

# GP NET

May 2011

GP NET (News - Events- Topics) - Insights for those interested in Microsoft Dynamics GP, a comprehensive, integrated, and dynamic business management solution

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## Upcoming Events

[See Microsoft Dynamics GP in Action Yourself - May 24](#)

## OTT, Inc. Joins GPUG - the Microsoft Dynamics GP User Group

The OTT, Inc. team is happy to announce that we are now a premier member of GPUG, a user driven Microsoft Dynamics GP User Group. GPUG, a user group of Dynamics Communities, Inc., was formed in 2006 with the vision of working closing with Microsoft Dynamics GP users to grow their knowledge and competencies in their ERP solution. GPUG membership is made up of Microsoft Dynamics GP Users, as well as Value Added Resellers (VAR), ISVs, and Microsoft Members.

“Being a member of GPUG provides OTT, Inc. with the opportunity to not only share our extensive product knowledge with other organizations, but it also gives us the opportunity to help other organizations improve their efficiencies and effectiveness through the use of Microsoft Dynamics GP,” says Eric Sheehan, CEO of OTT, Inc.

## See Microsoft Dynamics GP in Action Yourself: Microsoft Dynamics GP Overview Webcast - May 24

With all the buzz around [Microsoft Dynamics GP](#), and especially the [Microsoft Dynamics GP Buy 1 Get 3 promotion](#), the OTT, Inc. team would like to invite you to attend an educational Microsoft Dynamics GP overview webcast.

Mark your calendars for OTT, Inc.'s Microsoft Dynamics GP Overview Webcast, which will be held on Tuesday, May 24, from 1:00 p.m. – 2:00 p.m. (central). During this webcast, you'll learn more about Microsoft Dynamics GP, as well as see the product for yourself with a demo overview of the

functionality Microsoft Dynamics GP has to offer.

[Register today for this complimentary webcast by following this link](#), emailing [events@OTT-Inc.com](mailto:events@OTT-Inc.com), or by calling 651.262.2615

## Outperforming: Transactional Content Management's Surprising ROI

Pick a number: how much do you think your day-to-day productivity would be improved if you could get transactional content management software (formerly called digital filing, but now recognizing the intersection of business process and document management) rolled out across your enterprise?

Got your number in mind? Statistics show you should probably double it.

The TC in M: What is “Transactional Content”, anyway?

The document record of a single business transaction – no matter how small – holds information that’s chock full of potential business energy. Each piece of transactional content is like a single unit of business energy. We all know that efficiency is about getting the most out of each unit. Whether you’re going green or just wanting a more fuel-efficient car, you’re looking to get further while burning fewer resources. Your transactional content is each record of every process: your invoice books, your PO approval, your new client applications. Maybe it’s an image of a salesman’s expense receipts, or a carbon copy for when technical services delivered a product.

As the pace of business increases, so does the volume of transactional content. Evolutions in technology, best practice, and legal requirements strain productivity when the way you’ve always done things is unresponsive to your changing business.

Your accounts payable department can’t process reimbursement until they’ve received your hard copy. You can’t approve a legal contract until each department has gotten to see it. Sensible business users know that their time-honored physical processes are here to stay; and they’re challenged to bridge the widening gap between ERP and content storage.

Those who crack the transactional content puzzle leverage their information to capture business intelligence – making their information work for them, instead of against.

So, when considering the value or return on investment of transactional content management, consider that a series of AIIM studies published early this year reveal that non-users significantly underestimate the power of electronic content management to increase their efficiency in both routine tasks and project fulfillment.\*

- Over half of new TCM users indicate that administrative efficiencies increase by over 25%.
- Over half report that TCM improves client service delivery by 25% or more.

When 25% of the same demographic reports that content management will require five percent or less of their total IT projects spending this year, there can be no doubt that TCM returns a powerful return on investment.

KwikTag by ImageTag Transactional Content Management delivers the fastest ROI and the lowest TCO because it balances a comprehensive solution of automated routing and approval workflow and document management with ease of use and affordability.

For more information on KwikTag Transactional Content Management, OTT, Inc. at [info@OTT-Inc.com](mailto:info@OTT-Inc.com).

\*Miles, Doug. “Capitalizing on Content: A Compelling ROI for Change.” © AIIM 2011 [www.aiim.org](http://www.aiim.org) / © OpenText Corporation 2011

## Exemption Certificate Management: Ways to reduce audit risk, improve cash flow turnaround and increase exempt customer satisfaction

Tight crackdowns by state governments have included greater attention to non-taxed transaction compliance as they increase their number of audits that are sales tax oriented. Important to the auditor is the ability to produce a valid, current exemption certificate and evidence of its appropriate association with the right transactions. Each business must define a workflow process and storage option for managing their customer exemption certificates.

### Workflow Process

Many times, a seller won't be aware of their customer's exempt status until the point-of-sale. At that point, the seller has several options: he can accept the buyer's word that they are exempt, process the sale and wait for the buyer to produce and send the certificate at a later time; he can halt the sales process and request the exemption certificate to be produced prior to completion of the sale; or he can assist the customer in creating the exemption certificate on the spot.

Accepting the buyer's word and not charging sales tax on a purchase without the certificate in hand is very risky. Inconsistent practices in accepting and obtaining certs also increases risk of audit. But the greatest risk is the need to track and follow up to ensure you receive the cert post-sale and associate to the appropriate transaction in order to prevent a problem down the road.

Waiting for the buyer to produce the certificate and come back for the sale is risky as well, but the risk is that they will go elsewhere to purchase their item. This risk can reduce sales and cause an uncomfortable non-tax transaction experience for you and the customer.

Assisting the customer to create an exemption certificate on the spot in order to complete the sale process, reduce risk and improve the customer experience is ideal for non-tax transactions. This can be accomplished as a manual or an automated process.

A manual workflow process requires the seller to be familiar with state requirements and have copies of the forms to complete an exemption certificate. Once the form is completed and signed, the billing or ERP system needs to be given that information in order to apply the correct sales tax information. Depending on how the system is setup for the POS or retail location, this could be as easy as entering in the data at the point of sale or entering behind the scenes post-sale.

An automated workflow can still have limitations but improves the experience immensely. Automation means that the ability to create the cert automatically on-the-spot is easy, electronic and enables digital long term storage without the need for paper.

### Storage

With most manual processes, the seller collects the cert and files it in a physical location onsite or at another location. This can lead to lost certificates, difficulty finding them when a new transaction or an audit occurs and difficulty tracking expirations. For manual processes, electronic storage means scanning the document and saving it to a location on a desktop or server which may or may not be accessible from any other computer.

Automated systems can gather and store the certificates in a digital archive that is accessible from anywhere, should the system be a cloud-based system. Automated systems can also provide a means of associating the cert with the appropriate accounts and non-taxed transactions if it employee built-in intelligent management.

Whether you manage your exemption certificates manually or use an automated system, the goal of proper management is audit and sales cycle risk reduction, increased staff productivity and improved exempt customer purchase experience.

[To learn more about automating the exemption certificate lifecycle, we invite you download the white paper "Automating the Exemption Certificate Lifecycle" today!](#)

## Get a faster ROI on your ERP Purchase with the Microsoft Dynamics GP Buy 1, Get 3 Offer

If migrating to a new ERP (Enterprise Resource Planning) system is on your to do list, now's the time to check it off! We are pleased to announce the "[Buy 1, Get 3](#)" offer that will make it more affordable for you to move ahead with that investment.

Microsoft Dynamics GP is designed to provide you with control over and visibility into what is going on in your business, helping you make smart decisions which directly impact your bottom line and propel your business growth. In addition, Microsoft Dynamics GP helps your people to be more productive and scales as your business grows.

The "[Buy 1, Get 3](#)" offer can help businesses like yours move to a comprehensive business management solution at an affordable price. Now is the time to act!

Don't miss this opportunity to upgrade your ERP system at a significantly reduced investment! Email the OTT, Inc. at [info@OTT-Inc.com](mailto:info@OTT-Inc.com) or visit [www.GP3for1.com](http://www.GP3for1.com) to learn more about this great offer.

**Want to learn more about Microsoft Dynamics GP?** Don't miss our Microsoft Dynamics GP overview webcast, on Tuesday, May 24 from 1:00 p.m. - 2:00 p.m. (central). [To register, simply follow this link](#) or email [events@OTT-Inc.com](mailto:events@OTT-Inc.com).



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