

# Bridging the TRANSACTIONAL DOCUMENT *gap*

Helping Clients Maximize Their  
Investment in Microsoft Dynamics®

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It's no secret that companies invest a significant amount of resources – both financially and in the form of personnel – in their enterprise resource planning (ERP) systems. For the most part, these initiatives have an inward-facing focus, improving the efficiency of various core business and financial processes. In today's business environment, however, companies are increasingly determined to get every bit of return on investment from their technology investments that they can muster.

With ERP systems, the challenge many companies face is how to best extend their investment to external audiences such as suppliers, customers and business associates. It's no small task, particularly where reporting is concerned, which is why the drive toward more efficient and cost-effective transactional documents has the potential to create new opportunities for Microsoft Dynamics Partners seeking to deliver greater value to their client relationships.

## Speed of Business Demands Process Change

Transactional documents have always been an integral part of business. But with organizations expanding their operations across the globe and the speed of business multiplying, the need to transform the processes surrounding these documents is increasing dramatically. For many organizations, the lack of efficiency and high costs associated with composing and distributing important documents such as invoices, purchase orders, checks and shipping forms are compromising trading relationships, internal resources and profit.

The challenges posed by process inefficiencies and generic document output are felt strongly by users of Microsoft Dynam-

ics® AX and Microsoft Dynamics® NAV. Both of these solutions have been implemented around the globe with great success, but organizations seeking a new approach to reporting can encounter complex and costly changes to the application code base, and that threatens to dilute the advantages of the solutions.

## Which Path Makes the Most Sense?

From the perspective of a Microsoft Dynamics AX or Microsoft Dynamics NAV user, there's little value in diverting internal resources from more important components of an implementation in an attempt to rectify the appearance or general format of different transactional documents. Most Microsoft Dynamics AX users, for example, simply don't possess the internal knowledge base required to handle the X++ coding needed to develop and implement a new check design that meets internal business requirements and receives bank approval.

So, does such complexity open the door for a Partner to complete the programming work on behalf of the client? While that's certainly an option, it's a decision that shouldn't be made without significant due diligence with regard to time, resources and the general health of the client relationship.

Taking on the task of transforming a client's ERP output by spearheading the programming effort forces Partners to commit resources that would otherwise be focused on higher priority issues related to the implementation. This shift in resources could have an adverse effect, creating the potential for implementation delays and strained business relationships. Do the end results justify the costs? That's a question that Partners need to answer themselves.

The alternative to assuming the responsibility for the com-

plex custom programming is to leverage third-party applications, such as add-on document process automation solutions, that can help resolve the output challenges quickly and at a lower cost. And from a relationship perspective, faster resolution and more savvy use of resources are likely to raise the profile of the Partner organization – and its contribution – in the eyes of the client.

### **Deliver Greater Value to Client Engagements**

Choosing a document process automation solution over custom programming provides clients with the opportunity to build upon the native strengths of Microsoft Dynamics to quickly introduce new efficiency gains and reduce the costs associated with creating and distributing the highly customized documents their businesses require.

Through the addition of the advanced formatting and personalization capabilities commonly found in these types of solutions, clients can ultimately create an array of professional-looking documents ranging from invoices and checks to packing slips and customs forms. For instance, graphical elements such as logos, signatures and barcodes can be quickly added or removed from documents, and client administrators

can define, route and deliver documents to their point of need within the organization for automated printing, faxing, e-mailing, archiving or electronic payment.

With this type of approach, Partners can not only gain the freedom to maintain resource levels on other aspects of the ERP implementation (for example, building out business processes), but also leverage client-friendly user interfaces to empower their clients to assume ownership of their documents.


One such example of how Partners can empower clients is through the delivery of documents to customers and suppliers. Today, most organizations have reached a consensus on how they prefer to receive documents – it's a decision typically based on optimizing operational efficiency. Increasingly, e-mail (using PDF files), fax and the Web (via online portals) are the delivery channels of choice over standard mail. By introducing the ability to dictate the delivery channel for documents – whether on an individual basis or for batches – clients can more readily accommodate customer and supplier preferences.

On the surface, acquiring the ability to e-mail an invoice, for instance, may seem to be of little significance beyond the immediate reduction in paper. But when you consider the impact electronic delivery of that in-

voice can have on accelerating a supplier's accounts receivable cycle, the potential for automated document delivery to serve as a mechanism for strengthening business relationships comes into focus.

By providing the tools necessary to easily design and deliver high quality, professional-looking documents, Partners can play a crucial role in enabling clients to enhance their image and perception among customers and other business associates.

### **A Catalyst for a New Approach**

The ability to manage the generation and delivery of transactional documents electronically has become a strategic factor in helping organizations compete more effectively in a global marketplace. As organizations that have adopted the Microsoft Dynamics AX and Microsoft Dynamics NAV platforms look to get more value from their ERP output, Partners are in a unique position to serve as the catalyst for change, helping them to gain the security, reliability and control they require to make efficient reporting processes part of their long-term, global business strategies. 

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