

# MICROSOFT DYNAMICS® SL

Product Capabilities and Business Ready Licensing Module Guide

# Solutions

## *Business Ready Licensing for Microsoft Dynamics SL 2011*

For more than 25 years, Microsoft Dynamics® SL has delivered the functionality, performance, and ease of use that powers diverse businesses around the world. From financials and distribution to service and projects, Microsoft Dynamics SL brings people and systems together to help you run your business more efficiently.

Whether you are an existing customer evaluating options to expand your solution with additional modules, or are considering Microsoft Dynamics SL as your company's new financial management solution, this guide provides an overview of the product modules available within Microsoft Dynamics SL grouped by the functional area they address across your business.

The **BUSINESS ESSENTIALS EDITION** ● is for customers who need core financial management and trade functionality.

The **ADVANCED MANAGEMENT EDITION** ■ is the preferred solution for growing, midmarket, or high-functional-needs customers who are looking for an adaptive solution with a broad set of functionality, including all functionality included in the Business Essentials edition.

Additional **A LA CARTE** ▲ ◆ components are available to Business Essentials and Advanced Management customers. Each offering, Business Essentials or Advanced Management, gives access to a specific set of a la carte granules that provide a richer set of features and functionality to serve unique business needs.

## Business Essentials

The Business Essentials Edition includes **ALL** of the following components:

- Accounts Payable
- Accounts Receivable
- Bank Reconciliation
- Crystal Reports
- Currency Manager
- Employee Self-Service Suite (ESS)
- General Ledger
- Inventory
- Landed Cost
- Light User
- Management Reporter Designer User
- Multi-Company
- Order Management
- Purchasing
- Quick Query Editor
- Quick Query Editors
- System Manager
- Web Services for Microsoft Dynamics SL

## Advanced Management

The Advanced Management Edition includes **ALL** of the Business Essentials Components **PLUS** the following components:

- Analyzer
- Bill Of Material
- Cash Manager
- Flexible Billings
- Key Performance Indicators
- Microsoft Dynamics CRM 2011 Server
- Microsoft® Forecaster
- Project Allocator
- Project Controller
- Requisitions



**BUSINESS  
ESSENTIALS**

## Business Essentials a la Carte

A la carte components compatible with the Business Essentials edition. These additional components must be purchased individually.

- Application Server
- Bill of Material
- BIO Advanced
- BIO Foundation
- BIO Vue Users
- Cash Manager
- Customization Manager
- E-Commerce Gateway EDI
- Employee Self-Service Suite (ESS)
- Financial Statement Translation
- Light User
- Management Reporter Designer User
- Microsoft Forecaster
- Microsoft Dynamics CRM 2011 Server
- Microsoft Dynamics External Connector
- Microsoft SharePoint® Server
- Payroll (United States)
- Payroll—Advanced (United States)
- Requisitions
- Tools for Visual Basic® for Microsoft Dynamics SL
- Work Order

## Advanced Management a la Carte

A la carte components compatible with the Advanced Management edition. These additional components must be purchased individually.

- Advanced Shipping Management
- Application Server
- BIO Advanced
- BIO Foundation
- BIO Vue Users
- Communicator
- Contract Management
- Customization Manager
- E-Commerce Gateway EDI
- Employee Self-Service Suite (ESS)
- Employee Utilization
- Equipment Maintenance
- Financial Statement Translation
- Flat Rate Pricing
- Inventory Replenishment
- Light User
- Limited Device CAL
- Management Reporter Designer User
- Microsoft Dynamics External Connector
- Microsoft Forecaster
- Microsoft Project Connector
- Microsoft SharePoint Server
- Orders to Purchase
- Payroll (United States)
- Payroll—Advanced (United States)
- Project Budgeting
- Service Contracts
- Service Dispatch
- Time and Expense for Projects
- Tools for Visual Basic for Microsoft Dynamics SL
- Work Order

● Business Essentials Edition    ■ Advanced Management Edition

▲ A La Carte Modules on BE    ◆ A La Carte Modules on AM

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# Financial Management

## ACCOUNTS PAYABLE ● ■

Keep accurate information at your fingertips about money owed, due dates, and available discounts with a focused and flexible way to carefully track and take advantage of terms and discounts, predict cash requirements, and monitor payments so that they are made only once.

## ACCOUNTS RECEIVABLE ● ■

Actively manage your customer accounts and identify problems before they occur. Flexible, integrated functions provide you with detailed information and reporting to monitor receivables and do what you need to enhance your cash flow and bottom line.

## APPLICATION SERVER ◆ ▲

Off-load and schedule the execution of CPU-intensive tasks—such as the printing of reports and execution of processes—to other machines on your network. Microsoft Dynamics SL Application Server helps you control where processes execute, whether centralized on the database server, on separate application servers distributed throughout the network, over a wide area network (WAN), or over the Internet.

## BANK RECONCILIATION ● ■

Automate and simplify your bank reconciliation process to reduce paperwork, eliminate tedious administrative tasks, and help ensure accuracy.

## CASH MANAGER ■ ▲

Take the guesswork out of cash accounting, gain instant access to your current cash balance, and automate bank reconciliation. Powerful and integrated, Microsoft Dynamics SL Cash Manager is automatically updated when batches are released by other Microsoft Dynamics SL modules.

## CURRENCY MANAGER ● ■

Conduct global business easily, whether your company uses a single currency with plans to expand or already operates with multiple currencies. Integrate transaction processing across Microsoft Dynamics SL to track exchange rate fluctuations, determine possible gains and losses when making payments in another currency, and maximize multinational business profits.

## FINANCIAL STATEMENT TRANSLATION ◆ ▲

Isolate, evaluate, and eliminate the impact of currency fluctuations on your business operations with Microsoft Dynamics SL Financial Statement Translation. This flexible and integrated module helps you dramatically improve month-end close processes by performing necessary currency translations and automatically calculating gains/losses due to rate fluctuations.

## GENERAL LEDGER ● ■

Capture and analyze the financial information you need to make better business decisions with flexible, integrated capabilities that let you harness your accounting processes to meet the way you do business.

## MULTI-COMPANY ● ■

Monitor, analyze, and report on multiple companies or functional divisions within your organization. Focused and flexible capabilities help you set up multiple companies in one or more databases, run processes, close books, and report results by company or in a consolidated company.

## Business Intelligence and Reporting

### BIO ADVANCED ♦ ▲

Enable far-reaching insight and analysis for project operations and inventory sales, including the ability to extend information across your organization—from front line managers to executives.

### BIO FOUNDATION ♦ ▲

Preconfigured, built-in views of Microsoft Dynamics SL financial data empower executives and power users with operational, financial, and strategic analysis capabilities that break through the constraints of static, accounting-oriented reporting.

### BIO VUE USERS ♦ ▲

Business Analytics provides information at all levels of a company. Purchasing additional BIO Vue Users allows for more users to take advantage of the information unlocked with business information optimization.

### CRYSTAL REPORTS ● ■

Modify any existing report or create an unlimited number of custom reports to suit your needs with Crystal Reports Professional 8.5, the industry-leading report writer included with Microsoft Dynamics SL System Manager. Crystal Reports provides powerful reporting and query capabilities for both novice and experienced users. Use it to select, analyze, summarize, and present data in almost any way imaginable.

### KEY PERFORMANCE INDICATORS ■

Define and deliver web-based, personalized views of key performance indicators (KPIs) to individuals' desktops so that they can monitor and make strategic decisions on business performance.

### MANAGEMENT REPORTER DESIGNER USER ● ■ ♦ ▲

One user included with each Business Essentials or Advanced Management user. Additional users can be purchased a la carte by Business Essentials and Advanced Management customers. **Designer**—The Designer license includes the Administrator and Designer roles within Management Reporter. These roles allow the user to administer, design, generate, and view reports with access to both Report Designer and Report Viewer applications.

### MICROSOFT FORECASTER ■ ♦ ▲

Microsoft Forecaster is the fast, affordable way for midsize businesses, large organizations, and divisions of global enterprises to realize the benefits of a budgeting and planning application. It can be implemented quickly to provide users with immediate control of the entire budgeting and planning process. Microsoft Forecaster is a fully integrated budgeting and planning application designed to help companies create and execute accurate and realistic budgets.

### QUICK QUERY EDITOR ● ■

Connect to more than 100 predefined views of your financial data. This interactive screen sorts and selects information, and allows for filtering and saving of custom views or connecting to a custom SQL Server® view.

### QUICK QUERY EDITORS ● ■

Connect to custom SQL Server views and choose which fields to display and which Microsoft Dynamics SL screen to drill back.

● Business Essentials Edition   ■ Advanced Management Edition  
▲ A La Carte Modules on BE   ♦ A La Carte Modules on AM

# Supply Chain Management

## ADVANCED SHIPPING MANAGEMENT ♦

Automatically create shipping labels, build shipment detail, charge shipments, and do much more with Microsoft Dynamics SL Advanced Shipping Management.

## E-COMMERCE GATEWAY EDI ▲ ♦

With Microsoft Dynamics SL, you can take advantage of the benefits of conducting business electronically to solidify your position in the value chain. Microsoft Dynamics SL E-Commerce Gateway—EDI Edition works with Microsoft Dynamics SL Order Management to help integrate and automate business transactions with customers, vendors, and remote warehouses.

## INVENTORY ● ■

Help to ensure that your customers get what they want, when they want it—and maximize return on your inventory investment. Microsoft Dynamics SL Inventory helps you deal with a full range of inventory issues, including outgoing orders, incoming stock, returns, backorders, surplus inventory, and dead stock.

## INVENTORY REPLENISHMENT ♦

Replace inventory more accurately and help improve customer satisfaction. Microsoft Dynamics SL Inventory Replenishment provides integrated tools that optimize inventory stocking levels and automate purchasing to maintain favorable customer service levels and inventory balances.

## LANDED COST ● ■

Capture actual shipping, handling, and import fees (landed costs) and easily roll them into the total cost of goods. With Microsoft Dynamics SL Landed Cost, distributors and manufacturers can calculate accurate inventory valuation by including additional charges beyond item purchase costs, such as miscellaneous origin and destination fees.

## ORDER MANAGEMENT ● ■

Improve customer satisfaction by keeping order management employees on task and on top of the entire sales order process—under any circumstances—with Microsoft Dynamics SL Order Management. This core distribution module provides comprehensive capabilities for a range of industries, such as distribution, service, and manufacturing, to help improve efficiency and customer service now and as your business grows.

## ORDERS TO PURCHASE ♦

Accurately promise customers the goods they want, when they want them. Microsoft Dynamics SL Orders to Purchase helps balance inventory carrying costs with customer service levels so your representatives can fulfill customers' requests for goods, even when stock is short.

## PURCHASING ● ■

Boost productivity and reduce transaction costs with increased purchasing accuracy, speedy processing, streamlined receiving, and efficient invoice matching and vouchering. Microsoft Dynamics SL Purchasing provides buyers with accurate, up-to-date vendor and pricing information to help them make consistent, cost-effective buying decisions.

## REQUISITIONS ■ ▲

Help increase control and reduce paperwork by enabling employees to enter purchase requisitions online for manager approval and automatic transfer to Purchase Order Processing.

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## Manufacturing

### BILL OF MATERIAL ■ ▲

Define, analyze, and manage your company's products with Microsoft Dynamics SL Bill of Material. Comprehensive features in three important manufacturing categories—bill of materials, production routings, and product costing—provide support for costing and production of manufactured and assembled goods.

### WORK ORDER ▲ ◆

Streamline the planning and handling of your work orders, so you can control costs and maximize profits. Easy-to-implement and easy-to-use, Microsoft Dynamics SL Work Order helps plan and track product item costs and keep general ledger accounts and inventory quantities seamlessly integrated and in balance.

## Project Management

### ANALYZER ■

Enhance business decision-making with efficient access to comprehensive data about project performance and profitability. Quickly collect and summarize data for key metrics, selectively pinpoint details for analysis, and present results in intuitive and practical formats.

### COMMUNICATOR ◆

Enhance control of project progress and profitability by increasing awareness of changes in key indicators or documents awaiting action. Automated alerts keep you informed of pending deadlines, required approvals, escalating costs, and eroding margins, making it easy to intervene so projects and profits stay on track.

### CONTRACT MANAGEMENT ◆

Streamline time-consuming contract management tasks and increase the productivity of subcontractor interactions for even the most complex projects. By improving control over change orders, document tracking, and subcontractor disbursements, you can help ensure timely completion, enhance cash flow, and boost project profitability.

### EMPLOYEE UTILIZATION ◆

Get the information necessary to improve the profitability of service professionals and other human resources. Track personnel availability, billable time, revenues, and the realization of established utilization goals. View timecard line-item details, or speed up analysis by customizing and summarizing data in a variety of groupings and time periods.

### FLEXIBLE BILLINGS ■

Shorten billing cycles and improve cash flow by taking control of unbilled receivables and converting them more quickly to revenues. Streamline invoicing with automatic generation, formatting, and submission of drafts for approval; then easily note needed corrections, finalize invoices, and post receivables.

### MICROSOFT PROJECT CONNECTOR ◆

For companies that rely on the scheduling capabilities of Microsoft Project, Microsoft Dynamics integrates directly with Microsoft Project. The integration works in both directions, where the integrity of the Microsoft Dynamics data that flows through a company's financial system is not compromised. In cases where the relationship between the data in Microsoft Dynamics and that in Microsoft Project might affect financial and audit trail information, one-way integration, from Microsoft Dynamics to Microsoft Project, is available.



## PROJECT ALLOCATOR ■

Gain precise control over project finances by creating flexible, multi-tiered hierarchies to reflect the spectrum of labor rates and billing structures you need. Then automatically allocate charges and revenues, account for work-in-process, transfer or consolidate transactions, and record accurate data for billing and posting to general ledger accounts.

## PROJECT BUDGETING ◆

Take control of your project finances with powerful budgeting tools that allow you to significantly increase your project's profitability. By tracking your budgeting process throughout the life of your project, you can view the impact of budget changes on profitability and manage the information you need to make your project successful.

## PROJECT CONTROLLER ■

Improve your project profitability by providing project managers with the accurate, meaningful information needed to gain control over project revenue and expenses—enough control to make even low-margin projects profitable.

## TIME AND EXPENSE FOR PROJECTS ◆

Take control of your labor, project, and travel-related expenses. Accurate, timely cost information gives you the precise information you need to increase your productivity and make better, more effective business decisions.

# Microsoft CRM Integration

## MICROSOFT DYNAMICS CRM 2011 SERVER ■ ▲

Create and easily maintain a clear picture of customers—including complex supply chain relationships with partners and suppliers—from first contact through purchase and post-sales, using a comprehensive customer relationship management solution that's easy to learn and use.

## Field Service Management

### EQUIPMENT MAINTENANCE ◆

Track and control every aspect of routine and unscheduled equipment maintenance. Microsoft Dynamics SL Equipment Maintenance automates the work order process, allowing your maintenance department to generate work orders more quickly and accurately, track work orders with user-defined criteria (making time stamps obsolete), perform detailed accounting procedures with ease, and execute all of your maintenance/repair procedures with maximum efficiency.

### FLAT RATE PRICING ◆

Take full control over every flat rate in your organization and inspire more customer confidence in your organization. The flat rate pricing process, the standard in more service industries every day, is now easier than ever. With Microsoft Dynamics SL Flat Rate Pricing, you can stop purchasing expensive flat-rate books from an outside publisher and enable your technicians to give on-the-spot printed price quotes on specific services from your pricing catalog.

### SERVICE CONTRACTS ◆

Manage your service agreements more effectively and maximize revenue for every contract with Microsoft Dynamics SL Service Contracts. If your business has service agreements, you know that managing them can be difficult. But with proper management, service agreements can be a major source of revenue for service companies. With Service Contracts, before a technician is dispatched to a site, the customer service representative will be alerted to any active contracts that exist.

### SERVICE DISPATCH ◆

Track and manage every detail of your service organization with Microsoft Dynamics SL Service Dispatch. Flexible capabilities help you manage field technicians efficiently, clarify information about technicians' profitability, and accurately track customer information, including account status and equipment and service history.

## Payroll Management

### PAYROLL (UNITED STATES) ▲ ◆

Make payroll and benefits administration a smooth, predictable, and timely process with powerful and flexible capabilities that allow you to operate faster, smarter, and more profitably.

### PAYROLL—ADVANCED (UNITED STATES) ▲ ◆

Take the guesswork out of complex labor and time collection. Microsoft Dynamics SL advanced payroll helps you calculate true labor costs, meet time-sensitive government reporting requirements, provide flexible deductions and benefits, and most importantly, pay your employees accurately and on time. Advanced payroll requires the purchase of the Payroll.

## Collaborative Workspace

### EMPLOYEE SELF-SERVICE SUITE (ESS) ● ■ ▲ ◆

Allow your employees to view or update their personal data and create and manage their absence and enter personal requisitions. With the Employee Self Service license, employees can spend more time focusing on their day-to-day business and tasks and worry less about administrative burdens.

### LIGHT USER ● ■ ▲ ◆

Unlock business potential and enhance productivity by providing role-based access to information and processes from a single web-based portal. Business portal integrates seamlessly with Microsoft Dynamics SL to deliver applications, information, and processes to employees, customers, and partners across the organization. In addition, Light User provides connections to Microsoft Dynamics SL ERP data through tools like Microsoft Excel® and SQL Reporting Services. The Light User also includes a Management Reporter Viewer User—the Viewer license includes the Generator and Viewer roles within Management Reporter. Generators have access to generate reports already designed in Report Designer and view.

### LIMITED DEVICE CAL ◆

This license allows external, non-employee, non-validated people access to the Microsoft Dynamics database.

### MICROSOFT DYNAMICS EXTERNAL CONNECTOR ▲ ◆

The External Connector gives stakeholders not employed by the company access to critical business information that can streamline tasks and lower operational expenses.

### MICROSOFT SHAREPOINT SERVER ▲ ◆

Microsoft SharePoint makes it easier for people to work together. Using SharePoint, your people can set up websites to share information with others, manage documents from start to finish, and publish reports to help everyone make better decisions.

## Configuration and Development

### CUSTOMIZATION MANAGER ▲ ◆

Adapt your system to the specific requirements of your organization with Microsoft Dynamics SL Customization Manager. Quickly and easily modify any screen in any Microsoft Dynamics SL module without changing the underlying source code, and update screens as often as necessary to match the pace of your business growth.

### TOOLS FOR VISUAL BASIC FOR MICROSOFT DYNAMICS SL ▲ ◆

Build complete line-of-business applications with the flexible development foundation of Microsoft Dynamics SL Tools for Visual Basic. By enabling developers to work with familiar and widely used tools, you can minimize the amount of programming effort required to develop applications that communicate with Microsoft Dynamics SL and Microsoft SQL Server 2000.

### WEB SERVICES FOR MICROSOFT DYNAMICS SL ● ■

Extend connections with a web services architecture that leads to better performance and efficient application integrations—both for your current systems and for those you adopt in the future.

### SYSTEM MANAGER ● ■

Gain flexible control with capabilities that help you import and integrate information and optimize system performance across your organization.

