

## BUSINESS ESSENTIALS AND ADVANCED MANAGEMENT

### INTRODUCTION

*People drive business results; amplify their impact and you can achieve greater success. At Microsoft, we believe that when people are equipped with the right tools, they can surmount even the most complex business challenges. Software has increasingly proved to be one of the “right tools,” demonstrating a unique ability to amplify the ability of people to meet business management challenges.*

The primary way technology benefits businesses is by helping people manage operations and drive growth. Empowering people with familiar solutions that are based on the role they fulfill within an organization increases their productivity and enables them to make timely, informed decisions. When they are equipped with the information they need, when and how they need it, people become the key drivers of business success.

Microsoft Dynamics™ GP delivers technology that empowers people by combining the personal productivity enabled by the Microsoft® Office system with business process automation. To help Microsoft partners determine the best product fit for their customers, this document compares two Microsoft Dynamics GP solution packages: Microsoft Dynamics GP Business Essentials and Microsoft Dynamics GP Advanced Management.

### WHICH PRODUCT IS BEST FOR YOUR CUSTOMER?

**Microsoft Dynamics GP Business Essentials** offers a solution built for rapid installation and ease of use, packaged and priced for companies on a growth path. Designed to help people accomplish more from the start, it works like and with the familiar Microsoft Office system and utilizes proven Microsoft technologies to streamline and connect information, processes, and reporting capabilities across an entire business. As an organization changes and grows, Microsoft Dynamics GP Business Essentials offers a cost-effective, straightforward way to add functionality and users. In most cases, Microsoft Dynamics GP Business Essentials customers average 15 or fewer users.

**Microsoft Dynamics GP Advanced Management** is an exceptionally powerful, highly extensible software solution designed to help companies realize ambitious business goals, prepare for significant growth, and proactively manage complex business processes. Microsoft Dynamics GP provides superior integration with other Microsoft products and technologies, efficient customization capabilities, and the ability to extend functionality with tailored industry solutions. In general, Microsoft Dynamics GP Advanced Management customers range from 15 to over 1000 users.

### KEY HIGHLIGHTS FOR MICROSOFT DYNAMICS GP BUSINESS ESSENTIALS

- Microsoft Dynamics GP Business Essentials offers a streamlined user experience designed to enhance productivity and reduce training time and costs.
- Out of the box, Microsoft Dynamics GP Business Essentials helps organizations achieve real-time business insight so they can make decisions with confidence.
  - More than 200 refreshable Office Excel® report templates make it easy to perform ad hoc queries on Microsoft Dynamics GP data. Reports can be stored in a server location and quickly accessed without the need to log into the Microsoft Dynamics GP system.
  - Customers can expand report writing flexibility and take advantage of Microsoft reporting tools with more than 75 Microsoft SQL Server™ Reporting Services reports.
- Microsoft Dynamics GP Business Essentials works smoothly with Microsoft systems designed for smaller businesses, such as Windows® Small Business Server and SQL Server Express.
- Microsoft Dynamics GP Business Essentials delivers functionality designed to meet the needs of smaller businesses at an affordable price.
  - Robust financial management modules include General Ledger with Advanced Financial Analysis, Payables Management, and Receivables Management, as well as Encumbrance Management, Fixed Assets Management, and Intercompany.
  - Essential supply chain management modules include Inventory Management, Sales Order Processing, and Purchase Order Processing.

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- Built-in backup and restore functionality help ensure peace of mind—businesses can rest assured that their system data and settings are protected.
- Customers can fine-tune their solution by adding products available from hundreds of independent software vendors (ISVs).

### KEY HIGHLIGHTS FOR MICROSOFT DYNAMICS GP ADVANCED MANAGEMENT

- Microsoft Dynamics GP Advanced Management combines the familiar Microsoft Office system user experience, robust functionality, and advanced capabilities to deliver a solution that can meet demanding customer requirements.
  - Advanced distribution capabilities enable companies to streamline supply chain processes and improve customer service.
  - Manufacturing companies—in particular, companies engaged in discrete manufacturing-- can customize production and planning details with powerful forecasting and scheduling capabilities.
  - Service management capabilities enable companies to focus on customers and manage complex field service operations.
  - Approval controls within workflow processes—leveraging the Windows Workflow Foundation in Microsoft Office SharePoint® Server 2007, a standard workflow engine—help companies ensure that processes are followed.
- Flexible business intelligence capabilities reach across all levels of an organization, empowering people to make smart, proactive business decisions at any time and from remote locations.
  - Microsoft Business Portal enables people to use the Report Center to post reports for easy access from many locations, including remote access.
  - When used with Office SharePoint Server 2007, the Reports Library can provide remote access for reports. People can also auto-refresh Office Excel Reports that ship with Microsoft Dynamics GP.
  - Analysis Cubes in Microsoft Dynamics GP, built on SQL Server 2000 and SQL Server 2005, enable people to analyze business metrics from multiple angles.
  - Microsoft FRx® WebPort offers remote access to Microsoft FRx financial statements.
  - Microsoft FRx Forecaster offers a fast, affordable way to gain control of budgeting and planning.
  - Electronic document delivery capabilities make it easy to send e-mail invoices and other documents to business customers.
- When Microsoft Dynamics GP Advanced Management is deployed with Office SharePoint Server 2007, organizations gain advanced workflow and search capabilities.
  - Workflow approval processes include General Ledger, Payables Management, and Receivables Management batches, Credit Limit Override approval, Sales Quote approval, and Purchase Order approval. Companies can also develop new workflows or edit existing workflows to meet specific business needs.
  - People can search Microsoft Dynamics GP data as well as documents on Office SharePoint Server, including Office Excel, Office Word, and Office PowerPoint® files. Searches can be fine-tuned to find only information that is pertinent to the business, which increases the quality of search results.
  - Remote or mobile employees can access business data with just an Internet connection.
- Microsoft Dynamics GP Advanced Management provides IT staff with industry-standard personalization and customization tools, helping reduce IT overhead.
  - With Web Services for Microsoft Dynamics GP, businesses can share information with their customers, develop more adaptable integrations, and improve access to more information within Microsoft Dynamics GP.
  - Deployment wizards for Office Excel reports and SQL Server Reporting Services reports help simplify implementation.
  - The Developer Toolkit (available for separate purchase) and the Software Development Kit (included with Advanced Management) enable businesses to further extend and integrate their solution to meet specific requirements.

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### FEATURES AVAILABLE TO BOTH MICROSOFT DYNAMICS GP BUSINESS ESSENTIALS AND MICROSOFT DYNAMICS GP ADVANCED MANAGEMENT

#### SYSTEM

- Built-In Backup and Restore
- Security
- Multiple currencies
- Task Reminders
- Letter-Writing Wizard
- Setup Checklists
- Smart Tags
- Business Alerts

#### FINANCIALS

- Unlimited number of General Ledger Account numbers, 66 characters and 10 segments
- Fixed, Variable Allocation, Unit and Posting Accounts
- Account Alias
- Cashflow Calendars

#### FIXED ASSETS

- Unlimited Books
- 15 User-Defined Fields
- Depreciation of Projects
- Mass Transactions

#### PAYROLL

- Workers Compensation
- Shift Differentials
- Tax Sheltered Annuities
- Garnishments
- Retroactive Pay

#### ACCOUNTS PAYABLE

- Unlimited Number of Vendors
- Vendor Classes
- Up to 7 Aging Periods
- Scheduled Payments
- Printing Checks

#### ACCOUNTS RECEIVABLE

- Unlimited number of Customers
- Customer Classes
- Statement Printing Process
- 9 Statement Reports
- Balance Forward or Open Item Customer Types
- Refund Checks

#### SUPPLY CHAIN – INVENTORY MANAGEMENT

- Unlimited Number of Item Master Records
- Unlimited Number of Unit of Measures
- Unlimited Number of Price Levels
- Serial/Lot Tracked Items
- Items Classes
- Multiple Warehouse and Bin locations
- 12 Types of Inventory Quantities
- 5 Costing Methods
- ABC Analysis
- 6 Types of Items
- Landed Cost

#### SUPPLY CHAIN – PURCHASE ORDERS

- Drop Ship, Blanket and Standard POs
- PO Returns
- Unlimited Buyers
- 35 User-Defined Fields
- 7 Unique Dates Tracked

#### SUPPLY CHAIN – SALES ORDERS

- Process Holds
- Quotes, Orders, Back Orders, Returns and Invoices
- Bulk Orders
- Separate Fulfillment Orders
- 17 User-Defined Fields
- Commissions
- Auto PO Entry from Sales Order

#### TOOLS

- Integration Manager
- Direct SQL Access
- Extender

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### MICROSOFT DYNAMICS GP COMPARISON

	Business Essentials	Advanced Management
<b>System Management</b>		
Maximum number of users	Supports an unlimited number of users accessing the data at the same time	Supports an unlimited number of users accessing the data at the same time
Database	SQL Server 2005 or Express Edition (4 gigabyte database maximum per company)  SQL Server 2005 No database limit	SQL Server 2005 No database limit
Server Operating System	Windows Small Business Server Standard 2003 Windows Small Business Server Premium 2003 Windows Server® 2003	Windows Server 2003
Integration to Microsoft MapPoint®	Y	Y
SharePoint Servers		Windows SharePoint Services Office SharePoint Server 2007
Search		Y
Integration with Microsoft Dynamics CRM	Y	Y
Integration with Microsoft Dynamics Retail Management System	Y	Y
Process Server		Y
Business Portal for Web Access		Y
Field Level Security	Y	Y
Account Level Security	Y	Y
<b>Human Resource Management and US Payroll</b>		
Employees	Includes the ability to set up an unlimited number of employees	Includes the ability to set up an unlimited number of employees
Web-Based Employee, HR Self Service Options		Y
Paid Time Off Management	Y	Y
Tax Sheltered Annuities	Y	Y
Integration with Payables	Y	Y
Garnishing Wages	Y	Y
Federal, State, and FICA tax deductions	Y	Y

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	Business Essentials	Advanced Management
Vacation and Sick Time tracking	Y	Y
Retroactive Pay changes	Y	Y
Overtime Pay	Y	Y
Human Resource Management	Y	Y
Canadian Payroll	Y	Y
Deductions in Arrears	Y	Y
Accrual labor hours and cost by calendar date or pay period	Y	Y
Web Applications for HR and Payroll		Y
<b>Financial Management</b>		
Cash Flow Calendars		Y
Multiple Currencies	Y	Y
Intercompany	Y	Y
Budgeting	Y	Y
Collections Management		Y
Collections Letter Writing Assistant		Y
Grant Management		Y
Encumbrance Management	Y	Y
Vendor Consolidations	Y	Y
National Accounts	Y	Y
Customer Refund Checks	Y	Y
Vendor Checks	Y	Y
Electronic Funds Transfer		Y
Bank Reconciliation	Y	Y
Electronic Bank Reconcile		Y
Vendor and Customer Classes	Y	Y
1099 Vendors	Y	Y
Salesperson Commissions	Y	Y
Sales Territories	Y	Y
General Ledger Batch Approval Workflows		Y
Payables Batch Approval Workflows		Y
Receivables Batch Approval Workflows		Y

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	Business Essentials	Advanced Management
<b>Project and Service Management</b>		
Time and Material or Fixed Price Contracts		Y
Across-Project Summaries		Y
Project Performance Analysis		Y
Web access to Time and Expense entry		Y
Resource Management		Y
Service Contracts		Y
RMA Functionality		Y
Mobile device for field technicians		Y
Track Warranties by You or Vendor		Y
Recurring Billing for Service Contracts		Y
Service Call tracking		Y
Preferred Service Time for Service Calls		Y
Web access for customers to enter Service Calls		Y
Scheduled Maintenance per contract		Y
Set Effective Dates for contract changes		Y
<b>Supply Chain Management</b>		
Automatic PO Generation		Y
Quotes, Orders, Invoices, Back Orders, and Returns in Sales	Y	Y
Pricing by Customer or Item with tiered pricing	Y	Y
Multiple Warehouses and Bins	Y	Y
Stock Counting	Y	Y
ABC Analysis	Y	Y
Set up Buyers	Y	Y
Drop-Ship POs	Y	Y
Allow shipment price and invoice price changes during Receiving and Invoicing for POs	Y	Y
Landed Cost	Y	Y
Access to cost during order entry	Y	Y
Automatically calculate selling price	Y	Y
Multiple Ship-To addresses per order	Y	Y
Create POs from Sales Orders	Y	Y
Separate fulfillment process	Y	Y
Pick/Pack/Ship Functionality		Y

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	Business Essentials	Advanced Management
In-Transit Transfer (Two-Way Transfers)	Y	Y
Capacity Planning		Y
Multiple-Level Bill of Materials		Y
MRP Functionality		Y
What-if Analysis for MRP		Y
Create manufacturing orders		Y
PO Approval Workflow		Y
Sales Quote Approval Workflow		Y
Customer Credit Limit Override Approval Workflow		Y
Requisition Approvals		Y
Bulk Picking	Y	Y
Sales Forecasting		Y
Serial/Lot Tracking	Y	Y
<b>Business Intelligence and Reporting</b>		
Business intelligence tools available	Smart Lists Report Writer Advanced Financial Analysis Microsoft FRx Financial Reporter Microsoft FRx DrillDown™ Viewer Office Excel SQL Server Reporting Services	Microsoft Forecaster Microsoft FRx Suite Crystal Reports Professional Edition Analysis Cubes Performance Point Server
Refreshable Office Excel reports	Y	Y
Pre-defined reports available	Y	Y
Dashboard reporting		Y
Office SharePoint Server 2007 report deployment		Y
Export to Office Excel	Y	Y
Integration with Office Outlook	Y	Y
Excel-based budgeting	Y	Y
Access information outside of Microsoft Dynamics GP	Y	Y
Ad-hoc reporting	Y	Y
View reports from an Internet connection		Y
Display information through Web Parts on Office SharePoint Server 2007		Y
Analysis Cubes Powered by OLAP		Y

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	Business Essentials	Advanced Management
Financial Forecasting		Y
Microsoft FRx Financial Statements	Y	Y
Web access to Microsoft FRx Financial Statements		Y
Automated alerts to monitor changing information	Y	Y
Business Scorecard Manager integration		Y
Secure access to business data	Y	Y
<b>Tools</b>		
Web Services		Y
Visual Studio Tools		Y
Software Development Kit	Y	Y
Connectors to import data	Y	Y
Add fields and windows without development work	Y	Y
Modify the look and feel of existing application		Y
Personalize application to meet specific needs	Y	Y

