



Solution Guide for Dynamics GP®



Warehouse & Inventory Management

Gain accurate control
of your inventory



Fixed Asset Tracking

Track asset details
with a scan



Field Sales & Delivery

Streamline your sales
& deliveries

Welcome!



“My team now has everything under control, and I sleep better at night.”

We live for these testimonials because it means we have made a positive impact on a customer’s operational efficiency. It means that they have reduced past mistakes and increased their accuracy. Wouldn’t *you* like the confidence of tighter control of your inventory or assets?

We have prepared this guide to introduce you to our Panatracker® GP product. With a product line that contains “GP” in the title, it’s probably obvious that these solutions are tightly integrated with Microsoft Dynamics GP. We leverage the investment you already have in a system that excels in managing inventory, assets and financials. We then extend that capability by adding the power of barcoding and mobility to put the responsibility in the hands of the people that are actually performing the transactions.

Your actions are validated in real-time to block errors, and transactions are immediately applied to your inventory and asset positions. That means the information is captured when it happens, instead of writing it down and keying it into a GP window later. Gone are the delays, gone are the unreadable serial numbers, gone are mistaken shipments.

Buying this type of solution can be confusing. You don’t want to be trapped with a weak and overly-simple add-on that can’t grow with you. You also want to avoid over-spending on a heavy stand-alone system that gives you one more reconciling nightmare and months of implementation headaches. We have crafted an easy-to-use powerful system that will have you up and running fast. Really fast.

We are self-proclaimed tracking geeks, focused on using the latest technologies for better management of your stuff. Inventory and asset tracking is all we do, and that focus shows in our products and services.

This year marks a decade of development on the PanatrackerGP product. With customers across the world, we keep adding new features, and our customers continue to reap the benefits of a selection well-made.

Give us an opportunity to show you how we can help your organization gain the cost-savings that tighter control of inventory and assets will bring. Visit our website or call us to learn more.

The Panatrack Team

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The Power of the Portal

What is the PanatrackerGP Portal? It is a unique control center included in the PanatrackerGP system. Accessible from your web browser, it provides you with the means to:

1. **Administer the system.** Add users, control devices and security, tweak your workflow, set default values, manage email alerts, and adjust dozens of settings that “tune” PanatrackerGP to meet your operational needs.
2. **Review your transaction history.** Every transaction captured by PanatrackerGP is journaled. See what was done, when it was done, and who did it. Sort and filter that information right from the portal’s page. Your data is stored in SQL so you can create your own reports as needed.
3. **Customize PanatrackerGP to suit your needs.** Configure our unique FlexFields to capture custom data, attach custom logic to execute after recording a transaction, enable our “approval mode” to force a confirmation of transactions before submitting them to GP and more.

The portal is at the heart of an alert system that emails you in the event of a problem. While issues are rare, imagine the benefit of having a detailed email containing information on the problem. Better yet, with your permission, we use that information to improve our software and knowledgebase. Gain value from a community of users.

The screenshot displays the PanatrackerGP portal interface. The top navigation bar includes links for Administration, System Status, User Administration, Diagnostics, Change Password, Log Messages, Configure, Companies, Profiles, Devices, Transaction Setup, FlexFields, and Settings. The main content area is divided into two sections: Settings and Receiving Transactions.

Settings Page: This page controls various settings that affect how transactions are processed. It includes a list of settings with columns for Setting Name, Description, and Actions. Settings include AllowChangeReplenishmentReason, AllowChangeToAssetCustodian, AllowChangeToAssetLocation, AllowChangeToAssetPhysicalLocation, AllowChangeToAssetStructure, AllowChangeToAssetUserFieldGroupA, AllowChangeToAssetUserFieldGroupB, AllowDeliveryFromInvoice, AllowFixedAssetPurchaseOrders, AllowMfgCodeAssignments, AllowNegativeQuantity, AllowOrderSalesTaxOverride, AllowPickingFromInvoice, AllowPriceLevelChange, AllowReceivingWithoutPO, AllowScanInQuantityField, AllowSelectAllSerialsInBin, AllowTypeTransfer, AllowUnitPriceOverride, AskToReworkRemainingQuantity, AssembleAllowAutoLotAssignment, and AssembleAssignMfgCode.

Receiving Transactions Page: This page displays a list of receiving transactions. The table includes columns for Transaction Code, Status, Profile, Device, User Name, Purchase Order, Vendor, Vendor Doc#, Reference, and Package. The transactions are listed with their respective details, such as Transaction Code (RCV000151, RCV000150, RCV000149, RCV000148, RCV000147, RCV000146, RCV000145, RCV000144, RCV000143, RCV000142), Status (Succeeded, Discarded), Profile (PRODUCTION), Device (A1008), User Name (DefaultUser), Purchase Order (PO2156, PO1220, 62096, PO1218, PO2156, PO2088, PO1002, PO1218, PO2156), Vendor (ADVANCED0001, PO1220, 2251, ADVANCED0001, ADVANCED0001, ADVANCED0001, AUSTRIA, FABRIKAM0001, ADVANCED0001, ADVANCED0001), Vendor Doc# (24123), Reference (24123), and Package (CONT01).

Inventory Management

Full integration with Dynamics® GP makes Panatracker® GP an essential tool in effectively managing your inventory.



Are you currently using Dynamics GP and looking to improve control of your inventory? PanatrackerGP is the tool that will help you unlock the full potential of your current investment. Add PanatrackerGP to extend your Dynamics GP into a feature-rich inventory management system.

Replace spreadsheets and paper-based tracking with the efficient combination of mobile computers and barcode technology. PanatrackerGP gives your workforce an easy-to-use tool to capture inventory transactions at the point and time they occur. Real-time validation and fast access to inventory details adds efficiency, accuracy, and control of your inventory.

Start with our core inventory, designed to handle all of the basic transactions required to manage inventory. Add-on modules and configurable features make PanatrackerGP the most scalable solution in the market.

.....
"Our inventory is labeled and accurate, order picking is simple, and stock counts take a fraction of the previous effort...this has saved us a ton of time."
.....



IN

Chances are that most of your inventory arrives through a purchase order process.

PanatrackerGP makes this step easy by receiving this inventory right on the dock and printing a label. If your product already has a barcode, we can tie that information to GP. Want another way to add inventory? Just do an adjustment.

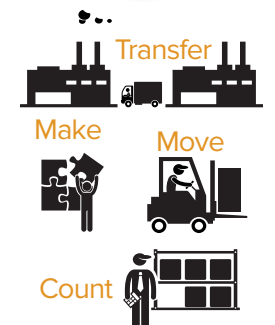


TRACK

Once the inventory is yours, record site transfers and bin movements. Just scan it and GP will know about it.

Do you manufacture things? We integrate to the GP Assembly and Manufacturing modules, as well as popular third-party manufacturing add-ons.

Keep your inventory under control by performing an occasional physical inventory or stock count. We tie directly to GP to make it easy.



OUT

Most companies sell their inventory to others or issue it for projects. PanatrackerGP makes order fulfillment easy. We can also streamline the shipping process too.

Using inventory for projects? Our adjustment transaction lets you record *what* and *why*. We integrate to popular project and service add-ons like WennSoft and Olympic Project Cost.



Transactions for Inventory Control



Core Inventory

We bundle the key transactions that everyone will need for effective inventory tracking.

Receiving

Accurately record and label inventory with real-time validation against your purchase orders.

Add Adjustment

Record inventory returns to stock or miscellaneous adjustments.

Site Transfer

Complete site transfer transactions. Optional printing supports the ability to re-package small items and label for destination locations.

Stock Count

Rapidly and accurately record stock counts of your inventory. A “spot count” feature is available for single-item verification by location.

Vendor Return

Identify and track inventory returned to the vendor. Additional reason code assignment adds valuable reporting.

Remove Adjustment

Record the usage and issue of inventory with a barcode scan.

Bin Move

Broaden inventory tracking with GP multi-bin features. View items assigned to a bin and move contents as a group.

Associate Manufacturing Item

Incorporate flexibility with alternate manufacturer cross-reference item numbers that can be used throughout the application.

Order Fulfillment

Modules that support basic and more complex picks, pack and ship tasks.

Pick Order

Access orders ready to be picked. Detailed picklist is presented to the user to track and capture pick details.

Batch Pick

Consolidate your orders to a single picklist, streamlining the picking process with a detailed picklist, with an individual order's quantity defined.

Assign Tracking Details

Associate tracking and bill of lading details to your orders. Use this feature to confirm loading to a truck or obtain signature capture for customer pick-ups.

Verify Order

For orders fulfilled to completion, add verification and pack function for additional accuracy.

Staging

Define orders to be shipped and efficiently move inventory to targeted staging areas.

Shipping Box Detail (License Plate)

Regardless if your shipping box is defined as a box, crate, or pallet, capture additional attributes including unit type and weight. Print a ‘box’ label for easy identification at the shipping station.

Other Modules

Project Accounting Transfer

Boost efficiency and simplify capture of items issued to projects.

Sales Order Entry and Edit

Create new sales transactions. Configuration options support the ability to add or edit existing orders.

Assembly

Capture components from bill of materials based on quantity to assemble. Print assembled item labels and create the “Assembly” transaction in GP.

Directed Transfer

Simplify restock picks utilizing directed pick lists. Expand tracking using “via” sites and recording receipt of inbound transfers at the destination site.

WennSoft Integration

Add the ability to select a service or job activity on inventory adjustment transactions. Accurately receive items assigned to a service or job on a P.O.

Manufacturing

Capture inventory transactions for your manufacturing process with integration options for Vicinity, GP and Horizon Manufacturing.

- ✓ Issue Inventory
- ✓ Create Production (Finished Goods Receipt)

ASN Receiving

Enhance efficiency and automate receiving from trusted sources through the Inbound Vendor Shipment infrastructure.

3 Tips for Inventory Control



1 Start barcoding your inventory!

You can't efficiently track inventory if you can't accurately identify it. Even if you aren't yet ready for an inventory management system, we encourage you to implement item labeling right away. By the time you put in a barcode system, your inventory will likely have turned over and all your products will already be conveniently labeled.

Check out www.panatrack.com for helpful blog posts or call us to learn more.

2 Devise a strategy to organize inventory!

If you now track inventory in Dynamics GP, then you are familiar with "sites". A site represents a physical building, but it could also represent a delivery truck or an inventory status (e.g. quarantine or quality hold). Also consider enabling "multi-bin" tracking within Dynamics GP. Bins allow you greater granularity to define locations within a site. Key tip: Name your bins in a manner that supports a useful sort order. Once you add a barcoding system, locating and tracking your inventory becomes very easy.

3 Evaluate the tools and reporting you already have with Dynamics GP.

Dynamics GP has the power to be a full-featured inventory management system. Enable some of its advanced features to tighten your inventory control. Research GP's features for resource planning, bin set up, priority assignments, and min/max management. Download our whitepaper, "Making the Most of Inventory Management – Leveraging Microsoft Dynamics GP and Barcode Technology" for specific ideas.



Depending on your industry and organization, you may refer to inventory in different ways:

Item	SKU	Parts
MATERIALS	Components	Goods

Regardless of how you refer to your inventory, if you have items that you acquire, use, or sell, you will see benefits in adding inventory management. Here are examples:

- ✓ Charge items issued to an internal department or employee.
- ✓ Maintain stock supply areas.
- ✓ Track parts used on jobs, service activities or work orders.
- ✓ Pick and ship items sold to customers.
- ✓ Track items rented or leased.
- ✓ Retain traceability (lot tracking).
- ✓ Maintain acquisition details for warranty tracking.
- ✓ Manage restocking from centralized to satellite locations.
- ✓ Maintain standardized truck inventory.
- ✓ Track materials issued to a manufacturing or assembly process.

Fixed Asset Management

Track your fixed assets with the simplicity of a scan.



Simply put, to protect your bottom line you need to maintain accurate records for your fixed assets. Too often, the physical details of your assets are managed outside of the accounting system and stored in spreadsheets or paper lists. Important questions such as “Who has it?” and “Where is it located?” go unanswered.

Gaining an accurate picture of your assets requires more than a few infrequent entries into the computer. It takes a solution that makes the tracking of assets simple – a solution that contains barcoded asset tags, mobile scanners, and a tight integration to the accounting system you already have.

PanatrackerGP extends Dynamics GP’s Fixed Asset module to help manage the physical details of your assets. Separated from the financial setup of your asset records, it’s a tool that simplifies adding, updating, and validating asset locations or custodians. Our unique platform allows you to synchronize asset details to the mobile computer and take it with you. Record updates where the assets are located and without a reliance on a continuous network connection.



“We now have a barcoded property tag on every laptop and server, and we can accurately track it as it changes hands. You have made this easy.”

Transactions for Asset Control

Associate Asset

Easily associate a new barcode asset tag to your existing assets. Filter the asset list by location, class assignment, or serial number to quickly locate and assign barcode tags.

Add New Asset

Tag it, scan it, and record key details about your new asset. Easily add the serial number, description, starting location, and more. Automatically create the corresponding receiving transaction if using a GP purchase order.

Update Asset

Access important asset details with a simple scan of the barcode. Quickly assign or re-assign who has it and where it’s located. With support for GP’s user-defined fields, you can tailor what information can be updated.

Assign Group ID

Group assets with the same attributes to take advantage of the Mass Change functionality within GP. Grouping assets supports the assignment of the proper Class, Book, and Accounts without needing to open each asset record in GP.

Validate Asset

Like a ‘physical inventory’ for your assets, confirm that you have an accurate location assignment for every asset. Additional options add validation to custodian and master asset ID assignment.

3 Tips for Fixed Asset Control



1 Tag your assets with a barcode label.

Get an early start on marking your assets with barcode tags. Select pre-printed commercial asset labels that will last as long as the asset. Design the labels with a “Property of Your Company” to highlight ownership and discourage theft.

Check out our website at www.panatrack.com for options or to get label samples.

2 Maintain a unique record for each asset.

Each asset that was assigned a barcode needs an independent record in your GP Fixed Asset module. This record stores the corresponding serial number along with specific assignments such as location and custodian. This provides the foundation to easily manage the physical details of your assets.

3 Determine your financial tracking strategy.

Define a strategy to set up financial record-keeping for your assets. Your acquisition cost can be captured for each individual asset record. Or create a master record for financial reporting. A Class ID assignment can differentiate your capital and expensed assets easily.

About Asset Labels

Asset tag identification plays an important role in an organization’s ability to quickly correlate different sets of information about each asset. This necessitates each asset to be uniquely identified. Panatrack recommends purchasing pre-printed serialized asset labels made with label materials and printing techniques that will ensure your asset identification will last as long as the asset itself. Include your company name for anti-theft and security identification.

Prefer to print your own? We can get you set up with the tools you need: label design and printing software, a barcode printer, and the correct label stock. Panatrack can provide you with your total asset tracking system.



PanatrackerGP tracks capital and expensed assets across a variety of organizations.

Examples include:

- ✓ Tools, electronics, laptops, cell phones and other trade assets on loan to students or employees.
- ✓ Medical equipment throughout hospitals or out-patient homes.
- ✓ Servers and networking equipment throughout Data Centers.
- ✓ Equipment leased to customers for jobs or special projects.

Field Sales

Capture sales transactions at the point of activity!



Streamline your sales operations by accurately capturing your customer's transactions anywhere. Gain accuracy by validating customer and inventory details at the point your customer interactions occur. Efficiently capture on-site customer sales activities. Confirm deliveries with signature captures. Manage consignment inventory. Record the items used on projects or jobs. Finally, print an accurate receipt on the spot!

Concerned about spotty cellular network coverage? PanatrackerGP's Field Sales solution doesn't require a continuous network connection. Your customer and inventory data is securely stored on the handheld computer and easily synchronized with Dynamics GP when a network connection is accessible. PanatrackerGP gives your workforce an intuitive interface and the peace-of-mind to record your customer interactions everywhere.

The PanatrackerGP portal is the robust infrastructure that manages everything. Set up handheld devices, configure workflows, and view detailed transaction logs for a full audit history. Replace your hand-written forms and redundant entry with an easy-to-use solution built on barcode accuracy.



"Having solid proof-of-delivery and easy order-entry has been a lifesaver. Plus, we have eliminated re-keying all that paperwork into GP!"

Transactions for Field Sales

Inventory Tracking

Boost your inventory control by efficiently capturing items used on jobs, service activities and on-site projects. Perform PO receiving and inventory transfers without needing a real-time connection.

Sales Processing

Eliminate paper-based forms and handwritten receipts. Add the ability to capture orders for customers or complete direct sales at the point of interaction with the customer. Capture signature acknowledgements, print a receipt or invoice, and accept payment.

Order Delivery

Synchronize orders by driver or region. Quickly identify pending deliveries and capture signatures for proof-of-delivery. An Update to the Batch ID for completed deliveries adds easy administrative management for final invoicing.

Payment and Cash Receipts

When sales transactions require processing of a payment, easily manage the process and add reporting and accountability to your staff.

3 Tips for Field Sales



1 Obtain customer receipt acknowledgement for delivery.

When delivering orders to a customer, capturing an electronic signature eliminates potential invoicing disputes. As an added step, provide a printed receipt or packing list at the time of delivery.

2 Plan for 'spotty' network coverage.

When evaluating tools to automate sales, delivery, or job/project inventory process, have a plan if network coverage is weak or not available. Solutions that support synchronization of data to a local device database will provide uninterrupted data capture processing for continued efficiency.

3 Evaluate additional GP features to better support sales and delivery.

Consider strategies to define salesperson, sales territory, order batch assignment, inventory site, and user-field assignment on sales order documents.



PanatrackerGP Field Sales is used for:

- ✓ Direct sales out of a mobile stock area, tradeshow, or showroom floor.
- ✓ Taking orders on a customer sales call.
- ✓ Restock or consignment activities at a client site.
- ✓ Order delivery confirmation.
- ✓ Issue of parts on location for job or project.
- ✓ Capturing parts used in a service activity.
- ✓ Confirming stock levels for trucks and vans.

Why Panatrack?

- ✓ **Direct Integration.** PanatrackerGP leverages your investment in Dynamics GP by using your existing inventory and asset database.
- ✓ **Easy to Use.** PanatrackerGP is highly configurable yet easy to learn and use.
- ✓ **Scalable.** Need simple data capture? We've got that covered. Need more robust functionality? Enable what you need when you need it. We grow with you.
- ✓ **Expertise.** We don't just deliver a piece of software. We offer our expertise to help you execute practical and accurate inventory or asset tracking. With our extensive knowledge in Dynamics GP, we help you use your system to your best advantage.
- ✓ **We listen.** Panatrack continues to evaluate ways to improve our solutions and continue to add new features and enhancements.
- ✓ **Great Support.** Since our expertise is tracking things, we naturally track our own efficiency in providing support. Your request for help is closely monitored and tracked through resolution. We also have a growing self-serve knowledgebase for common questions and tips.
- ✓ **Hosted?** We operate beautifully in the cloud or on-premise.

Call us to learn more!



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