



# ENHANCEMENTS

*Microsoft Dynamics™ GP 10.0  
Connecting personal productivity and business processes*



# UNIFY



# Microsoft Dynamics™ GP 10.0

## Delivering the enhancements you asked for

What you asked for in Microsoft Dynamics™ GP: new functionality that empowers everyone in your organization—from the CEO to the sales representative, the Director of Operations to the warehouse manager—with the ability to get the information they need, in a format that makes sense. You also told us that you want to incorporate your business processes into your system, rather than the other way around—without adding to IT complexity. And you stressed that you want to empower your people to work within the applications they use every day—the Microsoft® Office system.

Our goal was to deliver what you asked for: A business management solution that reflects the way your people truly work. Microsoft Dynamics GP 10.0 brings together personal productivity and business processes through new and improved integration with Microsoft Office SharePoint® Server 2007, Microsoft SQL Server™ 2005, and Microsoft .NET technologies.

With Release 10.0, your people gain:

- An enhanced user experience that puts the familiar Microsoft Office System experience to work in a business process environment tailored to individual roles.
- Straightforward, flexible workflow automation for the processes that matter most to your business.
- New business intelligence capabilities that free people to take full advantage of business information and Microsoft-based reporting capabilities, whether they're working in Microsoft Dynamics GP or another application.
- Enhanced search and social networking capabilities that make it easy and fast to find and use structured and unstructured business information from across your organization.

Microsoft Dynamics GP 10.0 also offers a number of technology innovations that increase ease and efficiency for extending and customizing your solution, along with more than 120 new features and enhancements that span a wide range of business management functions.

*Take your business forward with confidence.*

## The Right User Experience

*When you give people a user experience that truly represents the way they work, you do more than help increase efficiency—you give them a solution they want to use. Microsoft Dynamics GP already offers an intuitive experience that looks and feels like the Microsoft Office system, along with home pages tailored to individual roles. With Microsoft Dynamics GP 10.0, we take that experience to the next level with user interface enhancements that transform people’s ability to access role-specific information and take action on daily tasks.*

People across your organization can work faster and smarter using the Action Pane, an intuitive, graphical command bar inspired by Ribbons in the 2007 Microsoft Office system. Action Panes appear across all navigation lists, showing commands specific to the data contained within a list and eliminating the need to open multiple windows to perform a task.

### **A solution that people will want to use**

- People can now view a list of records relevant to their role or task, select one or more records, and then perform an action against all selected records. For example, a sales representative can work within the Customers List to select multiple customer records and then apply or remove a hold from all those customers at the same time.
- Without relying on IT staff, users can modify list views and save the preferences, as well as create lists for others to use.

- It’s easy to perform actions based on specific needs—people can view transactions in one window, with the ability to filter information and then perform actions on that filtered view. For example, an accounting employee can easily select transactions for posting based on specific criteria, not simply by batch or transaction level.
- Action Panes also meet reporting needs by offering print report options that are specific to the lists being viewed.
- List windows now include an Information Bar that displays details for the record selected, helping minimize the need to open new windows.

# PERFORM



## Business Intelligence within Reach

*Put everyone in your organization, from your CEO to your finance managers, salespeople to warehouse staff, in touch with vital business information. When deployed with Office SharePoint Server 2007, Microsoft Dynamics GP 10.0 can transform people's ability to access and analyze accurate, updated data in a format that makes sense, whether they work in Microsoft Dynamics GP or another application.*

Just as important, Microsoft Dynamics GP 10.0 delivers new flexibility for queries and report writing and enables your business to transition to industry-standard Microsoft reporting tools at your own pace.

### More power from Office Excel

- Decision makers who want to perform ad hoc queries on Microsoft Dynamics GP data without logging into the system can now work with Office Excel report templates, which are based on more than 200 SmartList favorites. Reports can be stored on Office SharePoint Server 2007 for easy access and instantly refreshed at any time to ensure data is current.
- With Office Excel 2007 Services, a component of Office SharePoint Server 2007, all your Excel-based reports, spreadsheets, and pivot tables can be stored in a centralized, Web-based location—helping ensure that people are using and sharing a real-time view of data.

- Administrators can work with data connectors and a straightforward wizard to view existing Microsoft Dynamics GP reports in Office Excel format, create new Excel reports that utilize Microsoft Dynamics GP data, and then store reports on Office SharePoint Server 2007 or in the Microsoft Dynamics GP Report List.
- Analysis Cubes for Office Excel have been converted to Microsoft SQL Server 2005. Two new dashboards, Sales Manager and Salesperson, deliver metrics targeted to those specific roles.

### New options for report management

- By replacing the Microsoft Business Portal Report Catalog with the Office SharePoint Server 2007 Report Library, we've opened the flow of information so that people can launch and view reports from within Microsoft Dynamics GP or directly from Office SharePoint Server 2007.\* We've also added new report types to the Report List, making it the starting point for finding all Microsoft Dynamics GP reports.
- Using the Microsoft Dynamics GP Report Scheduler, users can quickly publish reports to Office SharePoint Server 2007 Report Libraries.

\* The Microsoft Windows® SharePoint Services version of Business Portal still utilizes the Business Portal Report Catalog.

## New flexibility for report writing through Microsoft SQL Server Reporting Services

- Expand report writing flexibility with more than 75 SQL Server Reporting Services reports that provide a solid foundation for transitioning from Report Writer in Microsoft Dynamics GP to industry-standard Microsoft tools.
- Administrators can deploy SQL Server Reporting Services reports using a straightforward wizard. They also can generate Unified Data model (UDM) files for all Microsoft Dynamics GP reports and then open them in SQL Server Reporting Services or Office Excel formats.

Sales Summary					
Extraordinary Inc.					
Inventory Control					
6/30/2007		12:26:05 PM		NORTHAMERICA (header)	
Item Number Ref / P/B	Item Description Parent Name	Year	Total Quantity	Total Sales	Total Costs
17 00001 0000	Callahan Bush 1/2 Bush				
	6 Mar	1999	-4.0000	(\$12.3000)	
	6 June	1999	13.0000	\$63.1200	
	8 August	1999	23.0000	\$279.4400	
34H 00001 0000	34H Sale 3/1000				
	6 June	1999	13.0000	\$187.7000	
	7 July	1999	7.0000	\$105.1400	
	8 August	1999	26.0000	\$726.0000	
39H 00001 0000	39H Drilling Pad Frame				
	8 August	1999	13.0000	\$28.4000	
39H 00001 0000	39H Drilling Pad				
	7 July	1999	4.2500	(\$4.3100)	
	8 August	1999	16.2500	\$59.7000	
ANAMA 1000	Amara Head				
	8 Mar	1999	6.0000	\$3.0000	
	6 June	1999	2.0000	\$798.9600	
000000 0000	000000 0000				
	6 June	1999	5.0000	\$74.0500	
000000 0000	000000 0000				
	8 June	1999	13.2500	\$223.1700	
00 00001 0000	00 00001 0000				
	7 July	1999	13.0000	(\$176.3100)	
	8 August	1999	13.0000	\$276.1300	



Expand your report writing options with more than 75 SQL Server Reporting Services reports.

Simplify report deployment using a straightforward wizard.

# ANALYZE

## Workflow that Fits Your Business Processes

*Running an efficient, competitive business and responding quickly to change can depend on your ability to take advantage of business process automation—not only for operations, but also for critical daily tasks that keep your business moving forward—approvals, notifications, overrides, daily postings, and so on. By automating these processes and directing them to the right people at the right time, your organization can maximize efficiency, accuracy, and proactive management.*

When deployed with Office SharePoint Server 2007, Microsoft Dynamics GP 10.0 delivers straightforward, flexible workflow capabilities that make it easy to automate notification and approval processes. Out of the box, you'll have workflow support for six key business scenarios:

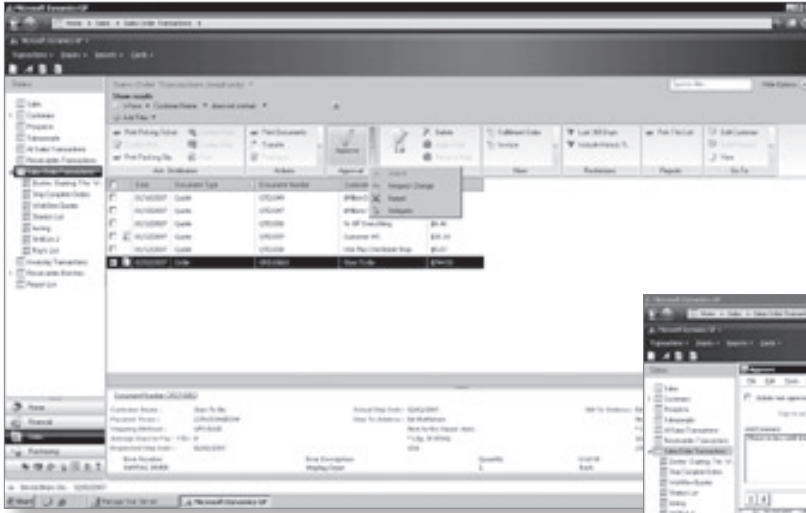
- General Ledger batch approval
- Receivables Management batch approval
- Payables Management batch approval
- Credit Limit Override Approval in Sales Order Processing Entry
- Sales Quote Approval
- Purchase Order Approval

### **Drive efficiency, accuracy, and accountability**

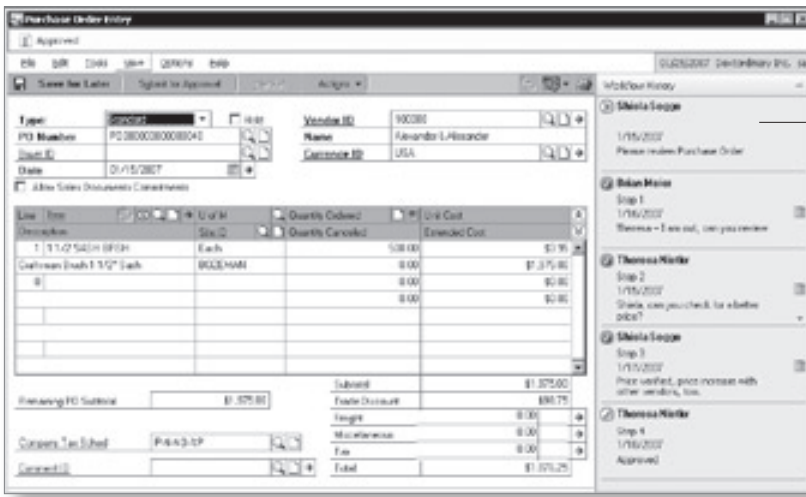
- Workflow in Microsoft Dynamics GP equips people to collaborate systematically and flexibly on tasks. Workflow processes can be set up to fit business and roles-specific needs so you'll know who has responsibility for specific actions and where a transaction is within the process—and you'll have the assurance that people are getting the right information at the right time.
- Notifications are extremely easy to understand and can include user-defined messages that clearly outline conditions for approving, rejecting, and delegating or requesting changes for documents.
- Your people work in the applications that make sense to them. Depending on the rules setup for a process, they'll receive automatic notifications through Office Outlook, Office SharePoint Server 2007, or the Microsoft Dynamics GP home page.
- Workflow functionality incorporates an audit trail of task ownership and actions to help ensure compliance and accountability.

# CONNECT

Workflow processes can be set up to fit the needs of people's specific roles.



Quickly define conditions for approval without juggling windows.



Workflow history provides an audit trail of tasks and ownership to help ensure compliance and accountability.

## Advanced Search Capabilities

*The variety of information sources for businesses is constantly growing, resulting in more data stored in more places; to find what they need, people are often forced to dig separately through folders, Web searches, file servers, e-mail, and more. Productivity goes down, and there's no certainty that the information that has been retrieved is timely or complete.*

When Microsoft Dynamics GP is deployed with Office SharePoint Server 2007, your people can efficiently find critical business information, regardless of its location, through enhanced search and social networking capabilities. The installation wizard registers the Web Services within the Business Data Catalog in Office SharePoint Server 2007—enabling people across the enterprise to search efficiently in the Microsoft Dynamics GP client or portal, not only for structured Microsoft Dynamics GP data, but also for unstructured information, including Office Word documents, Office Excel spreadsheets, and Office Outlook e-mail messages.

- How it works: For example, if a salesperson is searching for specific information about a customer, they can quickly implement a name search and retrieve all information related to the customer—including sales and service records, Office Outlook e-mail messages, items awaiting approval, and more.
- Searches can be initiated from within Microsoft Dynamics GP, Office SharePoint Server 2007, or the Desktop Search function.
- Searches can be set up and filtered using a straightforward wizard that makes it easy to define what data is searchable, and for whom.
- Information is also returned from SQL Server Reporting Services reports and even from reports that have been created in either text or PDF format.
- Administrators can register all Web Services in Microsoft Dynamics GP with the Business Data Catalog and then easily create new lists of information that can be viewed on Office SharePoint Server 2007 or Business Portal.



## Technology that Simplifies Complexity

*Microsoft Dynamics GP 10.0 delivers a software system that captures the way people truly work, helping you empower employees at all levels of your organization. At the same time, we've enhanced and simplified the technologies that drive your solution, helping you reduce IT overhead and gain the investment protection of innovation that works now and into the future.*

### **Roles-tailored security features**

In line with our mission to deliver people-ready solutions, the new security model in Microsoft Dynamics GP 10.0 is tailored to roles and tasks within roles. This new model allows for better auditing and reporting and for easier administration—while at the same time delivering strong security features.

### **Web Services in Microsoft Dynamics GP**

With this latest release, we add to an already extensive footprint of connection points for Web Services in Microsoft Dynamics GP, including Field Service Management. By utilizing these Web Services, you can share information with your customers, develop more adaptable integrations, and improve access to more information within Microsoft Dynamics GP. New support for row level filtering takes advantage of security within Microsoft Dynamics GP for information delivered via Web Services to customers, salespersons, and sales territories.

### **Simplified report deployment**

Simplify deployment processes for reporting to help reduce IT overhead. For example, the SQL Server Reporting Services wizard automates the report deployment process, including deployment for selected modules, report models, and data sources. Microsoft Dynamics GP 10.0 also offers an easy-to-use wizard that automates data connections and deployment for Office Excel 2007 reports, including reports for selected companies and registered modules. This wizard also creates a folder structure for organizing connections and reports by company and series.

### **Windows SharePoint Services and Office SharePoint Server 2007**

Business Portal, built on Windows SharePoint Services, enables Microsoft Dynamics GP users to take key processes online, foster collaboration across teams, and connect with external customers, partners, and suppliers. Microsoft Dynamics GP 10.0 now also works with Office SharePoint Server 2007 to enable online workflow and empower people to access, search, organize, and share data from within Microsoft Dynamics GP and other applications.

# SIMPLIFY

## **Why upgrade to Office SharePoint Server 2007?**

- Office SharePoint Server 2007 includes a number of products and services—including the Windows Workflow Foundation, Office Excel 2007 Services, Office InfoPath Server 2007, and the Office SharePoint Server 2007 Business Data Catalog. When Microsoft Dynamics GP is deployed with Office SharePoint Server 2007, you gain advanced search, information sharing, and workflow capabilities that can help increase business productivity and collaboration. Using a step-by-step wizard, people can easily define what data is searchable, and for whom.
- Microsoft Dynamics GP 10.0 delivers six workflows built on the Windows Workflow Foundation in Office SharePoint Server 2007. Additional workflows can also be created within Office SharePoint Server 2007 for a number of processes. For example, your IT staff or partners can create a workflow for legal contract review that is not dependent on Microsoft Dynamics GP. Through Web Services in Microsoft Dynamics GP, information can be added to your portal site with minimal development efforts.
- Creating internal and external portal pages is much easier when you combine the power of new Web Services in Microsoft Dynamics GP and Office SharePoint Server 2007. Without the need to add new code, you can create customer and employee portals that deliver role-based access to information, along with executive dashboards that can be accessed from Office SharePoint Server 2007.
- You can filter information on Business Portal pages based on Microsoft Dynamics GP companies. For example, a Salesperson dashboard might display only information from the company or companies associated with the salesperson.

# Microsoft Dynamics GP 10.0 Functional Enhancements

## Financial Management

*Increase flexibility and accuracy for managing budgets, collections, electronic funds transfer, payables and receivables processes, and more.*

### General Ledger

- A new reconciliation process enables users to generate an Office Excel spreadsheet, and then quickly identify transaction discrepancies between balances in General Ledger and sub-ledgers in Payables Management and Receivables Management.
- Help ensure compliance, accuracy, and traceability with automated, roles-tailored approval routings for General Ledger batches.\*

### Payables Management

- New options increase flexibility for defining 1099 information for vendors. You can now specify, by vendor, a default 1099 tax type and box number to print, adjust 1099 tax types and box amounts by transaction—including options to print in multiple boxes on a single 1099 form—or print multiple 1099s based on tax type for a single vendor.
- Simplify payables processes with automated, roles-tailored approval routings for Payables Management and Receivables Management batches.\*

## Collections Management

- Improved Collections Management Aging Reports with Notes enable users to group customer totals and documents by current and 30- 60- 90-day periods.
- Identify customers whose balance due is greater than their credit limit using a new query option in the Collections Management Build Query Window.
- Quickly generate collections letters that now include invoice numbers, dates, and amounts.

## Analytical Accounting

- Validate data across General Ledger and Analytical Accounting tables by running checklinks that compare information within tables.
- Manage budget planning with greater flexibility and accuracy by specifying start and end dates for budgets that span quarterly, semi-annual, or multi-year periods, while keeping existing options for a fiscal year intact.
- Create Analytical Accounting SmartLists that link Analytical Accounting information and enable people to analyze information according to specific criteria.

\* See page 6 for details about workflow in Microsoft Dynamics GP.

## **Electronic Banking**

- Setup functions for North American and European Funds Transfer (EFT) have been consolidated to simplify EFT setup and link customer and vendor EFT records to respective customer or vendor records.
- Gain flexibility for EFT file outputs, including optional pre-notes, printing non-negotiable checks for EFT payments, validation for transit numbers, and support for corporate payments.
- Track communication types for individual vendors, including Zero dollar check, Remittance, or None.

## **Encumbrance Management**

- Not-for-profit and public sector organizations can now encumber funds against an Analytical Accounting budget—or grant budgets defined within Analytical Accounting—rather than use a General Ledger budget.
- Gain a true picture of available budget with an enhanced Summary and Detail Inquiry window. Users can now view separate totals for pre-budget amounts for unapproved purchase orders (POs), pre-encumbered amounts from PO lines that exceed budget, and encumbered amounts for goods or services that have not yet been received. Additional enhancements to multi-year budgeting enable users to view inquiry data by budget or year.
- Accurately track start and end dates for grants and funds that span quarterly, semi-annual, or multi-year periods, while keeping existing fiscal year options for overall organizational budgets intact.

## *Human Resource Management and Payroll Management*

- Enhanced Pay Steps capabilities in Global Human Resources make it easy to associate an employee or pay code with a pay step table, as well as track employee grades and steps based on hire dates, adjusted time dates, or seniority dates.
- Quickly calculate and make retroactive pay adjustments to employee earnings for supplemental wages.
- Manage garnishment across different states and jurisdictions with user-defined tables that support multi-level withholding, based on individual garnishment requirements.
- Manage complex deduction priorities and stay in compliance with regulations with the ability to sequence all deductions, including tax-sheltered deductions and garnishment deductions.
- New setup checklists help simplify and speed deployment for Human Resources.
- Help simplify cross-border payroll processes with integration across Human Resources and Canadian Payroll.

# Microsoft Dynamics GP 10.0 Functional Enhancements

## Supply Chain Management Enhancements

*Help fine-tune inventory management, gain flexibility and control over manufacturing requirements and processes, and automate key purchasing and sales order processes.*

### Inventory Control

- Track inventory in transit between warehouses to determine more accurate promise dates, better manage inventory quantities, and prevent goods from being sold while in transit to the destination. Two-Step Transfers enters a middle site into the transfer process to allow for “via” tracking that includes freight time and landed costs. Once the goods are shipped from the starting site to the via site, an inventory transfer transaction is posted, creating a purchase receipt for goods in the via location.
- New Inventory Control setup options enable more flexible lot expiration management. For example, users can now receive automatic notifications when a lot is nearing its expiration date, as well as modify lot expiration date and attributes. With advanced warning that a lot is nearing expiration, the user can work proactively to consume the lot, evaluate the lot to determine whether the expiration date can be extended, or edit the lot’s attributes. Inventory Control preferences also include password protection to help prevent the use of expired lots in transactions.

## Purchase Order Processing and Sales Order Processing

- Efficiently process purchase orders, sales quotes, and credit limit overrides with automated, roles-tailored approval routings.
- Help reduce error with password protection for deleting a Returns Management Authorization (RMA) that is associated with a Return to Vendor (RTV) document.
- Quickly reverse the Cost of Goods Sold account when reversing scrap.

## Material Requirements Planning

- Improve material requirements planning (MRP) run capabilities and overall MRP performance with a new Pegging window that provides “move in”, “move out”, and “cancellation” suggestions for orders. A multi-level pegging tree enables easy tracing of demand for materials and registers new demand generated during the current MRP run. “What if” scenarios help ensure accurate planning. In addition, querying capabilities have been enhanced and can now be saved and rerun at a later date.
- Increase accuracy with site-specific inventory planning values, including “move in,” “move out,” and “cancellation” suggestions.

## Manufacturing Order Processing

- Gain flexibility and control over shop floor processes with the ability to reverse manufacturing order receipts after posting.

# STREAMLINE

## *Field Service Management Enhancements*

*Improve delivery of efficient, cost-effective service to customers, manage contracts more flexibly, and tighten control over inventory and equipment.*

### **Contract Administration**

- Help ensure accurate billing with the ability to credit a customer a flat or pro-rated amount when cancelling a contract.
- Quickly include or exclude expired lines when transferring or renewing a contract.
- Easily move contract line items from one contract to another or from one customer address to another.
- Select multiple equipment parts at one time and add them to a contract.
- Quickly reverse contract billing for single or multiple sales order processing documents.
- Track effective date changes when customers move to new locations to help improve dispatching efficiency.

### **Service Call Management**

- Specify preferred service times for service calls using the new Customer Service Hours window.
- Ensure more accurate parts usage reporting with the ability to differentiate I (Installable), R (Returnable), and C (Consumable) parts lines on the Parts Usage Report.
- Assign multiple technicians to a service call.
- Better manage inventory with the ability to use items tracked by lot numbers.
- Monitor critical information with equipment record audit trails for cross-checking the sales order or purchase order number that created an equipment record.

# Microsoft Dynamics GP 10.0 Functional Enhancements

## Additional Technology Enhancements

*Help reduce IT overhead and streamline processes for integrating and extending data sources and functionality.*

### System Tools

- Microsoft Dynamics GP installation now includes prompts for Open Database Connectivity (ODBC) information and verifies SQL Server setup to ensure compatibility requirements are met.
- Security can be synchronized across Microsoft Dynamics GP, Web Services in Microsoft Dynamics GP, and Business Portal.
- For mass deployments, Microsoft Dynamics GP now automatically creates a shared network drive for reports and forms dictionaries.
- Integration Manager now utilizes the eConnect Adapter instead of the SQL Optimized Adaptor to enhance solution extensibility.
- A new prerequisite checker for Business Portal ensures all system requirements and prerequisites have been met prior to the installation process.
- New system-level enhancements automate data connections for SmartList favorites. When a new object is created in SmartList Builder, a data connection becomes available for use in Office Excel.

### Extender

- Windows Groups make it easy to open multiple windows, including new read-only note windows, which are based on a conditional statement that automates business processes.
- Table Synchronization adds data integrity features that enable administrators and developers to move fields within a window and set additional table keys.
- Improve efficiency with a simplified interface for adding windows, copying information, and tracking multiple line items per master record.

# ACCELERATE

The chart below lists enhancements available with Microsoft Dynamics GP 10.0 module-based licensing (Standard and Professional) and Business-Ready Licensing (Business Essentials and Advanced Management) pricing models.

	Standard	Professional	Business Essentials	Advanced Management
Search		✓		✓
Workflow		✓		✓
Action Panes and List Pages	✓	✓	✓	✓
Developer Toolkit	**	*	**	*
Microsoft Office SharePoint Server		✓		✓
General Ledger	✓	✓	✓	✓
Payables Management	✓	✓	✓	✓
Collections Management	✓	✓		✓
Analytical Accounting	✓	✓	✓	✓
Encumbrance Management	✓	✓	✓	✓
Electronic Banking	✓	✓		✓
Human Resource Management and Payroll	✓	✓	*	*
Inventory	✓	✓	✓	✓
Material Requirements Planning	✓	✓		✓
Manufacturing Order Processing	✓	✓		✓
Field Service Management		✓		✓
Analysis Cubes for Microsoft Office Excel		✓		✓
Microsoft Office Excel Reporting	✓	✓	✓	✓
SmartLists	✓	✓	✓	✓
SmartList Builder	✓	✓	*	*
Microsoft SQL Server Reporting Services Reports	✓	✓	✓	✓
Extender	✓	✓	*	*
Integration Manager – Conversions	✓	✓	✓	✓
Integration Manager – Distribution	✓	✓	*	*
Integration Manager – Financials	✓	✓	*	*

\* Available for purchase separately

\*\* The Developer Toolkit Runtime is available for download

This list is subject to change. For more information, please contact your Microsoft authorized reseller.

## Microsoft Dynamics

Microsoft Dynamics is a line of business management solutions that automate and help improve financial, customer relationship, and supply chain management. Delivered through a network of Microsoft authorized resellers, these integrated, adaptable solutions work like and with familiar Microsoft software to streamline processes across an entire business.

**More information about Microsoft Dynamics can be found at <http://etekusa.com/microsoft-dynamics-gp>**

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**Microsoft**

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