ACHIEVE RESULTS

Microsoft Dynamics™ SL 7.0 Enhancements

Built for the future to help
you achieve more.

Microsoft Dynamics™

CONNECT

Microsoft Dynamics SL is an adaptable business management solution that works like and with familiar Microsoft software to help automate the transactions of project-, service-, and distribution-driven businesses, empowers people to work more effectively together to fuel business productivity, and provides managers insights to help monitor and grow their company with confident decision making.

Microsoft Dynamics SL 7.0 is built for the future to help you achieve more.

At a Glance – Microsoft Dynamics SL 7.0 Enhancements

Microsoft Dynamics SL 7.0 continues to expand upon the vision of the Microsoft Dynamics product line by providing features and benefits along four key objectives:

MICROSOFT DYNAMICS IS:	MICROSOFT DYNAMICS SL 7.0 IS:
Familiar to your people... Microsoft Dynamics works like and with other Microsoft products you and your people are familiar with, helping reduce the time required to learn how to use it, and freeing up time to focus on what matters most.	Microsoft Dynamics SL 7.0 is built for improved efficiency with configurable menus and tools that are familiar to your people. Microsoft Dynamics SL 7.0 offers: • New, Microsoft Office 2007-like menu interface • Configurable, role-relevant menus and home pages • Improved text editing
Fits with your systems... Microsoft Dynamics works the way your current technology works so it fits easily into your systems, helping to maximize your investment in Microsoft technology.	Flexible, easy to implement, secure, and built on technology supported by thousands of developers worldwide, Microsoft Dynamics SL 7.0 provides: • Integration and interoperability with existing systems • Compatibility and upgradeability of prior customizations • Compatibility to Windows Vista and Office 2007 • Better flexibility and supportability provided by Microsoft Visual Studio 2005
Fuels your business productivity... Microsoft Dynamics helps fuel the productivity of your business by automating your business-critical operations and adapting to fit your type of business, ensuring the most relevant insight.	New features and enhancements to fuel your business productivity with Microsoft Dynamics SL 7.0 include: • Quick Send invoices and purchase orders via email or fax • Pay-When-Paid • Expanded project multi-currency support • Field service enhancements for trade contractors • Expanded data fields • Easier, application access management with integrated Windows Authentication • Ability to access and manage more project information remotely and securely to better enable your mobile people
Enables confident decision making... Microsoft Dynamics helps you respond rapidly to the changing demands of your business, providing you with more complete insight across your organization so you and your people can make timely and informed decisions with increased confidence.	Microsoft Dynamics SL 7.0 allows better insight into your business with reporting tools that empower your people to make better decisions and analyze business transactions, with: • Pre-built dashboards and analysis reports for many roles in your company through BIO® for Microsoft Dynamics SL. • Built-in SQL Server Reporting Services

Empower Your People

Microsoft Dynamics SL 7.0 provides a new menu interface, based on design themes from products such as Microsoft Outlook that are familiar to your people. New role-relevant menus make it easy for people to focus on functions they need to do their job more efficiently. The new custom menu creation process provides a way to create custom steps that list how to complete a process.

Access Data Easily

Managers can gain a better understanding of what is happening in the business with enhanced analysis capability and improved reporting ability. Each person can also have custom home pages of information displayed right in Microsoft Dynamics SL 7.0, whether information from an internal company site, BIO® for Microsoft Dynamics SL view, or Business Portal page.

A Foundation for the Future

Microsoft Dynamics SL 7.0 has been upgraded to run on the latest version of Visual Studio 2005 (Visual Basic), making it a native .NET application and providing new interfaces to products like SQL Server Reporting Services. With access to a larger, vibrant developer ecosystem as well as a broad range of available .NET framework-based solutions—including mobile solutions, Windows applications, Web sites and Web services—people who use Microsoft Dynamics SL 7.0 can readily increase their development productivity.

With extended product support, and the ability to upgrade customizations, reports and ISV products, these enhancements help you build a foundation for the future.
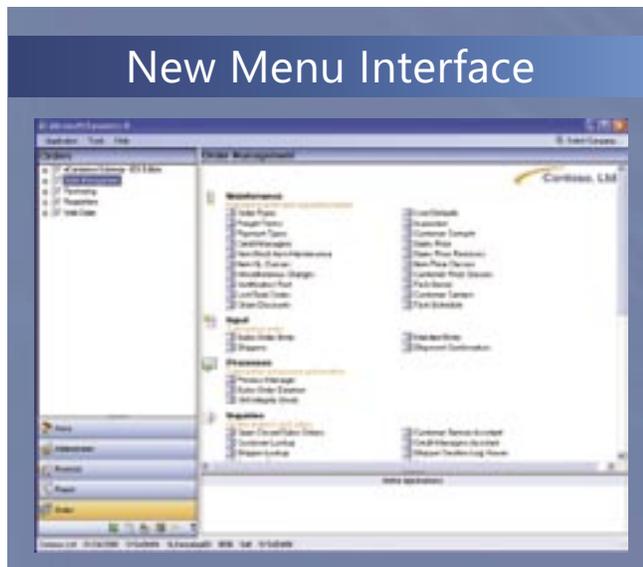
New Menu Interface

Navigate the new Microsoft Outlook-like menu interface with ease as Microsoft Dynamics SL provides menu trees and user-specific home pages.

Microsoft Dynamics SL 7.0 will be of special interest to:
- Companies with remote employees, multiple accounting departments or those with a number of legal entities customers
- Small to mid-sized businesses and especially project-centric firms in the following industries:

  - **Professional Services:** Organizations that provide management consulting, IT consulting, architectural, engineering, and surveying services; research, development, testing services, management, advertising and public relations services.
  - **Home Builders:** Construction companies that develop more than 25 lots per year.
  - **General Contractors:** Contractors that engage in residential or commercial construction.
  - **Specialty Trade Contractors:** Trade services contractors who provide heating, ventilating, air conditioning, electrical, and mechanical services.
  - **Any project-driven business:** that delivers billable contracts for their customers.
  - **Any business that distributes inventory:** and uses Microsoft Dynamics SL to manage customers' orders and inventory.

ENABLE

7.0 Enhancements

Foundation Enhancements

Enhancements to Microsoft Dynamics SL 7.0 make it easy for people to focus on functions they need to do their jobs more efficiently.

• Microsoft Dynamics SL 7.0 is now written in the latest version of Visual Basic 2005, making it .NET compliant and providing new functionality like insert/overwrite capabilities and interfaces to products like SQL Server Reporting Services. Built on Microsoft Visual Studio 2005, Microsoft Dynamics SL 7.0 offers greater flexibility and supportability, plus prior customizations are compatible and upgradeable.*

• Easier, application access management with integrated Windows Authentication associates each user's computer login to their Microsoft Dynamics SL 7.0 login, providing quick access to Microsoft Dynamics SL without needing to re-enter login information.

• Microsoft Dynamics SL 7.0 provides a new, Microsoft Office 2007-like menu interface, making navigation and custom process building available.

• New configurable, roles-based menus and home pages make it easy for people to focus on functions they need to do their job more efficiently. The new custom menu creation process provides a way to create custom steps that can be documented right on the menu for everyone to view and follow.

Menu Maintenance
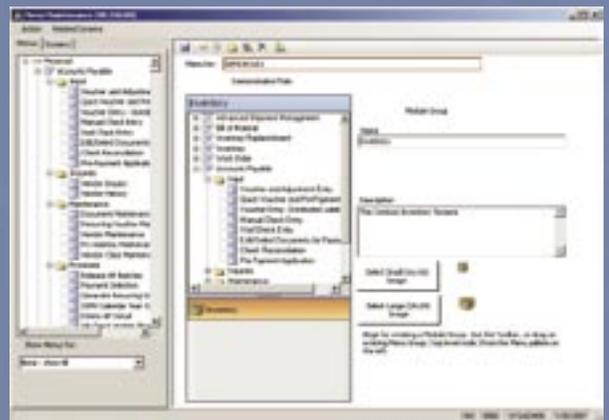
Create custom menus and text to list step-by-step instructions on how to complete specific job processes.

IMPROVE

• Customized home pages of information can be created for the people using the application and displayed right in Microsoft Dynamics SL 7.0, whether information from an internal company site, BIO® for Microsoft Dynamics SL view, or Business Portal page.

• Microsoft Dynamics SL 7.0 will be Windows Vista and Office 2007 compatible to ensure your system is maintained and secure by staying current with the latest Microsoft releases.

Financial Enhancements

New features in Microsoft Dynamics SL 7.0 can give you a better handle on cash flow, while helping you turn your receivables faster.

• Pay-When-Paid – This new feature will release subcontract vouchers to be paid only when the associated customer invoice is paid, helping to ensure the customer is satisfied with a job before the vendor is paid, and to protect the margin on invoiced work. Links can now be set up between Accounts Payable and Accounts Receivable documents. People familiar with the Microsoft Dynamics SL Project Contract functionality may recognize this capability. Pay-When-Paid with Microsoft Dynamics SL 7.0 will not require Project Contract Management.
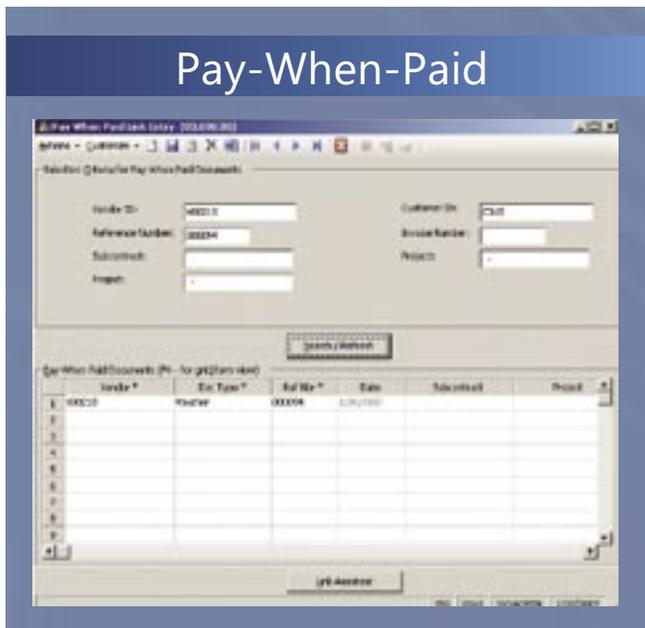

Link customer invoices with subcontractors to release payment to vendor after the customer has approved the work by submitting their payment to you.

• Quick Send – This new feature helps you improve order management efficiency, giving customers timely or on-demand access to their orders and invoices. Quick Send provides Electronic Document Delivery—the capability to send purchase orders and invoices to customers and vendors electronically via email or fax. Send batches of invoices for processing and each customer invoice is sent via the method of their preference. Individual documents can be resent as requested. Quick Send Electronic Document Delivery is available for the following print functions:

 • **Purchase Orders**
 • **Project Invoices**
 • **Construction Billing (AIA Invoices)**
 • **Accounts Receivable Invoices**
 • **Order Management Invoices**
 • **Service Series Invoices**
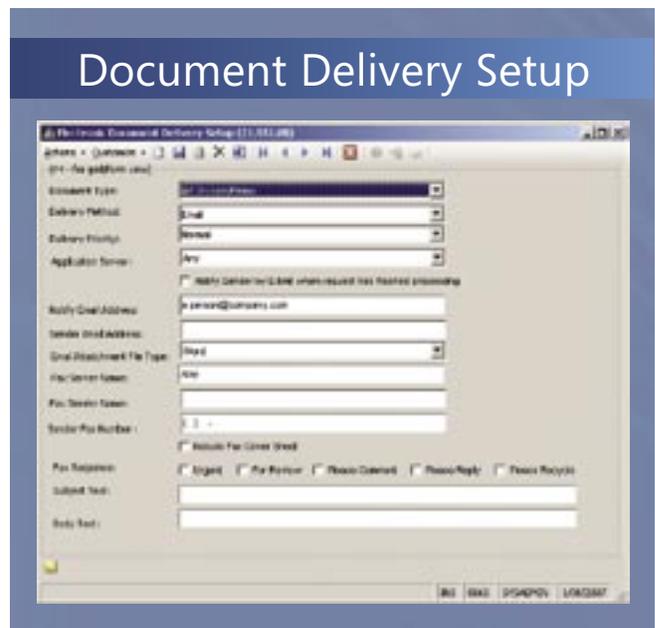
Set up document types and delivery methods for Quick Send Electronic Document Delivery for instant communication with customers regarding their order and invoice status.

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*NOTE: Customizations should be thoroughly reviewed by a Microsoft Certified Partner or other qualified person and evaluated in a test environment to determine if modifications are needed before proceeding with the upgrade.

Service Series Enhancements

With Microsoft Dynamics SL 7.0, you can increase your efficiency in processing service calls, helping you improve customer satisfaction.

• With the enhanced Generate PM Service Calls screen, you now have the ability to specify invoice line types and preventative maintenance tasks, speeding up your process of generating service calls. Plus, new generate options and the ability to specify invoice line types and preventative maintenance task statuses are available in Generate PM Service Calls Process (SE.300.00).

• Microsoft Dynamics SL 7.0 offers the ability to specify a different customer ID on a service contract attached to a master contract in Service Contract Entry (SN.001.00).

• Graphical Dispatch Board (SD.900.00) no longer filters only on Geographic Zone in Microsoft Dynamics SL 7.0, which now also uses the view in Dispatch – View Maintenance (SD.004.00).

Generate Service Calls

Now you can generate service calls based on all customers, a range of customers, or one customer, as well as all geographic zones or one zone.

FOCUS

Project Management and Accounting Enhancements

Gain more control of your projects with the ability to schedule billings and to report expenses in multiple currencies.

• Foreign currencies and a VAT tax line item are now accepted in the Expense Report entry program(s).

• Multi-Currency Scheduled Billings and Billing by Percent Complete have been enhanced to produce billings in the billing currency of the project.
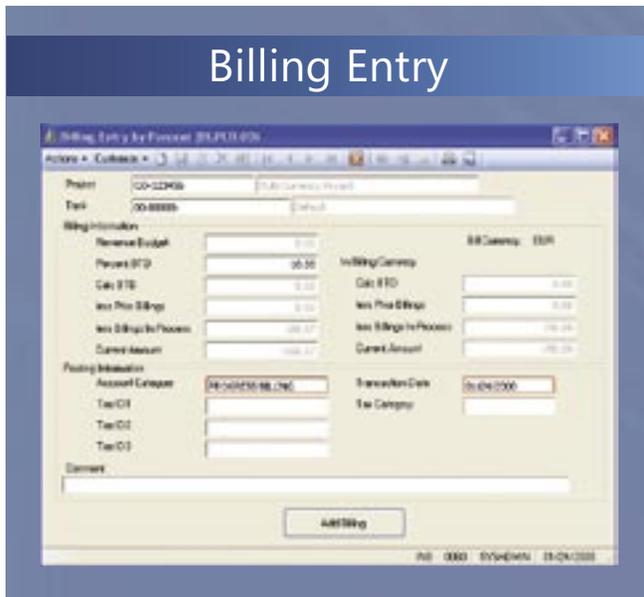

Billing Entry

The new Billing Entry by Percent screen will show calculated amount for multiple currencies when a percent is keyed in.

Analytics and Reporting Enhancements

Improve reporting and analysis and optimize the use of business information with BIO for Microsoft Dynamics SL to provide insight into your business operations and trends.

• With BIO for Microsoft Dynamics SL, an analysis solution built for Microsoft Dynamics SL first released with version 6.5, you can analyze the impact on your business of up to 900 business activities tracked within the database.

• Reports written in SQL Server Reporting services for SQL 2005 can be called directly from Microsoft Dynamics SL 7.0.

• New Microsoft FRx 6.7 SP9 enables Microsoft FRx 6.7 to be compatible with Microsoft Dynamics SL 7.0 so your reporting functionality leverages the improvements implemented in the core Microsoft Dynamics SL product.
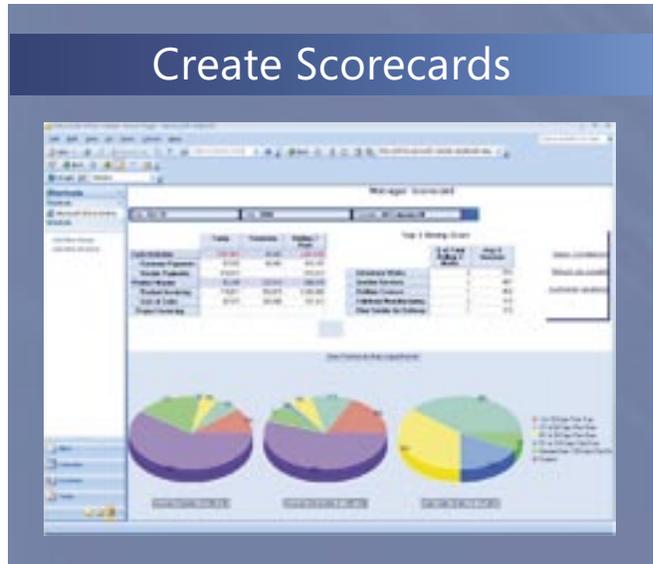
Create Scorecards

Create interactive scorecards for managers throughout the organization with information that is relevant to their job and make them accessible through Microsoft Internet Explorer, Microsoft Outlook, and more so people can use the tools familiar to them and get the data they need.

What is BIO?

BIO for Microsoft Dynamics SL is an easy-to-use analytics solution that helps amplify the impact all people can have in an organization through relevant insight into business drivers. Work from one set of company data by bringing operations and finance data such as projects, sales, inventory, customers, accruals, revenues, budgets, and more all together into one information tool. Interactive and self-service, BIO for Microsoft Dynamics SL provides personalized, role-based scorecards for everyone in your organization based on a common set of data.

BIO for Microsoft Dynamics SL allows your people to impact:
• **Increasing the lifetime value of customers**
• **Decreasing the cost of product and service delivery**
• **Strategic planning to expand your business**

BIO for Microsoft Dynamics SL empowers all business users to build, manage and utilize scorecards and reports through familiar tools. This powerful solution keeps your team focused on the health and success of your business every day.

INTEGRATE

Extending Access to Information

Business Portal in Microsoft Dynamics SL 7.0, based on the Microsoft Office SharePoint Services collaboration and document management solution, helps to increase the productivity of your company with many new features, including Project creation.

• With access to the Microsoft Dynamics SL Project Maintenance program through the Business Portal, project managers can now set up new projects and alter current project information from remote locations such as a client site using the Business Portal without needing to log into Microsoft Dynamics SL.

• In addition to document sharing, new access to Windows SharePoint Services 3.0 features includes blogs, wikis and RSS Feeds.

• With Microsoft Windows SharePoint Server 3.0, the latest version, you can help ensure your system is maintained and secure by staying current with the latest Microsoft releases
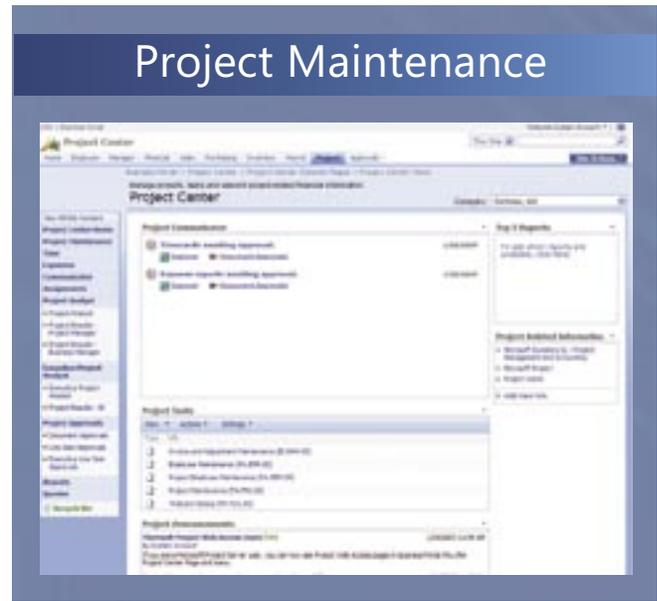
Access to Microsoft Dynamics SL Project Maintenance program is available from remote locations 24x7 through Business Portal without logging into Microsoft Dynamics SL.

What is Business Ready Licensing?

Business Ready Licensing is a pricing model that bases software license pricing primarily on the number of users as opposed to the modules/granules purchased and therefore the functionality and value of software is placed in the user rather than modules.

Microsoft Dynamics SL Business Ready Licensing includes two editions:

Business Essentials edition of Microsoft Dynamics SL	The Business Essentials edition of Microsoft Dynamics SL provides basic financial and distribution functions, as well as the ability to add advanced analysis and reporting, payroll, and customization tools.
Advanced Management edition of Microsoft Dynamics SL	The Advanced Management edition of Microsoft Dynamics SL offers powerful project management and accounting, distribution, and advanced financials as well as the ability to add additional advanced project, supply chain management, and field service modules. The Advanced Management edition of Microsoft Dynamics SL is inclusive of all Business Essentials edition components.

In addition to the editions listed above, you may also purchase additional components and/or users to add to either edition of your choice.

While Business Ready Licensing is required for new customers, all existing customers who have already licensed Microsoft Dynamics SL may continue to purchase additional components from the "modular-based" price list for their existing solution license.

To understand the modules and functionality included in the Business Essentials and Advanced Management editions of Microsoft Dynamics SL, as well as potential advantages of transitioning to this licensing model, talk to your Microsoft partner. As your company's needs change, Microsoft wants to support this growth by allowing a transition that recognizes the investment you've made in your current solution while enabling you to move to the edition that best fits your business needs.

Microsoft Financing

Microsoft Financing helps solve business problems. Whether you need software or a more comprehensive solution, including software, services, and hardware, we offer a financial option that helps make the technology you need more affordable. By financing your IT solutions and spreading the payments over the life of your IT investment, we can help optimize your budget to acquire the IT solutions you need and free up your corporate credit lines for other investments. In short, Microsoft Financing makes smart business sense. We shift the focus from, "How will I pay for it?" to, "What do I need?"

For more information, visit www.microsoft.com/financing

ACHIEVE

Service Plans for Microsoft Dynamics SL

Recognized as one of the most responsive and innovative support teams in the industry, Microsoft backs your investment in Microsoft Dynamics SL by working with your local partner to offer remarkable training and support services. Regardless of which service plan you choose, you'll receive software Upgrades, updates, virtual 24x7 access to CustomerSource, and unlimited organizational access to online training.

SERVICE PLAN FEATURES	ENHANCEMENT PLAN	STANDARD A PLAN	STANDARD B PLAN
Major upgrades, Updates, service packs	X	X	X
Investment Protection	X	X	X
Unlimited Online Training	X	X	X
Transition Investment Credits	X	X	X
Access to CustomerSource	X	X	X
Managed Newsgroups	X	X	X
Discounts on Flex Per-Incident and Flex 5-Pack Support	X	X	X
Service Plan Support		**X** – 2 support incidents – 3 hour guaranteed response	**X** – unlimited support incidents – 1 hour guaranteed response
Technet Plus			X
Online Chat and Screen Sharing			X

Deluxe Support Services

Together with your partner, Deluxe Support Services provides a unique support relationship. You'll receive the services of an account manager who will act as your advocate between your company and Microsoft that can provide the focused attention you need to help maximize your return on investment with Microsoft.

Deluxe Support Services includes:

SERVICES ACCOUNT MANAGEMENT	PROBLEM RESOLUTION SUPPORT	INFORMATION SERVICES
• Services Account Manager • Critical Case Management • 2 day on-site Supportability Review and Report • Resource Facilitation • Deluxe Orientation and Planning Session	• Problem Resolution Incidents • 24x7 System-down Support • One-hour Response Time • Priority Status in Microsoft Support Queue	• Managed Newsgroups • TechNet Plus • Unlimited online training

Haven't Upgraded in a While?

Microsoft Solomon 6.0 and Microsoft Dynamics SL 6.5 Provided:

Foundation Series
- Enhanced User Interface and User Experience
- Group customizations
- Enhanced tools for complying with Sarbanes-Oxley Act
- Customer Feedback tool in Help system
- Support for Microsoft Watson error logging
- New features within Business Portal 3.0
- Application Server enhancements
- Compatibility support for Microsoft SQL Server 2005
- Performance improvements throughout the system
- Enhanced schema help content
- Support for Microsoft Visual Studio 2005

Financial Series
- Advanced Timecard Entry for Business Portal
- New Module: Bank Reconciliation

Advanced Distribution
- Consolidate Multiple Shippers on a Single Invoice
- Improvements in efficiency and performance
- New Module: Requisitions
- Ability for Consolidated Invoices to flow through EDI (Electronic Data Interchange)
- Delayed Order Total Updating option enabled in Order Management
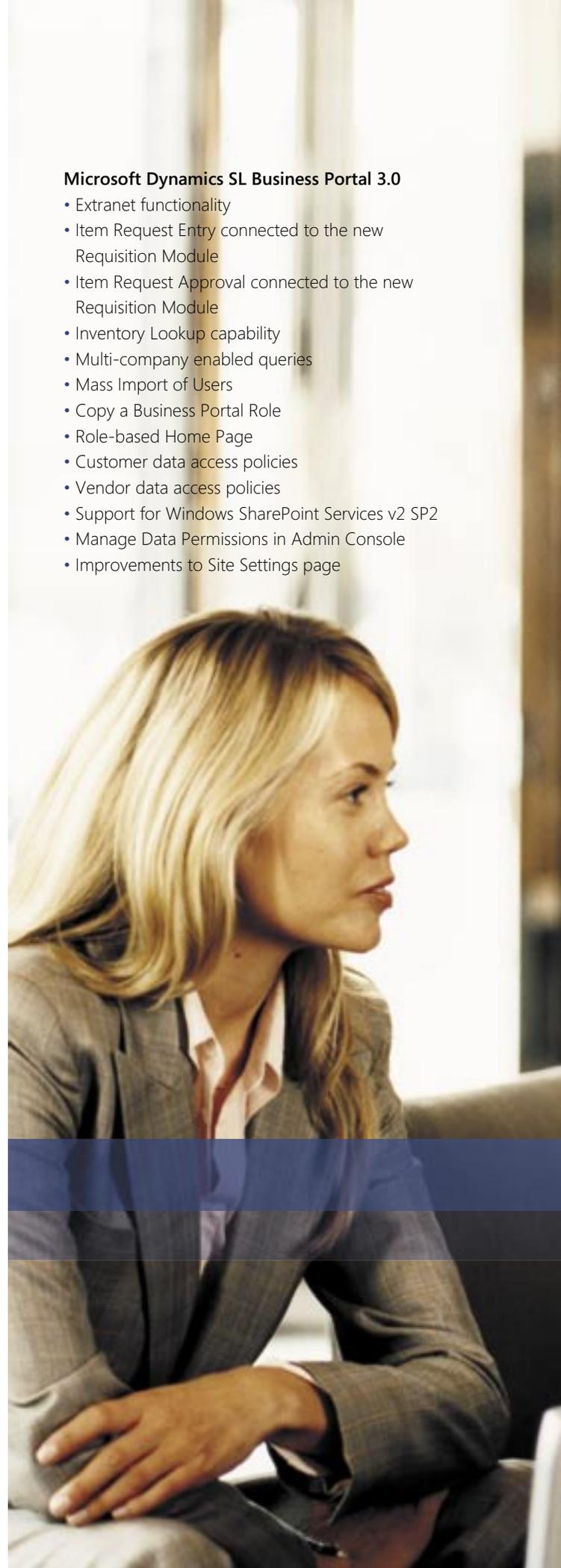
Enhanced Reporting and Budgeting
- Crystal 10
- Microsoft FRx 6.7 SP4
- Microsoft Forecaster 6.7
- Microsoft FRx Report Manager 6.7

Project Series
- Resource Assignment
- Government contractor invoice formats 1034 and 1035
- Historical Budgets by Period, Budget labels, AIA improvements
- Cash Manager integration to Project Management and Accounting
- Timecard Entry for Business Portal
- Timecard Approval for Business Portal
- Expense Report Entry for Business Portal
- Expense Report Approval for Business Portal
- Project Analyst for Business Portal
- Solomon Communicator for Business Portal
- Invoice Approval for Business Portal
- Task Inquiry for Business Portal
- Addition of a 3rd Rate Key in Allocations
- Changes in Purchase Order automatically update Project Commitments (in real-time)

Microsoft Dynamics SL Business Portal 3.0
- Extranet functionality
- Item Request Entry connected to the new Requisition Module
- Item Request Approval connected to the new Requisition Module
- Inventory Lookup capability
- Multi-company enabled queries
- Mass Import of Users
- Copy a Business Portal Role
- Role-based Home Page
- Customer data access policies
- Vendor data access policies
- Support for Windows SharePoint Services v2 SP2
- Manage Data Permissions in Admin Console
- Improvements to Site Settings page

ADAPT

Microsoft®