Microsoft Dynamics SL 6.5 Enhancements

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Microsoft Dynamics SL 6.5 can help you to better manage your accounts and process requests for goods or services more efficiently. The latest version provides role-specific functions for employees throughout your company. It delivers the tools your people need to connect to information, streamline processes, reduce inefficiency, and gain new business insights.

- **Save Time and Money**
  with the new Requisitions Module — Streamline the submission and approval of requests with the new Requisitions module. Employees can enter requests directly and managers can review and approve them immediately.

- **Simplify Account Management**
  with the new Bank Reconciliation Module — Get quick and easy access to your accounts for easier investment management.

- **Improve Security and Efficiency**
  with the Enhanced Application Server Module — Schedule reports to run as frequently as needed, with increased security, using the enhanced Application Server module.

- **Increase Productivity**
  with the Business Portal in Microsoft Dynamics SL — Connect to important information through the Internet with a Microsoft® Internet Explorer connection. The Business Portal of SL is easier than ever before.

Microsoft Dynamics SL helps you grow your business, improve customer and employee satisfaction, and work more effectively with your business partners, customers, and vendors. Your data is more secure and more accessible to the people who need it. With Microsoft Dynamics SL, help your business, improve customer and employee satisfaction, and work more effectively with your business partners. Your data is more secure and more accessible to the people who need it.

Build a Better Business — with Microsoft Dynamics SL 6.5


Microsoft Dynamics™ SL 6.5, formerly Microsoft Business Solutions—Solomon, can help build stronger businesses by empowering people to manage processes faster and more accurately. And Microsoft Dynamics SL 6.5 includes new modules and numerous enhancements specifically for our customers in professional services, construction, and distribution firms, as well as for government contractors.

Continuing its focus on project-driven organizations and distributors, and based on extensive feedback from our customers and partners, Microsoft Dynamics SL 6.5 delivers advantages in five broad areas.

**Empower Your Employees and Managers**
You can save time and money with the addition of the powerful new Requisitions module. Employees can enter purchase requests directly into the system, and managers can proactively approve or reject them. The module can support purchasing policies by company, department, cost center, or even by project. Approved requests can then be submitted for bids—potentially saving your company even more money.

**Manage Your Accounts Effectively**
The new Bank Reconciliation module provides easy access to your account balances and enables your staff to quickly reconcile company bank statements in electronic formats, extending the Microsoft Dynamics SL suite of applications for easier management of your bank accounts.

**Maintain Security and Efficiency**
Take advantage of automated processing with the enhanced Application Server module—this allows you to instruct your employees, and with new security measures in Application Server, you can lock a computer running the Microsoft Windows operating system while processing continues—helping to provide a more secure environment.

**Manage Data Access from Anywhere**
The powerful Business Portal 3.0 in Microsoft Dynamics SL, built on Microsoft SharePoint, provides an inventory lookup application, and a roles-based home page.

**Take Advantage of Project-Driven Organization and Distribution Enhancements**
Microsoft Dynamics SL 6.5 includes more than 100 enhancements to appeal to both existing customers in multiple industries and new customers in project-driven and distribution industries. The enhancements span all aspects of the product, making installation easier and providing performance scalability as well as new capabilities for financials and payroll, project management and accounting, distribution, field service, and customization tools.

This release will be of special interest to:
- Companies with remote employees or multiple divisions. Firms that have multiple accounting departments, several legal entities, or operations at several locations.
- Small to midsize businesses and contractors of the U.S. government. Project-driven organizations of this type with specialized accounting and tracking needs.
- Professional Services. Organizations that provide management consulting or IT consulting: architectural, engineering and surveying services; research, development, and testing services; and management, advertising, and public-relations services.
- Homebuilders. Construction companies that develop more than 25 lots per year.
- General Contractors. Contractors that engage in residential or commercial construction.
- Specialty Trade Contractors. Contractors who provide services such as heating, ventilating, air conditioning, flooring installation, and electrical and mechanical services.
- Any project-driven business delivering bilateral contracts for its customers.
- Wholesale Trade. Establishments primarily engaged in the wholesale distribution of durable goods.
- Any business that distributes inventory and uses Microsoft Dynamics SL to manage customer orders and inventory.

**Organizations That Benefit Most**

### Large Organizations
- Construction companies that develop more than 25 lots per year
- Mechanical service firms—specialty trade contractors—providing services such as air conditioning and electrical installation
- Disability service providers
- Construction companies that develop more than 25 lots per year

### Midsize Businesses
- Homebuilders
- Specialty trade contractors
- Construction contractors
- Any business that distributes inventory

### Small Businesses
- Small to midsize businesses and contractors of the U.S. government

### Professional Services
- Management consulting and IT consulting: architectural, engineering and surveying services; research, development, and testing services; and management, advertising, and public-relations services.
Enhanced Application Server Module — The new scheduling capabilities in the Application Server module give your people the ability to establish a schedule for executing automated processes or running reports. And now you can also lock down the Application Server programmatically.

Enhanced Performance Throughout the System — You can process more data in far less time with improvements in these applications and processes:

- Process Manager
- Service Contract Revenue Recognition
- Cash Transactions History Report
- Sales Order Entry
- Processing of Direct Deposits in a Terminal Server Farm Environment
- Updating Standard Costs from Pending

Enhanced Schema Help Content — Now it’s easier to extend and configure Microsoft Dynamics SL with better information about the structure of the Microsoft Dynamics SL database and data content. Schema Help files contain more detailed information about both new and existing tables.

Enhanced SL Object Model — Applications developed by Microsoft Business Partners and independent software vendors (ISVs) using Microsoft Visual Studio .NET 2003 and Visual Studio 2005 can more easily be brought into your Microsoft Dynamics SL environment, thanks to support for the Microsoft .NET Framework.

Microsoft SQL Server 2005 and Microsoft Visual Studio 8.0 Support — Because Microsoft Dynamics SL 6.5 includes support for the latest version of Microsoft SQL Server™ and Visual Studio, it will work well with updates to your Microsoft infrastructure.

Foundation

Now you can provide people across your organization with enhancements that increase productivity by improving your peoples’ experience in navigation, data entry, and database administration.
Financial Management

Improve your organization’s financial status with the new Financial Management additions. Microsoft Dynamics SL 6.5 makes it easier to reconcile your records with those from your bank—so you stay up-to-date.

New Bank Reconciliation Module—
Easy to set up and easy to use, you can streamline the management of your bank accounts, reducing effort and errors. Once set up, bank reconciliation takes only three quick steps every month: (1) import cash transactions, (2) review and clear the checks and receipts, and (3) close the period. It’s that simple. Reconcile bank statements quickly by importing transactions from your bank and automatically matching the records for reconciliation. Bank reconciliation can clear transactions from the following modules:

- General Ledger
- Accounts Payable
- Accounts Receivable
- Payroll

Project Management and Accounting

Get increased control of your organization’s project management and accounting functions with Microsoft Dynamics SL 6.5. Now you can apply additional mark-up rates and automatically update projects from purchase orders—easily keeping your project information current.

Addition of New Third Rate Key in Allocations—Looking up time-and-expense rates for employees who have different rates for different types of work is now far easier with the addition of a third rate key.

New Purchase Order Feature That Automatically Updates Project Commitments—Project managers can more accurately assess project spending and progress with the automatic updates that eliminate the need to run the Financial Transactions Transfer Process function manually.

New Extranet Access with Business Portal in Microsoft Dynamics SL—Employees, vendors, and customers gain the power to access the Business Portal through a Microsoft Internet Explorer connection. Employees can record time and expenses remotely. And managers gain more flexibility in reviewing time and expense sheets and invoices.

Gain more control over project expenses and make better decisions with this Web-based snapshot of your project’s financial, cashflow, and billing status.
Inventory and Order Management

Improve the management, efficiency, and performance of your distribution system. Enhancements in Microsoft Dynamics SL 6.5 give you more control of your purchasing and ordering processes, increasing employee and customer satisfaction.

New Requisitions Module—With the new Requisitions module, you can automate the procurement process by creating a flexible request, bidding, and approval system. You never need to worry again about losing paper requests. The module:

- Gives users the ability to submit purchase requests online and track all requests—approved or rejected—within the system.
- Makes it easy for managers to administer procurement expenses efficiently. They can also reduce costs by price-shopping approved requests before submitting a requisition.
- Provides features that help with encumbrance and budget validation, so you can track costs from the submission of the requisition. Once approved, the cost remains committed until the item is received, vouched, and posted to the general ledger.
- Shows funds encumbered against a project as a committed cost until the requisition becomes a purchase order. The status/budget update process relieves the commitment, changing the status of the funds to uncommitted.

- Offers several possible approval paths for a requisition, including by project ID (requires the Project Controller module), by department or cost center (defined manually or by subaccount segment), or as determined by a user-defined corporate policy.

New Role-Based Home Page—It’s easy to control the information that Business Portal users can view by defining access to internal or external home pages by role.

New Extranet Access Without a Virtual Private Network (VPN)—Employees, vendors, and customers can access company information 24 hours a day, 7 days a week.

New Item Request Entry Application—Employees can enter requests for supplies, furniture, goods, and services electronically and submit them for approval. To save time, they can also use all or part of previous requests as templates for creating new ones.

New Item Request Approval Application—Managers can respond quickly to approve or deny item requests. They can also evaluate the best prices on purchases proactively, saving time and costs when securing bids.

New Inventory Item Lookup Application—Users can quickly check the availability of quotes and evaluate stock levels by searching and viewing inventory items from within the Business Portal to improve service and customer satisfaction.

Business Portal 3.0 in Microsoft Dynamics SL

Empower your employees with access to relevant data built for their specific roles within the company, and extend important information to customers and vendors through Microsoft Internet Explorer to improve satisfaction with your company.

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New Multicompany-Enabled Queries—Employees can increase the accuracy of queries in a multicompany environment by viewing data for all companies—or just one—to easily analyze business information.

New Mass Import of Users Feature—Administrators save time with the simplified set up. They can easily configure settings for multiple users of Microsoft Dynamics SL who have similar rights in just one session.

New Ability to Copy a Business Portal Role—Administrators can copy an existing role as the basis for defining a new role—another time-saving feature.

Increase your productivity with new features in Business Portal 3.0 that give extranet users easy and secure access to corporate information—without requiring a VPN.
New Microsoft FRx 6.7 Service Pack —
With the new service pack, your reporting functionality benefits from security enhancements that make Microsoft FRx 6.7 compatible with password changes made in Microsoft Dynamics SL.

Utilize Business Portal Queries for Quick Access to Relevant Information — Give managers and frontline employees access to important information using the power of Business Portal 3.0 in Microsoft Dynamics SL. View customer orders from a single division, or view sales data rolled up across multiple reporting units, to easily analyze business information.

Analyze sales performance and improve management insight with a Web-based view of sales activity.

Analytics and Reporting
Quickly transform data into meaningful information with new capabilities for business intelligence and analytics. You can easily tailor reporting for individual users and export data into a pivot table for the automatic creation of graphs in Microsoft Office Excel. You can publish reports as Microsoft Office Word or Excel documents—and more.

Our service plans are much more than software maintenance programs. They are a key element to your success and expertise with a business solution. Microsoft Dynamics solutions deliver industry-leading service, helping you to ensure greater overall success with your investment. Our current service plans include:

Enhancement Program
With the Enhancement Program, you will always have the latest major version releases, minor enhancements, service packs, and tax updates for the product that you have licensed.

Standard A Plan
This plan provides a foundation level of services, including the Enhancement Program, which complements the support and training supplied by your local channel partner. (The Standard A Plan is required for the first year for new customers who acquire Microsoft Dynamics SL.)

Standard B Plan
This service plan includes all the benefits of the Standard A plan, plus the assurance of the availability of support and high responsiveness.

Deluxe Support Services
Together with services from your channel partner, this plan provides personalized service focused on your business applications. Most importantly, you can gain a trusted advisor from Microsoft—an account manager—who can focus on your needs and maximize your investment in Microsoft Dynamics SL. Choose from two types of plans—Deluxe Support Services Plus and Deluxe Support Services Standard.

Deluxe Support Services Plus
Designed for customers with a complex infrastructure or those with a high-risk or mission-critical implementation, this service plan fits the needs of organizations seeking a more personal relationship with Microsoft.

Deluxe Support Services Standard
This service plan fulfills the needs of customers that wish to receive the majority of their support from their channel partner but also want proactive support and involvement from Microsoft. This offering is well suited to highly customized implementations that require targeted, strategic assistance from Microsoft.

First-Rate Technical Support and Services
Microsoft Dynamics SL is supported by one of the most responsive and innovative service teams in the industry. Your investment is also extended by your local reselling partner, which offers training and support to meet your specific needs.

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Standard A Plan
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Standard B Plan
This service plan includes all the benefits of the Standard A plan, plus the assurance of the availability of support and high responsiveness.

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Standard A Plan
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Standard B Plan
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Flex Support
Flex 5-Pack Support and Flex Per-Incident Support provide affordable support from Microsoft for those who prefer to pay-as-they-go.

No matter which service plan you choose, excluding Flex Support, you will receive software updates. You will also get access to CustomerSource, a productivity-enhancing Web site, available 24 hours a day, 7 days a week. With Standard A, Standard B, or Deluxe Support Services, you receive technical support to keep your business running smoothly. You also gain access to online training, so your employees get quickly up to speed to maximize your investment in Microsoft Dynamics SL.

Programs are subject to change at any time, so please contact your Microsoft Business Partner for current offerings or see the Microsoft Dynamics SL Services Support Web site for more details:
http://www.microsoft.com/dynamics/sl/support/servicesplan.mspx
Haven't Upgraded in a While?

Microsoft Business Solutions—Solomon 5.0 and Microsoft Solomon 5.5 offered:

Foundation
- Office XP Smart Tag Manager
- Company name displayed in Title Bar
- Online user manuals

Financial
- Enhanced time-entry screens
- Ability to print multiple checks per employee per pay period or per payroll run

Advanced Distribution
- Inventory replenishment
- Order to purchase
- Landed cost
- Work order

Payroll Capabilities for Construction and Other Project-Related Businesses
- Union reciprocity and portability
- Service dispatch integration to Advanced Payroll
- Time and expense integration to Advanced Payroll
- Web-based Advanced Payroll time entry

Enhanced Reporting and Budgeting
- Microsoft FRx Report Writer 6.5
- Microsoft Business Solutions for Analytics—FRx Forecaster 6.5

Project Management and Accounting
- Multicurrency invoicing
- Utilization-expense cost-tracking
- Redesigned Web time and expense entry screens
- Integration with Microsoft Project Server 2002
- U.S. government contractor enhancements for Defense Contract Audit Agency (DCAA) compliance
  - Indirect rate calculation
  - Time and expense audit-trial capability
  - Revenue allocation rules based on a maximum
- Microsoft Solomon Desktop Web-based time-entry modifications
- Ease-of-use enhancements for data entry

Service
- Week-at-a-glance graphical dispatch board
- Microsoft MapPoint integration

Microsoft Solomon Desktop
- Multicompany Microsoft Solomon Desktop
- Integration with Microsoft Retail Management System

Microsoft Solomon Desktop
- Enhanced user interface and user experience
- Group customizations
- Enhanced tools for Sarbanes-Oxley compliance
- Customer feedback tool in Help
- Support for Watson error-logging

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Microsoft Solomon 6.0 offered:

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Financial
- Advanced timecard entry for Microsoft Business Portal

Advanced Distribution
- Ability to consolidate multiple shippers on a single invoice
- Improvements in efficiency and performance

Advanced Reporting and Budgeting
- Crystal Reports 10
- Microsoft FRx 6.7
- Microsoft FRx Forecaster 6.7
- Microsoft FRx Report Manager 6.7

Project Management and Accounting
- Resource assignment
- Invoice format 1034
- Historical budgets by period, budget labels, AIA improvements
- Cash Manager integration to Project Management and Accounting
  - “Project Enabler” renamed “Project Connector”
- Microsoft Business Portal enhancements:
  - Timecard approval
  - Expense-report entry
  - Expense-report approval
  - Project Analyst
  - Invoice approval
  - Task inquiry
- Microsoft Solomon Communicator

Field Service
- Service contact change history and audit-trail
- Flat-Rate Pricing module available on Microsoft Solomon Standard edition

MICROSOFT DYNAMICS SL 6.5 – ENHANCEMENTS
Total Solution Financing

Total Solution Financing from Microsoft Financing can ease the economic burden associated with acquiring and implementing software and hardware, as well as related consulting services. This program makes it easy to extend business management system costs over time, so you can manage your business finances more effectively today, while saving your cash for other opportunities or for emergencies.

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Total Solution Financing covers the cost of your entire business management system, including:

- All Microsoft Dynamics software and services.
- Hardware (servers, network devices, and PCs) required to get the solution up and running.
- Third-party software from authorized ISV partners as part of the total solution.
- Reselling partner’s implementation and consulting services.
- Any software from Microsoft used as part of the solution—for example, Microsoft Office 2003 Editions, Microsoft SQL Server, Microsoft Exchange Server, and Microsoft BizTalk Server.

Total Solution Financing is available only through a Microsoft Certified Business Solutions Partner. To find a partner near you, in the United States, call (888) 477-7989 and choose Option 1. If you are located outside the United States, call (1) 701-281-6500.