

**Microsoft®**



# WHAT'S NEW?

## Top Features in Microsoft Dynamics SL 2011

# Microsoft Dynamics SL 2011

Today's project-driven organizations face constant change. Companies must manage growing customer demand and keep up with strict compliance regulations—all while reducing operating costs. To stay ahead of the competition and remain profitable, companies need to get more from their existing technology investments.

With Microsoft Dynamics® SL 2011, you can raise the bar for productivity, performance, and growth across your entire organization. Based on extensive research and feedback from customers and partners, Microsoft Dynamics SL 2011 delivers the familiar user experience your people need; insight to fuel the results your customers want; and new ways for your project-driven business to adapt—and thrive—in a connected world.

Take advantage of the latest technology innovations with a new web services architecture that delivers stronger performance and efficient integrations for your current systems—and those you implement in the future. You can enhance your ERP solution by connecting with Microsoft Dynamics CRM to sync customer and project data, and access Microsoft® Project Server 2010 to bring together processes and financials.



“Everything in Microsoft Dynamics SL 2011 is a time-saver. It’s all geared toward saving our customers time, and making the experience easier, better, faster.”

CAROLYN JASIULEWICZ  
Progressive System Solutions

### **WORK PRODUCTIVELY**

With a familiar user experience, new activity panes, and enhanced search capabilities, people can get up to speed quickly and prioritize role-based tasks. New ad hoc query capabilities provide predefined views of your data to help eliminate guesswork and let you efficiently sort and drill back to details. Digital document management makes it easy to centralize and share information; automated processes speed general ledger tasks; and new multi-company enhancements let you open multiple company screens within a single session.

### **DRIVE BUSINESS VALUE AND INSIGHT**

Deliver insight across your organization and adapt easily to today's changing business needs. New features include flexible, real-time access to critical reporting data, enhanced time reporting capabilities, and specialized tools and reports to manage U.S. government contractor regulations—all with the convenience of 24/7 web-based access for remote workers.

### **CONNECT YOUR BUSINESS**

With this latest release, you can take advantage of a new web services architecture that opens the door to more flexible integrations with a host of applications and platforms. Connect to Microsoft Project Server 2010 to align project management with financials; and leverage project and customer web services to make your own connection to Microsoft Dynamics CRM.

# WORK PRODUCTIVELY

Increase productivity by giving people quick access to the information they need. By using a familiar solution that delivers greater automation for common tasks, you can streamline business processes, reduce errors, and improve customer service.

## Get more done in less time

- Help people start the day right with new activity panes, role-based menus, and quick lists that make it easy to prioritize specific job tasks.
- Find what you need in just a few clicks with enhanced menu search features and history lists. Simply type a few words to locate new information or view a history of recently viewed reports and screens.
- Get up and running quickly with a familiar solution that works like and with Microsoft Office products, such as Microsoft Outlook®, Microsoft Excel®, and Microsoft Word.



## Work with multiple companies more efficiently

- Complete entries for multiple companies in a single session—without having to close windows to log in to other companies.
- Manage multiple screens using color indicators to help ensure accurate association of companies for specific entries, from financial data to project entries and reports.
- Improve customer service efficiencies with the ability to enter service calls for multiple companies in the same form, and create duplicate service calls by selecting from previously entered calls.

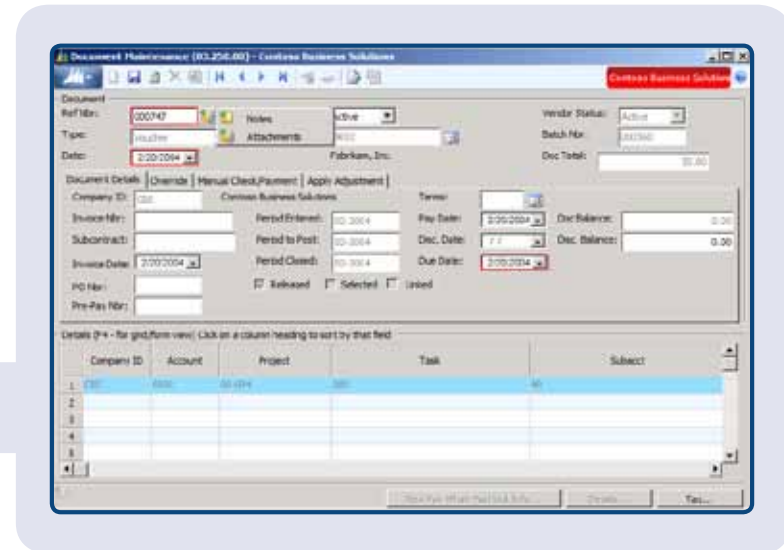


## Manage documents—and your general ledger—with ease

- Transform document management and make it easy to share information with employees, customers, and vendors using Microsoft SharePoint® technology.
- Work efficiently with a single, consolidated view of orders, requests, and customer data; and upload reports directly to a SharePoint site to share across departments.
- Automate the upload process using DocShare, and connect SharePoint sites related to customers, vendors, and projects.
- Extend insight by attaching documents directly to screens in Microsoft Dynamics SL.
- Gain tighter control of your general ledger and reduce errors with automated support for common tasks, such as reversing and copying entries and correcting journal batches.
- Connect transactions using a single view of accounts payable transactions and unreconciled purchasing transactions.

“We know how our projects are set up and how our projects are tracking costs. We can provide information to our executives, marketing group, and project managers that we were unable to before.”

MARCY McCOY  
MacKay & Sposito



# DRIVE BUSINESS VALUE AND INSIGHT

Extend insight across your business with real-time access to reporting data and flexible tools designed to help you meet today's changing business needs—all with the convenience of 24/7 web access.

## Gain real-time access to key reporting data

- Get over 50 predefined views of data using Quick Query to filter, customize, or drill back to a Microsoft Dynamics SL screen to view the original transaction—with the ability to save custom views.
- Give companies the ability to create their own custom views using standard or custom tables, and connect them into the Quick Query menu.
- Take advantage of Microsoft Management Reporter—a real-time financial reporting system built on the latest Microsoft technologies—to create boardroom-quality reports without IT assistance, enhance security for reports, and increase support for regulatory compliance.

## Adapt to change with greater flexibility

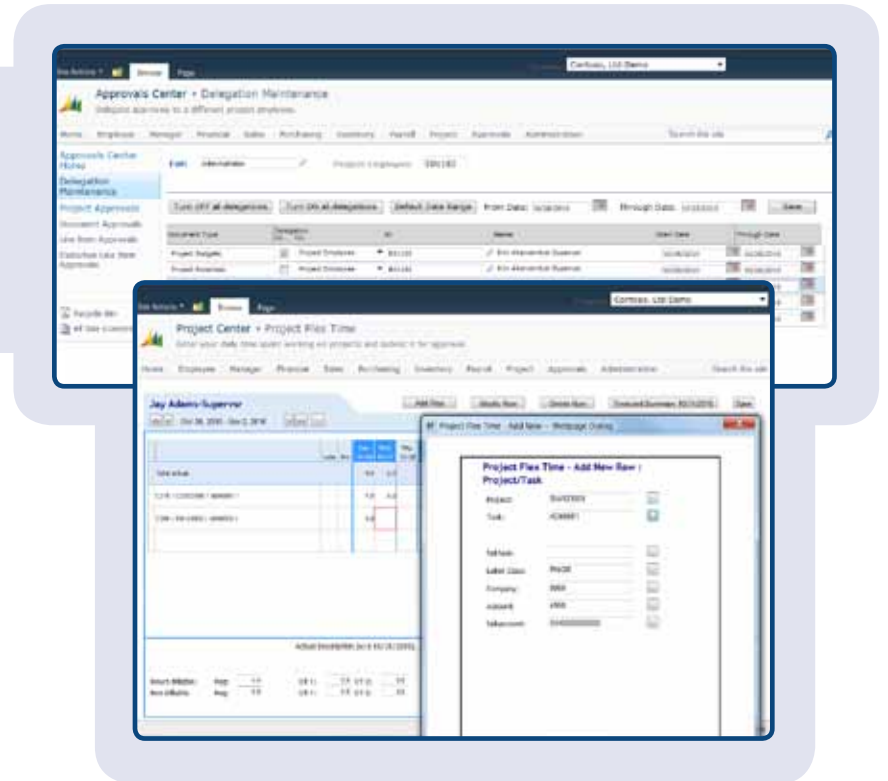
- Help simplify compliance and keep up with U.S. government contractor regulations by allocating labor and item costs based on a period or date range.
- Get the right information with job summaries and supporting reports designed specifically for government contractor jobs.
- Stay organized by using a standard method for common cost allocations, and by creating a secondary method with customer-specific rules for billing. Protect cash flow and margins by separating costs and billing—and collect costs while you're still negotiating billing terms.
- Enable project administrators to monitor and correct project postings using a security-enhanced auditing tool.
- Make changes to project, task, account category, account, or subaccount—as well as split transactions or process group changes—with greater ease and flexibility.



# DRIVE BUSINESS VALUE AND INSIGHT

## Empower remote workers with 24/7 web access

- Keep projects moving forward by giving team members and managers convenient, web-based access from any location, any time.
- Complete virtually any project-related task—from setting up projects and assigning resources to creating budgets and more—with the web-based Business Portal for Microsoft Dynamics SL.
- Give employees access to additional timecard detail, and provide timecard correcting features that improve accuracy of complex hours reporting—for example, when employees are asked to work on different projects within a single shift.
- Speed the approval process when key managers are away with summarized line-item approvals—and new automated approval delegation—for timecards, expense reports, project invoices, and budgets (including change order revisions).



“We now have one version of the truth. We provide information to clients, employers, and state and county government agencies with complete confidence in the validity of the data.”

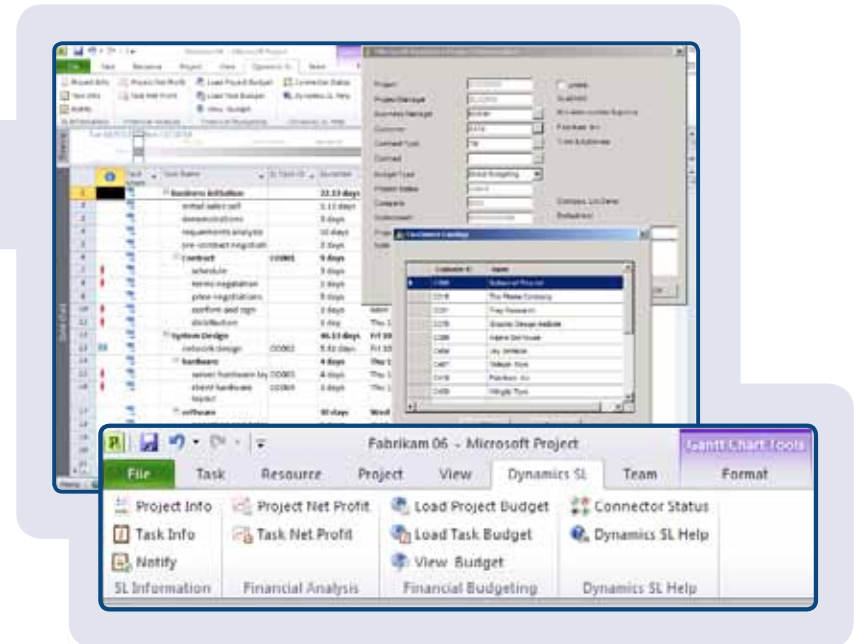
CHRISTOPHER HUERTA  
Lifeworks

# CONNECT YOUR BUSINESS

Bring people, processes, and systems together with new capabilities that let you adapt—and thrive—in a connected world.

## Link project management and accounting

- Align processes and financials thanks to two-way data integration between Microsoft Dynamics SL 2011 and Microsoft Project Server 2010—and maintain projects from either solution.
- Work confidently with access to comprehensive project data, such as resource assignments, budgets, revenue, and allocations. You can track tasks and subtasks with ease—and take action if things don't go as planned.
- Balance priorities with access to comprehensive, up-to-date records for shared resources.
- Reduce duplicate data entry and help ensure accuracy with mapped information that is current in both applications.
- Improve your budgets with the ability to view prior performance, including time-phased labor by resource; and monitor labor and expense by resource assignment.





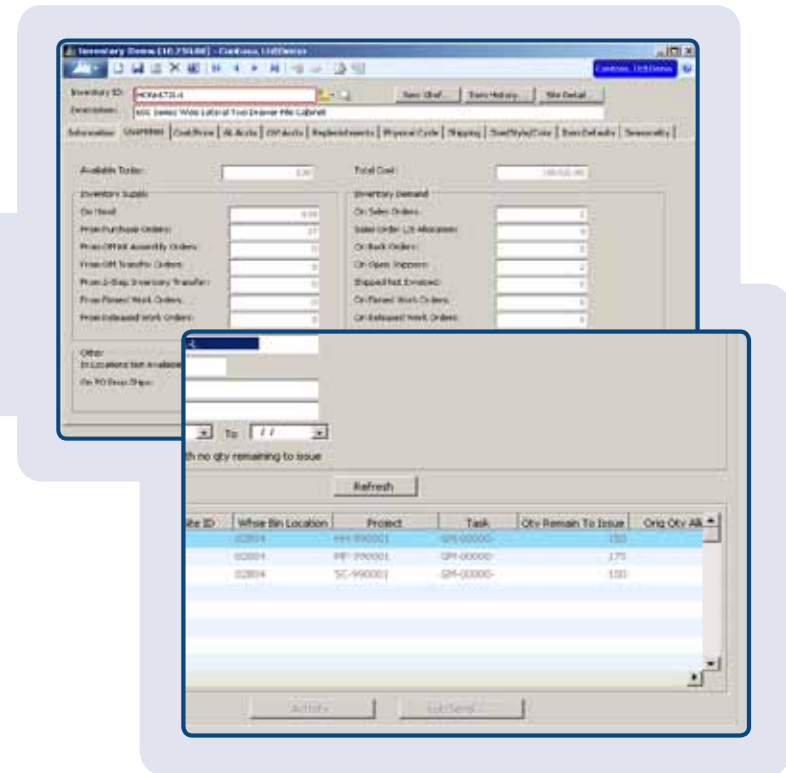
# CONNECT YOUR BUSINESS

## Bring together projects, purchasing, inventory, and order processing

- Capture time and expenses earlier with automated project creation that begins as soon as you create a sales order.
- Streamline inventory management with automatic project inventory allocations that occur when you place a purchase order.
- View project inventory allocations with ease. When additional inventory items are needed, you can search for inventory company-wide, quickly export the results to Excel, and then send email to others within the company. Available stock can be reallocated so that you can meet specific project demands and avoid accumulating redundant inventory.
- Improve customer satisfaction with consolidated project billing that includes shipped material, labor, and expenses on a single invoice.

## Get the most from web services and Microsoft technology innovations

- 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.
- Reduce costs by using Windows Communication Foundation to host web services, thus eliminating the need to buy separate servers.
- Use web services to connect to in-house solutions, like Microsoft Dynamics CRM, directly to your customer and project data. By aligning your sales, service, and back-office activities with a complete view of customer data, your employees can build profitable customer relationships.
- Take advantage of other powerful technologies such as Microsoft SQL Server®, Windows, SharePoint, and Project Server.



## ADDITIONAL FEATURES AND ENHANCEMENTS

### Take advantage of additional capabilities in Microsoft Dynamics SL 2011, including:

- Fee-based revenue recognition based on cost plus a percentage of that cost
- Project/GL reconciliation report
- GC Report Bundle (Job Summary Report, Labor Hour Details and Cost Details, ODC Detail, Revenue Detail, Cost Summary, Revenue Summary, and Indirect Cost Analysis)
- Automatic calculation of subcontract commitments
- Enhanced rich client timecard reporting
- Continued investments in Quick Query email and fax capabilities
- Continued investments in DocShare automated document storage, including an SDK for adding new DocShare documents

### LEARN MORE

To find out more about Microsoft Dynamics SL 2011, contact your Microsoft sales representative or Microsoft partner or visit:

[www.microsoft.com/dynamics/sl](http://www.microsoft.com/dynamics/sl)

“The new user interface is fantastic. The integrated login, multicompny switching, and the grid redesign are all going to make it much faster to navigate.”

SCOTT KOPALD  
Metson Marine





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