care community **has shaved a full month off the process and eliminated the need for paper or data entry.**





### #6. Recall done right

While every food manufacturer hopes they never face a recall, smart food manufacturers are ready to minimize the damage. When a very smart specialty jelly producer identified a possible “Listeria” contamination, they were ready to act quickly to avoid any consumer impact.

Full tracking of specific inventory items, by lot, by date and by quantity in a warehouse management system directly connected to Microsoft Dynamics GP allowed them to identify exactly where all affected products were in their distribution supply chain. The lot was recalled and every jar accounted for. No bad press for one smart jam maker.

While this event was not attributed to raw materials, they could have easily traced each component back to their suppliers as well. End to end supply chain control.

The company met their obligation to the FMSA — Food Modernization and Safety Act signed into law by President Obama and **minimized the costs and impact associated with product recall.**



### #7. New channels for growth

The internet has eased the way to tap into new channels of distribution for your products. An electrical goods wholesaler found channel opportunity by supplying a growing number of eBay vendors. Sales were on the rise, but so was the volume of individual direct shipments.

Thrilled with the new channel, but challenged by the order processing and the handling cost per transaction, the wholesaler needed to automate the system from end to end.

Through web integration, an import routine now delivers the orders from eBay directly into Microsoft Dynamics NAV with price, seller and customer information. With barcoding and hand held devices, **automation of the entire picking process ensures accurate, rapid fulfillment at a minimum cost to the wholesaler.**

Adding single item sales through new channels can test your current systems and processes built for high value transactions. Don't let your competitors charge into those channels before you do. Automated system integration and picking systems let you scale without zapping your profits.



### #8. Daily diet of numbers

Trying to manage 38 restaurants is challenging enough, but when you don't have dependable daily sales reports to monitor cash, measure cost versus sales performance and forecast future sales, it's even tougher. Efficient daily transaction processing and reporting is critical to good restaurant management.

Using Microsoft Dynamics GP and an integration with each of their restaurants' Point of Sale systems, the restaurant chain has automated the entire process. With one click, the accounting clerk automatically creates the GL and AP transactions in each company. Complete and accurate daily information allowed the company to implement a BI (Business Intelligence) solution to make the most of their data.

Through BI reports, the location and regional managers have **metrics and analytics with daily information on the profitability of each restaurant in comparison to other locations**. The company is able to quickly identify and take advantage of the practices at the top performing restaurants to apply across the company.



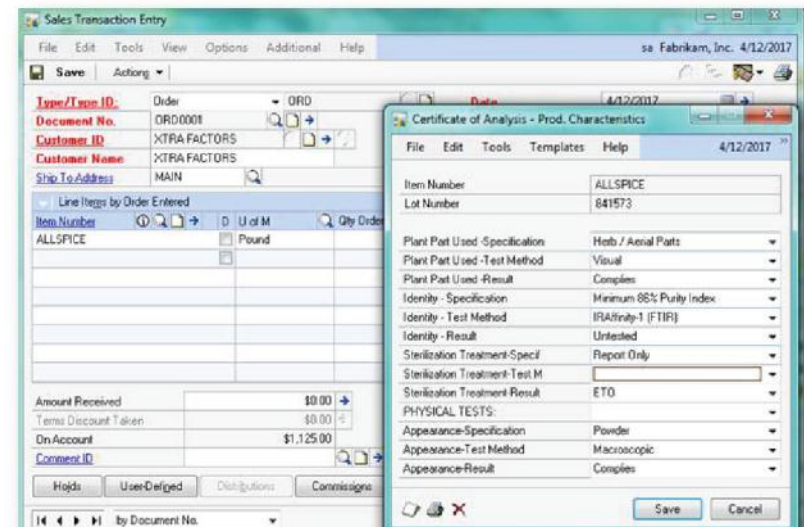
## #9. Spiced up quality control

Tracking and reporting on quality control for a food manufacturer is a critical ingredient for regulatory compliance. As one growing spice manufacturer found, the Quality Control (QC) Manager was spending more and more time in Excel manually tracking QC and production data. Information had to be captured from multiple places and the Excel sheet wasn't easy for others to access.

By extending the reach of Microsoft Dynamics GP, the spice maker was able to collect and centralize the QC data. Now, detailed information for each spice is available for lookup and reporting.

**QC information, which is required on all sales invoices, prints automatically and consolidated reports are readily available to all.** Now that he is focused on maintaining spice quality instead of Excel spreadsheets, the QC Manager has a recipe for success.

Your competitors have to deal with the same regulations that you do. By improving your processes to automate compliance, employees can spend their time heating up revenue instead of numbing their minds.



*Simplify tracking to save time and meet regulation requirements.*



### #10. Pricing negotiations

An office supply distribution company was experiencing wild variations in margins when contract pricing didn't keep pace with volatile inventory costs. Sales people would substitute out of stock products with lower margin merchandise, not realizing the impact on the company's bottom line.

Through Microsoft Dynamics GP, the **company gained control of their margins — not only leveling them out but increasing them — through real-time visibility into ever-changing inventory costs.** Sales people have full access to the cost of each product and can view margins at different price levels.

Knowing they are working with accurate data, salespeople can make precise pricing decisions with their reselling customers. Real-time margin analysis supports sales promotions and product mix suggestions to help customers take advantage of pricing opportunities.

Customers have gained confidence in the company's handle on pricing and trends in the marketplace, making them a valued partner. Competitors, lacking access to margin data don't stand a chance in tight negotiations.



### #11. Supply chain alerts

Scheduling production that is dependent on goods imported from China and Japan was a balancing act for an automotive supplier. A shipping container delayed by US customs or flooding on the Missouri could turn a tight schedule into a customer service disaster.

With a real time alert system built into Microsoft Dynamics GP the auto parts supplier now stays on top of any early or late sea shipments — **giving them precious extra days to react to the new receipt date.** With up-to-date arrival schedules of the sea containers, production can make contingency plans to either cover delays or speed up production in response to expected deliveries.

The amount of information across the supply chain has increased exponentially from electronic bills of lading to web-based inventory tracking. Buoy your profits by using that information to build competitive edge.



### #12. Multichannel cycles

Responding to the growing connection with their end users, manufacturers are finding new ways to deliver real-time information to all their channels.

A specialty bike manufacturer serving bike shops, sales reps and consumers across the country wanted to share up-to-date product information on the latest cruiser bikes. The dealers and sales reps also needed access to real-time inventory, order tracking and history of their bike and bike accessories.

Since all the information needed from product pricing to stock levels were housed in their Microsoft Dynamics GP system, the sensible solution was to share that information.

Through an online ordering system directly connected to Microsoft Dynamics GP, products are grouped into catalogs and displayed online for sales reps, distributors and consumers to see 24/7. Sales reps can place orders online from the field and distributors can check the status of delivery.

Instead of entering orders, **customer service personnel now spend 7 more hours each week helping customers and dealers** get the most from their bikes. That's how to win the race for sales.



## #13. Non-profit coordination

Non-profit organizations need to deliver information to a wide range of people — at the lowest cost possible. Meeting both those requirements and serving over 24,000 community members makes for a real challenge.

Through an integrated system built on Microsoft Dynamics GP, a large non-profit manages Point of Sale, fundraising, payroll and time and attendance. No double entry. No reports cobbled together from multiple systems. One place for all of the organization's information.

The committee members and governing bodies that make decisions for the organization have access to **reporting that delivers in-depth information on programs, volunteering statistics, membership numbers and more.** With better information, the organization spends more time and money delivering needed services to an ever growing community.





### #14. Oil collections

An oil and gas company was having trouble keeping up with the increase in the volume of their business — measuring the profitability of each of their 100+ delivery trucks and managing receivables for over 2,000 accounts. Their financial reporting and analysis was manual and extremely time consuming, dependent on multiple Microsoft Excel spreadsheets. They were dealing with multiple points of haphazard data and simply couldn't trust their reports and financial statements .

With the help of Microsoft Dynamics GP and an experienced partner they got their financial house in order and transformed their accounts receivable process.

Using Microsoft financial reporting, the company now has a **Profit and Loss statement for each truck unit reflecting the revenue and costs including repairs, maintenance, fuel, tires and GPS tracking.**

In addition, Collections Manager in Microsoft Dynamics GP has streamlined the accounts receivable process making it easier to manage the 2,025 invoices they send out each month. System reminders and automatic past due notices have reduced errors and improved cash flow. The company is reenergized and poised to fuel growth.



## #15. Digital white board

Historically, manufacturers have used a schedule board posted at each press or work station to note daily, last minute changes to the parts/jobs that station will run. Manually capturing demands every day, manufacturers net out the production required and painstakingly assign the production run to each work center.

A truck part manufacturer using Microsoft Dynamics GP financials knew there had to be a better way. Taking advantage of technology (and an experienced partner) the part maker added a real time Digital White Board (DWB). With the DWB, **demand is automatically captured through inbound Electronic Data Interchange (EDI) and processed through Materials Resource Planning (MRP).** The production schedule is set and jobs assigned to each work center automatically. Now the manufacturer can watch the “hours to go” Gantt chart shrink in real time as part production is posted.

The DWB also accelerates die/tool changeover with visible, predictable scheduling for each work center. No wasted downtime waiting for the schedule board to be updated. Higher production and higher profits.

Machine	7:00	8:00	9:00	10:00	11:00	12:00	1:00	2:00	3:00	4:00		
WC 122	CHRY 334	xx										
WC 232	GM23A	xxxxx KIA	xxxxxxxxxxxxx Toyo								xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx	
Press 23	Ford118	xxxxxxxxxxxxx Ford 119			xx							
Press 28-A	JCI 2003	xx							JCI 2008xxxxxxxxxx			

*Schedule printouts are inflexible and static.*



## #16. Re-engineer intercompany

A full service engineering company was following the industry trend to form cross-departmental teams to optimize coordination on big projects. Sounds simple, but the organization was made up of multiple specialized companies and they wanted to allocate costs across the companies.

With Microsoft Dynamics GP inter-company billing, the company is able to share resources across their organization while tracking individual project and company profitability. Through the **automated process of inter-company entries the appropriate accounts payables and receivables are assigned to projects and companies** — even supporting company/department markups based on different company rules.

Profitability reports based on companies/ services/projects allow management to continually refine their approach to projects.

		10/11	11/11	12/11	1/12	2/12	3/12	4/12	5/12	6/12	7/12	8/12	9/12	10/12	11/12	12/12	Total
01-01-100	Training & Planning	1.00	2.00	3.00													6.00
01-01-100	Documentation	0.00	0.00	1.00													1.00
01-01-100	Traveling	2.00	2.00														4.00
Customer: 01/10																	
Total																	

Assign revenues and costs to the right company without spreadsheets.



### #17. Take your order

Over the years, a wholesale restaurant equipment distributor expanded order taking from onsite stores to the phone and ultimately the internet.

To keep customer satisfaction high whether they are dealing person-to-person in the store or with customers buying directly over the web, inventory availability and alternate suggestions are always available to employees and customers — powered by integration between the website and Microsoft Dynamics GP.

Continuing the automation, workflow drives orders to their fully integrated warehouse management application to accelerate order processing and fulfillment.

Through company-wide integration and automation, the distributor controls costs and increases service levels. Through their technology improvements and best practices, **the distributor has decreased fulfillment time by more than 50% and reduced warehouse staff from 70 to 37.**



### #18. Engineered for success

For project-centric companies, tight integration between project management and financial accounting is critical to get a clear picture of project profitability.

When a civil engineering consulting firm was having difficulty measuring which projects and segments were most profitable, they decided to implement Microsoft Dynamics SL. Connecting the company's entire business, including project, financial and materials management, they have improved cash flow and profitability on a job-by-job basis.

To control project costs and maximize resource utilization they now track performance at the sector level and make adjustments to stay within budget. Microsoft Dynamics SL gives executives the reporting they need to measure performance against established goals and focus business development efforts to maximize profits.

With Microsoft Dynamics SL, the firm **has reduced month-end closings from five to two days and now does payroll in only two hours twice a month.** To top it all off, their estimators are **more precise with bids with the help of easy access to historical data** — giving them a competitive edge to win more profitable contracts.



### #19. Lights.Action.Agility

Everything doesn't need to be a big production. A Hollywood studio, running a Tier-I ERP system, needed to get better control of accounts receivable. Back lots, rented out to independent and non-studio-related TV and film production companies, needed an easy way to track open invoices and update the Tier-I system with new activity.

After rejecting the option to implement the Tier-I solution (too expensive to implement and maintain), the AR department chose Microsoft Dynamics GP.

Microsoft Dynamics GP is used to invoice the production company customers, process cash received against the open invoices and manage collections. **Credit limits for each customer are managed across all back lots to ensure no customer extends credit too far.** Integrations populate new accounts receivable transactions from each back-lot department to the Tier-I system.

Now the studio knows who owes them, how much and for how long. With managed risk the studio can maximize profitability for each back lot. A sure hit!

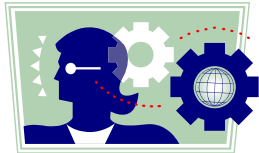


### #20. Freelance friendly

When a fast-growing placement agency was losing revenue from unbilled and undocumented time, they knew they needed to get more control over contract management. With hundreds of sub-contracted workers and freelancers, the placement agency needed better methods to collect worker's time and expense to fulfill contract requirements, manage multiple client support and integrate with payroll.

With Microsoft Dynamics GP, the agency got all the functionality they needed wrapped up in an easy-to-use interface that required little training for the freelance workers. Sub-contractors enter their timesheets and supporting documentation through a portal — all they need is an internet connection. For workers serving more than one client, recordkeeping is simplified through easy project assignment. Since timesheets are fully integrated to payroll, double entry has been eliminated.

The agency has **improved cash flow by automatically including the level of documentation required in the client's contract — minimizing collection issues.** To ensure placement profitability, preset rules verify that the invoiced amount is above the cost of the freelancer.

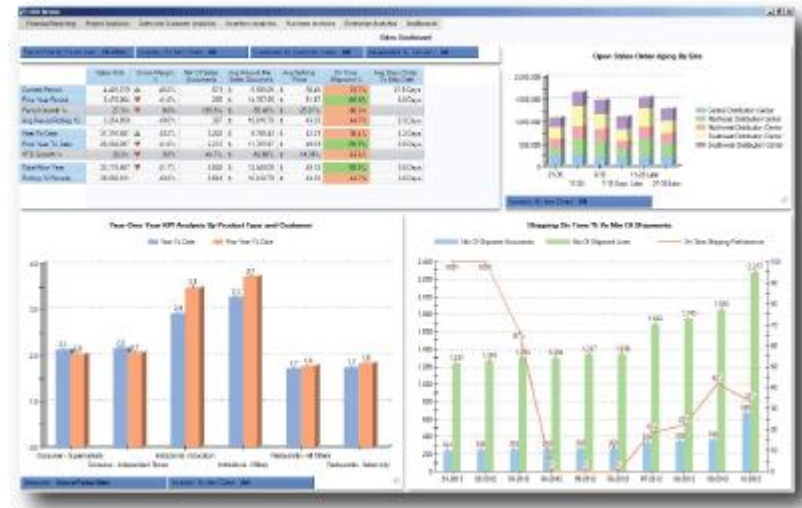


## #21. Analyze that

A growing diversified entertainment company was struggling to monitor the appropriate KPIs (Key Performance Indicators) for the consolidated enterprise as well as for each individual operating unit. With Microsoft Dynamics GP as their accounting system integrated with their POS (Point of Sale) application supporting their retail, event and restaurant operations, it was easy to find the right solution.

Using a business intelligence solution built for Microsoft Dynamics, their partner created custom analysis cubes to generate on-screen, interactive reports of operational KPIs. The entertainment company is now able to segment and analyze data for any set of factors — from the consolidated enterprise to the division to the individual operating unit.

Now they are getting the full value from integrated system data to manage not just the financial aspects of their business, but the operational aspects as well. With full visibility into the KPIs that monitor everything from payroll costs to product margins to store profitability, the company is more efficient in their decision making and has **shortened the monthly close cycle**.



Monitor results with easy to read dashboards.





### #22. Subscriptions rate

Helping real estate professionals is the mission of a subscription-based marketing and technology company. When the company was adding customers like crazy — 30,000 customers to be exact — but spending days getting the monthly bills out, they needed help.

Turning to Microsoft Dynamics GP and their smart partner, the company was able to pare those monthly billing times down to hours instead of days. Complex billing — providing for multiple subscription levels and loads of optional services — goes out the first day of each month.

With the supporting systems in place **the company has grown from 16,000 to 100,000 subscribers without increasing expenses or adding head count.**



### #23. Work flows

An RFID (Radio Frequency Identification) device manufacturer was committed to “go-green” by decreasing their dependence on paper documents. Fortunately for them, their Microsoft Dynamics GP system made it easy through configurable workflows that allow electronic documents to be routed via email for approval.

Approvers review and approve documents directly from their email using a smart phone, tablet or traditional computer, providing them the flexibility to approve transactions even when they are away from their offices. To meet audit requirements, approvals are stored in the system as electronic signatures with date and time stamps.

Before workflow, the company assigned one of their inside salespeople to walk sales orders around the office for credit and other approvals. He spent about sixteen hours each week getting signatures. Now, the salesperson is back at his desk full time. The **cost of the workflow implementation was paid for in the first month with the increase in revenue generated by this salesperson.** Not only is the company proud to be green, they are taking the competition to the cleaners.



### #24. Multi-line distribution update

A multi-line distributor was suffering from an outdated website and disconnected systems. While products were available through an antiquated shopping cart, current pricing and inventory levels had to be manually updated and special orders taken by phone.

Through an implementation of Microsoft Dynamics GP, the distributor was able to connect their accounting and inventory system with a robust B2B ecommerce solution. Easy content management allows the company to keep product information fresh. Customers can order and monitor shipping status online — even special orders.

With streamlined business processes and a welcoming website, **revenue has increased by 40% and customer service personnel spend 17% more time on revenue generating activities.**



## #25 Unshackle your data!

A New England correctional facility needed better access to their financial data as well as accurate reports on payables and receivables. Their data was locked in a cumbersome home-grown system that had been tweaked and customized over the years by countless IT workers. Built on old technology, the organization was at the mercy of an IT team close to retirement.

The accounting staff couldn't produce even the simplest AP and AR reports with any accuracy. Reports submitted to their board and the state government had to be painfully checked and double checked. Exporting data from the system to Excel for analysis seemed impossible.

Liberated by an implementation of Microsoft Dynamics GP, the accounting staff has a new lease on life with full control of their data. Their implementation partner was able to decipher the old code and import their data based on a chart of accounts that made it easy to meet board and state reporting requirements. They have instant access to 100% accurate data, dashboards for quick views of key metrics and reporting tools. **Reports that previously took weeks to prepare are now available on demand.** Let freedom ring.

**Altico Advisors Executive Dashboard**

Cash Balances	
	Balance
Computer-Uptown Trust	\$2,584,108.75
FIRST BANK	542,405.80
Flix Benefits-Lakes Bank	515,345.32
Payroll - Lakes Bank	554,520.47
Payco Cash-Uptown Trust	58,208.51
<b>Grand Total</b>	<b>\$2,708,791.85</b>

Accounts Payable				
Ageing				
0-29	30-59	60-90	>90	Grand Total
\$55,838.40	\$395.00	\$80.50	\$5,000.00	\$60,833.90

Inventory by Location	
	Value
CONTAINER	\$0.00
DEPOT	\$0.00
NORTH	\$5,089,805.18
SOUTH	\$0.00
VENDOR	\$0.00
WAREHOUSE	\$742,538.33
<b>Grand Total</b>	<b>\$5,782,393.45</b>

Accounts Receivable				
Ageing				
0-29	30-59	60-90	>90	Grand Total
\$15,044.77	\$14,416.11			\$29,460.88
\$107,993.76	\$98,948.09	\$43,200.89		\$285,173.74
\$4,338.00	\$8,905.73			\$13,243.73
\$23,775.21	\$4,322.39	\$107,375.87	\$38,025.95	\$270,499.42
<b>Grand Total</b>	<b>\$304,167.34</b>	<b>\$4,322.39</b>	<b>\$215,706.82</b>	<b>\$602,852.58</b>

*Simplify reporting to make decisions based on complete, current information.*



## Next Steps – Be Brilliant

You've probably seen challenges at your own company reflected in some of these stories. These companies invested in their processes and systems to tackle their challenges and step into the future.

**There has never been a better time to take the first step.**

If you are evaluating ERP solutions and are interested in how much Microsoft Dynamics GP costs, [click here](#) to get a GP Quick Quote. It's a great way for accounting software buyers at the beginning stages of evaluation to have a quick and easy way to estimate the cost of ERP software to determine if it makes sense to continue the process.

For more information, visit [www.boyerassoc.com](http://www.boyerassoc.com) or call 763.412.4300.



**Microsoft Partner**  
Gold Enterprise Resource Planning



## About Boyer & Associates

Boyer & Associates, a Minneapolis-based firm and Microsoft Gold Partner, resells and consults on accounting/ERP products including, Microsoft Dynamics GP, Microsoft Dynamics SL, and Microsoft Dynamics AX.

The firm provides implementation services, custom tailoring, integration, report writing and support services for each product. Boyer delivers on their client's vision by offering the best technology choices, configurable and tailored software, and team collaboration.

Boyer is the winner of Bob Scott's VAR Stars, Microsoft's President's Club and Accounting Today's Pacesetters Award.

For more information, visit [www.boyerassoc.com](http://www.boyerassoc.com) or call 763.412.4300.

