Microsoft®

WHAT'S NEW?

Top New Features in Microsoft Dynamics GP 2010

Microsoft Dynamics® GP 2010

Microsoft Dynamics GP 2010

Today's world demands a new way to do business. Organizations wrestle with the challenges of reducing operating costs while responding to greater customer needs—and ultimately increasing profitability. To stay competitive, conserve costs, and grow, you need to get more out of your existing technology investments.

Based on extensive research into real-world business models and rich feedback from customers and partners, Microsoft Dynamics® GP 2010 extends the reach of insight, productivity, and collaboration across your entire business. Our goal is to help ensure that people—and the different ways they work—are your most powerful asset.

This latest release makes it easier for people to make fast, informed decisions using business intelligence that's personalized to their roles and available through familiar Microsoft® Office applications. New capabilities continue to streamline and automate business processes, simplify setup and maintenance, and let you tailor your solution to meet specific user and business needs. Equally important, Microsoft Dynamics GP 2010 takes full advantage of Web services, integration with Microsoft Dynamics CRM, and a simplified platform to connect employees, customers, and vendors across applications and systems efficiently and cost-effectively.

With more than 150 enhancements, Microsoft Dynamics GP 2010 offers innovation that enables your people to work with information and processes in ways that are familiar to them—today and into the future.

"Together with Microsoft Dynamics GP 2010, we are building a better future, a more secure business, and a better way to keep our business running more efficiently."

PHIL HODGES
IT Director, Clean Burn

BUSINESS BENEFITS SUMMARY

ENHANCE INSIGHT

Give everyone in your organization the ability to access, analyze, and share information in ways that make sense for their particular job. Whether they're drilling down on KPIs from their role-based dashboards, accessing real-time reports through a Web browser, or performing sophisticated analyses using new options for Microsoft Office Excel®, all your people can contribute more to decision-making that fuels business performance.

MAKE IT EASIER

Drive productivity and results with a solution that's easier to use than ever before. New features streamline processes that include business operations and daily tasks, setup and IT administration, and personalization options that make it easy for people to meet individual business needs.

EXTEND CONNECTIONS

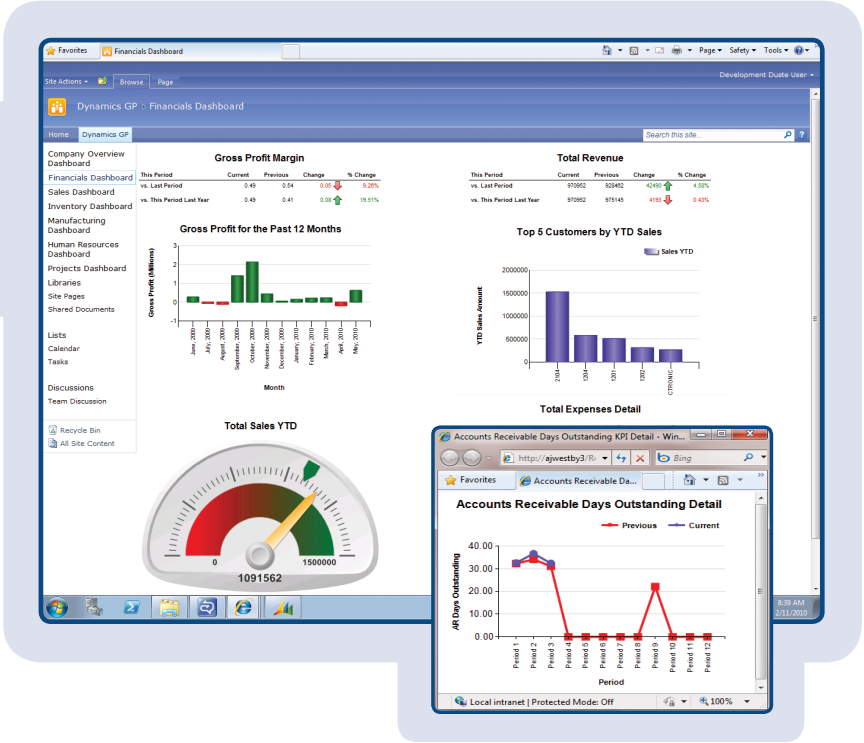
This latest release offers faster, more cost-effective portal deployment, integration with Microsoft Dynamics CRM, and enhanced Web services that fuel rich, flexible integrations. Microsoft Dynamics GP 2010 brings together employees, customers, and suppliers—by connecting people, information, and processes across applications and systems.

ENHANCE INSIGHT

Bring personalized business intelligence to key roles in your organization, get more out of Microsoft Office Excel, and extend access to information to everyone in your company.

Give people insight that's relevant to their roles

- Help speed planning and offer a clear route to deeper analysis with role-based, personalized dashboards and KPIs that include charts, graphs, and gauges.
- Get to the right level of detail with drill-down views that can take you quickly from a KPI or chart to a specific record source.
- Present targeted information for specific audiences with an enhanced library of more than 90 built-in Microsoft SQL Server® Reporting Services and 220 Excel reports.



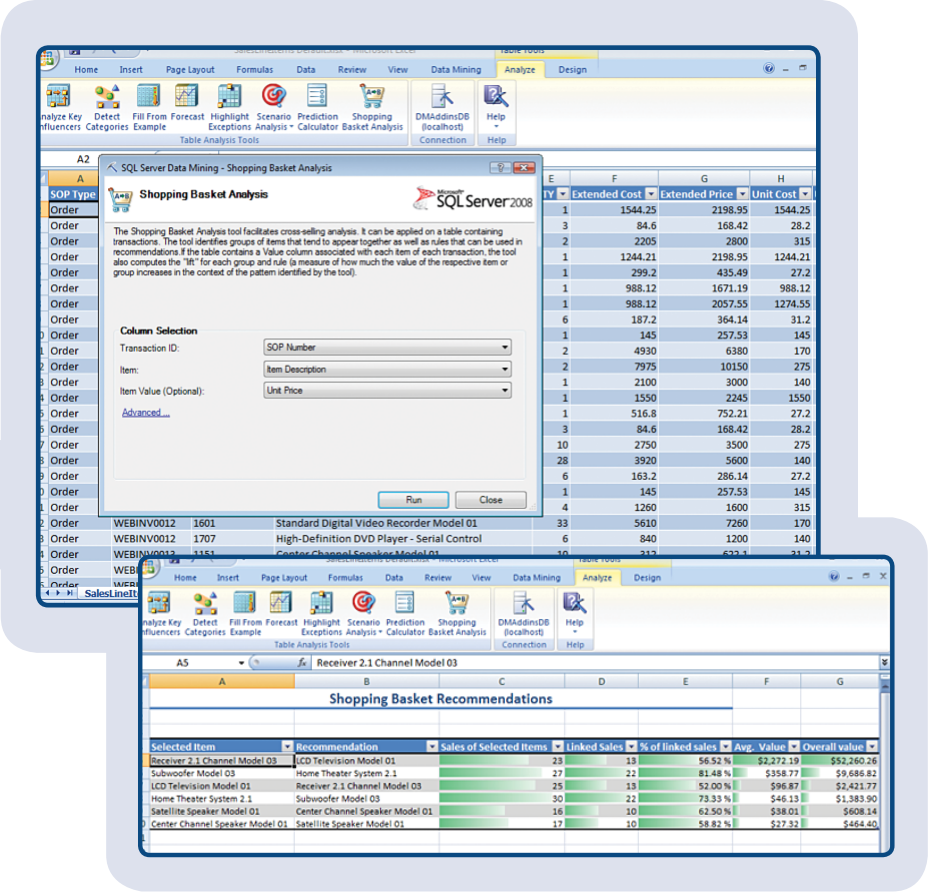
Expand access to information

- Turn everyone into a power user—even if they're not Microsoft Dynamics GP users—by using Microsoft SharePoint® technology to directly access and share information.
- Give people a centralized, Web-based source for viewing consolidated resources—and reduce administrative work—by deploying SQL Server Reporting Services Reports to SharePoint Server.
- Get more information—with less effort—by connecting multiple data sources, such as ISV applications or custom fields, within easy-to-use Action Panes and List Pages.
- Tailor information access and delivery to meet specific user and business needs with enhanced Web services.
- Make it easier to retrieve data and simplify report creation with SQL Server views—for example, use the built-in Extender tool to create SQL Server views that link data from Microsoft Dynamics GP, ISV applications, or custom solutions.

ENHANCE INSIGHT

Deliver advanced BI that works tightly with Excel

- Provide people with the latest business intelligence (BI) through the application you use most often. We now offer more than 220 built-in Excel reports that can be refreshed with a single click, whether they're accessed through Microsoft Dynamics GP, a network file share, or a SharePoint Server site.
- Use the Excel Report Builder to create refreshable Excel reports that include multiple sources of data, including ISV and custom applications. Reports can include data from multiple companies, with the ability to filter for selected companies.
- Get even more from the Excel Report Builder with the ability to generate PivotTable® views and automatic totals within reports in Excel.
- Connect built-in SQL Server data mining tools with Microsoft Dynamics GP so that people can perform advanced analytics in Excel, including what-if scenarios and predictive modeling and forecasting.
- Make it easier to retrieve and share data from any module, window, or ISV application. With Drill Down Builder, you can quickly define your drill-down location in Microsoft Dynamics GP, and then embed the field into Microsoft Office Word documents, Microsoft Office Outlook® e-mail messages, Excel and SQL Server Reporting Services reports, and SharePoint pages.



"The new dashboard reporting in Microsoft Dynamics GP 2010 will be very helpful for our management team. They rely on live and accurate management information at any particular time. One of the mantras we have here in management is...if you don't know it, you can't manage it."

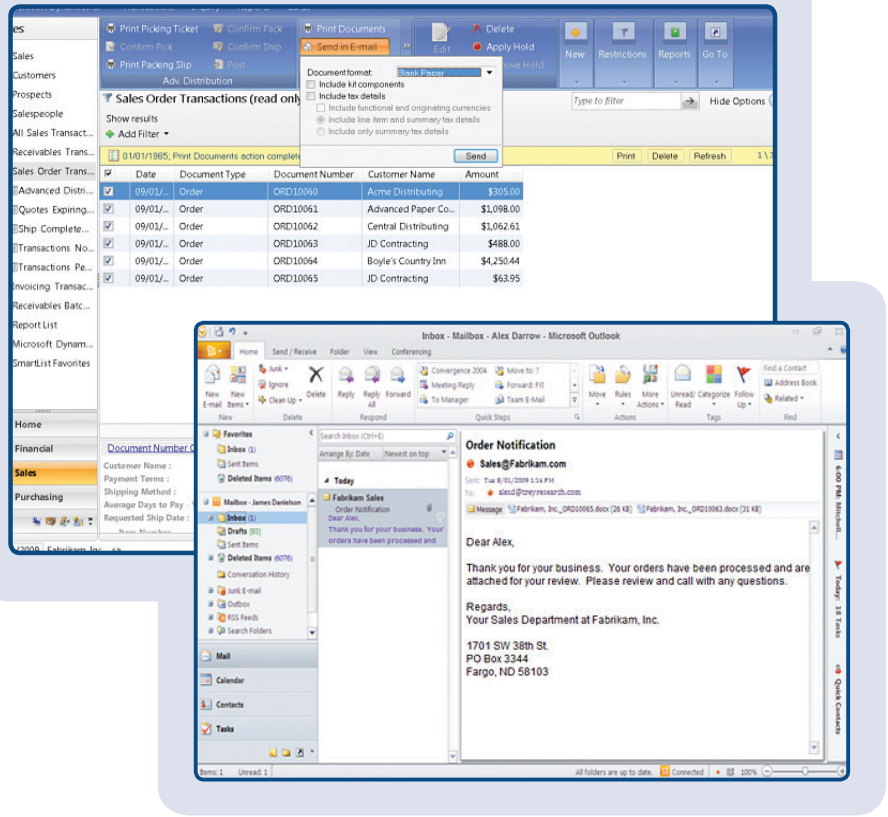
DAVID THOMPSON
Corporate Services Director, Central YMCA London

MAKE IT EASIER

Automate and personalize business processes with rich new features designed to help people work faster and smarter.

Increase productivity

- Take advantage of Office Word to quickly create well-designed invoices, packing slips, remittances, and other customer- and vendor-facing documents that draw information directly from Microsoft Dynamics GP.
- Connect with your customers and vendors more efficiently by sending batch and individual e-mail messages for documents such as invoices, orders, and check remittances.
- Improve budgeting efficiency and accuracy with the ability to quickly pinpoint and track detailed information when budgets change.
- Streamline logon processes and reduce "password fatigue" with default logon settings.
- Simplify security management for SharePoint, Web services, and Business Portal using the Microsoft Dynamics Security Synchronization Utility.
- Take advantage of enhanced tools for fast installation, setup, and data migration from applications such as QuickBooks and Peachtree.



"Microsoft Dynamics GP 2010 gives us the ability to set up all our forms in Microsoft Office. The integration between them is perfect. We can e-mail invoices [and] statements straight out of Microsoft Dynamics GP with nothing else in the way."

PAUL SMITH
Business Systems Manager, Central YMCA London

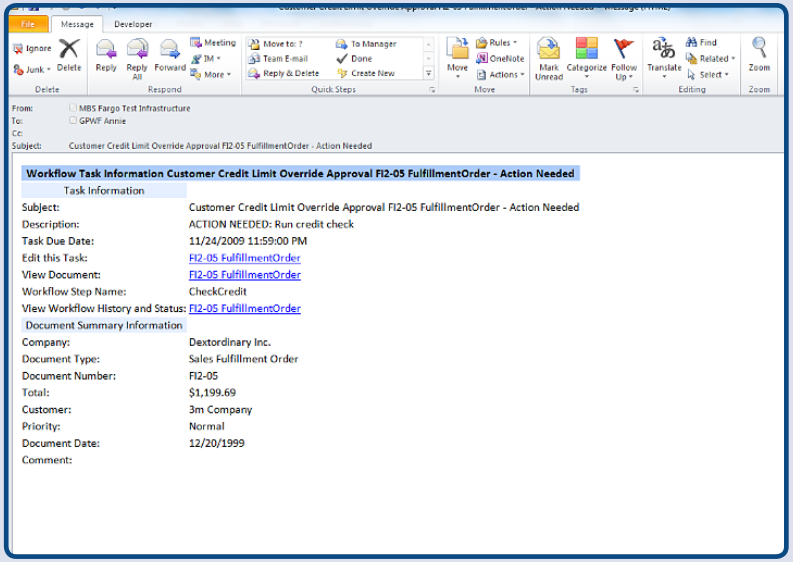
MAKE IT EASIER

Simplify personalization

- Stop juggling multiple sources of information in Microsoft Office Access® and Excel. Using the built-in Extender tool, you can link windows—either existing or new ones—to create a business-specific application.
- Track specific issues related to tasks by attaching multiple notes to any Microsoft Dynamics GP window. Connect notes from one document to another, so that people can quickly consolidate information for sharing and communication around tasks, action items, and escalation of service calls.

Foster efficiency and teamwork with enhanced workflows

- Reduce steps for routine tasks with enhanced workflow, including new workflows for onboarding employees, terminating employees, and vendor approvals.
- Create consistent processes and tracking documentation using new workflow steps for approvals, helping ensure that people take the right actions at the right time.
- Use Electronic Signatures to approve simple data changes for any field or document in Microsoft Dynamics GP. Enable users to sign off on changes from within Microsoft Dynamics GP or through SharePoint.

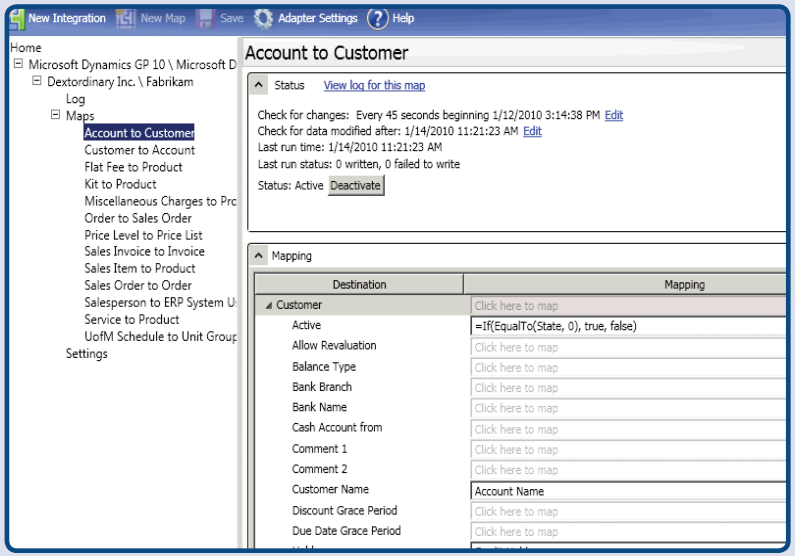


EXTEND CONNECTIONS

Dissolve traditional boundaries with solutions and services that connect applications and systems and make it easier to strengthen business relationships.

Connect applications and systems

- Equip sales people and business management staff to build profitable customer relationships using built-in, two-way integration with Microsoft Dynamics CRM. Sales information flows directly to the back office and provides sales people with a complete customer view. They can also quickly access detailed business information around contracts, pricing, product availability, and more.
- Use a new, straightforward integration platform based on Web services technology that connects applications to and from Microsoft Dynamics GP, and enables internal or external developers to create independent integration adapters.
- Take full advantage of the new streamlined Web services architecture that enables developers to quickly choose from more than 350 Web services that offer better performance and easier integrations.
- Create two-way connections through Web services that are not dependent on Internet Information Services (IIS)—eliminating the need to buy separate servers and greatly simplifying infrastructure and IT management.
- Capture business-specific information that you've been maintaining in spreadsheets, separate databases, or other systems. Consolidate all details related to a customer, client, or vendor that you track separately now, without the need to write new code to bring together the information, so you can report on it and simplify tracking.



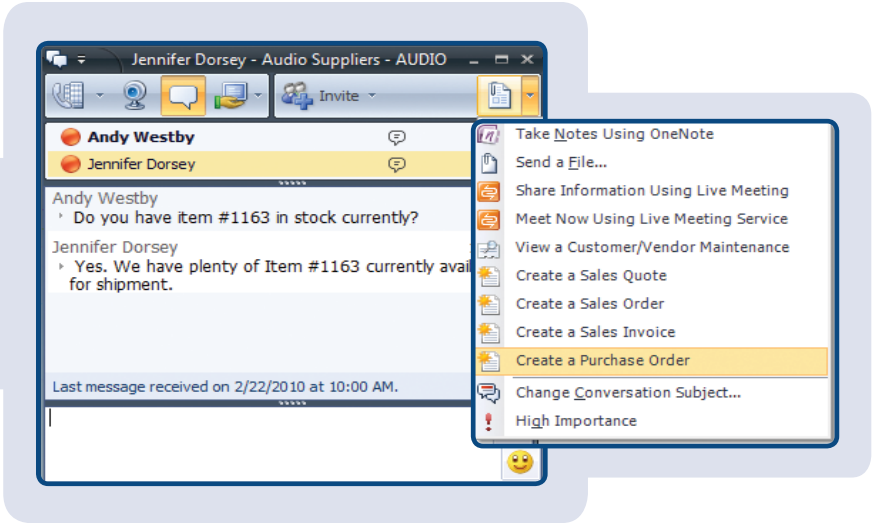
"The upgrade was remarkably uneventful. We started at about 2:00 on a Friday afternoon, finished up the last client and all the user testing Saturday afternoon, and Monday 8:00 A.M. we were off to the races."

JASON JOHNSON
IT Director, Spy Optic

EXTEND CONNECTIONS

Strengthen business relationships

- Take advantage of fast, cost-effective portal deployments to connect people and provide fast visibility and access to applications, information, and processes—without complicated implementation efforts.
- Know when your business contacts are online and provide them with convenient, fast communications and services with instant messaging that's built into Microsoft Dynamics GP. Connect through ad hoc conversations and Microsoft Office Live Meeting. Share customer and vendor information. Create and deliver sales quotes, sales orders, and purchase orders—all within Microsoft Office Communicator.



"We look at Microsoft Dynamics GP 2010 as being our 'one version of the truth' for the entire business. So when we're making direct store deliveries, we're creating transactions that trigger inventory, payables, receivables, and general ledger transactions; and we can share this activity back with our customers and vendors, so we're all working together from the same set of data."

MICHAEL GUNTHAR
Primo Water, Vice President of Operations

ADDITIONAL FEATURES AND ENHANCEMENTS

Explore how Microsoft Dynamics GP 2010 helps specific roles access and analyze information, streamline processes, and take advantage of leading technologies.

KNOWLEDGE WORKERS

EXCEL REPORT BUILDING

- Drill down on Excel Report Builder reports to Microsoft Dynamics GP.
- Simplify re-publishing reports with default settings.
- Create Excel Report PivotTable views and Report Totals using the Excel Report Builder.
- Create SmartLists that include Extender Data using the SmartList Builder.
- Help ensure easier access, administration, and sharing for Excel reports by expanding viewing publishing rights to users.

QUERIES

- Quickly gauge workload associated with specific activities: tasks are now presented visually as document cues.
- Quickly find and select records with filtered lookups for inactive/discontinued records.
- Access self-help support and services, join role-based communities, and get training directly from home pages and dashboards with Microsoft Dynamics Online Connect.
- Ensure tasks are completed on time with automated, customizable task reminders.

FINANCE MANAGER

GENERAL LEDGER

- Designate IFRS or GAAP when posting ledger transactions using a new reporting ledger.
- Automatically clear debit and credit amounts after posting General Ledger recurring batches, including Analytical Accounting.
- Simplify reporting for Analytical Accounting data with enhanced Analysis Cubes functionality.
- Create financial statements with dimension codes through Management Reporter and Analytical Accounting integration.

PAYABLES AND RECEIVABLES

- Post recurring Cash Receipt batches.
- Enter a negative cash receipt in Receivables Management.
- Define unique Receivables Management Electronic Funds Transfer (EFT) file formats to match bank-specific requirements.
- Simplify processing checks with new Payables Select Checks functionality, administered through a single window.
- Take expired payment term discounts in Payables Select Checks.
- Control Account Management includes Receivables Management functionality, similar to existing Payables Management functionality.
- Enable lockbox import of a single payment that applies to multiple customers/invoices into Receivables Management.

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ADDITIONAL FEATURES AND ENHANCEMENTS

FINANCE MANAGER (CONT.)

BUDGETING

- Track budget changes as transactions for detailed audit trails, including user, date, and budget change amounts.
- Consolidate multiple budget records into a single budget; specific account amounts are automatically summed for a consolidated view.
- Implement strong controls and specific task assignments with purchase order (PO) approvals, including the ability to prompt for encumbrance or set pre-encumber alerts for budget overages.

COLLECTIONS MANAGEMENT

- Send collections letters to the Bill-to Contact or to the Primary Contact.
- Display collections tasks in the "To-Do" area on the Home Page.
- Display unposted cash receipts in the Collections Management window.

HUMAN RESOURCES MANAGER

HUMAN RESOURCES MANAGEMENT

- Monitor Position Control for Human Resources (HR) with additional budgeting controls and reporting, including 14 additional reports.
- Provide Benefit Enrollment Summaries for individuals and teams through Benefits Self Service.
- Streamline HR management with new Payroll and HR reports, including employee attendance, hours, and primary pay.
- Enable better reporting with Excel-based reports for Certification, Licensing, and Training in Advanced Human Resources, including six new reports. Give employees access to Benefit Confirmation Statements through Benefits Self Service.

PAYROLL MANAGER—U.S. ONLY

CHECKS

- View and reprint payroll checks or remittance forms.
- Streamline payroll check processes by starting multiple payroll check runs simultaneously.

BENEFITS/DEDUCTIONS

- Sequence garnishment deductions with a single maximum limit for federal and/or state limits for the garnishment amount.
- Map deductions and benefits to multiple W-2 form boxes in Payroll.

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PAYROLL MANAGER—U.S. ONLY (CONT.)

- Track deduction/benefit limits in Payroll by fiscal year amounts in addition to calendar year.

ADMINISTRATION

- Efficiently classify employees' status with a secondary employee status code that designates why a person is inactive within a specific company.
- Post labor and indirect labor hours to Payroll from Field Service.
- Set up Payroll to use Analytical Accounting transaction dimensions and codes.
- Quickly select how posting reports will print within the Posting Setup window. In addition, new report options are available when choosing Payroll Edit Report preferences.
- Simplify PTO Manager tasks with a new user interface and streamlined processing.

OPERATIONS MANAGER

RECEIVING AND PURCHASING

- Auto-generate lot numbers during the inventory receiving process.
- Print back-order items on picking tickets.
- Roll down transaction date changes into the line items in Purchase Order Processing.
- Use new options for managing returns and invoicing on a PO if the returned goods will be replenished.
- Create a quote, order, invoice, or purchase order, and view customer or vendor information, within an Office Communicator instant message.

RETURNS

- Create an encumbrance when creating a PO return.
- Speed up receiving and invoicing processes for returned goods and replenishments with new options for returns.

MANUFACTURING

- Enhance ease of use for Sales Forecasting with sorting capabilities, lookup boxes, reporting dates, and tool tips.
- Efficiently move to a lean or Just-in-Time (JIT) inventory model with the ability to set a range between order point and order up to level, where Material Requirements Planning (MRP) generation will not render a Manufacturing Order.
- Changing the cost for manufacturing items now includes additional controls for rolling up the cost.

ADDITIONAL FEATURES AND ENHANCEMENTS

SERVICE MANAGER

REPORTING

- Project Accounting now offers eight additional built-in SQL Server Reporting Services reports, including aged trial balance by project, expenses versus retainer, profit and loss by project, and more.

SERVICE CALLS

- Automate and simplify preventive maintenance escalations with workflow.
- Generate preventive maintenance service calls only for contracted equipment.
- Add non-inventory items to a service call.
- Choose to combine or not combine preventive maintenance service calls if multiple requirements are marked for service call generation.
- Automate the transfer of service calls to history during the billing process.

CONTRACTS

- Assign multiple service hour ranges on contracts—for example, 8:00–10:00 A.M. and 9:00–11:00 P.M.
- Enable flexible and specific billing frequency (day and month) in Contract Administration.
- Reconcile contracts procedures in Field Service.
- Add kit items to contracts and service calls in Field Service.
- Consolidate multiple contracts into one invoice.
- Bill on separate invoices for contract lines that use multiple sites.

IT MANAGER

SECURITY MANAGEMENT

- Copy user security from one user to another.
- Sort security windows by access rights.
- Business Portal Administration Pages have moved from SharePoint site settings into application administration pages, enabling more robust, easier monitoring of security controls.
- Automate the logon process with system ability to "remember" user and password combination and/or company.
- Help users get started quickly after security-enabled activation with automatic display of navigation panes.

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IT MANAGER (CONT.)

ADMINISTRATION

- Business Portal can now be upgraded from version to version, saving valuable time for future upgrades.
- SharePoint version tracking now identifies when sites have changed, including Web parts and customizations.
- Optimize development processes with right-click support for common actions.
- Utilize 64-bit compatibility for Dexterity-based applications in emulation mode. Work with full 64-bit mode for external applications such as Business Portal.
- Strengthen Field Service administration and table stability with new Checklinks maintenance.

WEB SERVICES

- Increase flexibility of Web services with options to work with IIS or Windows® hosting.
- Enable faster, easier deployment with multiple contracts in Web services, organized by series rather than by the entire group.
- Choose from more than 350 Web services, all designed to work with a streamlined architecture that helps improve performance and simplify integrations.

INTEGRATION AND PERSONALIZATION

- Populate multiple 1099 form amount fields with data.
- Integration Manager now uses Windows Reporting; dependency on Crystal Reports has been removed.
- Automated updates for error logging drive efficiency for key development and administrative tasks in Integration Manager.
- Quickly create, read, update, and delete applicant information using a new eConnect node.
- Disable or hide Extender fields on forms and windows.
- Add multiple identification key fields on Extender forms and windows—for example, customer ID key and address ID key—with Integration Manager.
- Connect applications to and from Microsoft Dynamics GP through Web services technology, including the ability to create independent integration adapters.

RAPID DATA MIGRATION

- Migrate data from Peachtree or QuickBooks to Microsoft Dynamics GP.
- Automatically assign General Ledger account numbers in QuickBooks for users who do not have account numbers.
- Edit the chart of accouts from Peachtree or QuickBooks with the Rapid Migration Tool.

FEATURES YOU'LL WANT TO EXPLORE

From richer Microsoft Office integration and advanced reporting capabilities to innovative technology enhancements that make it easier to do business, the latest product releases of Microsoft Dynamics GP have delivered enhancements that span all solution areas.

Here are some highlights. To find out what business benefits you might be missing, talk with your Microsoft partner!

MICROSOFT OFFICE EXCEL INTEGRATION

We're the leaders in providing built-in integration with the reporting and analytics tool you use most often.

- Export data with one click directly to Excel from any Microsoft Dynamics GP SmartList.
- Choose from more than 220 built-in, refreshable Excel reports with real-time data that are designed to meet a wide range of specific reporting needs. Reports can be accessed from Microsoft Dynamics GP, a secure network location, SharePoint Server, or even Outlook.
- Simplify deployments for Excel reports with an easy-to-use wizard and automated data connections.
- Enable advanced analysis and mining of Microsoft Dynamics GP data with SQL Server add-ins for Excel.

  Learn more about add-ins for SQL Server 2008.

  Learn more about add-ins for SQL Server 2005.

- Get the answers you need, gain deeper insight into any business aspect, and compress your decision cycles with unmatched computational power using PowerPivot technology.

  Learn more about PowerPivot.

- Create new Excel reports—without calling on developers. Reports can include:
  - Data drawn from multiple sources and databases.
  - Automatically embedded totals, PivotTable views, and calculations.
  - The ability to drill down from the report directly into Microsoft Dynamics GP.

SQL SERVER REPORTING SERVICES INTEGRATION

We're giving businesses the ability to work easily with the latest SQL Server reporting technologies.

- Choose from more than 90 built-in reports, designed to cover the subjects that various roles use most often.
- Give people the ability to view information and drill down to varied levels of detail with more than 100 graphical charts and an additional 14 KPIs.
- View charts directly from the Home Page or Business Portal Centers and drill down into more detail to get more answers.
- Keep up with business trends and important business metrics with Executive Center Dashboards that cover key areas of your business, including finance, sales, and more.
- Easily create customized, targeted reports using the SQL Server Reporting Services Report Builder.
- Use built-in report models to quickly add intuitive, user-friendly field names without having to know the exact table or column the data resides in.
- Take advantage of the Report Builder and Report Models to personalize graphical gauges, metrics, KPIs, and chart-based reports—or create new ones.
- Take the pain out of converting Crystal Reports. Microsoft Dynamics GP offers a simplified process that enables third-party vendors to quickly and cost-effectively migrate Crystal Reports to SQL Server Reporting Services Reports.

  Learn more about migrating Crystal Reports.

EASE OF USE

We give people a familiar, roles-based experience that includes easy navigation and rich access to information.

HOME PAGE

- Get started quickly with default Home Page templates based on role and industry—there are more than 21 roles that can be personalized to meet user needs.
- Stay current with tasks and take fast action with automated reminders, such as those for overdue invoices or shipments due today, that offer instant drill-back to SmartLists for more information.
- Set up Quick Links on user-specific Home Pages to the windows you use most often.
- Get single-click, personalized access to frequently used reports with My Reports links.
- View metrics and drill down quickly from a general view to specific details—including source records—when working from the Home Page.

NAVIGATION

- Reduce training and ramp up quickly with a familiar user experience that looks and feels like Outlook.
- Gain centralized access to reports—whether they're stored in Microsoft Dynamics GP, on a network share, or a SharePoint site—with comprehensive Report Lists.
- Quickly find and open Microsoft Dynamics GP windows through the functional Area Pages, similar to pallets from previous releases.
- Reduce time spent on tasks with Action Panes and List Pages that bring together information, list filters, and related tasks. For example, you can view a list of customers and printing statements, process an aging statement, or assess finance charges from one window, for a single or multiple customers—all at the same time.
- Link tables from multiple data sources, including ISV applications, to List Pages and Action Panes. In addition, List Pages can accommodate large data sets without slowing performance.

ROBUST FUNCTIONALITY

- Improve and enforce business processes with nine built-in workflows for approvals and tasks.
- Reduce time reconciling Accounts Payable and Accounts Receivable to General Ledger with new reconciliation processes.
- Find information faster by searching from Microsoft Dynamics GP and other sources, like Excel, using the power of SharePoint.
- Track detailed information on changes to budgets, including who, when, and what have changed.
- Connect with your business contacts through instant messaging that lets you create quotes, orders, purchase orders, and more with Office Communicator.
- Add flexibility for Electronic Funds Transfers with the ability to accommodate more types of banking protocols.

FLEXIBILITY

We're committed to helping you simplify efforts and reduce costs for deploying your solution and connecting with other systems and applications.

EASE OF DEPLOYMENT

- Quickly configure company setup data with a wizard-based approach, or leverage one of the 13 available industry specific configuration templates.
- Streamline new company configuration by copying company setup from one company to another. Simplify deployment for reporting tools—for example, SQL Server Reporting Services and Excel—with intuitive, step-by-step report deployment wizards.
- Get built-in Excel and SQL Server Reporting Services reports up and running quickly with a built-in deployment wizard.
- Get easier security setup, maintenance, and auditing with role-based security features, synchronization tools, and the option to remember user and company settings.

INTEGRATION AND PERSONALIZATION

- Speed processing time for routine or batch imports using Integration Manager.
- Choose from more than 350 Web services that deliver streamlined processes for both simple and complex integrations, to simplify integration deployments and improve usability and performance.
- Eliminate the need to install separate servers for hosting Web services—a new architecture means that Web services are no longer dependent on IIS.
- Connect Microsoft Dynamics GP and Microsoft Dynamics CRM with a built-in integration adaptor that offers two-way data integration.
- Build business-specific mini applications—without writing new code—using the Extender tool. You can use this tool to bring in data from disparate sources, create new windows and links, and much more.

SHAREPOINT AND MICROSOFT OFFICE SYSTEM INTEGRATION

- Enable people who don't work in Microsoft Dynamics GP to access data in SQL Server Reporting Services and Excel, without the need to purchase additional full user licenses.
- Access Excel reports while working in Outlook.
- Use Word forms to create and print invoices, packing slips, remittances, and other customer and vendor-facing documents.
- Quickly populate Word communications with Microsoft Dynamics GP data with the Letter Writing Assistant.

FOR MORE INFORMATION

To find out more about Microsoft Dynamics GP 2010, contact your Microsoft sales representative or Microsoft partner or visit:

www.microsoft.com/dynamics/gp

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