Bottomline
Technologies®

Keeping Pace: Accelerate Custom Form Capabilities in Microsoft Dynamics®

You need forms and reports that keep pace with the needs of your customers and suppliers. The days of static designs that can only be created or revised by advanced developers are past. Forms and reports should be as responsive and dynamic as the rest of your business.

While the names of the forms and reports you use to conduct operations probably haven't changed much, especially customer facing forms, the need for speed and customization has. Purchase orders, AP checks, sales invoices, order acknowledgements, bills of materials and all the other forms that drive your business need to be tailored to your customer's needs. They must deliver personalized communications in the right format, at the right time, and reflect current corporate branding, signatures, terms and conditions, and more.

In many cases, ERP software functionality has not kept pace with the growing need for such agile form creation. As a result, designers are often forced to muddle through with applications built for general reporting instead of a specialized forms design tool..

THE CHALLENGE:

**ERP Implementation
Forms Design**

During the design phase of a manufacturing company's ERP implementation the project team identified more than 2,000 unique forms. Each department agreed they could reduce the number of forms by 20%, but the estimate for forms design was still 50% over budget.

To solve the issue, their Dynamics® partner recommended they:

- Implement Transform® for Microsoft Dynamics® PrecisionForms™

- Prioritize the forms list for each department

- Train one power user in each department

- Work with the power user to establish a realistic forms completion schedule

As a result, the entire list of forms was completed before the go-live date, well within the original budget.

To respond to these changing requirements, many companies are putting the power of forms design in the hands of users instead of developers. This agile forms creation helps these businesses:

- Reduce the need to devote valuable IT resources to form design

- Give users more control, reducing frustration

- Deliver the flexibility that promotes responsiveness to customer and vendor requirements

- Automate form distribution processes to improve productivity, cut costs, and speed time to cash

The creation, customization and distribution of forms should be fast and easy to meet the changing needs of your business as well as those of your customers and vendors. In this white paper, we'll explain how your organization can take a modern approach to form customization to keep pace with today's business requirements.

Keep IT teams focused on high value work

Effective management of an IT department requires allocating limited resources to an unlimited number of requests. Every IT manager has to make difficult choices that affect the operations of the organization.

Eliminate the need to use valuable developer time for form modification

Form development is one of those continuing resource balance issues. While you don't want to allocate the valuable time of development resources to form creation, departments need to use forms that serve the most current business requirements.

By putting the power of form creation in the hands of users, you can stop diverting valuable development resources and empower departments to create their own forms, take ownership of their time investment, and continuously improve business practices.

Furthermore, through a controlled forms design solution, IT can ensure the security of data and appropriate access to sensitive information.

Reduce time and costs associated with going-live

The issue of balance can become critically acute during an ERP implementation. You need all development hands on deck to get the system up and running quickly.

Through a user-friendly forms management solution, you can train non-developers to create forms and spread the workload thereby reducing implementation and migration times from weeks to days. What's more, their familiarity with the functions of the department can mean fewer revision cycles and innovative solutions to reporting challenges.

Give users more control and less frustration

When employees have to wait for days, weeks or even months to get documents formatted to meet their needs, they are likely to find a clever way to work around the roadblock. While you can't blame them for wanting to get the job done, work-arounds usually remove documents from secure processes including audit tracking and access controls.

Empower users with forms design application

The most effective way to keep employees from working outside the system is to give them applications that enable them to respond to changing requirements. Encourage users to take ownership by making the design process simple with a design application that is easy to master. Using an intuitive interface empowers even non-technical staff to design forms, giving control to those who understand the document and business needs best.

Security and data access are also critical considerations in choosing a design application. User and group security settings should reflect the underlying ERP security to ensure data is protected.

Think local, act global

For businesses with diverse locations and global client sets, it's critical to localize forms and reports to conform to regional business practices. It should be easy for your report designers to support regional requirements such as paper sizes, languages, currency and date, formatting, and auto translation of field names to make reports more accessible in different languages.

THE CHALLENGE:

International Offices

Through a recent acquisition, a consumer goods distributor added four offices located in Europe and Asia. As their first international facilities, the CFO wanted to standardize corporate forms, but understood that they would need to be localized for languages and paper size.

To solve the issue, the distributor empowered each office to design the forms to meet the local requirements as well as the corporate standards. The process included:

- Implementation of Transform for Microsoft Dynamics PrecisionForms

- Web-based training for two to three power users in each facility

- A shared document repository for the offices to leverage the forms design work of each office

By localizing design, each office has forms that work with the their language, currency and paper size and the integration of the international offices was made significantly easier. well within the original budget.

Be more responsive to customers and suppliers

In today's world, customers, and suppliers expectations have evolved and keeping up with their preferences on how and when they want communications can be challenging.

Customers don't respond well when they receive invoices that are confusing or multi-page packing slips that are mostly blank paper. Suppliers don't appreciate purchase orders that require multiple emails to clarify shipping instructions or terms and conditions.

Format forms to best communicate required information

"One size fits all" simply doesn't apply. To keep pace with customer and supplier requests, you need a forms solution that makes it easy to tailor communications based on their requirements. All while giving you full visibility and transparency of all your outbound communications so you can make decisions quicker and respond more effectively to their calls.

Power users and conditional logic

For every company, and especially for enterprises with multiple divisions or business units, the number of variations in customer requests has reached overwhelming proportions. ERP software hasn't kept pace.

Which is where a decentralized approach is so important. When forms designers, who are familiar with product lines or business processes, can build drag and drop forms with conditional logic, you have a powerful customer service application.

Enhance your reports with branding

Every document that leaves your business provides an opportunity to build your brand and your reputation in the marketplace. Forms should be uniquely designed to serve the interests of the people who receive them. Build sales by suggesting complementary products or strengthen relationships with product information that educates.

Automate processes to improve operations

In the past, forms were static documents that had to be filed, routed, saved or archived. But a new way to think about forms is emerging. Tapping into the underlying data, forms can become workflow documents that automate manual processes to improve productivity, cut costs and speed time to cash.

Reduce the need for human intervention in common processes

Through conditional formatting and business rules, forms can be automatically routed to save time and money. Just a few examples include:

- Route customer invoices via email, fax or print based on preferences set in accounts receivable records

- Identify exception invoices that are informational only and should not be printed or distributed

- Use OMR markers or barcodes printed on the form to automate folding and mailing processes and reduce mailing costs

Ensure document availability across the business

Storing documents efficiently today means providing access across geographic borders. Through automated archiving that leverages your central storage repositories, you can save countless hours spent searching for documents and requesting copies.

Automated electronic archiving processes should use data driven rules to define, route and deliver documents to their logical storage location.

Transform for Microsoft Dynamics PrecisionForms

Design and Deliver Custom Documents from Microsoft Dynamics® AX and Microsoft Dynamics 365 for Finance and Operations Output

Many organizations that have standardized on Microsoft Dynamics AX and Microsoft Dynamics 365 for Finance and Operations (365FO) have been able to dramatically increase the efficiency and cost-effectiveness of their document-based business processes through the use of Bottomline's advanced capabilities for transactional document automation.

Bottomline's award-winning solutions allow organizations to streamline business processes that rely heavily on paper-based documents. By automating the routing, delivery and storage of transactional documents, users can quickly and easily increase the functionality of their document output while reducing costs.

And because the solutions integrate with industry-leading ERP systems such as AX and 365FO users are able to protect their existing IT investments while easing ongoing ERP maintenance and upgrades.

PrecisionForms allows you to:

- Create more professional looking business documents, including invoices, purchase orders, delivery notes and MICR checks

- Reduce implementation and migration times from days to hours

- Make designing branded quality output simple

- Optimize business communications tailored to your customer needs

- Automatically distribute forms and reports to multiple locations with customized formatting for each device (print, fax, email, or stored documents).

- Save, distribute and output reports to local systems such as SharePoint in real time

- Extend and support workflows beyond the boundaries of your ERP

*For more information and to see **PrecisionForms in action, watch our video.***

WATCH VIDEO

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About Bottomline Technologies

Corporations and banks rely on Bottomline for domestic and international payments, efficient cash management, automated workflows for payment processing and bill review and state of the art fraud detection, behavioral analytics and regulatory compliance. More than 10,000 corporations, financial institutions, and banks benefit from Bottomline solutions. Headquartered in Portsmouth, NH, we delight customers through offices across the U.S., Europe, and Asia-Pacific.

For more information, visit www.bottomline.com.

Corporate Headquarters
325 Corporate Drive
Portsmouth, NH 03801
United States of America

Phone: +1 603.436.0700
Toll-free: +1 800.243.2528
Fax: +1 603.436.0300
info@bottomline.com

Europe, Middle East, Africa Headquarters
115 Chatham Street
Reading, Berkshire RG17JX
United Kingdom

Tel (Local): 0870 081 8250
Tel (Int): +44 118 925 8250
Fax: +44 118 982 2253
emea-info@bottomline.com

Asia Pacific Headquarters
Level 3, 69-71 Edward Street
Pyrmont, Sydney NSW 2009
Australia

Tel: +61 2 8047 3700
Fax: +61 3 9824 6866
ap_info@bottomline.com