



2025
EDITION

SOURCEPASS[™] ERP

The 2025 Guide to Microsoft Dynamics and Enterprise Resource Planning

How to centralize data and
streamline operations.

Microsoft[®]
GOLD CERTIFIED
Partner

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INTRODUCTION

What Is ERP and Why It Matters

What is ERP?

Enterprise Resource Planning (ERP) might sound like a buzzword, but at its core, it's about simplifying complexity.

Enterprise Resource Planning (ERP) solutions are integrated software systems that help organizations manage and automate core business processes in real-time.

From finance to supply chain, ERPs centralize data and streamline operations, enabling improved decision-making and efficiency across departments.

With an ERP solution in place, you're no longer managing your company through a collection of disconnected tools. Instead, you gain a 360-degree view of your operations, which improves collaboration and accountability across departments.

INTRODUCTION

Key Features of ERP Systems

How Does Modern ERP Impact Business?

Financial Management

General ledger, accounts payable/receivable, budgeting, and financial reporting.

HR Management

Employee records, payroll, recruitment, and performance tracking.

Inventory Management

Stock tracking, warehouse management, and demand forecasting.

Business Intelligence & Reporting

Dashboards, data analytics, and real-time insights.

Customer Relationship Management

Sales tracking, customer support, and marketing automation.

Manufacturing & Production Planning

Sales tracking, customer support, and marketing automation.

Project Management

Task assignments, time tracking, and resource allocation.

Supply Chain Management

Procurement, logistics, order management, and supplier coordination.

Compliance & Risk Management

Regulatory compliance, audit trails, and role-based access control.

ERP SOLUTIONS & MICROSOFT DYNAMICS

Sourcepass Infinity: Your Dynamics ERP Partner

ERP is only as powerful as your partner.

That's where Sourcepass Infinity comes in. We're not just implementers — we're your ERP strategy consultants.

Our services include:

- Business process analysis
- Custom solution design
- Seamless implementation
- Onboarding and training
- Ongoing support and upgrades

We understand that no two businesses are the same. That's why we approach every engagement with a fresh perspective, aligning Dynamics to your unique needs and goals.

With a track record of successful implementations and client relationships built on trust, Sourcepass Infinity brings clarity to ERP strategy.

Whether you're looking to fix operational inefficiencies, improve financial visibility, or future-proof your business, we'll get you there.

ERP SOLUTIONS & MICROSOFT DYNAMICS

The Power of Microsoft Dynamics



Microsoft Dynamics stands out as a leading ERP platform, combining the power of cloud-based technology with deep integration across financial, operational, and customer-facing functions.

Whether you're a small business or a growing enterprise, Dynamics 365 and Dynamics GP offer scalable, flexible tools designed to streamline operations, enhance decision-making, and drive productivity — all within a familiar Microsoft ecosystem.

- **Financial Management:** Automate tasks like Accounts Payable/Receivable, budgeting, and reporting.
- **Inventory & Supply Chain:** Track stock levels, manage vendors, and streamline procurement.
- **Customer Relationship Management (CRM):** Understand and engage customers better.
- **HR and Payroll:** Manage people with integrated tools.
- **Analytics & Reporting:** Use dashboards and real-time data to make smarter decisions.

What sets Microsoft Dynamics apart is its modular flexibility — you only use what you need, when you need it.

Microsoft Dynamics allows for powerful integration with other business systems, including deep integration with Office 365 and other Microsoft services.



Business Transformation: Upgrading to Microsoft Dynamics 365 streamlines operations with automated workflows, significantly reducing manual tasks.



Financial Management: The platform provides enhanced financial oversight with real-time and historical data through user-friendly dashboards.



Scalability and IT Simplification: Microsoft Dynamics 365 offers scalable plug-and-play features and a cloud-based system that simplifies IT infrastructure.



Security and Integration: Microsoft Dynamics 365 ensures compliance with built-in security features and fosters collaboration through seamless integration with the Microsoft Ecosystem. AI tools and real-time inventory management optimize demand planning.



Is it time to upgrade to Microsoft Dynamics?

- ☐ Are manual processes making your team inefficient, leading to errors and hindering productivity?
- ☐ Is your team investing hours outside your current system, manipulating spreadsheets to extract meaningful information?
- ☐ Is your team finding it challenging to manage transactions across multiple companies or handle multi-currency transactions?
- ☐ Is your team struggling to provide timely information, resorting to workarounds to manage data?
- ☐ Is your team struggling to meet customer demands due to delays in order processing and fulfillment?
- ☐ Do you rely on external advisors, often CPAs, to validate financial data as you question the quality of your information?
- ☐ Have you come to the realization that your current systems are impeding your ability to explore new business opportunities?

QUICKBOOKS TO DYNAMICS

Signs It's Time to Move On from QuickBooks

QuickBooks is a solid starting point for up and coming businesses. Eventually, though, you may find yourself patching together spreadsheets or managing multiple workarounds.

- ☐ **Am I duplicating tasks across departments?**
- ☐ **Do I lack visibility into inventory or customer data?**
- ☐ **Are manual entries causing errors or delays?**
- ☐ **Is my current solution creating bottlenecks?**

If you answered “yes” to any of these questions, this may indicate your system has become a barrier rather than a support mechanism. Business growth shouldn't be held back by limited software.

Dynamics gives you a unified, intuitive platform with room to grow — helping you eliminate redundancy, enable collaboration across departments, and refocus your energy on driving innovation and customer satisfaction instead of chasing down data inconsistencies.

CASE STUDY

Solving Licensing Issues with Microsoft Dynamics

Introduction

Universal Traffic Service (UTS) is a premier partner for manufacturers, distributors, and importers who seek full-service strategic transportation management. Its services go beyond rates into value-rich areas such as proactive communication, cost management, and system integration.

Challenge

UTS was experiencing a licensing issue with its Microsoft Dynamics GP provider that needed to be resolved quickly. UTS had been using the Microsoft Dynamics GP solution as a stable and reliable accounting platform, with functionality such as Collections Management and Refund Check features becoming important aspects to its daily operations.

UTS relies on the flexibility of Microsoft Dynamics GP, the customization of manual payment import, and the ability to email remittances for payables and receivables.

Our Approach

With decades of experience with a comprehensive range of business software around the Microsoft Dynamics 365 and Dynamics GP software platforms, Sourcepass was confident that they could remediate the issue for UTS.

As part of its full-service strategy of requirements analysis, re-engineering services, implementation, and professional Dynamics software support, Sourcepass was well equipped to get to the bottom of the issue.

Solution

UTS reached out to Sourcepass Infinity for guidance and recommendations to see if they could help resolve the Microsoft Dynamics GP licensing issue.

Not only was Sourcepass Infinity able to resolve the licensing issue for UTS, it was also able to offer recurring, annual enhancements at a reduced cost, creating immediate ROI for UTS.

“

Sourcepass Infinity is able to provide the technical support that UTS needs, while maintaining a professional and pleasant working relationship. Jack and his team have been a pleasure to work with for many years.

Julie Norman, Vice President – Finance at UTS

”

Conclusion

Sourcepass Infinity not only successfully resolved the licensing issue for UTS, but also provided a strategic advantage by offering recurring, annual enhancements at a reduced cost. This proactive approach not only ensured that UTS's systems remained up-to-date and fully functional, but also delivered significant cost savings. The immediate return on investment (ROI) was evident as UTS benefited from continuous improvements and optimizations without the burden of additional expenses.

This comprehensive solution underscored Sourcepass Infinity's commitment to delivering value and efficiency, enhancing UTS's operational capabilities and financial performance.

MICROSOFT DYNAMICS

Key Benefits of Dynamics ERP with Sourcepass

Dynamics Solutions with Sourcepass Infinity

With Microsoft Dynamics 365, you will utilize applications designed to enhance business management of finances, operations, and workflow.

Your business will gain functionality for financials, analytics and reporting, project management, inventory and order processing, operational enhancement and performance tracking.

How Dynamics Helps Your Business:

- ✓ Make data driven decisions
- ✓ Take control over analytics
- ✓ Optimize operations
- ✓ Increase productivity
- ✓ Adapt as business grows
- ✓ Enhance customer engagement
- ✓ Empower employees
- ✓ Work smarter and faster

Features & Outcomes

- ✓ Superior operational efficiency and breakthrough customer experience
- ✓ Agility and reduced complexity without increased cost
- ✓ Automated financial processes
- ✓ Sales & supply chain management to enhance sales effectiveness, streamline processes, and drive growth
- ✓ Reporting & forecasting



Sourcepass Infinity, a division of Sourcepass, offers a comprehensive range of business software and consulting services supporting the Microsoft Dynamics 365 and Dynamics GP software platforms.

BEST-IN-CLASS ERP SOLUTIONS

About Sourcepass Infinity

Every great journey starts with one step — let Sourcepass Infinity be your guide!

Whether you're ready to move on from QuickBooks, upgrade your current Dynamics solution, or simply explore what ERP could mean for your business, we're here to help. Schedule a consultation with our experts, and let's craft a roadmap tailored to your goals.

We'll help you demystify ERP and translate tech jargon into plain business terms. Whether it's preparing internal teams, setting realistic milestones, or making the business case to stakeholders, our experts will be with you from discovery through deployment. The next chapter of your growth story starts here — and Sourcepass Infinity is ready to help you write it.

Dedicated to excellence.

Sourcepass has achieved SOC 2 Type II and ISO 27001 certifications, reflecting our commitment to safeguarding the confidentiality, integrity, and availability of data, environments, and cybersecurity processes for both customers and trusted partners alike.

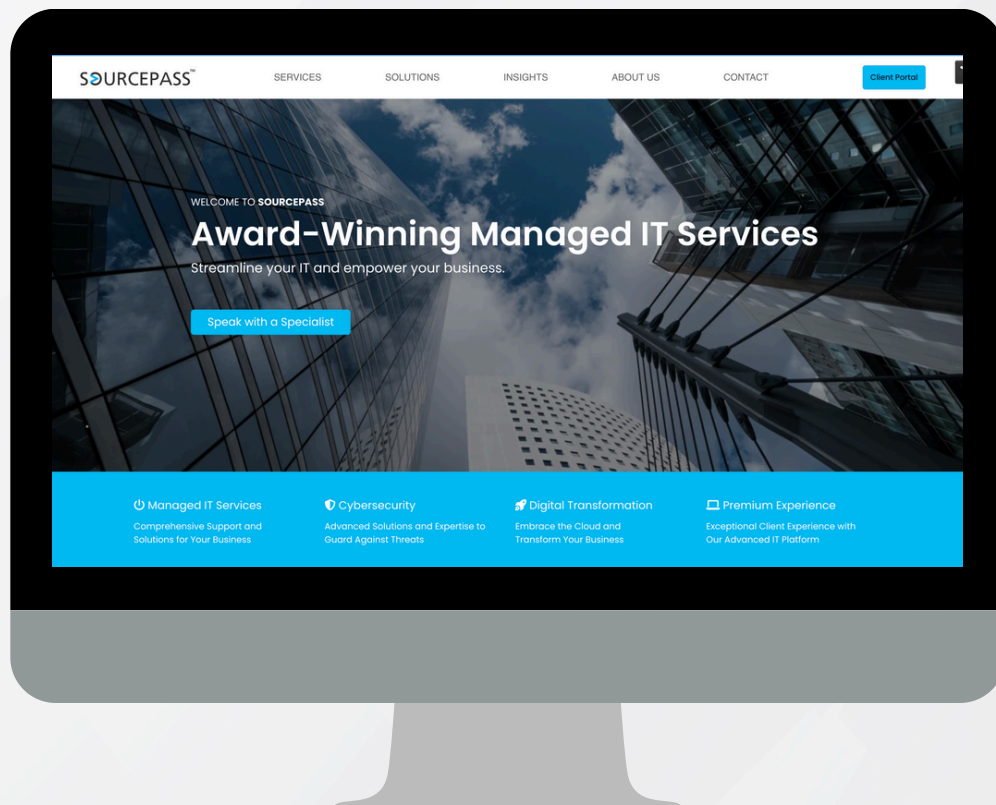


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