Microsoft® Business Solutions–Great Plains®
Enhancements–Release 7.5

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The software modules described in this document are sold separately and may not be available with all versions of Microsoft Business Solutions-Great Plains. Please refer to the Microsoft Business Solutions Price List for current prices and availability of each module. If you currently license one of these modules and are active on an Enhancement Program, you will automatically receive the enhancements contained in that module.

Microsoft Business Solutions—Great Plains Release 7.5

Introduction

Designed for rapid time-to-benefit and low cost of ownership, Microsoft Business Solutions–Great Plains offers integrated solutions that support critical business processes and collaborative information management. Release 7.5 delivers expanded capabilities to help your business improve efficiency and profitability; respond rapidly to customer demand; empower management and employees; and expand the reach of information and processes across the global enterprise.

Release 7.5 enhancements include:

- **Effective inventory and distribution management--** Help improve profitability and deliver superior customer service with powerful inventory, distribution, and order management capabilities that meet the most demanding requirements.

- **Enhanced reporting capabilities--** Design compelling views of data with Crystal Reports® 9.0 Professional, as well as publish reports on a recurring basis. Improved Project Accounting reporting capabilities keep you informed about budget revisions and revenue projections for projects.

- **Flexible expense management--** Equip employees to create offline expense reports anytime, from any location. Eliminate paper trails and shrink expense processing costs with electronic receipt imaging.

- **Extended integration--** Integrate key processes and information with Microsoft® applications and services; and connect employees, partners, and customers to applications and information via the Web using Microsoft Business Solutions Business Portal.

When you invest in a major business solution, you need to know that the company behind it will be there to take care of you. Microsoft Business Solutions, which includes the businesses of Great Plains, Solomon, Microsoft bCentral™, and Navision, has a long history of leadership in creating business management solutions that streamline your important business processes and help you achieve success by making smarter, faster decisions. All of our products are backed by the finest support and services in the industry, ensuring your peace of mind.

Supply Chain Management Enhancements

Advanced Distribution

Maintain tight control over your distribution channels, improve processes, and drive superior customer service with Advanced Distribution capabilities.

Improve efficiency and accuracy for ordering processes

- **User-Defined Workflow -** Establish consistent, accurate workflow procedures by defining up to six stages within the order-to-invoice cycle. Harnessing this pick/pack/ship process improves control, inventory accuracy, and ultimately customer satisfaction.

- **Automatic Back-Order Allocation -** Maximize delivery efficiency with automated back-order allocation that accounts for latest receipts, returns, adjustments, and sales order amendments.

- **Mass Order to Invoice Transfer** - Identify the most appropriate time to transfer defined groups of orders into the pick/pack/ship cycle by using a shipment date, customer class, or document ID.

Increase access to key information

- **Document Search and Update -** Search for documents and pinpoint detailed information using lookup windows and a wide range of parameters, including document ID, workflow status, or batch number. Documents can be amended within the lookup window and progressed from stage to stage as appropriate.

- **Enhanced Inventory Information -** Quickly identify the best item to satisfy customer demand by viewing inventory levels for specific items at a glance, using item lookup screens that include quantity information.

- **Shelf Life Control -** Help ensure that incoming items conform to shelf-life requirements by recording the minimum period—for example, sell by, use by—for items within a lot. The system will then warn you upon receipt when inventory received will have less than minimum acceptable shelf life.

Meet customer-specific needs

- **Customer Part Numbers** – Improve the customer service experience by cross-referencing customer item codes to the main inventory file. Employees can communicate with customers using the customer's preferred terminology, and also take orders via lookups driven by customer item codes.

- **Customer-Specific Item Substitution**–Avoid potential ordering bottlenecks such as pack-switch promotions and shortages of key items, as well as respond effectively to customer demand, with automatic, date-sensitive substitution of one item for another.

- **Customer-Specific Picking Instructions** – Meet specialized delivery needs by recording and printing special instructions on picking documents – such as expiration dates - for specific combinations of customers and items.

Supply Chain Management Enhancements

Advanced Picking

Keep pace with competitive markets and low margins. New Advanced Picking capabilities provide you with the flexibility needed to minimize handling processes and costs for both single and multi-site operations.

Meet site-specific needs

- **Site-Specific Facilities—**Improve productivity and profitability for multi-site operations by ensuring that each site works with preferred bulk and individual picking methods.

- **Configurable Picking Rules--**Tailor operations at the site level for maximum throughput and customer service by specifying whether or not bulk picking is in use.

Minimize handling processes and costs

- **Picking Resource Management--**Facilitate shorter pick journeys and send goods straight to the appropriate loading bay by producing bulk picks coupled with individual sequenced picks.

- **Add to Load Facility--**Work flexibly within scheduling constraints by generating bulk picks as schedules permit, with late additions to the load picked as a separate consolidation.

Improve efficiency and customer service levels

- **Consolidated Picking Lists--**Save time and effort by issuing consolidated (bulk) picking lists across numerous orders for common items. This enables wave picking within the distribution center or bulk picking of a series of orders.

- **Flexible Item Maintenance--**Adapt picking rules to meet item-specific requirements by defining whether or not an individual item can be bulk picked.

- **Sequenced Picking--**Gain operational efficiency and serve customers effectively: Print individual picking lists in bin/bay sequence as defined at the site level, yet present customers with lists that display their preferred sequences.

Supply Chain Management and Manufacturing Enhancements

Available to Promise

Empower your employees to make strategic decisions and provide superior service. New inventory and order management capabilities help ensure the right inventory is available at the right time to meet customer needs and boost profitability.

Provide customers with accurate information

- **Transaction Merge and Sequencing--**Automated tracking makes it easy to find all un-posted transactions that will affect stock availability, including Bill of Materials, Sales Order Processing, Purchase Order Processing, and Inventory transactions. Drill down to any transaction listed and see a revised stock projection when you amend product quantities or delivery dates.

Respond quickly to shipping requests

- **Calculate Ship Date--**Enter quantity information to automatically determine the earliest date a specific quantity of inventory can be supplied to your customers, while still meeting all existing commitments.

Make strategic decisions about inventory usage

- **Forward Rolling Inventory Projection--**Pinpoint inventory availability and risks of stock-outs, including statistics on real and projected sales and the sequence of anticipated delivery.

Manufacturing Enhancements

Advanced Distribution, Advanced Picking and Available to Promise
Compatibility – Manufacturers with heavier distribution requirements can take advantage of these new Distribution modules to improve process efficiency, strategic decision-making, and customer service levels.

Extended Pricing Compatibility – With the additional pricing flexibility provided by the
Extended Pricing module, manufacturers can now create customer-specific item pricing, such as special sale and promotional prices, to serve customers more effectively.

Preactor Finite Capacity Scheduling - Integration of the Manufacturing Series with
Preactor® FCS 200 allows manufacturers to schedule and manage shop resources more effectively, as well as make reliable order promises, increasing agility and improving customer service.

Project Management Enhancements

Project Accounting

Tighten project controls and track utilization for projects more effectively with enhanced reporting capabilities, flexible billing options, and support for new accounting methods.

Stay informed with new Project Accounting reports

- **Change Order Report**--Easily compare revisions to an original budget by viewing detail at the budget line item level.
- **Periodic Budget Report**--Display periodic information within a specified range of dates for each budget using several range options, such as the contract ID or project number.
- **Pre-Billing Worksheet**--View service and project fees in the pre-billing worksheet for any of the project types and include Cycle ID as a printing option.
- **Project Cost Breakdown**--Display all cost transactions within a specified range of dates and use several options to restrict projects included in the report.
- **Enhanced Performance Reports--**View specific project information for billings to date and revenue recognized per contract and project.
- **New Summary and Detail Distribution Reports-**Print a detail or summary report of employee expense and billing transactions that have been created and posted, including account distribution information.

Tailor billing options to meet project needs

- **Billing Cutoff Dates--**Specify default cutoff date options in the Billing Setup Window. The cutoff date is then displayed in the Billing Entry window, and determines which transactions will be included in the billing.
- **Cycle Billing Reports--**View budget details that were not processed during cycle billing by choosing whether or not to print error log reports after running cycle billing.

Increase accuracy with new accounting capabilities

- **Effort Expended Labor Only Accounting Method--**Recognize revenue based on the quantity of labor expended for combined projects and contracts of cost-plus or fixed-price projects.
- **Intrastat Support--**Easily maintain information for the Intrastat Trade Reports required for items bought from or sold to European Union (EU) vendors or customers.

Track project details more effectively and reduce data entry

- **New Lookup Options--**Manage specific project details with new lookup options, along with advanced lookups for items, employees and managers.
- **Enhanced Templates--**Reduce data re-entry by specifying end dates in templates that can be applied across multiple contract and project records.

Analytics Enhancements

Crystal Reports® 9.0 Professional

The Microsoft Business Solutions Analytics applications provide a broad range of capabilities that range from advanced financial analysis to the simplest report requests. With Great Plains Release 7.5, Crystal Reports Professional 9.0 equips users to create enhanced reports and to quickly and easily transform data into presentation-quality information.

Create compelling views of data in record time

- **Custom Templates--**Save time and eliminate the need to format individual reports. The standardized formatting and logic of Custom Templates makes it easy to create and apply a consistent look and feel across multiple reports.

- **Faster Report Design with Reusable Components--**Store key report objects-- including text objects, images, and Custom Functions--in a central library. Users can then design and maintain reports efficiently by reusing, sharing, and updating popular report objects within the library.

- **Improved Report Wizards and Experts--**The redesigned Report Creation Wizard provides intuitive design tools, simplifies common reporting tasks, and streamlines more complex functionality into the Experts.

Spend less time creating and maintaining formulas

- **Formula Workshop--**The Formula Workshop provides a central location for developing and maintaining formulas and custom functions, and includes a codeless Wizard, enhanced error tracking, and auto-complete functionality. The formula string limit has been increased from 256 to 64,000 characters.

- **Custom Functions--**Maximize formula usage: Create custom formula-language functions by extracting business logic from key formulas, and then store custom functions in the Crystal Repository for reuse across multiple reports and single-point updating.

Enhance views of report information

- **More Charting Options--**Display information across time with new Gantt charts or as points on a dial with new Gauge charts, as well as use conditional formatting to highlight figures past a threshold value.

- **Sharper Images for Presentation-Quality Reports—**Crystal Reports 9.0 supports vector-based images, allowing you to zoom in on charts, maps, and other images without affecting image quality.

- **New Report Explorer--**Navigate easily to your reports and explore specific details in design view, using the new Report Explorer. Plus, all Explorers are now floatable windows that let you tailor the design environment to meet specific needs.

Maximize usage for existing reports

- **Improved Export to Microsoft Word and Microsoft Excel--**With options to export data only or fully formatted reports, along with support for image export, Crystal Reports ensures that Word or Excel files contain the exact information you need.

- **Side-by-Side Installation** (Make hed bold)--Crystal Reports 9.0 can be installed on the same machine with previous versions of Crystal Reports, facilitating easy migration of existing reports.

Analytics Enhancements

Report Scheduler

Equip employees and management to publish updated reports easily and ensure that updates don't fall through the cracks. The Report Scheduler enables recurrent publishing for any report option or any report created with Report Writer.

Publish reports when you need them, the way you need them

- **Support for multiple formats--**Publish reports in any format supported by Report Writer, including HTML and PDF.

- **Recurrent Publication--**Reports can be scheduled to print on a recurring basis. Several scheduling options make it easy to define almost any interval you want.

- **Immediate Publication--**Along with flexible scheduling options for recurrent publication, Report Scheduler includes the option to print reports immediately.

- **Scheduling Overrides--**If you don't need to publish all reports that are due, simply select the ones you want. Report Writer can also publish all reports without informing you they are due.

Improve reporting efficiency, without interrupting productivity

- **Automatic Checks**--Help eliminate reports that fall through the cracks. When a user logs into Great Plains, Report Scheduler automatically checks to see if that user has any reports to publish that are overdue.

- **Background Processing**--Because publishing occurs in the background, users can continue working in Great Plains while processing is completed.

Provide security-enhanced, shared access to information

- **Role-Based Access**: Role-based security options help you define who can publish and view a report, so sensitive information is seen by the appropriate people.

- **Online Posting**: Publish reports to the Microsoft Business Portal and enable decision makers throughout the organization to view reports via a Web browser.

Financial Management Enhancements

eExpense Offline and eExpense Receipt Imaging

The world's leading Web-based travel and entertainment (T&E) solution, eExpense automates each step of the expense management process—from expense report preparation and approval to policy compliance, reimbursement, and data analysis. Release 7.5 delivers new eExpense modules that can eliminate paper-based receipts and empower employees to create expense reports offline, from any location.

eExpense Offline: Empower employees to create reports from any location

- **Offline Expense Reporting Capabilities--**Free employees who travel to focus on their jobs, rather than on tracking expenses, by enabling them to create simple or complex reports while disconnected from the Internet. Reports can be submitted easily, the next time the employee goes online.

- **Offline Support for Itemizations--**eExpense Offline supports complex itemization of expenses while the user is in a disconnected state, including automated pre-population and calculation of foreign exchange rates.

- **Seamless Transfer of Expense Transactions--**Provide efficient processing and timely reimbursement with seamless transfer of expense transactions to eExpense.

eExpense Receipt Imaging:

- **Save money and improve service levels Hosted Receipt-Imaging Service--**A hosted, subscription-based service, eExpense Receipt Imaging lets eExpense users submit, review, and audit travel and entertainment receipts electronically, without the costs and complications of managing paper-based receipts.

- **Electronic Attachment of Receipts to eExpense Reports-**-Employees no longer need to mail in paper receipts. Faxed receipts are received and attached electronically to eExpense expense reports for review and audit, helping ensure timely, accurate processing and reimbursement.

- **No Physical Storage Costs**-- By storing images online and providing easy access via eExpense, the imaging service eliminates the high costs of routing and storing paper receipts.

- **Immediate Implementation for Maximum ROI**--Research indicates that eliminating paper receipts from expense reporting processes can save up to $4 per expense report.

Foundation Enhancements

Business Portal

Unlock business potential and enhance productivity by providing security-enhanced, immediate access to information from a single Web-based portal. Built on Microsoft .NET technologies, Microsoft Business Solutions Business Portal integrates seamlessly with Great Plains to deliver applications, information, and processes to employees, customers, and partners across the enterprise.

Increase availability of business information
- Publish sales reports, outstanding purchase orders, budget reports—all the information your employees need to make informed decisions.
- Provide employees with the ability to use ad-hoc queries (similar to SmartLists) of information, such as top 10 customers by territory or customers with past due accounts.
- Enable employees to retrieve detailed information about customers, vendors, inventory items, and other key business information.

Enable employees to complete common tasks more efficiently
- Add-on modules, available in subsequent releases of Microsoft Business Portal, enable you to deliver centralized access to Web-based applications. Examples include employee and manager self service, time and expense entry, and purchase requisitions.
- Workflow management improves efficiency for routine processes such as timecard and expense report approval. For example, expense reports are routed to the appropriate managers for approval before being routed to accounting for posting.

Share information and processes with your customers and suppliers
- Grant trading partners access to the appropriate role pages.
- Easily determine which processes and information you wish to share with your trading partners, giving them security-enhanced access with appropriate restrictions.

Extend business applications to employees
- Deliver access via Windows® Terminal Server.
- Create links to commonly used windows, so employees can easily access the windows they use most often to do their jobs.
- Provide an inexpensive and easy-to-use alternative for those users who only need occasional access to information.

Tailor Business Portal to your business
- Identify which tasks and information you wish to share by role, and add reports, queries, and tasks to each role-based page.
- Enable users to add Web parts such as stock tickers, travel updates and weather reports to their pages.
- Customize the site with your company logo and change fonts and colors.

Provide Ease of administration
- Browser-based delivery eliminates the need to load and update applications on each desktop computer.
- Inherent integration reduces deployment and maintenance costs.
- Rapid security setup allows for mass entry of users by matching users to their corresponding Employee ID.

Foundation Enhancements

Advanced Security

Advanced Security enables you to reduce IT administration with simplified methods for configuring user security, yet help maintain high levels of protection for your business system.

Simplify processes for configuring and managing user security

- **Explorer Style Interface**—An intuitive, familiar interface supports multiple users, companies, and dictionaries. From this location, administrators can control access for forms, windows, fields, records, tables, and reports; as well as tools and documents, posting permissions, and SmartList Objects. A special view groups all customized resources into a single area.

- **User-Class Settings:** Administrators can simplify configurations by applying security settings to a user class, with changes rolling down to users assigned to the class. Settings can also be applied to a user, with settings rolling up to the class.

- **Error and Access Management**: Interactive dialogs enable administrators to identify and help fix security errors without needing to change login user. If access is denied for a window or report, the administrator can locate further information quickly and grant temporary or permanent access, again without needing to change login user.

Smart Tag Manager

With Microsoft® Office XP Smart Tag Manager, you can equip managers and employees to work more productively, providing context-sensitive "links" between Microsoft Office documents and data in their Great Plains® applications.

Drill back instantly to customer, vendor and product information

- **Budget reports** –If you use Microsoft Excel for budgeting, you can link back from the account numbers or descriptions in spreadsheets to the period summary or detailed transaction information for each account.
- **Checkbook balances** - If you receive an e-mail alerting you that one of your checkbooks has fallen below the minimum balance, you can click on that checkbook name and see a list of recent checks and deposits.

- **Vendor invoice review** - When a vendor sends an e-mail asking for payment, you can quickly view the vendor's outstanding invoices to determine if payment is appropriate at this time.

- **Customer information--**Look up a customer's address and account activity information even if you aren't running Microsoft Business Solutions–Great Plains.

- **Requests for employee information--**Locate employee information instantly to provide immediate follow-ups to e-mail requests, and at the same time help ensure sensitive payroll information is available only to authorized personnel.

Integration Enhancements

Integration

Streamline processes and provide access to consistent information across your business with new integration capabilities.

Microsoft Business Solutions Customer Relationship Management

Microsoft CRM helps mid-market companies increase sales success, deliver superior customer service, and make informed business decisions. Built for low total cost of ownership, it's accessible from Microsoft Outlook® and the Web, integrates with other systems, and adapts and scales to meet changing needs. Integration with Great Plains includes key data mapping for accounts, contacts, product catalog, orders, and price lists.

Microsoft Business Solutions Retail Management System

Designed specifically for independent merchants, Microsoft Retail Management System (MRMS) helps independent merchants serve customers effectively, manage business processes, and keep pace with any size competitor. MRMS will provide integration with Great Plains General Ledger and Purchasing.

Windows® SharePoint™ Services for Microsoft Windows Server 2003

Share information, collaborate on documents, and collect team knowledge over the Internet or your corporate network. With the release of Windows SharePoint Services, key business indicators can be easily viewed from your Great Plains data, with pre-defined templates for analyzing sales, inventory, and earnings information.

Microsoft Office Excel 2003

Import Great Plains data directly into Excel 2003 for easy analysis and reporting, using a built-in data source.. An intuitive Excel wizard makes it easy to pull in just the data you want. Relationships between related information are maintained, helping ensure that data is relevant to your needs.

Microsoft Business Network

Work more effectively with trading partners with the Microsoft Business Network (MBN). Improve the visibility of operations and key information, increase the velocity of business transactions across companies, and leverage a platform for collaboration that allows multiple companies to look and act like one virtual entity. MBN extends Great Plains by fully integrating with customer and inventory master records as well as sales order processing.

Bank One Direct PayCheck Card

Eliminate paper checks, reduce check handling costs for employees without bank accounts, and increase employee satisfaction with direct deposit to

their personal Bank One Direct PayCheck Visa® card. Web-based integration between Payroll and Bank One simplifies and automates the enrollment and setup processes, while integration with ACH functionality deposits employee paychecks directly to their card account.

Professional Services

Experience Award-Winning Training and Technical Support

Recognized as one of the most responsive and innovative service teams in the industry, Microsoft Business Solutions backs your investment in Great Plains by working with your local reselling partner to offer remarkable training and support services.

Regardless of which support plan you choose, you'll receive software updates and 24/7 access to CustomerSource, a Web site designed to enhance your productivity. If you enroll in Foundation Services, Unlimited 1-Hour Support, or Premier Services, you'll receive expert technical support to help keep your business running smoothly, as well as access to online training to ensure you get up to speed quickly and continue to find new and better ways to use Great Plains.

Great Plains Service Plan Details

	Enhancement Program	Foundation Services Program	Unlimited 1-hour Support	Premier Services
Free Product Releases				
All major upgrades and minor updates	✓	✓	✓	✓
Payroll tax tables and updates	✓	✓	✓	✓
Convenient Online Services				
Access to CustomerSource, a Web site for technical solutions and productivity support	✓	✓	✓	✓`
Technical Support				
Support included in service plan		✓ 6 incidents	✓ Unlimited Support	✓ Available with 100 incidents or Unlimited Support
Guaranteed response time	Same-day response time if you purchase Per-incident Support	✓ 3-hour response time	✓ 1-hour response time	✓ Available with 1-hour or ½ hour response time
Priority status on service request				✓
Technical Account Manager and technical team dedicated to knowing your business				✓
Educational Benefits				
Access to online training		✓	✓	✓
Orientation Training on CD-ROM		✓	✓	✓
Regularly-scheduled Online Interact sessions with support professionals		✓	✓	✓

Existing customers can find additional information about their service plan at www.greatplains.com/customersource.