Upgrade Value Guide

Functionality Designed for the New Way to Do Business.

Today's world demands a new way to do business. Today's business climate requires change. To stay ahead, organizations must address the challenges of reducing operating costs while responding to greater customer needs – ultimately increasing profitability. To stay competitive, cut costs, and grow you need to get more out of your existing investments.

There has been significant value added in each of our product releases. Use this guide to understand the key functionality updates that span the past three releases of Microsoft Dynamics® SL. If you aren't on the most current version you're not benefitting from the latest innovation available to your business.

Systemwide		
7.0	7.0 Feature Pack	2011
Screens & interface upgrade		Screen & interface enhancements using common Microsoft Dynamics® features
Role based navigation in rich client & Business Portal		Menu search capabilities to find screens and reports
Home Page feature can display a web page inside Microsoft Dynamics® SL		Payables, Receivables and Project Activity Panes & related Quick lists take users to a starting point
Favorites feature adds submenu and editing support		
Role based navigation in web based Business Portal		Menu navigation history to recall/open previous screens and reports
Create & preview custom menus through new Menu Maintenance screen. Calls & opens Dynamics and other products, screens and reports		Quick Query – Search using user friendly views of your Microsoft Dynamics® SL data

Edit (insert or overwrite) capability in screen text fields	Business date security	Share screenshots with built in Print Screen feature
Expanded field sizes for name, address & email		Grid to Excel – Export grid information directly to Microsoft® Excel
Quick Send - ability to email or fax invoices or purchase orders	Quick Send – additional documents supported with multiple recipients	Quick Send enhancements included printing, support multiple invoice formats, editing email addresses, turn off and the ability for one time Quick Send recipients
	DocShare - Store predefined documents to a Microsoft® SharePoint® site	DocShare enhancements & instructions for adding custom DocShare documents
Windows Authentication support		Quick Switch enhancing company changing feature
		Open screens or reports in multiple companies at the same time.
		Company on screen identification by name and color
	Inquiry screens – sortable grids	Enhanced grid display using alternating colors
		Document Attachments –allows attaching of documents to Microsoft Dynamics® SL screens, storing documents in Microsoft® SharePoint® or network drive locations
		Removed required event log notification action
		Email links to screens and loaded documents
		Microsoft Dynamics® SL 2011 Project and Customer Web Services
		Web Services Framework and SDK to enable customers to develop own web services
Microsoft® Office 2007 compatibility		Microsoft® Office 2010 compatibility
Upgrade to Microsoft® Visual Basic 2005 .NET		Upgrade to Microsoft® Visual Basic 2008 .NET

Financial		
7.0	**7.0 Feature Pack**	**2011**
Pay When Paid – Requires customer payments to be received before paying a vendor	Payroll – void payroll check enhancement allows voiding of check in a different period	GL Correcting Journal Transactions feature - reverse, reverse/correct, and copy GL batches
	Hard Close – Limits users from posting to previous periods and/or fiscal periods	Delete partially released AR/AP batches
		New Link PO and AP Documents screen for invoices not linked to receipts
		Payroll - W2's 4 Up report
		Payroll – new Direct Deposit Register report
		AR – Updated Sales by Commission report

Project		
7.0	**7.0 Feature Pack**	**2011**
Flexible Billings - Multi-Currency Scheduled Billings and Billing by Percent Complete	Subtask tracking in Project Controller	Automatic Project Approval Delegation in Business Portal
Direct or Revision budgeting flag added at Project Maintenance level	Calculate and load labor budget automatically, based on Resource Assignment	Calculate and load revenue budget automatically, based on Resource Assignment
New "Template" project status added	Resource/Employee Integration from Project Server	New Project Transaction Transfer screen
New full featured Project Maintenance screen in Business Portal	Business Portal – Resource Assignment added	Line item timecard approvals in Business Portal
Multi-Currency Project Expense Reporting	New standards for Business Portal Notes & Comments entry	Project Budget Revision Approvals in Business Portal
	Project and Task Maximums	Automatic posting of Subcontract commitments

	Project Flex Time – Web based time entry supporting bi-weekly and semi-monthly time cards	Project Flex Time enhancements to include editing, deleting entries and entering correcting time cards
	Actual labor posting	Allocator recalculation method based on periods and/or date ranges
		Second allocation method added.
		New allocation rate keys
		New Fee-Based Revenue Recognition type added
		Project/GL Reconciliation report
		Support for additional project invoice formats for DocShare and Quick Send.
	Microsoft® Project Server 2007 Connector added. Two-way project-task-team data integration, and budget creation and profit look up	Microsoft® Project Server 2010 Connector added. Enhancements and server side validation

Distribution & Service		
7.0	7.0 Feature Pack	2011
	Inventory – added site groups for inventory	Goods for Project Inventory allocates inventory to a Project
	Order Management Sales Prices – revisions by inventory group	Bill OM Projects Shippers in Flexible Billings and support milestone billing
		Create Projects from OM Sales Orders entry screen
New options added in Generate PM Service Calls	Enhancements to Cancel & Expiration processes	Multiple company service call entries
Ability to specify different customer ID's on a service contract attached to a master contract ID	Added concurrent invoice processing	Duplicate Service Call entries
Graphical Dispatch Board – Enhancements queue filters	Graphical Dispatch Board Service Call Search	
	Graphical Dispatch Board – Send emails to Technician or Customer	
	Graphical Dispatch Board – Exclude inactive or admin hold customers from lookups	

Reporting		
7.0	7.0 Feature Pack	2011
Added Microsoft® SQL Server® Reporting Services (SSRS) support		Government Contractor report pack (13 new reports)
		Quick Query – Search using user friendly views of your Microsoft Dynamics SL data
		Support for new financial reporter, Microsoft® Management Reporter
		Upload SAP Crystal Reports 2008 & Microsoft® SQL Server® Reporting Services (SSRS) reports to a Microsoft® SharePoint® site
		Business Portal support for Crystal reports 2008 & Microsoft® SQL Server 2008® Reporting Services reports
		Upload Business Portal reports to Microsoft® SharePoint®
		Report Scheduler available on all Business Portal centers for quick access to printed reports and report scheduling.
Business Intelligence solution: Business Information Optimization® (BIO)		BIO® 2011 for Microsoft® Dynamics SL