

Altico White Paper and 2014 Calendar: From New Year's Resolutions to Year End Goals with Microsoft Dynamics and Altico Advisors



ALTICO

The Answer to Your Problems:

12 Real-life examples of how
Microsoft Dynamics changed
these businesses.

Altico's MLS Relationship Management

- Integrated Platform
- Streamlined Reporting
- 360 Degree View of Activity
- & MUCH MORE



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This Altico Advisors white paper is also a four-seasons calendar of successful Microsoft Dynamics GP for ERP and Dynamics CRM implementations illustrated by 12 Altico client stories. It's light-hearted, visually pleasing, **and** technically informative.

Whether you are an avid Dynamics user or are interested in taking the next big step, this white paper is for you. Follow us through a series of case studies in various industries showcasing how Microsoft Dynamics can maximize your business. Each study focuses on a different scenario to provide you with information on the diverse uses for Microsoft Dynamics CRM and ERP.

CRM and ERP, what are they?

Customer relationship management, CRM, is a complete software solution used to track all interactions between a business and all of its constituencies—prospects, clients, vendors etc. CRM provides a 360-degree view of your customers while automating sales, streamlining customer service, and integrating marketing.

Enterprise resource planning, ERP, integrates and manages finance, e-commerce, supply chain, manufacturing, project accounting, field service, payroll, human resources and much more. ERP systems allows you to add functionality and users as your business grows. In other words, ERP systems are flexible and scalable.

What is a Microsoft Partner?

A Microsoft Partner is a business that provides Microsoft software, services and support. In order to qualify, these businesses must pass a variety of tests and demonstrate outstanding skills in the Dynamics field.

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Industry: Distribution, Regional Supermarket Chain

Challenge: Integrate 3 major disparate systems, reduce manual processes, improved efficiency with technology, and limited access to information

Solution: Replaced AS400 with Microsoft Dynamics GP ERP system on industry standard SQL database, integrated disparate systems, automated order process with GP Manufacturing Order Processing, BOM and MRO, centralized inventory control and reporting

January

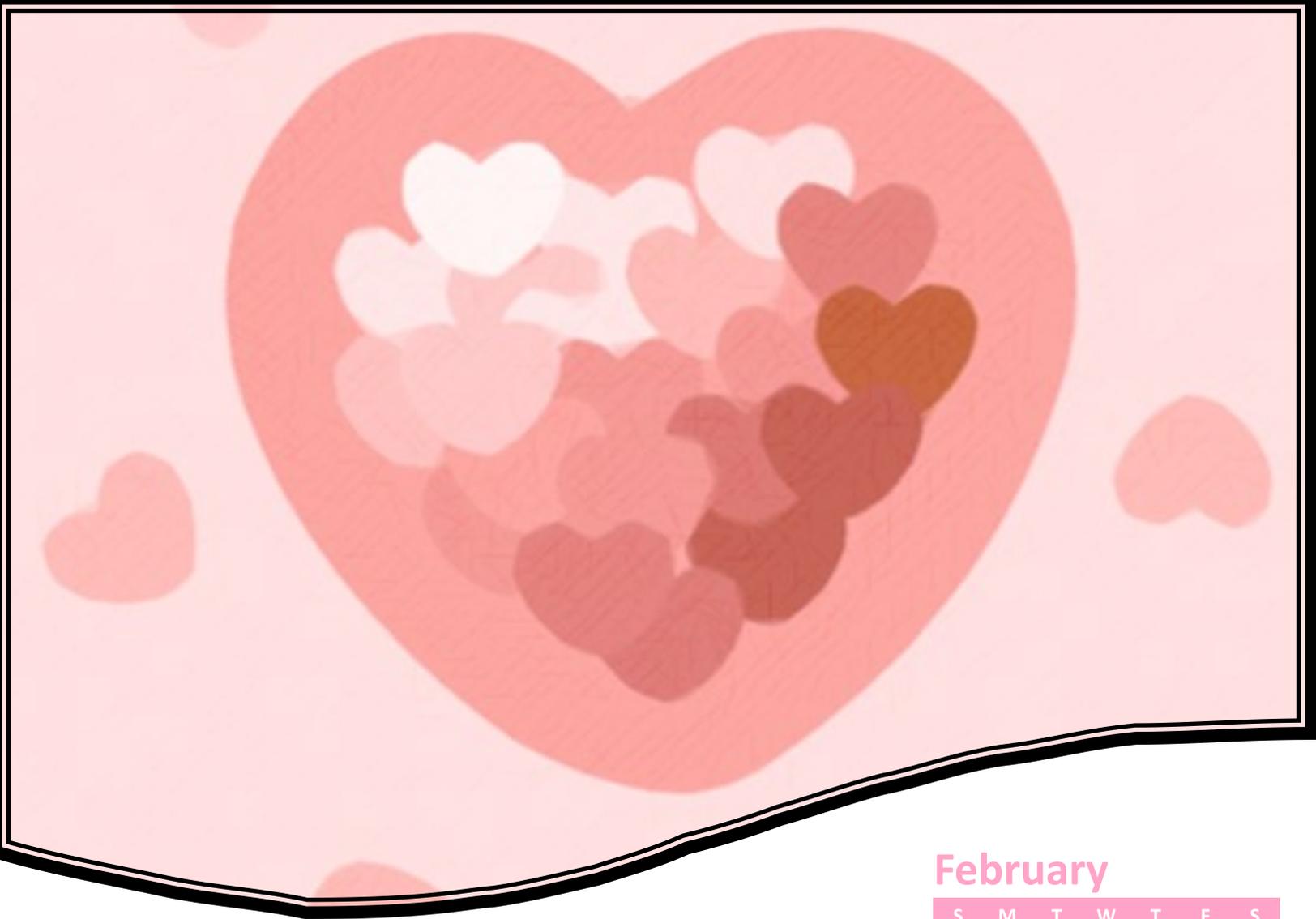
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January: Making Resolutions with State-of-the-Art Technology

Starting out as a single store, this 18-location regional supermarket chain knew they needed to update, improve, and integrate their system. After establishing a relationship with Altico Advisors, their current business system was analyzed and a detailed plan was created.

By making a resolution to bring their systems and business processes into the 21st century, they were able to revamp the supermarket chain's operations with state-of-the-art tools to manage accounting and banking, human resources, inventory and supply chain.

With these new tools, senior management now has Business Intelligence (BI) and Reporting capabilities, manual processes and inefficiencies have been dramatically reduced.



Industry: New England’s Largest MLS (Multiple Listing Service)

Challenge: Rapid growth, manage multiple service subscription products, lack of customization and real time data, moving invoicing to cloud

Solution: Challenges resolved with Altico Relationship Management, Microsoft Dynamics GP, Microsoft Dynamics CRM, Invoice Cloud, Scribe Integration and Microsoft SQL Server

February

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26	27	28	29	30	31	1
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23	24	25	26	27	28	1
2	3	4	5	6	7	8

February: Managing Core Relationships

Being one of the nation’s largest MLS companies, selecting a system capable of managing complex relationships, providing flexible subscription options, and tracking and managing licenses is essential.

Altico’s MLS Relationship Management Solution paired with Microsoft Dynamics GP and CRM provides MLS organizations with the ability to view a member’s 360-degree interactions in real time as well as solid financial reporting that is critical for monitoring day-to-day business transactions.

In addition to the integrated Microsoft Dynamics GP and CRM solution, InvoiceCloud was also implemented to allow worry-free invoicing and self-service payment.



Industry: Professional Services (Servicing physicians to streamline their business processes)

Challenge: Start-up company growing through acquisitions, current software and infrastructure inadequate, searching for fully integrated solution, no access to critical real-time data

Solution: Microsoft Dynamics GP for accounting and business management, Microsoft Dynamics CRM for sales force and marketing automation, Microsoft Dynamics SharePoint for document management, integrating external data and reporting

March

S	M	T	W	T	F	S
23	24	25	26	27	28	1
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16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

March: Getting Lucky with Attico

With short and long-term goals in hand, this professional services company was on a mission to get lucky. They needed to achieve economies of scale with a central accounting business management and document sharing network.

The solution that would make the most financial and business sense was a phased implementation and integration of Microsoft Dynamics GP, CRM, and SharePoint. With these systems in place, the solution fit the company's vision, centralized applications for sharing critical information internally as well as with clients, and allowed access to external data and robust reporting capabilities. The CEO was lucky. He bought a Cadillac right out of the gate!



Industry: Discrete Manufacturing

Challenge: Selecting the right solution, defining strategic business objectives, realizing the company's full potential establishing best practices for future growth

Solution: Strategic road map, detailed documentation processes, recommendations for process improvements and product neutral assessment

April

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30	31	1	2	3	4	5
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April: Showers Future Growth

Growth within a company can be viewed as a tactical challenge, especially when they're projecting double-digit growth over the next two years. With assistance from Altico Advisors, this company was able to assess the situation strategically and develop a roadmap of their business objectives.

Approaching the challenge as a business partner, Altico was able to help this manufacturing company extract relevant information, measure performance and take a critical look at their future business plan.

Once this roadmap was established, it was clear that they needed newer technology, an application to fit their needs, and a partner to support their business goals and track their progress.



Industry: Medical Device

Challenge: Replace multiple manual systems; exponential growth required a better system for inventory control and customer service management; minimal disruption to ongoing operations; unique reporting and inventory control issues given that the parent company is located in Europe

Solution: Microsoft Dynamics GP and CRM integration, automation that replaced spreadsheets, SQL database, customized reporting and inventory controls

May

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Cinco de Mayo: Making Time for Business Your Way

As a world leader in centrifugation technology, innovation and safety for more than 100 years and a recognized top clinical/ research centrifuge manufacturer, this company looked to Altico for help so they could maintain their customer-focused business approach.

With product growth and consumer demand rising, a system for inventory control and customer service management is crucial. The integrated ERP and CRM solution implemented by Altico helped them maintain a high level of customer support with minimal disruptions to existing operations.



Industry: Software Development

Challenge: Opening a branch in the UK given a small US-based IT and finance staff in a compressed time frame

Solution: Deployed Microsoft Dynamics GP for multi-company, established the UK business as a separate operating entity, financial reports designed by Altico to support the new business model

June

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22	23	24	25	26	27	28
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June: All Those Bells and Whistles

Opening an overseas branch can entail numerous challenges. With a limited IT staff and time frame, this software development company looked to Altico Advisors for a solution.

By deploying Microsoft Dynamics GP through Altico, the core business remained unaffected and their financial reporting, budgeting and forecasting improved exponentially. As hoped, their UK branch was up and running in record time. With their IT staff free from this hassle, they were able to remain focused on their clients and were not distracted from their primary mission. Dynamics GP had all the bells and whistles they needed!



Industry: Software Development Company

Challenge: Company experiencing growth; current software and infrastructure inadequate; searching for a fully integrated solution to deploy immediately

Solution: Deployment of a new system in record time, Microsoft Dynamics for accounting and business management, Microsoft SharePoint for document management, integrated external data and executive reporting

July

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29	30	1	2	3	4	5
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13	14	15	16	17	18	19
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July: Controlling the Boom

In 2007, the largest privately held anti-malware and technology software company experienced a 140% increase in bookings over 2006. More than 250 million world-wide users are protected by their software today and they were adding on average 150,000 new users per week.

A company growing this fast cannot scale to meet the increased demand and can find their internal system taxed beyond its limits. This problem had to be immediately resolved.

And it was resolved—by deploying a new system with unlimited growth potential, a centralized application for sharing critical information and a fully integrated business and customer management solution, their booming growth is now under control.



Industry: Wholesale Distribution

Challenge: Issues with the integration of their Microsoft Dynamics GP for ERP and Microsoft Dynamics CRM system were causing major disruptions. The fix was going to be cost-prohibitive

Solution: Altico deployment of an elegant and simple Scribe solution

August

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27	28	29	30	31	1	2
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31	1	2	3	4	5	6

August: Making Clients Happy Campers

This wholesale distribution company acquired the US distribution rights for a one of a kind brake lathe product. It soon became the world-leader, recommended and even required by dealers around the globe. The major challenge this distribution company was facing was data not properly passing between Microsoft Dynamics CRM and GP. Without a smooth integration, the system was slow and caused significant disruptions to their business

When they reached out to other vendors, they were told it couldn't be fixed. They were told it would cost a ton of money, reduce integration speed and add tremendous overhead. With the use of Scribe integration tool, Altico implemented a simple solution that completely resolved their issues and had no negative impact. Needless to say, they were happy campers.



Industry: Finance and Venture Capital

Challenge: Server needed to be replaced immediately, rapid turnaround required to minimize downtime, IT department stretched too thin, needed outside help

Solution: Migration to new server, upgrade to newest version of Microsoft Dynamics GP, and single point of contact through Altico Advisors

September

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September: Turning Over New Leaves

When a server is dying, you have to act quickly. This finance company needed to upgrade their Dynamics GP quickly because rapid turnaround was essential to minimize downtime. With a small IT department that was stretched thin, they were unable to take on the project themselves. Changes had to be made, fast.

With a virtually painless server migration and software upgrade, the new server is able to handle the current load and still has plenty of room for growth. By upgrading to the latest version of Microsoft Dynamics GP, this financial firm added functionality so that managing 32 client companies became easy. The venture capital firm realized the ROI of turning over new leaves.



Industry: Process Manufacturing

Challenge: Deliver concise, critical data to department heads and executives, provide that data in real time and personalize the view for each individual

Solution: Altico Executive Dashboards (AEDs), real-time key performance indicators and personalized views of critical business metrics

October

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19	20	21	22	23	24	25
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2	3	4	5	6	7	8

October: Picking the Right Pumpkin out of the Patch

Frequently, department heads and executives who are not fluent in the use of Microsoft Dynamics GP and CRM nonetheless need access to high level data and key performance indicators (KPIs). With Altico's Executive Dashboards (AED), staff members at all levels can view custom dashboards that display real-time data and statistics hassle-free with the click of a mouse, right out of Microsoft Outlook.

By selecting this solution, managers and executives don't have to request and wait for reports to be created. Altico's dashboards are simpler and faster than most Business Intelligence tools on the market today. The process manufacturing firm picked the right pumpkin.



Industry: Discrete Manufacturing

Challenge: Disparate inventory and financial systems, data reconciliation nightmares; antiquated applications and infrastructure

Solution: Microsoft Dynamics GP manufacturing and financials, state-of-the-art infrastructure and full integration

November

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30	1	2	3	4	5	6

November: Bringing Systems Together

Having separate inventory and financial systems posed a problem for this manufacturing company. Linking systems through spreadsheets and accessing disparate programs was becoming overwhelming. Given their desire to integrate their manufacturing, inventory and order entry systems with their back office, the Microsoft Dynamics GP manufacturing suite offered the full functionality they needed.

Having experience in manufacturing, the Altico team was able to understand this company's business from both a financial and process perspective. Altico provided a state-of-the-art, robust infrastructure as well as training and support so multiple vendors were not required. All systems go!



Industry: Discrete Manufacturing—Intelligent Emissions Reduction Solutions

Challenge: Complete ERP system to include financial management, reduce month end closing time, support built-to-order and built-for-stock manufacturing, and capability to integrate the ERP and current CRM system

Solution: Microsoft Dynamics GP, Microsoft Office Excel and Microsoft Server Product Portfolio SQL Server

December

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21	22	23	24	25	26	27
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December: Closing Your Books with Altico

Closing your books may seem like a hassle. By partnering with Altico Advisors and implementing Microsoft Dynamics GP, this clean-technology provider was able to reduce the time needed for month end closings by half. The switch from Intuit QuickBooks, which at first met the company's early needs but was unable to support first-in-first-out (FIFO) inventory accounting practices, was necessary.

Additionally, Altico deployed F9, a tool that connects Dynamics GP to Microsoft Excel for reporting as well as data analysis, allowing the ability to build dynamically updated financial statements in Excel.



Proven Methods. Real Results.

Altico was formed with one core idea--to provide unparalleled service for mid-market businesses in New England. The management team and the company's founders have decades of extensive experience in the business solutions industry. We strive for excellence in the performance of our service - implementing Microsoft Dynamics GP (formerly Great Plains), Dynamics CRM, and Integration Services for clients throughout New England and New York. We define our success as being viewed by the clients and partners with whom we work as the "best partner." That's why our mission statement was designed to be a goal that must be achieved EVERY DAY!

It is our passion to establish the closest and deepest possible relationships with our clients. It is our belief that we can provide an array of ongoing services that will continue to support your business after your system has been implemented. Altico's founders and the entire team are dedicated to a service model that allows you to maximize the investment in your system and have ready access to the information required to run your business. We see the day after you "go live" as the beginning of the real relationship where your choice to partner with Altico will show the greatest dividends.

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