Dynamics Release 7.0

Enhancement Brochure

Empowering you with business information to manage growth effectively

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Abstract

This document provides an overview of the enhancements included in Release 7.0 of Microsoft Great Plains Dynamics. Please note that information contained within this document may be subject to change.

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Those that must be purchased separately are indicated by the **<P>** symbol.

Those solutions only available on Dynamics SQL are indicated by the **<SQL Only>** symbol.

Dynamics Overview

Microsoft Great Plains Dynamics is a cost-effective, easy-to-use accounting and business management software solution designed specifically for small and medium-sized businesses. By delivering unparalleled access to decision-driving information, by providing you with a fast ROI, and by supporting you with the finest customer service in the world, Dynamics helps you grow and manage your business better.

The Dynamics integrated solution provides financial, analytic, distribution, project accounting, human resources and payroll, e-commerce and CRM functionality that works the way you do and can be customized to fit your business needs. What's more is that as a Dynamics customer, you know you've invested in a solution and company that will grow with you over time. Today, more than 23,000 businesses like yours are using Microsoft Great Plains Dynamics to improve their competitive advantage - a testimony to our success.

As part of our continued commitment to deliver the most reliable and feature-rich software solutions on the market, we offer you Dynamics Release 7.0. In this new release you'll find expanded distribution capabilities, more robust financial controls, tighter integration with Microsoft Office XP and new, flexible reporting options. And beyond all the new solutions, you'll find that more than 90% of the enhancements come from partner and existing customer requests, enhancing ease of use and satisfying your business needs.

Dynamics Release 7.0 includes enhancements throughout the product line, with special focus on:

Expanded Distribution Capabilities
?? Streamline order processing procedures
?? Track the total (landed) cost of inventory across multiple locations (or bins)
?? Supply a unique "ship-to address" for each line of a sales order

More Robust Financial Controls
?? Streamline previously tedious tasks like deferring revenue and expenses and aging unapplied payments and credits
?? Provide enhanced service to your customers and expedite revenue receipt through scheduled payments, refund checks and by reprinting and emailing statements
?? Ensure accuracy and security of your data through new, easy-to-use security options

Tighter Integration with Microsoft Office
?? Interconnect Dynamics data to Microsoft Office applications using Office XP Smart Tags
?? Create custom drill down links that launch Outlook, Web pages or documents from within Dynamics

Flexible Reporting Options
?? Manage and publish reports created in FRx Financial Reporting to the Web, where users can then view and drill down on reports using only a Web browser
?? Schedule reports to run on the FRx Report Server at a designated date and time with automatic distribution options, and increase productivity

Microsoft Great Plains is also delivering on its goal to help Dynamics customers efficiently link their financial applications to the rest of their critical business systems. As part of this effort, we are introducing Microsoft Customer Relationship Management — a new CRM product designed to work with Dynamics to help build more profitable customer relationships. This product will be available in the fourth calendar quarter of 2002.

In addition, Microsoft Great Plains continues to strengthen its award-winning services with innovative support and training options, including the back office service tools suite. This suite contains more than 30 service utilities that make the consolidation and changing of data faster and more accurate, so customers can focus on increasing their business success.

Office XP Smart Tag Manager <SQL Only>

The Office XP Smart Tag Manager is designed to make it easy for you to create and manage Smart Tags that integrate with Dynamics. Microsoft Office XP Smart Tags are context-sensitive links embedded in Microsoft Office documents that alert users to convenient options such as formatting choices or additional data analysis.

Smart Tag recognizers automatically are established for key master records within Dynamics. Anytime these items appear in Microsoft Word or Excel documents, they will be recognized with a Microsoft Office XP Smart Tag. On a per user basis, you can indicate which master records you wish to have recognized with Office XP Smart Tags. The initial list of items that will be recognized include:

- ?? General Ledger Accounts
- ?? Customers
- ?? Vendors
- ?? Items
- ?? Employees
- ?? Checkbooks
- ?? Salesperson

How Smart Tags Work

When a master record is recognized as a Microsoft Office XP Smart Tag, you will have several options for what action you want to take. If you are <u>not</u> running a Dynamics application, you can quickly look at – or copy and paste – related Dynamics data in a "popup" window that will appear. If you have a Dynamics application running, you can open a maintenance, inquiry or note window related to the item you've recognized, or you can open a Smart List "favorite" with related information.

For example, if you need to write a letter to a vendor but don't know their address, Smart Tags can help. Simply type the vendor name into a Microsoft Word XP document, and when the vendor name is recognized as a Vendor in Dynamics, the Smart Tag dotted line will appear under the name. You can then click the Smart Tag to open a "popup" window containing the company's address. Then just copy that address into your letter.

Smart Tags recognize text such as General Ledger accounts--as well as customers, vendors, employees, checkbooks and salespeople--in Microsoft Excel, Outlook and Word…

…And allow you to link to the underlying information in Microsoft Great Plains for instant answers to your questions.

Advanced Window Security

Advanced Security provides an extremely powerful, yet simple method for configuring User Security. It has a multi-user, multi-company and multi-dictionary Explorer-style interface, which can control form, window, record, table and report access as well as tools and document access, posting permissions and SmartLists objects. It also includes a special view, which groups together all the customized resources into a single area.
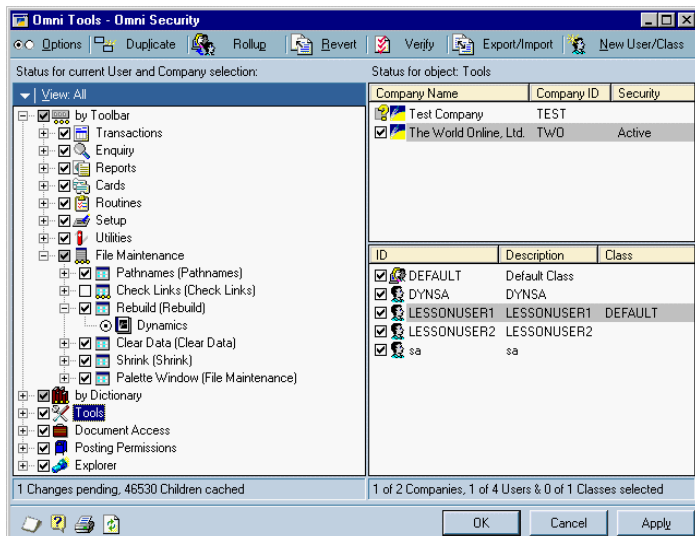
Familiar Explorer-style interface makes it easy to manage and configure user security settings

Advanced Security adds interactive dialogs which will identify errors with security and allow the system administrator to fix the problems on-the-fly without needing to change login user. The system will also give more information when a window or report is denied access and optionally allow the system administrator to grant temporary or permanent access, again without needing to change login user. This functionality will become available for Dynamics Release 7.0 System Manager in the third calendar quarter of 2002.

Custom Links

Dynamics Release 7.0 will allow you to easily connect with key Internet links and services that you use every day right from within Dynamics. For example, you may want to add drill down capabilities on the Customer ID or Name fields that will open specific Web pages or that will create an e-mail message directly from within Dynamics. An unlimited number of drill down options exist, allowing you to personalize your application, while connecting Dynamics to external solutions and Internet activities.
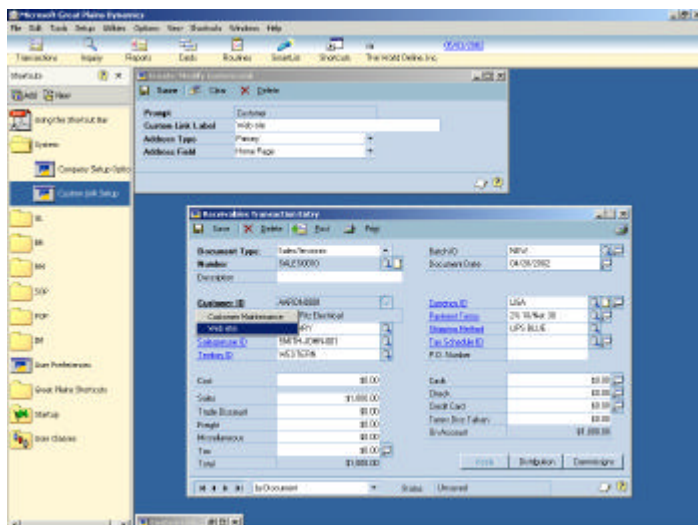
Create custom drill downs throughout the system to launch web pages, launch Outlook and address e-mail, or launch documents.

The following are some of the extended custom link capabilities you will find in Dynamics Release 7.0:

Custom Drill Down Capability
From within the Customers, Vendors, Items, Salespeople, and Employees cards in Dynamics, you can create custom links or drill downs that can launch Outlook and address an e-mail message, launch a Web Page or launch a document. An unlimited number of drill downs can be created for each reference within Dynamics.

Create custom links based on another value in the system
a) Tracking Number links can be created based on the Shipping Method for a document. For example, if the shipping method is UPS, you can select the tracking number and drill down to the UPS site. The system will automatically populate the tracking field on the site.

b) Checkbook links can be created based on the checkbook selected. For example, you can drill down on a Wells Fargo checkbook to the Wells Fargo web page and drill do wn on a First Bank checkbook to the First Bank web page.

c) Credit card links can be created based on the credit card selected. For example, each credit card field could have a drill down to the web page for that card to view online balances. Individuals responsible for accounts payable activities will find this feature beneficial if they make payments based on corporate credit cards.

d) Currency-specific links can be created based on the currency selected. For example, you can drill down on a currency for a transaction to an exchange rate site on the Internet.

In addition, you can also choose to drill down to the same location for all values. For example, if all your checkbooks are Wells Fargo Checkbooks, then you can set up one custom link to go to the Wells Fargo page. You wouldn't have to set up a custom link for every checkbook you have.

Expanded SmartList Views (formerly Explorer)
With Release 7.0, the Explorer tool has been renamed SmartList and many objects have been added including:

- ?? Fixed Assets Purchase
- ?? Receivings Transactions
- ?? Receivings Line Items
- ?? Landed Cost Group ID
- ?? Landed Cost ID
- ?? Tax Detail Transactions
- ?? Canadian Payroll Employee Master
- ?? Canadian Payroll Pay code Year-To-Date
- ?? Canadian Payroll Outstanding Accrued Amounts
- ?? Canadian Payroll Transaction History

Use the additional SmartList views to obtain information on Receiving Transactions, Receiving Line Items, Landed Cost Group ID, Landed Cost ID, and Tax Detail Transactions.

Option to use Shipping Method When Selecting Default Tax Schedule
Within the Tax Detail feature, you can use the shipping method to compare the customer and vendor schedule against the items.

International Addressing
To accommodate addresses around the world, an additional address and phone number field has been added within the Customer and Vendor Maintenance windows. As well, the State/Province ID field will increase from four to 29 characters.

Enlarge Screen Output View and Layout View
When viewing reports, or working within the Report Writer Layout window, you can utilize drill down capabilities, or display a report as a percentage of the overall report. Graphical reports display in a small font providing you the ability to enlarge information you desire and print for viewing to the screen.

Graphical Reports
Graphical reports will be incorporated throughout Dynamics 7.0, converting and updating many of the most common reports to a new graphical standard.

European Electronic Funds Transfer
European users can now pay vendors electronically rather than issuing a check.

Add Language ID to Cards
This feature allows you to create Languages and Language IDs and then apply the information to a User, a Customer and/or a Vendor. The Customer and Vendor card information will be added to the User Interface and the User Information will be added at the table level only.

Tax Detail History
Tax information can now be more accurately reported by allowing transactions that use taxes to maintain the history of the details of the taxes.

Back Office Service Tools: System Manager <SQL Only>

Database Disabler <P>
This tool allows the 'sa' user to disable any company database. Once the database is disabled, the company option is removed from the login window that you see when logging into Dynamics. The company database can easily be reactivated.

Shortcuts Copy <P>
This tool enables you to copy the shortcut settings from one user to another user. This is especially useful when users have frequently used, specific shortcuts set up for third-party windows or data entry windows, and multiple users need the same shortcuts set up.

Macro Scheduler <P>
This tool allows you to set up and schedule macros throughout the accounting system based on date and time. You could schedule nightly procedures to be executed on a single or daily basis. You can also perform low load testing. For example, this tool has the ability to take one transaction and create additional transactions automatically for use in scalability tests.

Login/User Generator
Recreate all logins and users based on the users that are set up in your system. The tool is useful for recreating Logins and Users to a restored database on a new server or a test server.

Toolkit
With this tool, you can rebuild the GL00105 without going into SQL query analyzer, turn on/off dexsql.log, rebuild indexes and recreate Dex Procs and tables.

General Ledger

General Ledger Detailed Trial Balance Report

With Release 7.0, the Originating Master Name has been increased to 64 characters to match the Customer Name and Vendor Name fields. When posted to General Ledger, the Originating Master Name, Originating Master ID and Originating Document Number will be updated. This feature provides consistent and accurate information in General Ledger for analyzing the history of a transaction.

Customer and Vendor names are now displaying in the Originating Master Name field on the Detailed Trial Balance report, which will allow for easier historical analysis. Multi-currency transaction information, such exchange rates, currency type, and originating amounts will also display on this enhanced, graphically formatted report.

Multicurrency General Ledger Trial Balance

Within the General Ledger Trial Balance, you can view information in multiple currencies. In addition, you can easily reconcile the General Ledger with sub ledgers. This report along with most other reports in the system, is now in an easy to read graphical format.

Disallow Manual Account Entry

Within any General Ledger account, you can allow or disallow account entry capabilities for an individual account. These accounts can still be posted to; however you cannot manually enter or select this account when entering a transaction. If the account has been set up as an automatic posting account on a vendor, customer, or item record, it will properly post to the account. For example, this prevents manual adjustments to accounts such as Accounts Receivable and Accounts Payables controlling accounts. This feature will provide you with additional control and security over the data entry of account numbers.
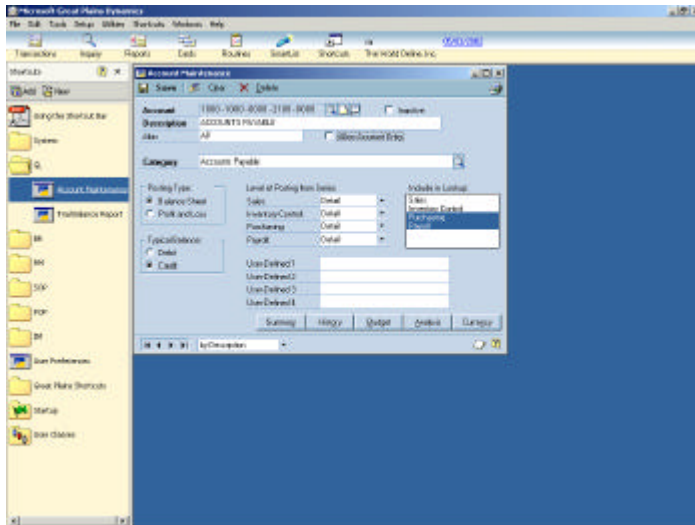
Disallow manual account entry for those accounts that require tighter control, such as Accounts Payable and Accounts Receivable accounts. This will prevent manual adjustments within the general ledger to the specified accounts, keeping your sub ledgers intact with your General Ledger.

Calculate Taxes in General Ledger
You now have the ability to associate tax details with general ledger transactions.

Revenue/Expense Deferrals <P> <SQL Only>
Revenue/Expense Deferrals enables you to defer reven ues and distribute costs over specified periods, by calculating and posting values spread over selected date ranges. Allocation types can be created within the system, and then applied against transactions as they originate in Dynamics General Ledger, Receivables Management, Payables Management, Sales Order Processing, Invoicing, Purchasing Order Processing, and Inventory Control. As well, "retro allocations" can be applied to previously posted transactions where revenue or expenses should have been deferred originally, but were not. All appropriate journal entries and audit trails are maintained during this process. Revenue and costs are realized according to the rates they are applied to within the system, enabling more accurate accounting without the administration. In Release 7.0, this feature will enable more streamlined data entry that is compliant with the rest of the Dynamics solution.

Bank Reconciliation

Select Bank Transactions Window
The user interface changes within the Select Bank Transactions window will allow you to more easily see which transaction is currently selected in the scrolling window.

Default Checkbook
The new default checkbook feature will speed transaction entry by allowing you to select a checkbook to default automatically when entering transactions within the Bank Transaction Entry window in Bank Reconciliation.

Fixed Assets Management

Straight-line Constant Rate Depreciation Method
A new straight-line depreciation method has been added. This new method uses the standard straight-line formula, which is based on the original life of the asset instead of the remaining

life. The existing straight-line method based on remaining life will continue to be available. The new method provides the option for calculating depreciation via a constant yearly rate as an alternative to using the remaining value calculation.

Import Assets by Asset ID
In addition to importing assets by Asset Label, you can now import assets into an asset group using the Asset ID. This provides an easy way to select assets to include in a group to be used for mass maintenance or depreciation. For example, assets to be included in a group can be selected using the SmartLists Search feature, exported to Excel, and then imported into Fixed Assets.

Inquiry Reports
Fixed Assets information displayed on inquiry windows can now be printed directly from the inquiry windows. This provides a method to easily print information about a specific asset. The option is available for Asset Inquiry, Asset Book Inquiry, Financial Detail Inquiry and Projections Inquiry.

Fixed Assets Added to Menu Bar
Fixed Assets is listed directly under Setup and Utilities on the Menu Bar, rather than Financials. This makes it easier to access these windows, plus provides navigation consistent with other Dynamics modules.

Purchasing Integration
You can now assign multiple purchasing transactions to the same Fixed Asset when posting an asset acquisition from Payables Management or Purchase Order Processing to Fixed Assets. This allows an asset's purchase information to be associated with more than one purchase transaction. Additional new features include:

- ?? In addition to costs posted from a purchase transaction, an asset's acquisition cost can include costs not posted from a purchase transaction. Each separate cost item can be identified as a separate transaction.

- ?? Purchase transactions can be assigned to existing assets.

- ?? Any purchase information can be changed or deleted for an existing asset.

- ?? Multicurrency transactions (in different currencies) can be assigned to the same asset.

- ?? SmartList includes a new Fixed Assets Purchase category so you can more quickly and easily view fixed asset information.

User Defined Fields
A new option will be provided to define valid values for Fixed Assets user-defined fields. Also, for user-defined fields for which the date format is used, an option will be provided to require entry of a valid date. This speeds up data entry and ensures consistency in asset information.

Calendar Information
The Fixed Asset Management Fiscal Calendar will supply all calendar information rather than the Dynamics fiscal calendar. Consistent calendar information will now be utilized during all Fixed Assets processing and you will be able to utilize a different fiscal calendar for Fixed Assets than the rest of your Dynamics system.

Fixed Assets Adapter for Integration Manager

Fixed Assets can now be added using Integration Manager. This allows you to pull asset information from old systems into Fixed Asset Management quickly and easily.

Payables Management

Payables Management Date Sensitivity

In Release 7.0, Payables Management transactions are now date sensitive, enabling you to enter transactions across multiple years with the summary information reflecting the transactions correctly. This means you can enter Payables transactions into a new year before closing the previous year; and your 1099 information will still be accurate. Additionally, this capability allows you to view the summary information based on the fiscal year or the calendar year for any year in which history was saved. As well, reconcile functionality has been enhanced to allow you to update period summary amounts based on detailed amounts. Summary amounts can be viewed for any year, simply by specifying the year.

Updated 1099 Formats

All 1099 formats have been updated.

Age Unapplied Credit Amounts

You have the option to let the system age any unapplied credit amounts when an aging is run in Payables Management. This can make your aging period balances more accurately reflect amounts that are actually owed in each period. The aging will be based on the document date in relation to the aging date and how the aging periods have been set up in Payables Management Setup.

Scheduled Payments <SQL Only>

You can now create scheduled payments in Payables Management for vendors that you pay on an installment basis. Create payment schedules, calculate interest and amortization amounts, and perform "what-if" scenarios to determine the impact of various interest rates, payment amounts, frequency and installment number changes.


Create what-if scenarios to determine how different payment frequencies and interest rates affect amortization schedules.

eExpense

Dynamics eExpense is the world's leading Web-based travel and entertainment (T&E) solution that automates each step of the expense management process – from expense report preparation and approval to policy compliance, data analysis, and reimbursement. Expense reports are automatically delivered to approving managers, accounting departments, as well a s budget and travel managers for streamlined processing, reimbursement, and data analysis. The expense report data is easily integrated into Dynamics Payables Management for reimbursement to employees.

Employee Importer

A new wizard allows an administrator to add new or update existing employees via importing of data files from Dynamics, greatly reducing the amount of work required to keep employee data current in the system. You can also create and manage templates for importing the data files, which will also reduce the work effort.
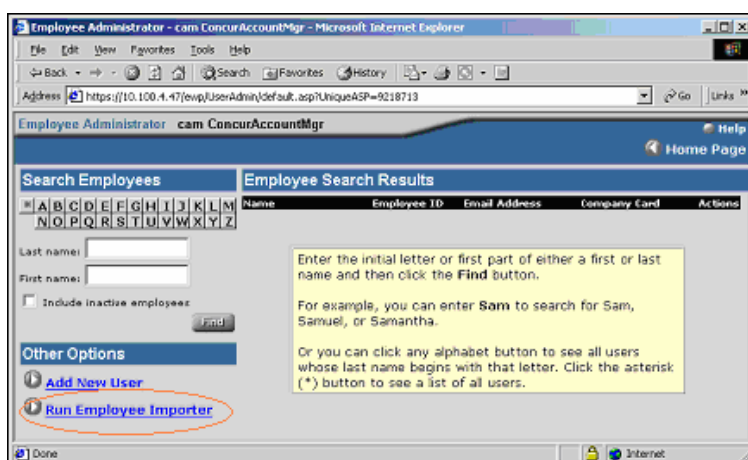
Let the import wizard do the work when adding or updating employee information in eExpense.

Updated AP/GL File Export

Dynamics eExpense now accommodates 15 additional fields (six of which are to accommodate VAT functionality for EMEA) for a total of 85 fields.

Integration for Palm OS?

You can now capture **out of pocket** expense data quickly, easily and off-line on any Palm OS 3.0 and above device by utilizing the native Palm Expense application installed or available on the CD that came with the device. The integration only requires a download of a 700K sync conduit to your computer and a few set-up steps. After installation, expense data synchronization to eExpense is part of the standard Palm sync process.

Approver Report List

A manager can view all expense reports he or she has approved, either summary or detail, in the view expense reports section.

Batch Holiday

There are currently 10 banking holidays per calendar year, during which time US Federal Reserve banks and branches are closed. In the event that you do not observe all 10 banking holidays and you need the ability to control batch dates (regardless of banking holidays), you will now be able to:

?? Allow for 'on-demand' (i.e. usually within an hour and a half) creation of APGL export files.

?? Specify the Approval Date as well as the Pay Date.

Reset Password

If a user forgets their password, and is locked out of the eExpense system, you now have the option of allowing users to reset their own eExpense password. This reduces the administration time for you and allows a more user friendly and self-service solution to your end users.

Attendee Delete

You can delete (or hide) previously saved attendees so they don't show up in the list of saved attendees on the Attendees dialog box when entering dining and entertainment expenses in eExpense. Having the ability to not track past attendees will decrease the download time your power travelers encounter and make it easier to maintain attendee lists.

Optional Quick Approve

Administrators now have the ability to disable the Quick Approve feature to enforce finance policies.

Receivables Management

Receivables Date Sensitivity

Receivables Management transactions are now date sensitive, allowing you to enter transactions across multiple years with the summary information reflecting the transactions correctly. View the summary information based on the fiscal year or the calendar year, in addition to viewing the detail since the last Receivables Management year-end close. In addition, the reconcile process includes the option to update the summary amounts based on the detail amounts.

Auto-Apply Credit Documents to Finance Charge Documents
Auto-applying credit documents to finance charge documents provides the option to have the auto-apply process apply the selected unapplied credit document amount first to any unapplied finance charge documents. This new feature will help speed data entry by allowing you to apply cash receipts to finance charge documents first, without requiring you to manually change the apply amount.

Reprint Statements
At any point in time, you can reprint a statement (or group of statements) using the new Reprint Statements feature, even after running the Paid Transaction Removal process. The reprinted statement shows the exact same data as the original statement; however, is labeled as a Reprint Statement.
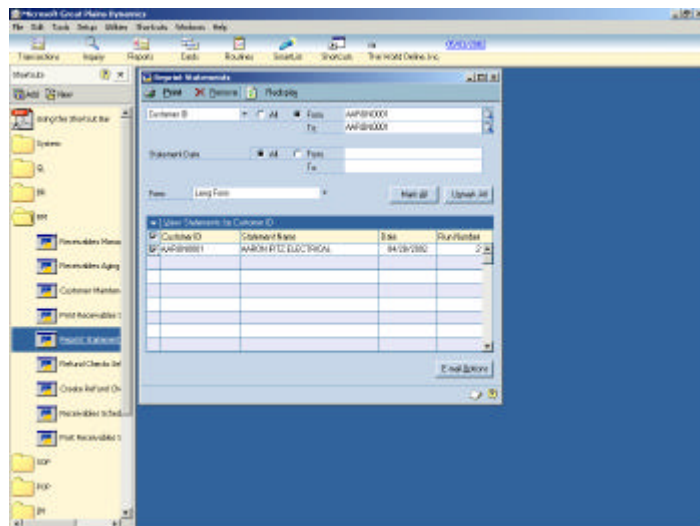
Mark an individual statement for reprinting or select a range of statements based on customer or statement date range.

Refund Checks
You can use Refund Checks to create receivables debit memos for customers who have credit balances, and print refund checks for those customers using Payables Management.

The Refund Checks feature became available with Release 6.0 Extensions, however, with Release 7.0 you can create miscellaneous charge documents for customers instead of creating an invoice in Payables Management. You also have the option to create a temporary vendor to use for refund checks, process refunds for balance forward customers, and process refunds using multiple currencies.

Lockbox Processing Cash Receipts
Lockbox Processing, added to Dynamics in Release 6.0 Extensions, automatically applies customer payment information from a lockbox transaction file provided by the customer's bank. No longer is the administration associated with managing cash receipts a cumbersome, manual task, but rather is processed with an electronic batch that is compiled by any banking institution and sent to Dynamics for transacting within Receivables Management.

Release 7.0 will enable cash receipts to be brought in using the checkbook currency, as well as streamline the user interface of the Lockbox Processing feature to easily fit with the rest of Dynamics.

## Scheduled Payments <SQL Only>

You can now create scheduled payments in Receivables Management for customers who pay on an installment basis. Create payment schedules, calculate interest and amortization amounts, and perform "what-if" scenarios to determine the impact of various interest rates, payment amounts, frequency and installment number changes.
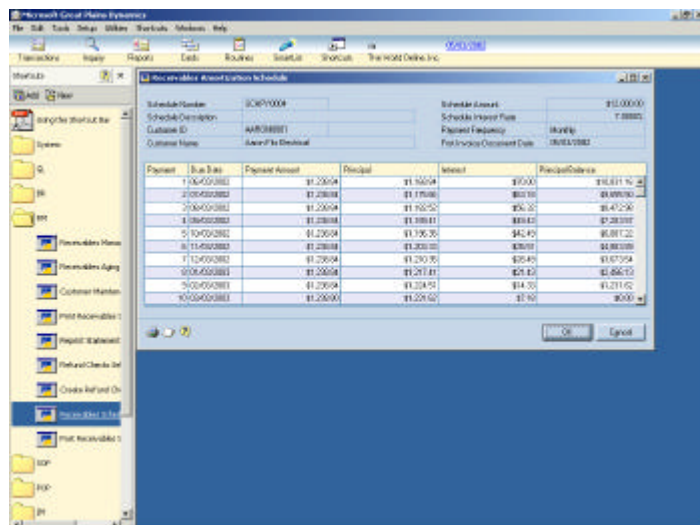
Create what-if scenarios to determine how different payment frequencies and interest rates affect amortization schedules.

E-mail Statements

During the print statement process, you can now e-mail customer statements in a .PDF format. To create statements in .PDF format, you must have the Adobe Acrobat software installed.
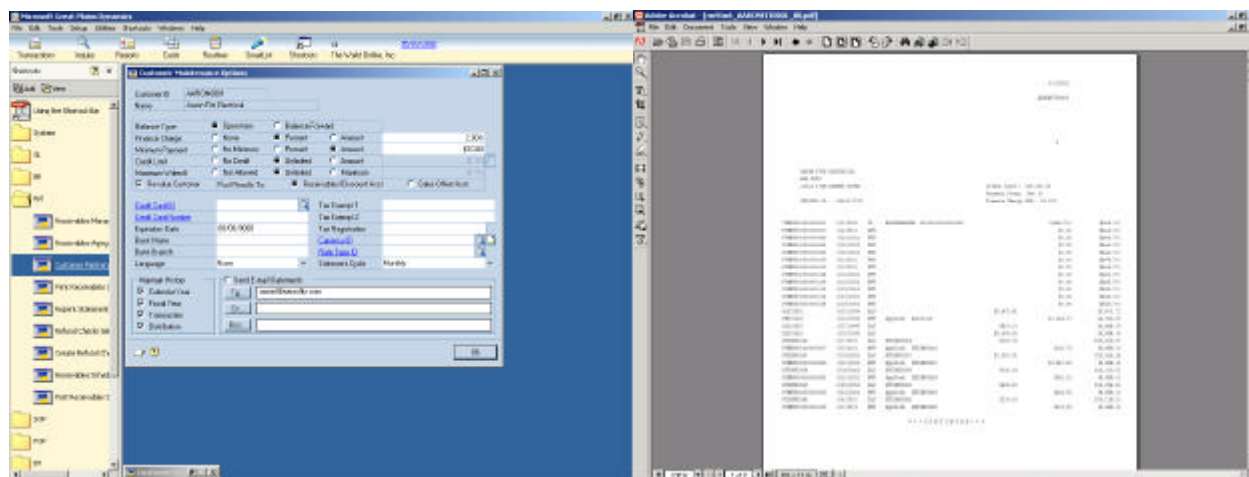
Define multiple e-mail addresses per customer to send statements electronically.

Finance Charge on Positive Balances

The Include Unapplied Credits in Aged Balance option provides the ability to only apply finance charges to customers that have a positive balance. This enables you to better manage the way you apply finance charges and ensures that customers are not assessed finance charges incorrectly.

Back Office Service Tools: Financial Series <SQL Only>

Account Modifier/Combiner<P>
This tool enables you to change an old account number to a new account number, or combine like accounts into a single account without manually keying in the data. This tool includes both the account modifier and combiner.

Fiscal Period Modifier<P>
This tool enables you to change fiscal year definitions and reset data in the open and history tables. It allows you to change the fiscal year by changing the year stamp on transactions.

Checkbook Modifier<P>
The Checkbook Modifier enables you to change existing checkbook IDs to new checkbook IDs. All Work, Open and History records are updated with no loss of data.

Fixed Asset Modifier<P>
Use this tool to reclassify an Asset Code within the Fixed Assets module and reflect that change in all tables throughout the system.

General Ledger Master Record Triggers<P>
This tool helps you add an account or item in a master database and have this record then flow to all databases or just certain ones, thus avoiding needless data entry.

Vendor Modifier <P>
This tool enables you to change an existing Vendor ID to a new Vendor ID with the click of a button. Instead of having to key in a new Vendor ID and re-key open invoices, you are able to update all Work, Open and History records seamlessly.

Vendor Combiner <P>
This tool allows you to combine a Vendor ID into another existing Vendor ID. By doing this all the Work, Open and History Records combine into the new Vendor. No data is lost and the Summary Balances are recalculated. The original Vendor ID is removed from the system after it is combined into the other Vendor ID.

Vendor Name Modifier <P>
This tool enables you to change an existing Vendor Name to a new Vendor Name with a click of the button. All Work, Open and History records are updated seamlessly.

Payables Select Checks Combiner <P>
This tool allows you to consolidate checks to the same vendor when users are appending to an existing checks batch. This can be of great value if users frequently build batches of Payables checks and select different document number ranges or different date ranges.

Payables Minimum Check Utility
Use this tool to pick a minimum amount for your Payables checks created through the Select Checks process. It will prevent any checks being created for under the minimum amount specified.

Payables Management Master Record Triggers <P>
This tool helps you add a vendor or item in a master database and have this record then flow to all databases or just certain ones, thus avoiding needless data entry.

Receivables Management Master Record Triggers <P>
This tool helps you add a customer or item in a master database and have this record then flow to all databases or just certain ones, thus avoiding needless data entry.

1099 Modifier <P>
This tool enables you to change documents to 1099 documents if you have incorrectly set up your vendors, or if you forgot to mark the 1099 vendor option on your Vendor Card for a year or a portion of the year.

Territory Modifier
This tool allows you to change Territory IDs in the system. The result is a new Territory ID with no loss of data.

Territory Combiner
This tool enables you to combine Territory IDs into another Territory ID without losing any Work, Open or History Records. After the completion of the tool, the old Territory is removed from the system.

Customer Modifier <P>
This tool enables you to change Customer Numbers in the system. You can change from an existing Customer Number to a new Customer Number. Instead of having to key in a new Customer Number and re-keying all your open Invoices, you can update all Work, Open, and History records with the click of a button.

Customer Combiner <P>
This allows you to combine a Customer Number into another Customer Number without losing any Work, Open or History Records. The old Customer Number is removed from the system after the completion of the tool and the Summary records are recalculated to include both customers' summary information.

Customer Name Modifier <P>
This tool enables you to change an existing Customer Name to a new Customer Name with a click of the button. All Work, Open and History records are updated seamlessly.

Salesperson Modifier <P>
This tool enables you to change Salesperson IDs. The result is a new Salesperson ID and no data is lost or has to be re-keyed into the system.

Receivables Management Transaction Unapply <P>
This tool enables you to unapply documents in the history table and automatically moves the records back to the open table which allows you to reapply the records as needed. This is a good alternative to removing history and re-keying data if the records were applied incorrectly.

Sales Order Processing

Ship To By Line

The new Ship to by Line item functionality will supply a unique "ship-to address" for each line of a sales order document. This address will be used when printing shipping documents. This new capability enables organizations that have heavy distribution and Internet-sales needs to ship goods to multiple locations from the same order. Shipping documents can be printed for each unique shipping address, which simplifies the order process in that multiple orders no longer need to be created when shipping information changes at the line item level.
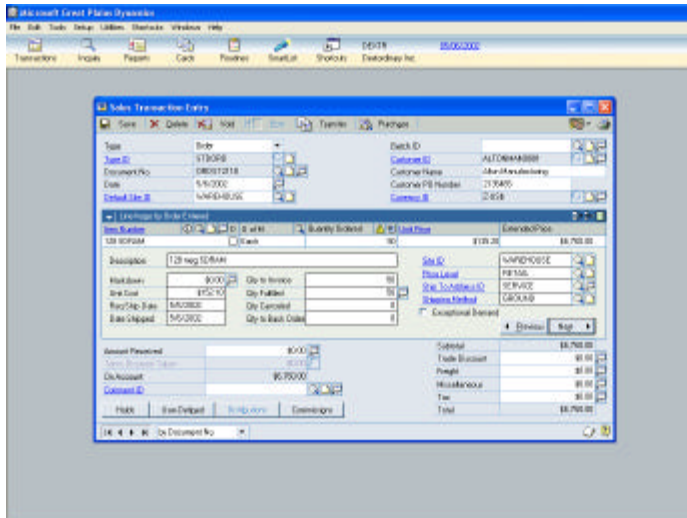
With Release 7.0, you can have a unique ship-to address for each line on a sales order.

Track Orders Using New Custom Link

With Release 7.0, the tracking number has been added in the User Defined Field area in Sales Order Processing. With this new feature, you can track orders by entering the tracking number(s) for an order in SOP, and using a hotlink to UPS or FedEx sites to track the shipments online. This new custom link will pass the number entered in SOP to the Internet site that you have connected to for the drill down.

Sales Order Processing Entry Window Changes

Within the Sales Order Processing entry window, you will use a "card" to view record-level detail rather than viewing the information across three lines in the scrolling window. This allows data entry at a detailed level within the main window, rather than having to access a separate Sales Order Processing detail window to enter the information.
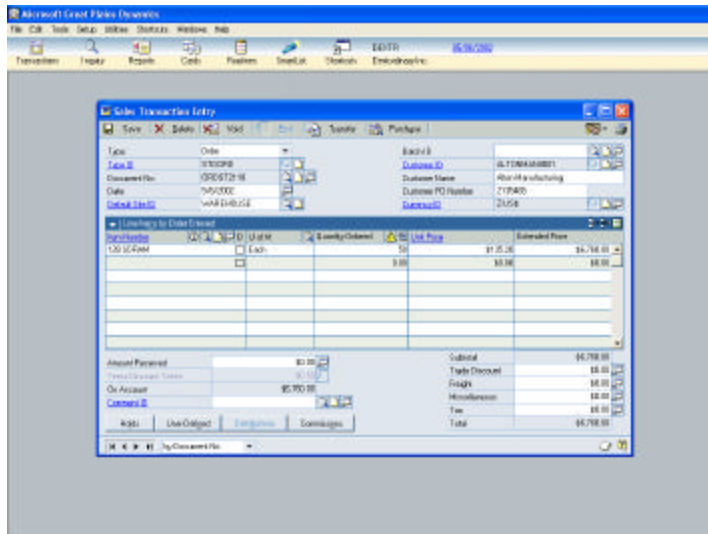
Sales Order Processing has a streamlined user interface to facilitate rapid order creation with only the necessary information visible.

Credit Card Payment Processing

Credit card orders taken over the Internet or otherwise should only have the credit card charged when the order ships. And, revenue recognition must also comply with shipment dates. To address these guidelines, new Credit Card Payment Processing capabilities in Dynamics enable the order to be taken and the credit card to be authorized without charging the credit card and without recognizing revenue until the order ships to the customer. In situations where only a partial order is shipped, amounts consistent with the shipment will be charged to the credit card and recognized as revenue.

Purchase Order Processing

Revalue Inventory for Cost Variances

There are times when you may receive an invoice where the cost differs from what you expected. In instances where you accept the cost variance, you may want to update the Inventory subsidiary module with the actual cost, especially if the variance is significant. With Release 7.0, you now have the ability to choose whether inventory should be revalued for cost variances, allowing you to indicate whether cost variances from Purchase Order invoices should be updated or "revalued" within Inventory purchase receipts. Or, you can select to leave Inventory purchase receipts untouched, posting variances to an expense account instead.

Automated Purchase Order Generation <SQL Only>

This new feature enables you to set up any number of predefined parameters wi thin Dynamics Inventory Control to automatically replenish inventory items or groups of items. By automating the replenishment process, you are ensured that customer orders are fulfilled on a timely basis.
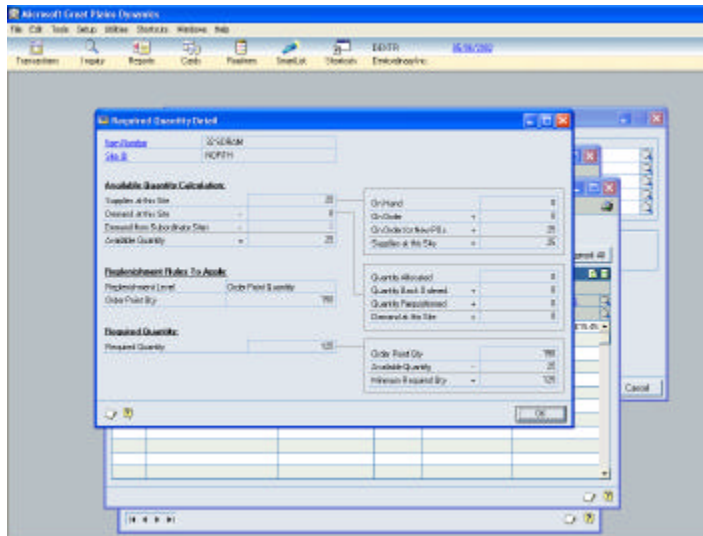
Auto PO Generator for Dynamics enables you to create suggested orders based on the inventory status and conditions defined by your inventory managers.

Landed Cost <SQL Only>

Landed Cost is the "total" cost that it takes to get a product to your doorstep. When you buy a product from a vendor, there are often times additional costs involved besides the cost the vendor quoted you. These additional costs are things like freight, insurance, and duty. In Release 7.0, you can define the different types of costs that may incur. These different types of costs can be assigned to items which in turn default on the Purchase Order. When recording a shipment, the landed cost types and amounts will default. You can edit the amounts and the currency, as well as add or remove the "estimated" landed costs that might incur. These costs are added to the expected cost from the vendor and used to update Inventory. You are able to record invoices from the landed cost vendors as well as the product vendor as you receive them. Based on the Revalue Inventory setting, variances in cost may be recorded in Inventory or may be expensed.
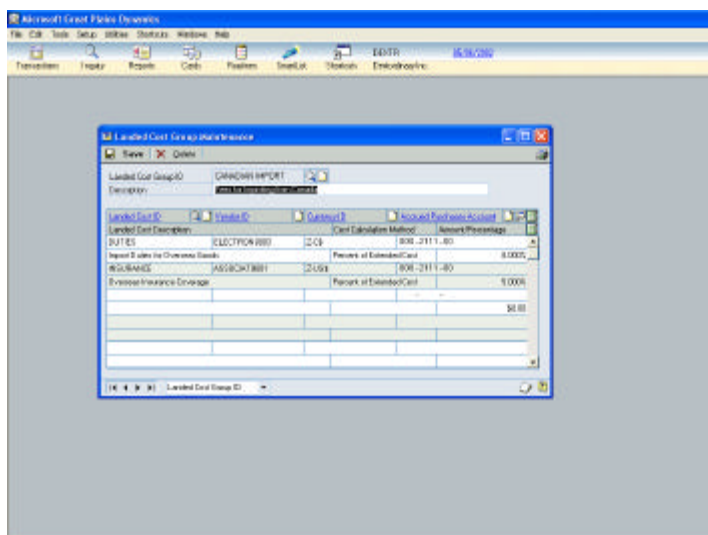
Group a variety of costs together that may be associated with an order, site or item.
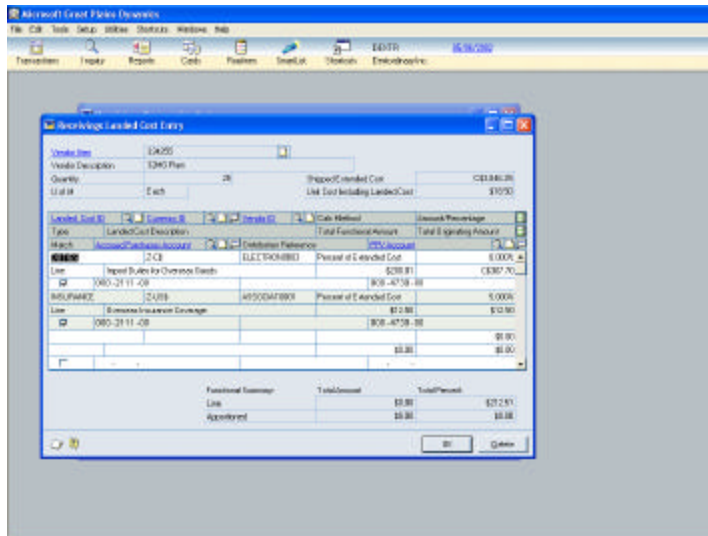
All costs that have been assigned to an item are automatically allocated upon receiving entry of the order.

Calculate Taxes in Purchase Order Processing

With Release 7.0, you can select to have taxes automatically calculated, or select to use a single or advanced tax schedule method for getting detailed tax information into reports when purchase orders are generated and when freight and miscellaneous charges are calculated.

Purchase Order Processing Returns

Return functionality in Purchase Order Processing allows you to remove items from inventory that have previously been received, or to decrease the amount owed to the vendor due to previous purchase order invoice activity. This allows you to access vendor performance information from Dynamics and better track their inventory.

Specifically, this supports the return of an item against a posted receipt that exists in Inventory purchase receipts. This ensures that the correct cost is accessed from Inventory and that the correct General Ledger account distributions are backed out of General Ledger.

Receivings User-Defined Fields

Five user-defined list fields, 20 user-defined date fields and 10 user-defined text fields have been added to Receivings Transaction Entry. These additional user-defined fields provide an easy way to track additional information for shipments and shipment invoices.

eRequisition <P> <SQL Only>

Electronically interconnect your employees by giving them the power to enter their own purchase requisitions right into your purchasing system. You'll save time in the purchasing department, eliminate inefficient paper systems, increase purchase order accuracy, and best of all, have complete control over the entire process.

eRequisition allows employees to enter their own purchase requisitions using a Web browser over a corporate Intranet. The requisition is routed to the appropriate individuals for review and approval, before it is entered in the Dynamics Purchase Order Processing system. eRequisition eliminates the need for a paper-based requisition system in your company, and gives all employees an easy and efficient way to enter requisitions.

- ?? Allows employees to route a requisition from their desktops to the supervisor or person authorized to approve the requisition.
- ?? Approved requisitions are automatically routed to the accounting department.
- ?? Provides views for employees, supervisors and accounting department members to see purchase requisitions in process.

- ?? Allows for security on views, based upon user, to limit access on requisitions and ensure that they are requisitioning against the appropriate budgets.
- ?? Creates purchase orders by combining line items for the same vendor from multiple requisitions.
- ?? Delivers seamless integration with Dynamics Purchase Order Processing to eliminate data re-entry.
- ?? E-mail notifications inform the end user of activities such as rejection, deletion or final approval of their requisition.

Inventory

Multi-Bin Capabilities <SQL Only>

New Multi-bin capabilities in Dynamics Inventory Control enable quantity tracking at the bin level, including allocations. Features include a web interface to view quantities, move transaction capabilities between bins, and track the quantity type at the bin level.
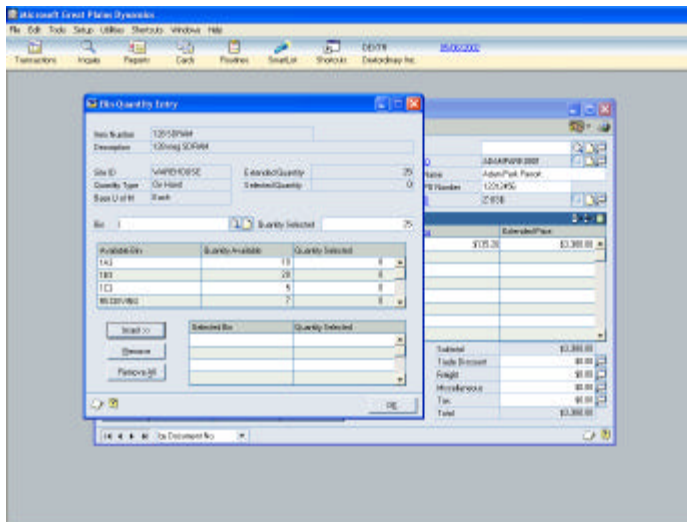
Items can be stored in numerous bins within a warehouse and then picked according to the bin that makes the most sense.

Back Office Service Tools: Distribution Series <SQL Only>

PO Next Number Default

This tool will allow you to prevent Purchase Order Processing from defaulting the next PO Number or Receipt Number to a number that is previous to the current PO Number. For example, this can happen when an existing PO Number is pulled up and deleted. There is also an option to set a minimum PO Number default, so the system won't default to anything below the minimum.

Sales Order Processing Customer - Item Historical Lookup <P>
Use this tool to store Customer specific ordering history along with last invoice date and last price used. A lookup is available from within Sales Order Processing Entry and the Sales Item Detail window.

Sales Order Processing Lot Number Overrides <P>
Use this tool to create a temporary Lot Number receipt during the Sales Transaction Entry process and allow the system to manage the Lot Number quantity accurately. After the Lot Number is received through POP, BOM, or IV, the temporary receipt is removed and the actual lot receipt is updated to reflect that a portion of it has already been sold. This tool can benefit companies that use Lot Number processing and run into situations where they sell their Lot Numbers before they are entered into the system through Purchase Order Processing or Bill of Materials.

Item Reconciler
This tool enables you to Reconcile Inventory or Intellisol Advanced Purchase Order. This tool can increase performance if all items don't need to be reconciled. Only those items that need reconciling will be reconciled using Back Office Service Tools.

Item Number Modifier <P>
This allows you to change an Item Number without losing any Work, Open or History records.

Item Number Combiner <P>
This enables you to combine an Item Number into another Item Number without losing any Work, Open or History Records. After the completion of the tool, the old Item Number is removed from the system.

Item Description Modifier <P>
This allows you to create a new description for Item Numbers without a lot of manual data entry. All Work, Open and History records are updated.

Inventory Site Modifier <P>
This allows you to change the Site/Location Code without losing any data.

Inventory Site Combiner <P>
This allows you to combine Site/Location Code. It does not post adjustments to the general ledger.

Project Accounting

Change Orders

With Dynamics Project Series Release 7.0, you now have the ability to create and track change orders in Project Accounting. Change orders are modifications of specifications or provisions of the original contract, and typically cover changes in the design, method or manner of performance, facilities, equipment, materials, site, and period for completion of work. Currently, within Project Accounting you can make modifications to the budget directly in the Budget Maintenance, Budget Detail Entry or Budget Detail Items windows as well as in cost transaction windows when adding new budget items. Change Order functionality provides you the flexibility of affecting budget revisions to multiple projects by creating and processing a change order record. Three types of change orders are tracked: internal changes; company initiated changes and customer initiated changes.


Easily track changes to a contract or project that requires customer approval.

Project Losses Transaction Posting

Project Loss support allows you to view and analyze profitability or loss on each project after performing revenue recognition. For contracts that are not combined, a visual cue alerts you that a loss has been incurred. You then can drill down to the budget detail for more information.

Third Party Billing

Third Party Billing allows you to bill third parties by printing an invoice or billing statement for an individual or company other than the primary customer. This allows for a single project to be billed to multiple customers.
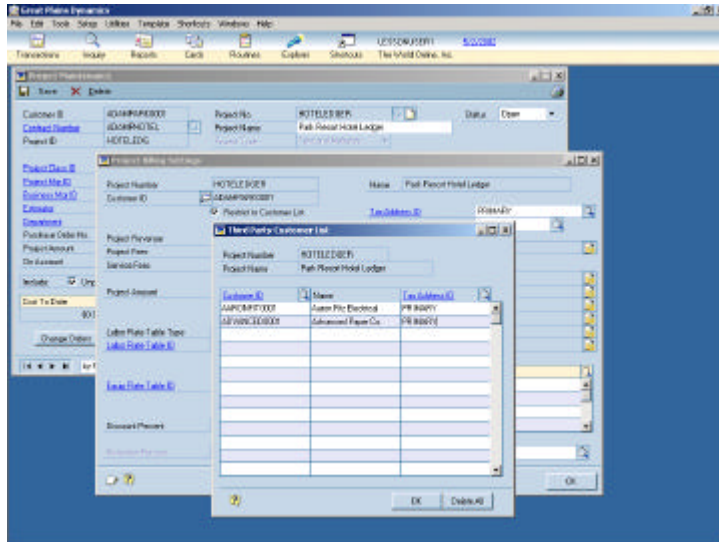
Bill costs to multiple customers by associating a third party customer list to the project or contract.

Canadian Payroll Integration

Now you can seamlessly integrate information from Dynamics Project Accounting to the Canadian Payroll module.

International Date and Currency Support

Release 7.0 adds support for international currency and data formats when creating timesheets and expense reports.

Cycle Revenue Recognition

Now you can setup multiple revenue recognition cycles for your projects. You can process all service contracts at one time, recognize all the contracts of a given customer in one document or simply perform recognition on all contracts and projects at once.
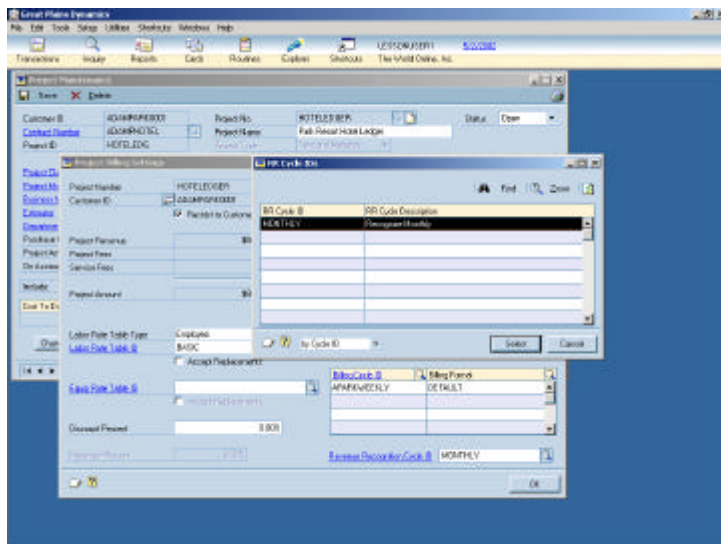
Quickly setup multiple revenue recognition cycles for each project

Edit/Add New Budget Items during Transaction Entry

You can now edit or add budget line items on the fly in the transaction entry windows without changing the status of the contract and project to Estimate – even if the project and contract status is Open.

Apply Workers' Compensation Codes to Timesheets

You can now apply the workers' compensation code and the SUTA of the project when entering timesheet transactions and before processing employee payroll.
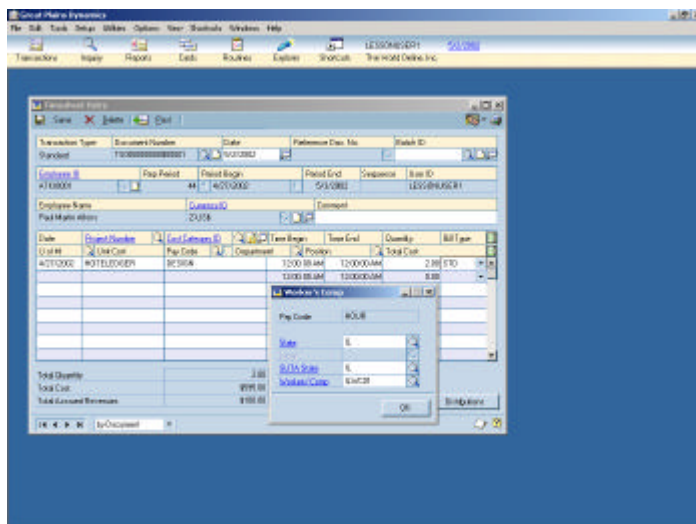
Easily update workers' compensation codes on employee timesheets.

Post to Receivables/Payables Management

Now you can choose whether to post transactions to Dynamics Payables Management and Receivables Management or to Project Accounting ledgers only. This option can be specified when setting up employee expense, purchasing invoices and billing.

Multi-currency Billing and Purchase Orders

You can now make data entry transactions using multiple originating currencies and then bill then in a different currency. You can also create purchase orders using multiple currencies.

Australian GST Support

You can calculate GST in employee expense, inventory transfer, purchase order and billing transactions. In addition, eight new reports have been created to comply with Australian GST requirements.

Human Resources Series Enhancements

When you work with employee information and answer requests for personnel data on a daily basis, you need information that's not only easy to access, but more importantly, that's accurate. Dynamics Release 7.0 includes several new features that will help you get the information you need, then act on it. In addition to new reporting options, we've improved usability and added more flexibility within these modules that will help increase your productivity when performing routine activities, like employee set up and ongoing maintenance tasks.

Human Resources and Payroll

Automatic Assignment of Employee ID
You now have the option to let the system automatically assign employee IDs.

Zero Value Benefits and Deductions
When using Human Resources and Payroll together, benefits and deductions with a value of zero can be set up in Human Resources with corresponding codes in Payroll. This is helpful when you prefer to assign benefit and deduction values on an employee-by-employee basis rather than at the company level.

Human Resources

Inactive Check Box on Reports
You now have the option to include or exclude inactive employees in all Human Resources reports. This makes it easy to restrict the employee information included on common reports like personnel lists, attendance reports and benefit enrollment lists.

Window Level Notes
Window level notes can be used in all Human Resources windows.

VETS-100 Reporting
To comply with reporting requirements, tracking of 'Other Veterans' is now included, as well as maximum number and minimum number of regular employees on board during the period covered by the VETS-100 Report.

Inactive Employee Record Removal
You have the option to automatically remove Human Resources Employee Maintenance information for employees marked as inactive.

US Payroll

Multiple Years of History
Unlimited years of payroll data can be retained, making it easy to report and inquire on historical information on a calendar or fiscal year basis. Historical detail and summary information is readily available for quick inquiries on specific employees or full audits of an entire year. In addition, the reconcile process has been enhanced to provide the option to update the summary data from the history detail.
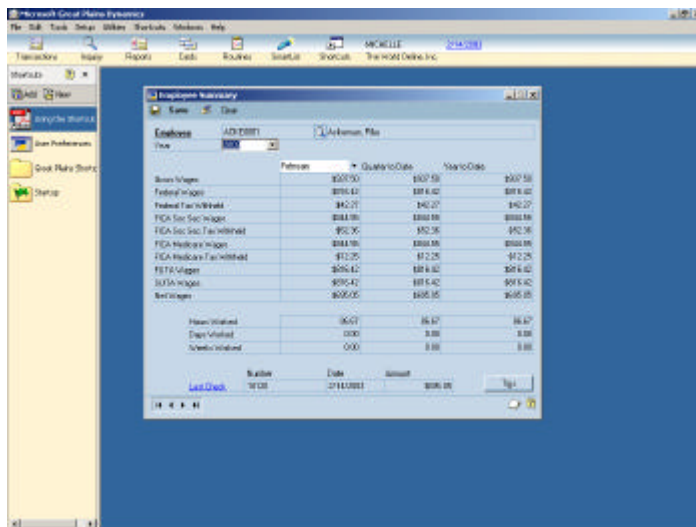
Payroll users will find having the ability to track multiple years of history makes comparison reporting fast and accurate and year-end closing processes simpler.

Period-End Reports Based on Date Ranges

Period-End Payroll Reports (formerly Month-End Reports) can include ranges of employees and be based on specific date ranges that can cross multiple periods, including multiple years. A practical need for this is the requirement to print Workers' Compensation reports according to the periods set by state agencies.
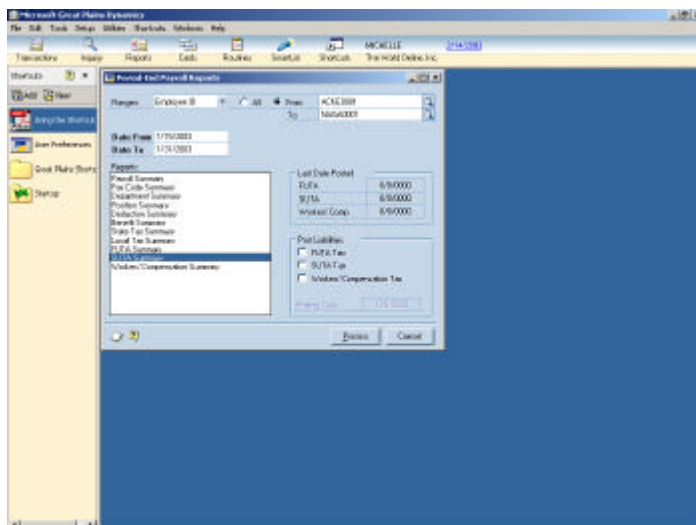
The combination of multiple years of history and new period-end reporting functionality provides significant reporting flexibility.

Supervisor and Location

You can now record Supervisor and Location information in Employee Maintenance.

Codes with YTD Amounts on Checks

Year-to-date amounts can be printed on check stubs or earning statements for any code even if they're not included on the current pay run, providing employees a complete record of all year -to-date amounts.

Manual Check Adjustments
Beginning balances entered in the Manual Check Adjustment Entry window will now only post to Payroll and not to General Ledger and Bank Reconciliation.

Federal Wages and Federal Tips
Wages and tips subject to federal tax will now be stored with employee summary records, making it easy to access and report on this information. You can view Federal Wages on the Employee Summary window and Federal Tips on the Employee Tips Summary window.

Edit Financial Information
To provide a stronger audit trail for financial changes made within the system, Payroll users will no longer be able to edit financial information in any payroll windows other than Employee Summary.

US Payroll Direct Deposit

Automatic Inactivation/Reactivation of Direct Deposit
Employee direct deposit information can be automatically inactivated or reactivated when an employee's status changes.

Remove Direct Deposit Information for Inactive Employees
When a record for an inactive employee is deleted, the employee's direct deposit information also will be automatically removed.

Canadian Payroll

Integration with Human Resources
Integration between Canadian Payroll and Human Resources offers complete sharing of employee master record information, pay code information, pay rate history, attendance tracking and much more, eliminating duplication of data and data re-entry, further reducing the possibility of error.

Integration with Project Series
Integration between Canadian Payroll and Project Series allows you to access and use employee information, position information, pay rate tables and pay rates when entering time transactions within Project Series Time Sheet Entry and post the transactions from Project Series directly into Canadian Payroll avoiding double entry.

New Advice Slip Reports
The Direct Deposit advice slip default reports are now available in both text and graphical formats.

eTimesheets for Payroll <SQL Only>

Integration with Canadian Payroll
If you're using Canadian Payroll for payroll processing, your employees can now record their time directly into Canadian Payroll using a Web browser. Allowing employees to enter their time according to the approval process you define will reduce data entry and entry errors and speed payroll processing time.

Back Office Service Tools: Human Resources Series <SQL Only>

Employee Modifier <P>

This tool enables you to change an Employee ID without losing any Work, Open or History records. A new employee ID is introduced to the system, while the existing one is removed.

Certified Payroll Report <P>

Use this tool to add a Project Number to employees' hourly transactions and track these hours on a per Project basis. The transactions are then printed on a weekly report and are separated by Project Number with a breakdown for each employee by department, job title and pay code.

FRx® Financial Reporter 6.5

XBRL

New functionality within FRx® Financial Reporter 6.5 allows you to create and publish XBRL 1.0 (Extensible Business Reporting Language) compliant reports. XBRL is a freely available electronic language for business reporting that is based on XML (Extensible Markup Language). It provides the business community a standards-based method to prepare, publish in a variety of formats, reliably extract, and automatically exchange business information.

Taking advantage of reports already created in FRx Financial Reporter, you can simply associate or map an existing financial report row to the appropriate XBRL line item. Then, selecting the new FRx Financial Reporter output type "XBRL", FRx Financial Reporter automatically creates an XBRL-compliant "instance document" (i.e. output file). Once in XBRL format, the financial report data can then be automatically consumed by any other XBRL aware application. For example, public companies can submit XBRL information to EDGAR® Online, or private companies big and small can send XBRL data to financial institutions (such as banks) that support XBRL.
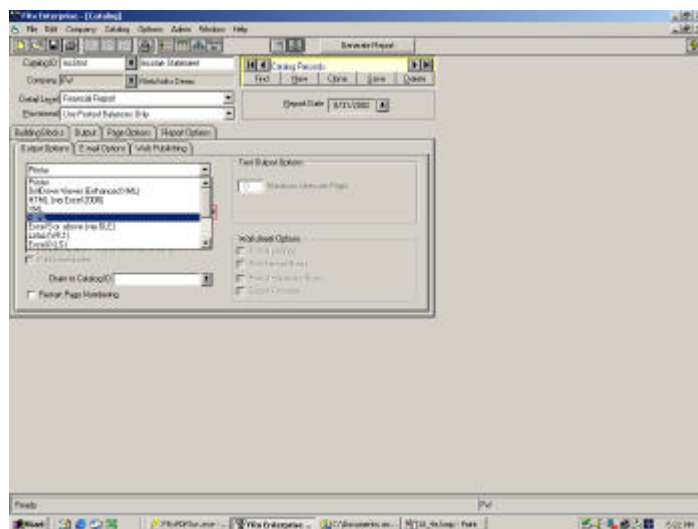
XBRL output option for creating XBRL 1.0-compliant reports.

FRx® WebView

Now available as an add-on module, <P>

FRx WebView is a financial portal that offers the publishing, storing and managing of FRx reports via the Web, providing both report administration and report viewing online via a Web browser. Using the FRx® Report Designer or the FRx® WebView administrator, FRx Financial Reporter reports can be sent or "published" to FRx WebView. Access to FRx WebView is password protected by a user ID and can be specified at the report folder, report and/or reporting unit level in order to provide a secure environment. You can view any report to which they have access, as well as drill down from summary information to transaction detail using only an HTML browser—no additional client software is needed. Administrators can quickly and securely store FRx Financial Reporter reports in a centralized location on an intranet or the Internet.

New functionality in FRx Financial Reporter 6.5 allows you to print reports from the Web in an Adobe PDF format with advanced options including detail level (financial, account, and/or

transaction) and number of units of the Reporting Tree to print (current unit, all units). Also new is administrative functionality to grant and/or deny access to report folders, reports or reporting units based on security groups.


View and drill down on reports in a Web browser using FRx WebView.

FRx® Report Server

Now available as an add-on module, <P>
The FRx Report Server, with its scheduler functionality, is designed to help financial professionals like you automate the production of reports that need to be run and distributed on a regular basis, and offers a scalable, high-speed production reporting environment. Reports can be scheduled to run overnight or during off-peak hours, so that generating and distributing large reports will have less of an impact on the organization's server resources. You can also select when and how specific reports should be generated and distributed—via email or automatically on the Web. Sending reports to the FRx Report Server for processing and distribution enables you to continue on with other projects on the client machine, therefore increasing productivity.

New in version 6.5, you can access the FRx Report Server from their workstation, start, pause or stop the FRx Report Server and cancel in process reports. You may also view the status of reports that are complete, running and scheduled to run.
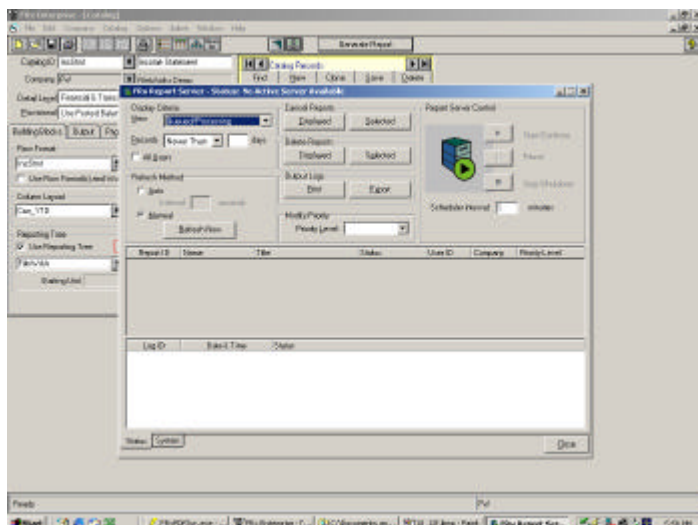
A much improved user interface for managing the FRx Report Server.

Currency Translation

Now available as an add-on module, <P>
FRx Financial Reporter includes "multi-currency" functionality as part of its baseline offering, allowing FRx Financial Reporter reports to be created on multiple currencies that are posted and saved within the general ledger. But for many companies, more sophisticated currency translation capabilities are needed. The currency translation functionality allows a financial professional to access the functional currency (the "home" currency) within the general ledger and translate it into another currency for reporting purposes only. As an example, if a company required a financial statement in a different currency than the "home" currency, one could be created with Currency Translation without ever changing the data that resides in the general ledger. All entries to the general ledger may be made in a single currency, then translated into the specified currencies for reporting purposes. On-the-fly or informal translations are now possible without ever booking those currencies to the general ledger. This functionality supports the requirements of GAAP (especially FASB52) and the EURO accounting provisions. Users can designate the method for translation on a row-by-row basis. Exchange rates can be entered to reflect a daily "spot" rate; historic exchange rates and triangulation currencies may also be designated.

New in version 6.5 of FRx Financial Reporter, the Currency Rate Maintenance Wizard guides you through setting up currency exchange rate tables. You can pull this information directly from the GL system. You are now able to set up individual currency rate sets for each company within FRx Financial Reporter. Finally, the Monthly Rate Table now supports month end and monthly average rates for currency translation calculation in reports.

FRx® Forecaster 6.5

Available as an add-on module, and compatible with versions 6.0 or 6.5 of FRx Financial Reporter, <P> <SQL Only>

Added to Dynamics in Release 6.0 Extensions, FRx Forecaster allows you to immediately realize the benefits of budgeting and planning. New integration features mean FRx Financial Reporter, FRx Forecaster and the Dynamics General Ledger are more tightly integrated than ever before. You can seamlessly access data from General Ledger to begin the budgeting process, build actual vs. budget reports and drill back to data at its source.

FRx® ExpressLink

FRx ExpressLink walks you through simplified mapping and processing procedures for placing data from General Ledger directly into the FRx Forecaster database to help start the budgeting process. This functionality saves time and ensures that the data in the baseline budgets is accurate from the start. FRx ExpressLink reads information from General Ledger, sets up the structure, then populates the FRx Forecaster database. These automated procedures eliminate the need to manually export, map and import general ledger data to the FRx Forecaster database. When mapping accounts from the source to FRx Forecaster, you can consolidate segments and balance information before moving the data into the budget.

FRx® DirectLink Interface

FRx DirectLink now provides even tighter integration between the information held in General Ledger and FRx Forecaster via FRx Financial Reporter. The FRx DirectLink interface allows account and balance data to be read from both General Ledger and FRx Foreca ster databases on the same report, which can be incredibly useful for creating integrated reports comparing both actual and budget data. This new functionality allows for streamlined report setup and access to budgeting data without moving it back into General Ledger. You can book codes from General Ledger and FRx Forecaster, map FRx Forecaster to General Ledger for each unit of the Reporting Tree and generate reports combining General Ledger and FRx Forecaster data with 12 output options (e.g. OLAP, XML, Excel, etc.).

Drill Back to FRx Forecaster Detail

You can now combine FRx Forecaster and General Ledger data into the same FRx Financial Reporter report. Then, when drilling down on this information, the FRx DrillDown Viewer will allow you to drill back into the appropriate source, either General Ledger or the FRx Forecaster database.

Input

You can now define a flexible input screen with up to 100 different periods from multiple budget versions and create calculated columns such as a variance between plans as a guide for a new plan. Additionally, a single account row entry screen has been added for you to input and compare the current account's budget against a baseline. The Single Account Input Screen allows for increases based on percentages or amounts over the baseline, making it easy to focus on the account at hand. A notes page has been added that displays an account history and allows you to input a bulk note about a specific account. Finally, a budget version will now store 13 periods to support a rolling 12 month view or a thirteen week period.

More flexibility added to the Input screen of FRx Forecaster.
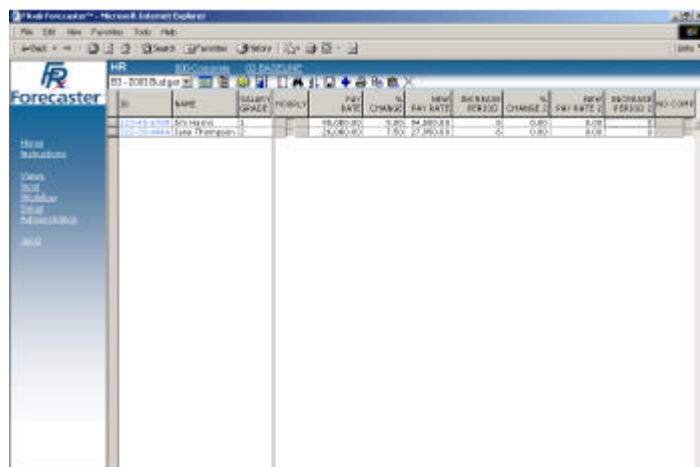
Human Resources
FRx Forecaster allows you to add more detailed budgeting data to specific personnel and include more flexibility in designating salaries and bonuses. FRx Forecaster makes it easier to budget employee assets in complex scenarios. Using the enhanced HR master screen, you can view employee information across multiple cost centers for quick determination of time allocation by individual. Detailed records for each component of employee compensation are now stored in the database. This feature enables you to pull this important information into account-level views.

Salary and hourly budgeting options in the HR screen.

Benefits
The FRx Forecaster Benefits screen allows you to define benefits for employees by the budget version. A set of five user-defined fields may be used to qualify individual employees for benefits. This functionality allows you to create different budget versions in order to make comparisons depending on the defined benefit variables. You can define an incremented benefits tier for which a fixed benefit is applied; supports flat-rate driven, fixed amount and fixed amount incremented benefits. You can also define and enforce limits on individual benefits; for example, FICA will reach a ceiling and won't accrue further.

Complex benefits scenarios supported.

Views
Detailed Views using the Type P breakout feature show detailed information for each of the accounts being broken out. Previously only the summary account displayed details. You can select the page orientation and margins when printing reports, display 100 columns and create views that display and drill down into detailed compensation information.

Integration Manager

Fixed Assets Adapter
Using the Fixed Assets adapter, you can easily perform integrations into Fixed Assets.

VBScript Library
The VBScript Library provides more useful examples to assist users in customizing and extending their integrations.

New Packaging
A "Conversion-Only" offering provides one-time use of the Integration Manager for initial conversions. A "Financials or Distribution Only" offering allows you to purchase tools for integrating into just the Financials and/or the Distribution Series, rather than needing to purchase the entire Integration Manager product.

Dexterity

COM Support
You can now easily integrate with COM compliant applications, such as Microsoft Outlook, Word, Excel or Access, from within Dexterity. Examples of COM functionality you could add using Dexterity include:

- ?? MSMQ support - You will be able to queue messages coming in and going out.
- ?? XML support – You will be able to generate and parse XML Documents.

Included in COM Support are:
- ?? Typed References - You can set to a specific object type (i.e. COM) and class of that type (i.e. ADODB.Recordset).
- ?? Class Browser - This feature will be used as a lookup for the COM Object Type for typed reference data types, in addition to showing available classes, interfaces, and enumerations from each library defined in the dictionary.

eConnect `<SQL Only>`

Multicurrency Objects
In addition to the 40+ points of integration available with eConnect today, multicurrency integration points are now included.

New Packaging
eConnect is now available in three component packages:

- ?? Core (SM, GL, MC, RM, PM, and BR objects)
- ?? Sales (SOP objects)
- ?? Purchasing (POP objects)

Professional Services Enhancements

Back Office Service Tools

Back Office Service Tools Suite <SQL Only>
The Back Office Service Tools Suite offers you a full range of data customization and control utilities. There are more than 20 service tools that help make the consolidation and changing of data faster and more accurate for Dynamics users. You can use these automated tools to change large amounts of data in minutes — without having to manually enter each change. This ensures data integrity and increases the productivity and efficiency of working in your Dynamics solution. A description of the Back Office Service Tools is included within the corresponding series enhancements sections earlier in this document. Those that must be purchased separately are indicated by the <P> symbol.
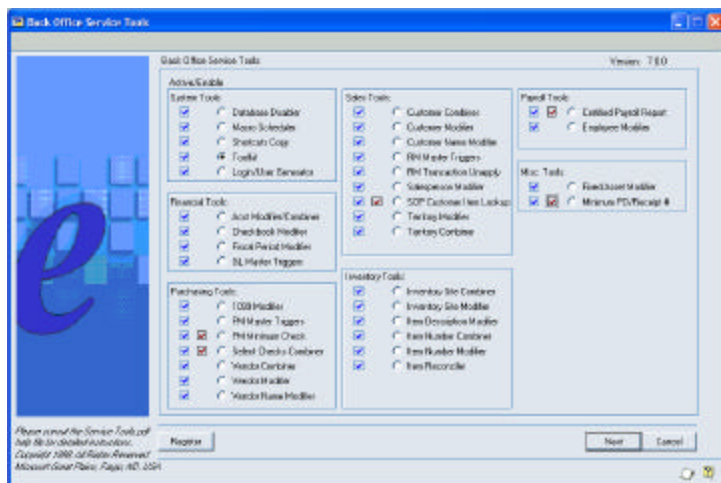
You can purchase the tools individually or as part of one suite by contacting **MBSProfessionalServices@microsoft.com**. You will receive registration keys for the tools purchased. Back Office Service Tools will not increase your system list price or be counted in your service plan fee calculation.

Technical Support

Microsoft Great Plains Support Tuner
The Support Tuner is a software application on the Dynamics Release 7.0 CD that enables you to:

?? **Check Your Computer** by collecting information about your system in one place for faster look-ups during a support situation. Information includes the version of your Microsoft Great Plains solution, database type and service packs.

?? **Run Automated Fixes**, which are like automated TechKnowledges. By using these programs instead of following the steps in a Q&A document, you can quickly and more accurately solve common support problems.

The Support Tuner, Check Your Computer and Automated Fixes are included at no charge with your Enhancement Program enrollment.

Chat and ScreenSharing — a new feature of eSupport

Microsoft Great Plains is pleased to provide you with Chat & ScreenSharing as an additional benefit to your service plan enrollment — at no additional charge! We have made these additional investments to ensure you continue to receive industry-leading support and the highest value possible in your service plan.

- ?? Chat enables you to have a real-time conversation with a support engineer for a more efficient problem-solving process.

- ?? ScreenSharing gives you the option of sharing your computer screen with a support engineer so they can see your exact problem and even fix it for you, resulting in faster, more accurate resolutions.

If you are enrolled in a Premier Services or Unlimited 1-hour plan, you can proactively choose the Chat & ScreenSharing option when submitting a support request. This change was made so that you can save even more time when requesting support assistance. Chat is ideal for troubleshooting requests that are urgent, such as a stopped payroll batch, a stalled Year End Close, or a mission-critical process that needs immediate attention.

If your service plan doesn't include the ability to proactively use Chat & ScreenSharing, Microsoft Great Plains support engineers may use these time-saving tools when they will be helpful in resolving complex problems.
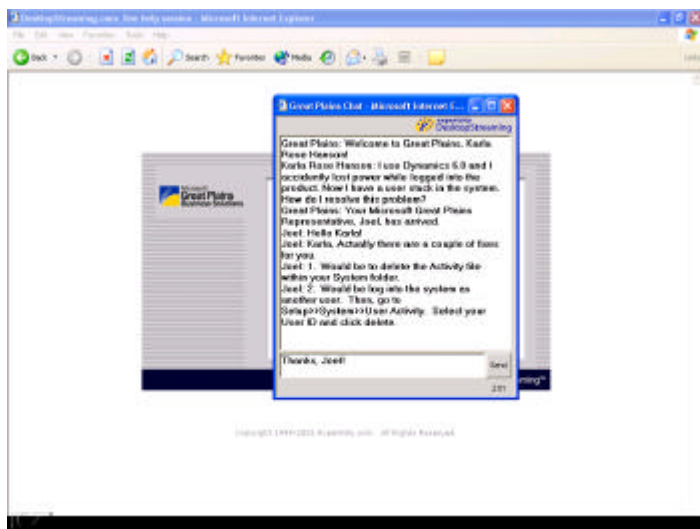
Training

A formal training plan is one of the most effective means for you to avoid value loss from what CIO's call "application erosion", and Internet-based Training is one of the easiest ways to receive continuous training. That's why Microsoft Great Plains added educational benefits to nearly every service plan.

One of the key components of your service plan is access to the convenient, 24X7 Internet-based Training system. This online educational benefit is available to you at no additional charge if you are in your second service plan year or beyond with Microsoft Great Plains and if you are enrolled in the following service plans:

- ?? Foundation Services-Preferred
- ?? Unlimited Support
- ?? Premier Services

**Now you receive more online training in your service plan**
Upon renewal of – or upgrade to – one of these service plans, you will receive access to even more online training courses, including overviews, updates, and continuing education across Microsoft Great Plains products and related technologies.

Previously, the online training benefit gave customers access to a limited library of approximately 20-25 tutorials that were most applicable to their solution. Upon renewal, your registered training user(s) will receive the full Foundation Library, with access to approximately 150 tutorials that span across your total implementation.

Through online training, a designated individual(s) in your customer's organization has the flexibility to learn at his or her own pace and schedule, right from the PC. These multi-media tutorials provide instruction and quizzes from 10 minutes to 45 minutes in length. New courses are added on a regular basis making this the most dynamic list of training offerings available.

Additional subscriptions to Microsoft Great Plains Training Online are also available through sales operations (contact mbssalop@microsoft.com) or in the Training area of CustomerSource.

Before you can begin using Microsoft Great Plains Training Online, a small multimedia player will be installed for you from your Dynamics Release 7.0 installation disk. This player will allow you to see, hear, and interact with the courseware on our online training site. This download is necessary only once - it won't have to be installed again. This installation happens automatically when you choose the install option on the Release 7.0 CD.
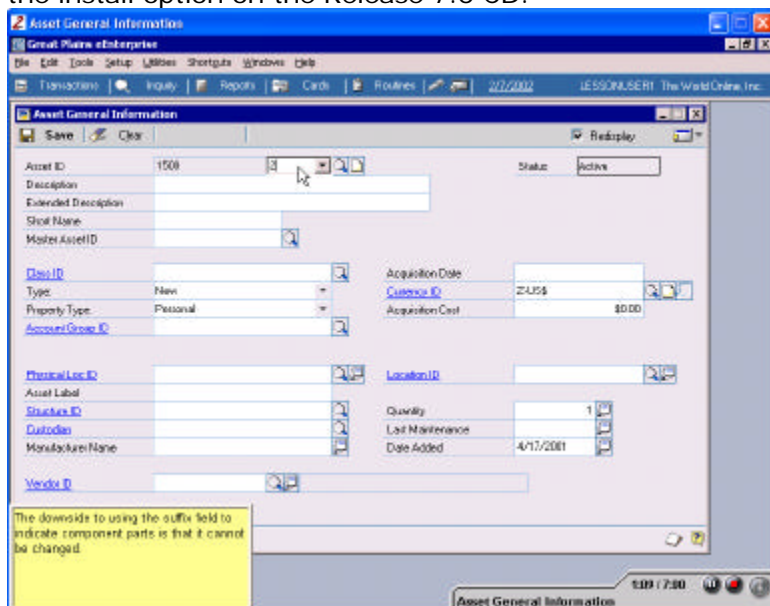
Online training includes:

?? An intuitive navigation that makes online learning easy to use as well as provides you the flexibility and control you need to learn at your own pace, at the time that's convenient for you.
?? Interactive quizzes that help you put your new knowledge to the test. Some quizzes are more traditional, for example multiple choice and true/false. Others quizzes take on a game-show look.
?? Software simulations that help you practice what you've learned through the online training. The simulations offer you business scenarios asking you to perform procedures on the module on

which you are training. Built into the scenarios are hints to help you if you're not progressing the right way, as well as demonstrations of the correct procedures.

?? A direct link to an online mentor. Even though you may be training without a live trainer, you now have the ability to email questions to the training staff at Microsoft Great Plains and get answers to your questions.

?? Extensive progress tracking that allows you to manage your learning. The system records information about the tutorials you've completed and those you have in progress. It even reports on the quizzes you taken and your pass rate.

Enhancement Program Enrollment and the Journey to Microsoft® .NET

The Microsoft .NET platform will offer definitive business value and strategic advantages to your business, and it will enable Microsoft Great Plains to provide solutions that rapidly adapt to and address new market demands. However, change can also produce uncertainty, especially about the future.

That's why we're excited to be able to announce an unprecedented and unparalleled commitment to our customers. Microsoft Great Plains Dynamics Customers have the commitment and security of knowing they will be able to transition their current solution to the .NET platform by doing these two things:

1. Make sure your Microsoft Great Plains solution is running on Microsoft SQL.
2. Maintain continued enrollment in the Microsoft Great Plains Enhancement Program.

In the past, moving to next generation solutions meant purchasing new software. With Dynamics that no longer applies. As long as you are current on the Microsoft Great Plains Enhancement Program and using Microsoft SQL, you will be able to move to the .NET platform when the time is right for you, without having to repurchase the modules you already own. For example, as Microsoft .NET solutions become available, you will be able to move your current General Ledger to the .NET General Ledger solution.

With your .NET readiness ensured via the Microsoft Great Plains' Enhancement Program, your investments today and in the future are not only secure, but more valuable then ever before. This commitment enables you to manage your business now, while helping prepare for the future and the benefits delivered as a result of .NET.

In the meantime, we will continue to invest in and enhance Dynamics far into the future. We've demonstrated commitment to and innovation in our products in the past – far beyond the release of new platform solutions. We will continue that commitment to our current and new customers as we also begin to introduce the benefits and value that .NET can bring to their business.

System Requirements

This following are hardware requirements and recommendations for minimum, midpoint, and high end, client/server installations. The recommendations are based on experience with many different installations and should be used as a reference in determining hardware needs for each individual configuration. Users may need to increase these recommendations due to environmental factors to achieve individual performance expectations.

Outline:
- A. Database recommendations
- B. Workstation requirements
- C. Minimum Server requirements
- D. Midpoint Server recommendations
- E. High End Server recommendations

A. Database Recommendations:
- ?? Microsoft SQL Server 7.0 (service pack 3 or later)
- ?? Microsoft SQL Server 2000 (service pack 2 or later)
- ?? Pervasive.SQL 2000i (service pack 4 or higher)
- ?? C-tree

B. Workstation Requirements:

Operating System	Windows 98, Millennium Edition (ME), NT 4.0 Workstation Sp 6a, Windows 2000 Pro Sp 2, Windows XP
Processor:	Pentium 266*
Hard Disk Space:	210 MB
Ram:	128 MB*
Video:	SVGA (800x600) with 16-bit video driver
CD-Rom:	Optional
Network Card:	32-bit, 100 base T, or 1000 base T Ethernet

* Clients with heavy processing use Pentium III 450 MHZ or higher and 256 MB RAM or higher

C. Minimum Server Requirements:

Use the following guidelines if you:
- ?? Use only Financial Series modules
- ?? Have between 0-15 concurrent users
- ?? Use Report Writer or Crystal Reports

Pervasive.SQL 2000/C-tree Server Minimum Requirements:

Operating System	Windows NT 4.0 Sp 6a, Windows 2000 Server Sp 2, NetWare 5.0, 5.1, 6.0
Processor:	Pentium 300 (Intel)
Hard Disk Space:	250 MB + space for accounting data
Ram:	NT server: 256 MB for first 4 users + 1 MB for each additional user. NetWare server: 256 MB for first 5 users (See

	NetWare documentation for memory requirements for systems with more than 5 users).
Video:	SVGA (800x600) with 16-bit video driver
CD-Rom:	Optional
Network Card:	32-bit

Microsoft SQL Server Minimum Requirements:

Operating System	Windows NT 4.0 Server Sp 6a, Windows 2000 Server Sp 2
Processor:	Dual Pentium 400 Mhz (or equivalent)
Hard Disk Configuration:	18 GB for accounting data + 9 GB for transaction Log/system files. RAID 5 for OS, Apps, SQL Data Files.
Ram:	512 MB
Video:	SVGA (800x600) with 16-bit video driver
CD-Rom:	Yes
Network Card:	32-bit 10/100 MB Ethernet

D. Midpoint Server Recommendations:

Use these guidelines if you:
- ?? Use Financials Series modules
- ?? Use Distribution Series modules moderately
- ?? Have between 10 and 30 concurrent Pervasive users
- ?? Have between 5 and 10 concurrent C-tree users
- ?? Use Terminal Server
- ?? Use Report Writer or Crystal Reports
- ?? Perform Some OLAP (online analytical processing)

Pervasive.SQL 2000/C-tree Server Recommendations:

Operating System	Windows NT 4.0 Sp 6a, Windows 2000 Server Sp 2, NetWare 5.0, 5.1, 6.0
Processor:	Dual Xeon 500 Mhz (or equivalent)
Hard Disk Space:	250 MB + space for accounting data
Ram:	12 MB for first 10 users + 16 MB for each additional user
Video:	SVGA (800x600) with 16-bit video driver
CD-Rom:	Optional
Network Card:	100 base T Ethernet

Microsoft SQL Server Recommendations:

Operating System	Windows NT 4.0 Server Sp 6a, Windows 2000 Server Sp 2
Processor:	Dual Pentium 400 Mhz (or equivalent)
Hard Disk Configuration:	RAID 1 for OS and Apps, RAID 5 for Data
Ram:	1 GB
Video:	SVGA (800x600) with 16-bit video driver

| CD-Rom: | Yes |
| Network Card: | Dual 100-bit, 10/100 MB Ethernet or single 1000 base T Ethernet or Fiber PCI NIC |

E. High End Server Recommendations:

Use these guidelines if you:
- ?? Use Financial and Distribution Series modules
- ?? Have more than 25 concurrent users
- ?? Use Terminal Server
- ?? Use Report Writer or Crystal Reports heavily
- ?? Perform some OLAP (online analytical processing)

Pervasive.SQL 2000:

Operating System	Windows NT 4.0 Sp 6a, Windows 2000 Server Sp 2, NetWare 5.0, 5.1, 6.0
Processor:	Pentium III 700, or higher
Hard Disk Space:	250 MB + space for accounting data
Ram:	1 GB for first 25 users + 16 MB for each additional user
Video:	SVGA (800x600) with 16-bit video driver
CD-Rom:	Optional
Network Card:	100 base T or 1000 base T Ethernet

Microsoft SQL Server Recommendations:

Operating System	Windows NT 4.0 Server Sp 6a, Windows 2000 Server Sp 2, Windows 2000 Advanced Server Sp 2
Processor:	Quad Xeon 600 Mhz (or equivalent)
Hard Disk Configuration:	RAID 1 for OS and Apps RAID 1 for database log files RAID 5 for data files
Ram:	2 GB or more
Video:	SVGA (800x600) with 16-bit video driver
CD-Rom:	Yes
Network Card:	Single 1000 base T Ethernet or Fiber PCI NIC

Coming Soon to Dynamics Release 7.0

Microsoft Customer Relationship Management (Microsoft CRM)

To help customers integrate and automate business processes, Microsoft is introducing Microsoft Customer Relationship Management, an application tightly integrated with Dynamics. With Microsoft CRM, businesses can make well-informed decisions, improve sales effectiveness, and provide superior customer service, resulting in more profitable customer relationships. Accessible from Microsoft Outlook and the Web, Microsoft CRM is easy to deploy and use, integrates with other business systems, and scales as your business grows. Microsoft CRM will be available in the fourth calendar quarter of 2002. **<P> <SQL Only>**

Business Productivity Application
Microsoft CRM provides the functionality you need to ensure better business decisions and consistent, efficient sales and customer service processes.

Low Total Cost of Ownership
With centralized installation and familiar, intuitive user interface and work tools, Microsoft CRM is easy to customize, use, and maintain. It is accessible from both Microsoft Outlook and the Web and scales to grow alongside your business.

Integrated Solution
Microsoft CRM integrates with Microsoft Great Plains eEnterprise 7.0, Dynamics 7.0 and Solomon 5.0, with Microsoft Office, and with other customer-facing and business management systems.
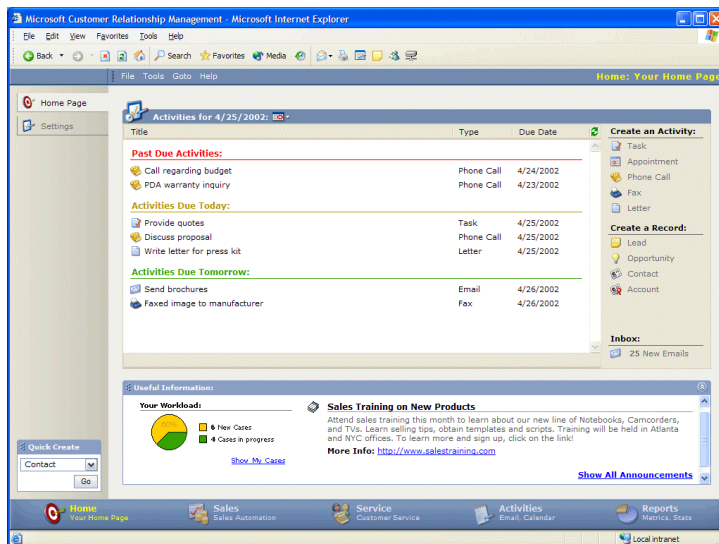
From the Microsoft Customer Relationship Management Homepage, access critical information, such as activities, workload, and internal news. Quickly create an Opportunity or Contact, as well as easily access the Sales and Customer Service Modules and Reports. It's all in one place to boost your productivity.

Sales

Full Reporting Capabilities
Comprehensive reporting tools help management understand customer needs, forecast sales, measure business activity, and evaluate employee performance for sales and customer service, so that business owners can identify opportunities, trends and problems.

Complete Customer View

View customer and account activity and history including: contact and account information, pending orders, open customer service issues, payment history and more. Track communications across multiple channels including the Web, e-mail, fax, and phone.

Share Information

Easily view, update, and share information across teams and departments to ensure more consistent and efficient sales and customer service processes.

Access from Outlook and the Web

Work online or offline in Microsoft Outlook with full access to Microsoft CRM sales functionality: accounts, contacts, products, sales literature, activities, opportunities, and more. Or, work online from any location, using only a Web browser.

Workflow Rules

Use or customize workflow rules for automated business processes, including escalation and notification and leads routing.

Opportunity Management

Import leads and customer data from multiple sources, including Web sites and other applications. Assign workflow rules to automate lead routing, notification, and escalation processes. Track and convert leads to opportunities and then to sales.

Order Management

Customizable product catalogs, quotes, and orders and invoice forms with automated updating help you manage orders from start to finish.
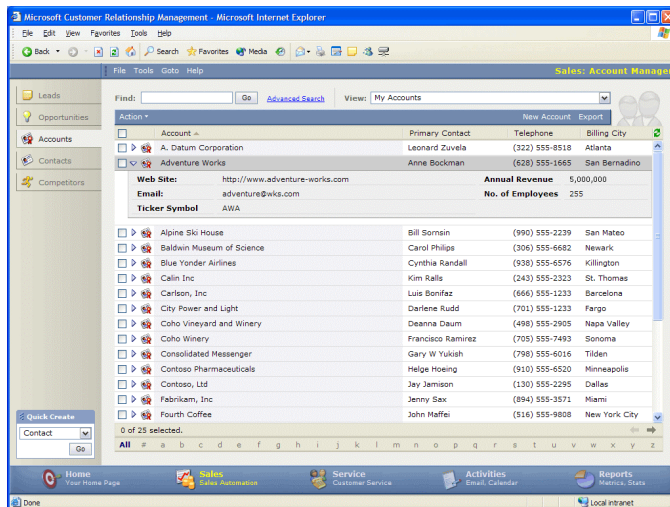
Keep information regarding Leads, Opportunities, Accounts, and Contacts centralized and readily available. Track new leads and customers through the sales cycle and easily update records as leads become customers.

Customer Service

Incident Management

Automated routing, queuing, and escalation of service requests ensure efficient, consistent service.

Problem Resolution/Knowledge DataBase
Create and access a library of articles and FAQs. Automated approval and review processes ensure consistency and access control.
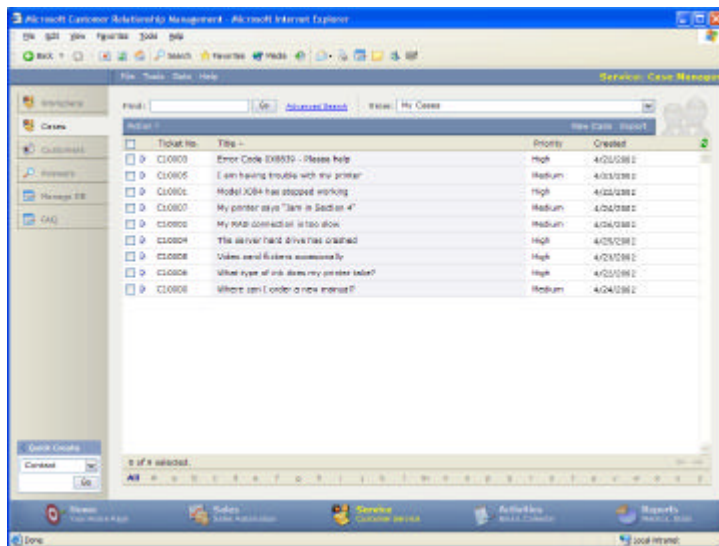
Customer Portal
Enable customers to serve themselves and access support information, check order status, and submit service requests.

Chat and E-mail
Give customers real-time access to customer service representatives.

Contracts/SLA
Create and update new and existing contracts/agreements.

All cases and problem resolution tools are at your command to manage support incidents through to resolution and empower you to provide consistent and efficient customer service.

Integration

Microsoft Great Plains Business Solutions
Microsoft CRM integrates with eEnterprise 7.0, Dynamics 7.0 and Solomon 5.0 on the following fields: accounts and contacts, payment history, catalogs, sales orders, price lists, contracts, and more.

Microsoft Office
Microsoft CRM supports Office 2000 and Office XP, including Mail Merge with Microsoft Word and data export to Microsoft Excel. Users can access full sales functionality, online and offline, with Microsoft Outlook.

Customer-facing Systems
The Microsoft CRM Customer Portal integrates with your existing customer-facing Web site.

Within Microsoft CRM
Sales and Customer Service Modules within Microsoft CRM are tightly integrated to facilitate information sharing and efficient sales and customer service processes.

Microsoft Business Network

The Microsoft Business Network (MBN) connects small and mid-sized businesses with their trading partners. Once connected, these businesses can use the Network to improve the visibility of operations and key information, increase the velocity at which they transact with one another, and ultimately use a platform for collaboration enabling multiple companies to look and act like one virtual entity.

Richly integrated with both Microsoft Office and Microsoft Great Plains Dynamics, MBN provides a seamlessly integrated way to connect, communicate, and collaborate with vendors and customers. Companies can use MBN to set up their own business-to-business extranets or business-to-consumer storefronts as well as sending and receiving structured business documents in XML or EDI formats. All information is synchronized between MBN and the on-premise Office and Microsoft Great Plains Dynamics system. The Microsoft Business Network will be available in the fourth calendar quarter of 2002. **<P>** **<SQL Only>**
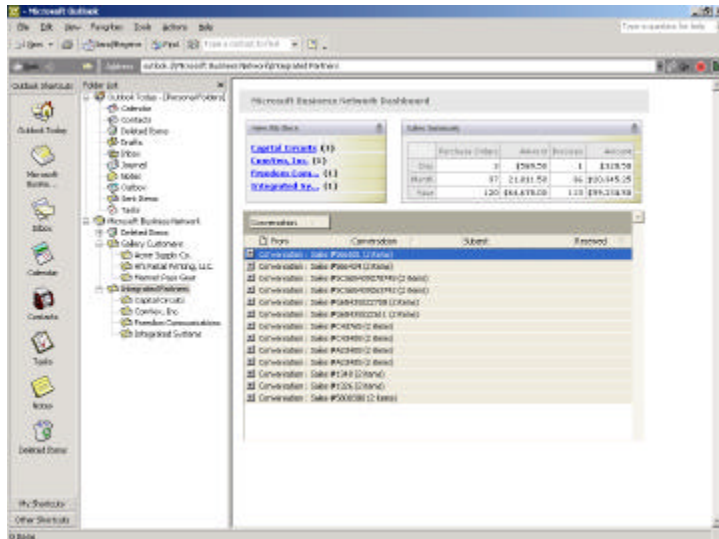
Business messaging is integrated with Microsoft Outlook 2002, providing an intuitive way to managing incoming orders, outgoing invoices, etc.
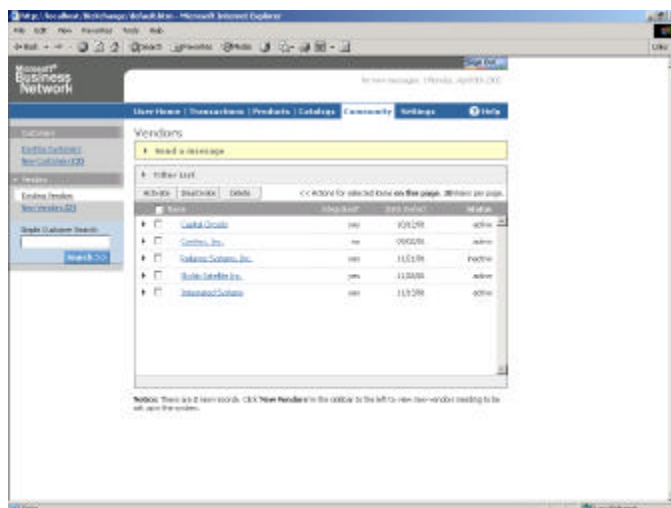
Manage your trading partner community with easy-to-use on-line tools that are integrated with your Dynamics application.

Microsoft Great Plains BusinessDesk

The Microsoft Great Plains BusinessDesk is designed to enable everyone in your extended organization to access business information and participate in business processes through a Web-based portal. This personalized desktop, deployed for Dynamics, will deliver business applications and information to all employees within your business. The BusinessDesk also will allow you to navigate to content stored and managed by other systems, serving as a portal to current Microsoft Great Plains applications. BusinessDesk will be available in the first calendar quarter of 2003. **\<P\>** **\<SQL Only\>**

Personalized and Roles Based
Microsoft Great Plains is committed to providing a specific and personalized experience for you, based upon your role within the organization. The user interface for the BusinessDesk is designed to allow you to access the applications, information and content most specific to your organizational role.

One key component of the BusinessDesk will be Web-browser access to all windows within Dynamics. When used in conjunction with Microsoft Windows Terminal Server, any employee that has the appropriate security rights, will be able to log into Dynamics and use any of the many windows within the system.

Microsoft Great Plains also will deliver many "self-service" applications to enhance the BusinessDesk experience and provide the right solutions for each individual. These applications will include:

- Timesheet entry
- Purchase requisition entry
- Expense report entry
- Online procurement for direct and indirect products and services
- Employee profile and pay record review
- Team management
- Benefits management
- Skills and training
- Recruitment
- Online posting of company news and events

Interactive, ad-hoc query
Customers like you have indicated that one of the most useful ways that Microsoft Great Plains can help them is by ensuring they are delivering accurate and up-to-date business information to more knowledge workers within their organizations. One way that we're working to help you meet this information delivery goal is through SmartList, an ad-hoc query solution built into the BusinessDesk, providing online and interactive access to financial and operational data throughout Dynamics. Through the use of linked information, not only can knowledge workers find the information they need, but they'll also be able to drill down and drill around to locate related information or context for the view they're currently using. In addition, SmartList is seamlessly integrated with Microsoft Word and Excel; any SmartList can be exported to these familiar productivity solutions so the data can be further analyzed.

Extended using Web Parts
Web Parts, customizable software components built with a digital dashboard, are included within many pages of the BusinessDesk. Microsoft Great Plains will deliver hundreds of Web Parts across all

aspects of financial and operation business solutions. In addition, many other independent software vendors also will choose to use Web Parts as a key tenet of their solution design. It will be easy to combine Web Parts from many vendors into a seamless customer solution. Already, a community of Web Part solutions is located at
www.microsoft.com/sharepoint/downloads/webparts/introduction.asp.
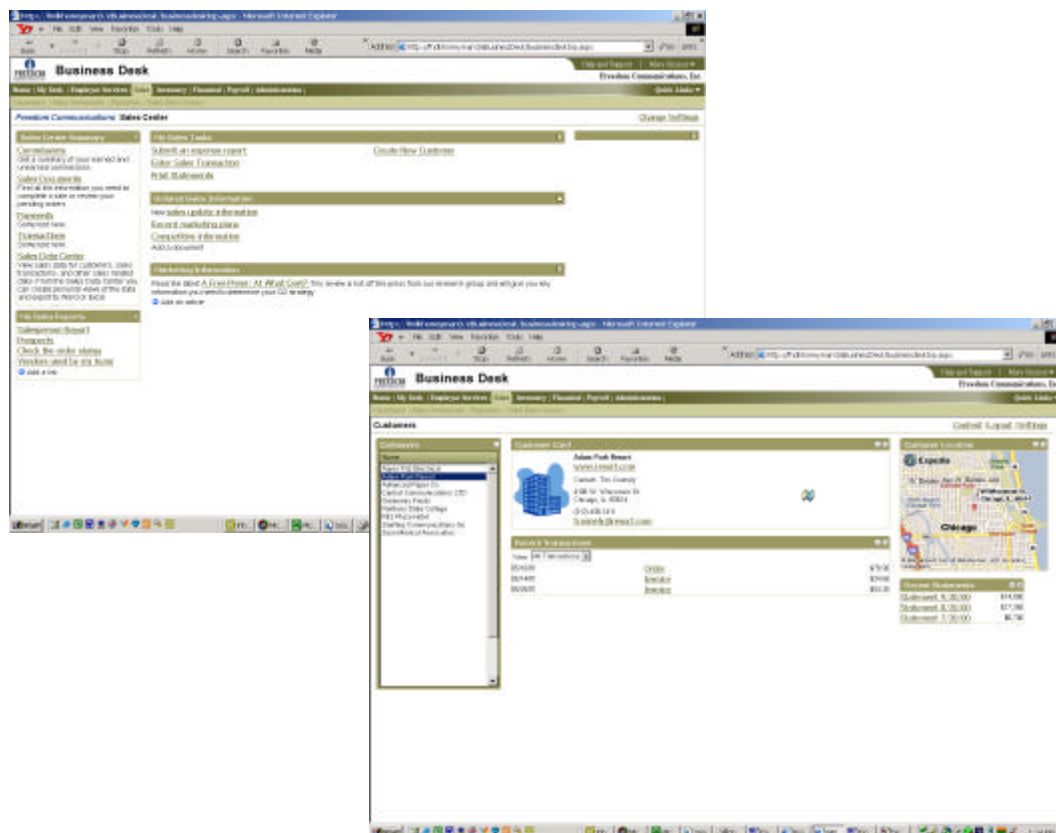
QuickSell Retail Solutions for Dynamics

In today's complex retail environment, retailers need a point of sale system that is capable of handling all retail channels – from brick and mortar stores and virtual shops, to catalog, mail order sales and more. Unfortunately, the majority of today's SMB retailers have a cobbled -together solution that is neither efficient nor effective.

As part of our continued commitment to your business success, Microsoft Great Plains is introducing a comprehensive, interconnected retail management and Point of Sale (POS) solution designed specifically for small and medium-sized businesses. Our new QuickSell Commerce offering for Dynamics provides extensible, off-the-shelf, general merchandise, POS & retail applications that link POS, payment processing and the Web together.

QuickSell's Windows-based POS solutions are a best-fit for general merchandisers, hard and soft goods stores, convenience, grocery and service retailers, and single stores through nationwide chains. QuickSell users realize greater success through:

- ?? **Ease of use and scalability** – Easy, out of the box integrated solutions that allow retailers to grow from a single location to multi-location chain without migrating POS or back office applications.
- ?? **Improved decision making** – Real-time sales and inventory visibility across stores as well as comprehensive reporting.
- ?? **Improved transaction speed and efficiency** – Integrated credit processing that eliminates the need for separate payment processing devices.
- ?? **Gains in operational efficiency and profitability** – Automated inventory management, shipping and receiving, re-ticketing, cash management, credit settlement, and deposit preparation.
- ?? **Improved customer service** – Faster transactions, gift cards, promotions, customer account management, and more.

QuickSell also leverages payroll through time and attendance, productivity tracking, and commissions, and is a multi-platform solution that will run on Windows PCs as well as popular point of sale devices from companies such as IBM, NCR, Wincor, and Fujitsu. In addition, QuickSell connects retailers with their partners, customers, and suppliers and across retail chains via the .NET platform.

The QuickSell series includes three interconnected modules designed for Windows and built entirely on Microsoft tools and technologies – assuring integration with current and future products and scalability within the enterprise.

- ?? **QuickSell Commerce (QSC).** QSC is a Web-enabled, scalable POS solution that enables brick-and-mortar retailers to maximize in-store capabilities and expand into chains and the Web for increased sales and marketing opportunities.
- ?? **QuickSell Commerce HeadQuarters (HQ).** HQ enables multistore retailers to manage the entire retail enterprise from the head office. HQ pulls and integrates POS and back-office information from multiple, store-level QSC installations.
- ?? **QuickSell 2000.** Designed to serve single-location SMB stores, QuickSell 2000 has proven it can manage nearly every type of inventory, including specialty hard goods; soft goods; grocery; services; and high-volume, fast-paced convenience stores.

Integrated with Dynamics' financial series, this combined solution brings a sophisticated yet easy-to-use and cost-effective offering to small and medium-sized business retailers, through a "connected" model with visibility to chain-wide inventory and sales reporting. The QuickSell series is available as a standalone solution today, and the integration with Dynamics Release 7.0 will be available in the fourth calendar quarter of 2002. **<SQL Only> <P>**