

6+ Top Tips: Incremental Digital Transformation While Using Microsoft Dynamics GP (Great Plains)

Our focus is on providing a "Safe Haven" for Microsoft Dynamics GP users to gain access to expert GP support, GP training, GP upgrades, GP Cloud Integration, and consulting services for Microsoft Dynamics GP.

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 the 2000s, 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.

“ Through our Support Plans, our team will support you and your team with available fixes and updates for **taxes, payroll, regulatory, and various ISV add-ons** that we anticipate will be published through multiple providers across the Dynamics GP ecosystem. ”

In 2024 Microsoft announced End of Life support of GP for December 2029 with extended security updates until 2031. That same year Endeavor4 made a 10-year pledge, to not only support GP beyond these milestones but also to help it evolve well into the future. Through continued investment in Dynamics GP and third-party applications, your existing ERP can be extended and positioned as a strong foundation for digital transformation, supported by following these 6+ tips #GPstrong #GPforever:

6+ TOP TIPS: INCREMENTAL DIGITAL TRANSFORMATION ON MICROSOFT DYNAMICS GP

1	REVIEW YOUR BUSINESS PROCESSES	3
2	FURTHER AUTOMATE FINANCE PROCESSES	4
3	DESIGN & REBUILD ADDITIONAL LINE OF BUSINESS METRICS	5
4	EXTEND SYSTEMS TO SUPPORT REMOTE SELF SERVICE	6
5	CREATE AN EXPANDED FOCUS ON COMMUNICATIONS	8
6	MAINTAIN UP-TO-DATE DYNAMICS GP PLATFORM	9
6+	LEVERAGING AI TO OPTIMIZE TOOLS AND GP DATA	10



1

REVIEW YOUR BUSINESS PROCESS

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 several 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:

- **Digital-First Processes that Eliminate Paper Dependencies:** Start digital, stay digital - look at integration points between systems. Encourage customers and vendors to send digital copies rather than paper-based documents.
- **Process Optimization to Unlock Operational Performance:** Look for process optimization opportunities. Sometimes external experts can bring a fresh perspective to teams resistant to change.
- **Automated Data Capture with Intelligent Document Processing:** Leverage cloud-based AP/PO/Reporting automation tools that combine OCR (Optical Character Recognition) for reading digital documents to pre-populate fields with relevant data. Cost savings can range from \$1 to \$5 per invoice.
- **Maximizing Value from Existing GP Capabilities:** Increase your adoption of built-in functions within Dynamics GP. Many of these functions have matured over the years and are well worth adopting. Additional Dynamics GP training may also help to close gaps. Example EFT and other digital payments.



2

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 monthly.

How to Resolve:

- **Standardized Processes for Consistency and Repeatability:** 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 most tasks.
- **Consolidated Reporting for Faster, User-Driven Insights:** 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.
- **Optimized Approvals and Exception-Based Workflows:** 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.
- **Leveraging Mature GP Workflow and AP Automation Capabilities:** Dynamics GP workflow and budget automation include a variety of mature tools available at no additional cost, with continued enhancements across recent releases. These capabilities can be extended through accounts payable automation solutions including invoice capture, OCR-based data entry, and approval workflows to streamline processing and improve transaction accuracy.



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:

- **Data-Driven Insights to Strengthen Decision Making:** 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.
- **Cross-Functional Automation to Streamline Operations:** Work with departments to help automate tasks and reporting through cross-functional workshops, building a shared understanding of process automation.
- **Centralized Shared Services for Multi-Entity Efficiency:** 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.
- **Extensibility with Microsoft Power Platform Innovation:** Finance teams can access the Microsoft Power Platform including Power Apps, Power Automate, and Power BI to create forms, simple workflow processes, and reports and dashboards integrated with data found within Dynamics GP, SQL Server or in the Microsoft Cloud on Azure or through Microsoft Fabric.



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 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 (i.e. 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:

- **Extend GP with Integrated Cloud-Based Apps:** There are several cloud-based applications that can be cost-effectively integrated with your on-premise or cloud-hosted 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
- **Unified Applications for Streamlined Workflows and User Experience:** 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).

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.

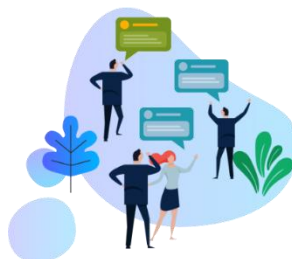
Internal inter-departmental communications are also important to help facilitate the automation of internal business processes. Workflow triggers can be set up to automatically email individuals based on key field changes. These can be related to security changes, adding vendors, purchase requisitions, 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 as a Central Hub for Business Communication:** 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.
- **Automated Email-Driven Workflows and Document Sharing:** 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. Be sure to keep Dynamics GP up to date to maintain compatibility with Microsoft 365 and Exchange Online.
- **Advanced Communication and Automation with ISV Tools:** Third-party ISV (Independent Software Vendor) applications are available via Endeavor4 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.



Accelerate your Dynamics GP Upgrade Cycle 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 Endeavor4 representing client needs.

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, back in 2021, the move from Dynamics GP 18.3 to 18.4 was typically completed for clients as an 'in-place update', often in under a week. This process is expected to follow a similar structure to the final Dynamics GP 18.12 (GP 2030) release in December 2029, and potentially beyond that point, with the extended Security updates that Microsoft has announced will be released until April 2031.
- Our team will keep you updated on future developments for releases from Microsoft for SQL Server and Windows Server. For example, Dynamics GP 18.8 now supports SQL Server 2025 and Windows Server 2025 with future versions expected in 2028. Keeping your OS and database infrastructure up to date will help to further maintain a strong security posture and stability to Dynamics GP.
- Look for specific dates for the end of Mainstream Support for a specific version. Although Endeavor4 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 with cloud technology, cyber security and integrated applications it is recommended that Dynamics GP upgrades be performed more frequently from now until the last available full release from Microsoft in December 2029, along with any subsequent security updates released at the time.

How to Resolve:

- **Proactive Upgrade Planning for System Stability:** 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.
- **Budgeting & Resource Planning for Future Updates:** Get an upgrade quote from Endeavor4 to budget ahead of time for cost and resource allocation.
- **Structured Upgrade Approach to Minimize Risk:** Endeavor'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.
- **Stay Informed with Ongoing GP Insights and Updates:** Subscribe to Endeavor's monthly GP Insights Newsletter and mailing list for important notices and alerts. Subscribe by emailing support@endeavor4solutions.com.



Utilizing AI-Enabled Microsoft 365 Tools to Capitalize on the Power of GP.

As organizations look to modernize their operations while continuing to leverage their existing Dynamics GP investment, integrating AI-enabled tools offers a practical and incremental extension to GP capabilities. While Dynamics GP does not provide native Copilot capabilities, it can participate and utilize AI-enabled workflows through Microsoft's tools, including Microsoft 365, the Power Platform, and third-party solutions.

These extensions can enhance GP's capabilities through automating repetitive tasks, exporting GP data to excel and leveraging Copilot for analysis, to effectively enhance and support decision making. Layering AI on top of the existing GP workflow can unlock new efficiencies, reduce manual effort, and begin building a scalable foundation for more advanced digital transformation initiatives without requiring a full ERP replacement.

What to Look For:

- Identify manual, repetitive tasks that rely on structured data entry such as invoice processing, reconciliations, and report generation. These are prime candidates for AI-assisted automation through external tools.
- Review how data is extracted from Dynamics GP (e.g., Excel exports, SQL queries, reporting tools) and assess opportunities to layer AI-driven insights, summaries, or anomaly detection on top of this data.
- Evaluate business processes that require interpretation, pattern recognition, or forecasting (such as cash flow analysis, collections management, or inventory planning) where AI models can augment traditional reporting.
- Assess current integrations with Microsoft tools (Excel, Outlook, Power BI, Power Automate) to determine where AI capabilities such as Copilot or predictive analytics can be introduced without disrupting core GP workflows.

How to Resolve:

- **Augment GP with AI-Enabled Microsoft 365 Tools:** Export GP data into Excel and leverage Copilot for analysis, forecasting, and narrative summaries, while using Outlook and Teams Copilot features to streamline communication and decision-making.
- **Leverage Power Platform for AI-Driven Automation:** Integrate Dynamics GP data with Power BI, Power Automate, and Power Apps to enable predictive insights, automated workflows, and AI-assisted process orchestration without modifying Dynamics GP.
- **Introduce OCR and Intelligent Data Capture Tools:** Deploy third-party cloud-based AP/PO/Report automation tools with built-in AI agents for invoice scanning, document recognition, and automated data entry to reduce manual effort and improve accuracy across financial workflows.
- **Implement Incremental AI Use Cases with Scalable Architecture:** Start with focused, high-impact applications (e.g., invoice automation, anomaly detection, reporting summaries), then expand into more advanced AI scenarios as data governance and integration maturity improves.

Check Out "What's New"
in Dynamics GP at:



CONCLUSION | USING DYNAMICS GP IN SUPPORT OF YOUR INCREMENTAL DIGITAL TRANSFORMATION

Our team is here to support you now, and throughout your Dynamics GP journey.

Trust in our **GP Support North** team of experts to work with side by side to start you on your Digital Transformation journey while staying on Dynamics GP. Eventually, you may need to migrate off of GP to a new Cloud-based ERP system. The plans and investments you make today, can often be translated over to your new Microsoft ERP system, essentially, bringing them (process & technology) with you to your new platform.

Our Endeavor4 ERP consultants have the unique perspective of actively supporting both Dynamics GP and the new Microsoft cloud-based ERPs including Microsoft [Business Central](#), [Dynamics 365 Finance](#), and [Dynamics 365 Supply Chain](#). Each are enabled with AI and designed by Endeavor4 to help you make your business better.

Contact our GP Support North team at Endeavor4 for assistance with your process review and software selection process:

[Dynamics GP Upgrade](#)

[Business Central Overview](#)

[Finance & Supply Chain Management](#)



About GP Support North at Endeavor4

GP Support North at Endeavor4 is a dedicated team of Microsoft Dynamics GP (Great Plains) consultants who love GP. We believe that GP has a long and prosperous future, and we are here to support you and your team. Although Microsoft announced a [Dynamics GP End of Life for 2029-2031](#) we believe that Great Plains still has lots of life. #GPstrong and #GPforever.

At Endeavor4, our continued success is due to our focus on our Microsoft customers, our people, and our four core values of **Knowledge, Integrity, Trust, and Accountability.**

Our Top Goals for Dynamics GP Clients:

1. **Maximize The Value from Dynamics GP:** Extend the life of your Dynamics GP investment by optimizing current processes, reducing manual effort, and leveraging built-in functionality alongside cost-effective third-party enhancements.
2. **Use GP As The Basis for Digital Transformation:** Increase the long-term portability of optimized processes and investments in Dynamics GP. This is so that Incremental Digital Transformation investments you make today, can be translated over to your new Microsoft ERP system, essentially bringing them (process & technology) with you to Microsoft Business Central or Dynamics 365 Finance & Supply Chain.
3. **Enhance Insights Through Integrated Analytics and Reporting Tools:** Leverage available reporting platforms and connected analytics solutions to identify trends and support more informed data-driven decision-making.
4. **Provide Dynamics GP Clients with Choice:** As a "Safe Haven" for Microsoft Dynamics GP users can gain access to expert GP support, GP training, GP upgrades, GP Cloud Integration, and consulting services for Microsoft Dynamics GP. We want to empower these clients with the information to make the choice (Stay or Migrate) and timing that best meets their business needs.

With offices in Boston, Chicago, San Antonio, Halifax, Toronto, and Vancouver, our consultants support more than 650 active Dynamics GP clients throughout North America. Over the years, Endeavor4 has been named multiple times to the Microsoft President's Club – the top 5% of Microsoft Partners Worldwide.



Making Your Business Applications Work
Smarter & Harder For You.