AMP IT UP!

What’s New in Microsoft Dynamics GP 10.0
Joint Business Value

Simplify how people work together

Help protect & manage content

Find information & improve business insight

Reduce IT costs & improve security
The Right User Experience
Technology and Functional Enhancements

[Image of software interface with a man standing in front of it]
Business Intelligence Within Reach
Workflow That Fits Your Business Process
AMP IT UP!

Roles Based Interface
User Experience

Pain Point
I need to be able to change settings based off what I would like to see.

Feature
Ability to change settings per user

Pain Point
To perform tasks, it takes many different windows open and is very cumbersome.

Feature
Action Panes and List Pages

Pain Point
It takes my users so long to learn to navigate the system.

Feature
Navigation Bar with Vista look and feel.

Sammy – Shipping and Receiving
"On time and no damage – that’s me."

Key Tasks: Fulfilling and shipping orders
AMP IT UP!

Spotlight on Business Intelligence
Confidently connecting people, processes and decisions

<table>
<thead>
<tr>
<th>Monitor</th>
<th>Good</th>
<th>Better</th>
<th>Best</th>
</tr>
</thead>
<tbody>
<tr>
<td>FRx</td>
<td>Financial</td>
<td>Key Performance</td>
<td>Scorecarding</td>
</tr>
<tr>
<td>SQL Reporting</td>
<td>Reporting</td>
<td>Indicators</td>
<td>Performance</td>
</tr>
<tr>
<td>Services</td>
<td>Services</td>
<td></td>
<td>Point Server</td>
</tr>
</tbody>
</table>

| Analyze          |               |                     |                     |
| Smart Lists      |               | Excel Reports        | Analysis Cubes      |
|                 |               |                     | Performance         |
|                  |               |                     | Point Server        |

| Plan             |               |                     |                     |
| Excel Reports    |               | FRx Forecaster       | Enterprise           |
|                  |               |                     | Reporting            |
|                  |               |                     | Planning             |
|                  |               |                     | Point Server         |
Excel Reports

Pain Point
Static Excel reports

Feature
Over 175 refreshable Excel reports

Pain Point
Difficult to share reports

Feature
Deployed to Microsoft Office SharePoint Server or other shared network location

Pain Point
Limited time to learn new features

Feature
Excel report names, filters and data match what the users would experience with SmartList Favorites

Arnie - Accounts Receivable Administrator

"I can't efficiently handle the volume of invoices that need to be sent to customers or the receipts my company receives."

Key tasks: Verifies shipment paperwork and creates invoices. He processes and applies cash receipts to appropriate invoices. He may follow up on past due accounts to obtain payment.
Microsoft SQL Server Reporting Services

Pain Point
Total cost of ownership

Feature
70+ Microsoft SQL Server Reporting Services Reports are shipping with Dynamics GP 10

Pain Point
Limited IT staff available

Feature
Microsoft SQL Server Reporting Services Wizard is available to assist with deploying Microsoft SQL Reporting Services Reports

Pain Point
Limited training opportunities

Feature
Industry standard reporting tool utilizing the Microsoft stack

Kevin – Sales Manager

“I make my sales team successful.”

Key tasks: Manages sales reps for his area and tracks what they are doing. He helps them to close sales and may do limited selling himself.
Report Lists

Pain Point
Reports stored in multiple locations

Feature
Integration with SQL Reporting Services and Microsoft Office SharePoint Server

Pain Point
All report types do not show up in the Report List

Feature
Allow all file types to be included in the Report Lists

Vince – Operations Manager

“There’s no time like the present to address problems.”

Key tasks: Ensures the timely and cost-effective delivery of products by managing the operations of the logistics, production, service departments.
Nancy – Super Sales Rep

"Everything to do with customers, old and new, is my responsibility."

Key tasks: Handles customer interactions, including finding leads, fulfilling orders, up selling, and dealing with services issues.
Tasks and Roles

- Order Processing Tasks
- Account Manager Tasks
- Sales Manager Tasks
- Sales Rep Tasks

Order Processing Role:
- Susan
  - Order Processor

Account Manager Role:
- Michael
  - Account Manager

Sales Rep Role:
- Nancy
  - Sales Rep
SharePoint Server (MOSS) Functional Areas

Server-based Excel spreadsheets and data visualization, Report Center, BI Web Parts, KPIs/Dashboards

Docs/tasks/calendars, blogs, wikis, e-mail integration, project management “lite”, Outlook integration, offline docs/lists

Enterprise Portal template, Site Directory, My Sites, social networking, privacy control

Enterprise scalability, contextual relevance, rich people and business data search

Rich and Web forms based front-ends,

Integrated document management, records management, and Web content management with policies and workflow

Business Intelligence

Business Forms

Content Management

Search

Portal

Collaboration

Platform Services

Workspaces, Mgmt, Security, Storage, Topology, Site Model
Business Intelligence with Microsoft Office SharePoint Server 2007

Pain Point
Reports stored in multiple locations

Feature
View and launch files stored in Microsoft Office SharePoint Server from within Microsoft Dynamics GP

Pain Point
Limited IT staff available

Feature
Microsoft Office SharePoint Server Wizard now available to assist with deploying data connections and Excel reports

Pain Point
Non-GP Users need access to information

Feature
Report Deployed and dashboards do not require a GP Login, just a MOSS Cal.

Charlie – President and CEO

"The buck stops here."

Key tasks: Keeps the business viable by determining product and company direction. He is involved with all departments and depends on accurate information from his staff.
AMP IT UP!

Search
Pain Point
Need to find information quickly while customer is on the phone waiting.

Feature
Search

Pain Point
I have to go to many places to get information about a customer

Feature
Search

Pain Point
I need to make decisions quickly with the most accurate information.

Feature
Search

Connie – Credit and Collections Manager

“It’s better to work something out than to lose a customer.”

Key tasks: Research customer information, credit decision maker, collection manager
Search Company Set-up

Search Wizard automates the setup of companies for search.

For each Company/Entity/Property in selected list:

- API Calls generate Metadata XML file for company
- API Calls to Create
  - Content Source
  - Scope
  - Search Result page
  - Crawl rules
  - Search rules

Search pages can be accessed from the Dynamics GP.

Microsoft Dynamics GP

MOSS

BDC

SharePoint Search
AMP IT UP!

Workflow
Workflow

**Pain Point**
I need to approve all Purchase Orders over $50,000 along with my Purchasing Manager.

**Feature**
Purchase Order Workflow allows you to configure your workflow processes including thresholds, approvers, and delegates.

**Pain Point**
I need to be able to approve transactions without having access to the system.

**Feature**
Workflow

**Pain Point**
It is difficult to manage my complex approval process outside the system due to Sarbanes–Oxley regulations.

**Feature**
Workflow

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Sara – Chief Financial Officer

"I know at any given time where the company is and where we are going."

**Key tasks:** Oversees business costs, determines companies financial direction, financial figure head of company.
Phyllis – Purchasing Agent
(1) PO2107 has been entered for 3 Light Cordless phones. Total cost is $225.87.
(2) Submits the Purchase Order for approval in Microsoft Dynamics GP.

Nicole – Purchasing Manager
(1) Reviews details of PO2107 using Microsoft Outlook & SharePoint Server.
(2) Signs off on PO2107 using Microsoft Outlook.

Ken – Accounting Manager
(1) Reviews the details of PO2107 using SharePoint Server.
(2) Provides final sign off on PO2107 using SharePoint Server.

Phyllis – Purchasing Agent
Views PO2107 workflow history in Microsoft Dynamics GP and continues to process document.
### Purchase Orders

<table>
<thead>
<tr>
<th>PO Number</th>
<th>Vendor ID</th>
<th>Date</th>
<th>Purchase Order Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>PO2087</td>
<td>ADVANCED0001</td>
<td>2/14/2005</td>
<td>$28.46</td>
</tr>
<tr>
<td>PO2089</td>
<td>ADVANCED0001</td>
<td>2/14/2005</td>
<td>$75.99</td>
</tr>
<tr>
<td>PO2090</td>
<td>ADVANCED0001</td>
<td>2/14/2005</td>
<td>$75.99</td>
</tr>
<tr>
<td>PO2091</td>
<td>ADVANCED0001</td>
<td>2/14/2005</td>
<td>$2,049.00</td>
</tr>
<tr>
<td>PO2096</td>
<td>COMPUTER0001</td>
<td>6/14/2007</td>
<td>$220.00</td>
</tr>
<tr>
<td>PO2098</td>
<td>ACETRAVE0001</td>
<td>4/12/2007</td>
<td>$500.00</td>
</tr>
<tr>
<td>PO2099</td>
<td>ADVANCED0001</td>
<td>4/12/2007</td>
<td>$96.00</td>
</tr>
<tr>
<td>PO2102</td>
<td>AARONFIT0001</td>
<td>4/12/2007</td>
<td>$150.58</td>
</tr>
<tr>
<td>PO2104</td>
<td>AARONFIT0001</td>
<td>4/12/2007</td>
<td>$379.95</td>
</tr>
<tr>
<td>PO2105</td>
<td>AARONFIT0001</td>
<td>4/12/2007</td>
<td>$150.58</td>
</tr>
<tr>
<td>PO2106</td>
<td>ACETRAVE0001</td>
<td>4/12/2007</td>
<td>$151.98</td>
</tr>
</tbody>
</table>

**Total:**
- Remaining PO Subtotal: $0.00
- Subtotal: $0.00
- Trade Discount: $0.00
- Freight: $0.00
- Miscellaneous: $0.00
- Tax: $0.00
- Total: $0.00
If conditions are met Purchase Order PO2107 for Pilar Ackerman will be routed through workflow for approval.

Update next approvers days to act on their task

Add Comment:

Remaining PO Subtotal: $225.87

Vendor ID: ACKE0001
Name: Pilar Ackerman
Currency ID: Z-US$

<table>
<thead>
<tr>
<th>Quantity Ordered</th>
<th>Quantity Canceled</th>
<th>Unit Cost</th>
<th>Extended Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

Subtotal: $225.87
Trade Discount: $0.00
Freight: $0.00
Miscellaneous: $0.00
Tax: $0.00
Total: $225.87

Submit For Approval
Purchase Order Approval Tasks (Fabrikam, Inc.) - Purchase Order Approval PO2107 has been assigned to you

Administrator

Sent: Wed 2/21/2007 8:35 PM
To: Nicole Holliday

Workflow Task Information
Purchase Order Approval PO2107 - Approval Needed

Task Information

Subject: Purchase Order Approval PO2107 - Approval Needed
Description: PO2107 has been routed to you for approval.
Task Due Date: 2/22/2007 11:59:00 PM
View Document: PO2107
Workflow Step Name: Step 1
View Workflow History and Status: PO2107

Document Summary Information

Company: Fabrikam, Inc.
Document Type: Purchase Order
Document ID: PO2107
Total: $225.87
Vendor: Pilar Ackerman
Priority: Normal
Document Date: 4/12/2007
From: Administrator
To: Nicole Holliday
Cc:
Subject: Purchase Order Approval Tasks (Fabrikam, Inc.) - Purchase Order Approval PO2107 has been assigned to you

Workflow Task Information Purchase Order Approval PO2107 - Approval Needed

Task Information

Subject: Purchase Order Approval PO2107 - Approval Needed
Description: PO2107 has been routed to you for approval.
Task Due Date: 2/22/2007 11:59:00 PM
View Document: PO2107
Workflow Step Name: Step 1
View Workflow History and Status: PO2107

Document Summary Information

Company: Fabrikam, Inc.
Document Type: Purchase Order
Document ID: PO2107
Total: $225.87
Vendor: Pilar Ackerman
Priority: Normal
Document Date: 4/12/2007
Comment:
Microsoft Dynamics Workflow

Purchase Order Number: PO2107
Order Date: 4/12/2007
Workflow Priority: Normal
Workflow Status: Pending Approval

Vendor: Pilar Ackerman
Ship to: Fabrikam, Inc.
987 Willow Ave
4277 West Oak Parkway
Winnetka IL 98272
Chicago IL 60601-4277
(312) 555-0115 x0000

PO Type: Standard
Status: New
On Hold: No
Payment terms: Discount Available Amount $0.00 Discount $0.00 Due Date Discount Date
Contract: 
Contract expiration date:

<table>
<thead>
<tr>
<th>Item Number</th>
<th>Description</th>
<th>Site Id</th>
<th>Qty Ordered</th>
<th>U of M</th>
<th>Unit Cost</th>
<th>Extended Cost</th>
<th>Required Date</th>
<th>Inventory Account</th>
<th>Vendor Item</th>
<th>Requested By</th>
</tr>
</thead>
<tbody>
<tr>
<td>01373</td>
<td>Light Cordless 1</td>
<td>WAREHOUSE</td>
<td>3</td>
<td>EACH</td>
<td>$75.29</td>
<td>$225.87</td>
<td>4/12/2007</td>
<td>000-1300-01</td>
<td>01373</td>
<td></td>
</tr>
</tbody>
</table>

Subtotal: $225.87
Trade discount: $0.00
Freight: $0.00
Workflow Task Information Purchase Order Approval PO2107 - Approval Needed

Task Information

Subject: Purchase Order Approval PO2107 - Approval Needed
Description: PO2107 has been routed to you for approval.
Task Due Date: 2/22/2007 11:59:00 PM
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Workflow Step Name: Step 1
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Company: Fabrikam, Inc.
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Task Information

Subject: 
Description: 
Task Due Date: 
View Document: 
Workflow Step Name: 
View Workflow History and Status: 

Document Summary Information

Company: 
Company: 
Document Type: 
Document ID: 
Total: 
Vendor: 
Priority: 
Document Date: 
Comment:

Purchase Order Approval PO2107 - Approval Needed

Your approval is requested on PO2107

From: System Account

Type comments to include with your response:
I approve PO2107.

Update new due days
Due Days

Approve  Reject  Delegate...  Request Change  Cancel
Welcome to Microsoft Dynamics Workflow

Workflow is a term that refers to an automated business process. For example, you can set up a workflow to define the approval process for purchase orders or General Ledger batches.

A workflow defines how a document or batch moves through the system. It defines who must approve the document or batch, and the conditions under which they must approve it.

How to get started:

- If you're the workflow administrator or workflow manager, you can begin setting up workflows by clicking the Administration link.
- If you're assigned to a task, click the Tasks link to view the documents or batches assigned to you.
Workflow Tasks

Use this page to access your tasks for each workflow type and organization.

Workflow - Company task list

Purchase Order Approval Tasks (Fabrikam, Inc.)
## Purchase Order Approval Tasks (Fabrikam, Inc.)

List where the workflow will record task information for all Purchase Order workflows in progress for Fabrikam, Inc.

<table>
<thead>
<tr>
<th>Task</th>
<th>Due Date</th>
<th>Status</th>
<th>Link</th>
<th>Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchase Order Approval PO2102 - Approval Needed</td>
<td>1/31/2007</td>
<td>Completed</td>
<td>PO2102</td>
<td>Approved</td>
</tr>
<tr>
<td>Purchase Order Approval PO2107 - Approval Needed</td>
<td>2/2/2007</td>
<td>Not Started</td>
<td>PO2107</td>
<td></td>
</tr>
</tbody>
</table>
Purchase Order Approval Tasks (Fabrikam, Inc.): Purchase Order Approval PO2107 - Approval Needed

This workflow task applies to PO2107.

Your approval is requested on PO2107

From: System Account

Type comments to include with your response:

[Text Area]

Update new due days

[Due Days]

[Submit Options: Approve, Reject, Delegate, Request Change, Cancel]
Purchase Order Approval Tasks (Fabrikam, Inc.)

List where the workflow will record task information for all Purchase Order workflows in progress for Fabrikam, Inc..

<table>
<thead>
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<th>Due Date</th>
<th>Status</th>
<th>Link</th>
<th>Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchase Order Approval PO2102 - Approval Needed</td>
<td>1/31/2007</td>
<td>Completed</td>
<td>PO2102</td>
<td>Approved</td>
</tr>
<tr>
<td>Purchase Order Approval PO2107 - Approval Needed</td>
<td>2/2/2007</td>
<td>Completed</td>
<td>PO2107</td>
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AMP IT UP!

What’s New in . . .
Human Resources and Payroll
Retroactive Pay

Automatically calculate and make retroactive pay adjustments to employee earnings (supplemental wages) based on historical transactions.
Court-ordered garnishments may require deductions from an employee’s wages for child support, medical support, unpaid taxes, or debts.
Sequencing TSA Deductions

Give users the ability to define the order in which deductions are withheld from an employee’s paycheck.
Enable Microsoft Dynamics GP to automatically create payables vouchers from payroll deductions, federal, state, and local taxes. Many separate transactions are consolidated in one voucher.
Overtime Rate Manager

Enables users to stay FLSA compliant by calculating overtime rates based on the employee’s weighted average wage.

Added flexibility to setup multiple overtime calculation methods for different employee groups.
Deductions In Arrears

Free up staff from manually tracking uncollected deductions by automatically collecting the amounts during subsequent pay periods. All deductions can be set up for arrears processing.
Advanced Payroll

Pay Policy Manager – Simplifies defining and calculating different pay rates for a single employee. It integrates with the Microsoft Dynamics GP Payroll module to provide the most accurate and consistent payroll system.

Payroll Hours Posting to GL – Post employee payroll hours to GL Unit Accounts to provide a quick and easy way to compare actual versus budgeted payroll amounts. It integrates with the Microsoft Dynamics GP Financial and Payroll modules.
Advanced Payroll

Advanced Labor Reporting
Reporting labor costs are now quick and easy by having the flexibility to create detailed reports for everyone from Executives to Department Managers.

Labor Accrual Manager
Calculate accrued hours and earnings by calendar date instead of by pay period, since most pay periods do not coincide with actual months. You can now allow for calculating estimated costs and post them to the GL.
Microsoft Dynamics GP Payroll now allows an unlimited number of accrual schedules for automating PTO Calculations.
Advanced Human Resources

Certification, License & Training enables you to maintain Certification, License and Training information for your employees within Microsoft Dynamics GP Human Resources.

Employee Health & Wellness Manager enables you to track health related employee data such as tests and immunizations within Microsoft Dynamics GP Human Resources.
Benefit Self Service

Conduct your open enrollment like Fortune 500 companies. Benefit Self Service gives you the tools to deploy web-based enrollment no matter how large or small your organization may be.
AMP IT UP!

Top 10 Reasons to Upgrade
Top 10 Reasons to Upgrade

6. Manage planning and production with greater agility. Gain more control over your shop floor with the ability to reverse posted manufacturing order receipts. The new multi-level pegging tree makes it easy create what if scenarios for better planning.


8. Efficiently manage demanding payroll requirements. Quickly calculate and make retroactive pay adjustments to employee earnings, as well as monitor garnishment across different jurisdictions with added ability to sequence tax-sheltered annuities.

9. Streamline purchase order processing with automated, role-tailored approval routings and the ability to use expired lots when entering purchasing returns.

10. Maintain tighter control over distribution by tracking inventory in transit between warehouses with Two-Step Transfers and flexible lot expiration capabilities.
Top 10 Reasons to Upgrade

1. Facilitate strategic decisions with standard reporting tools with over 200 refreshable Excel reports, and more than 75 Microsoft SQL Server® Reporting Services reports.


3. Empower your people to be productive with the Action Pane, a graphical command bar, inspired by “Ribbons” in Microsoft Office. People can preview and filter information and then perform actions against multiple records, from one window.

4. Find and share the right information, fast using Microsoft Office SharePoint Server 2007. People can initiate searches that return Microsoft Dynamics GP, Office Word, Office Excel®, Office Outlook®, and other application information.

5. Save time and improve accuracy for payables processes. Adjust vendor-specific 1099 tax types and box numbers. New EFT options include optional pre-notes, printing non-negotiable checks, validation for transits, and corporate payments.