



What's New in Microsoft Dynamics™ SL Release 6.5

**Empower.
Connect.
Build a better business.**

October 2005

Microsoft Dynamics™

Microsoft Dynamics™ is a family of business solutions that helps your people and your business work more effectively. Microsoft has launched this new brand to represent Microsoft's strategy to align its Business Solutions products with its R&D roadmap centered on a people and process-centric design approach to deliver breakthrough innovation in two significant release waves. As an important element of the Microsoft Dynamics brand, Microsoft Solomon will leverage the new brand and Microsoft Business Solutions—Solomon will be renamed to Microsoft Dynamics™ SL. Within the product you will see this name change beginning to take effect.

Purpose

This document summarizes the significant new capabilities planned for the Microsoft Dynamics SL 6.5, formerly named Microsoft Business Solutions – Solomon 6.5.

Outline

This document contains the following sections:

1. Product Summary
 - Primary New Features of Microsoft Dynamics SL 6.5
 - This Release will be of Special Interest to...
2. Detail of New Features
 - A. Foundation
 - B. Financial Enhancements
 - C. Project Management and Accounting Enhancements
 - D. Inventory and Order Management
 - E. Microsoft Dynamics SL Business Portal 3.0
 - F. Analytics and Reporting
3. Haven't Upgraded in a While?

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Product Summary

Built to help you better manage accounts and process requests more efficiently, Microsoft Dynamics SL 6.5 empowers your employees, managers, customers, and vendors. Microsoft Dynamics SL helps them increase their effectiveness by providing the tools they need to view and process data based on the permissions that you have established.

Automate the Procurement Process

Automate the procurement process with a flexible request, bidding and approval system. The addition of a powerful new Purchase Requisitions module to the Distribution Series streamlines the process of submitting and approving requests, saving your company time and money. Employees can enter their requests directly into the system through the rich Microsoft Dynamics SL client or through Microsoft Dynamics SL Business Portal. Managers can then approve or reject requests as they are submitted. Flexible approval definition allows the module to adapt to your approval and processing requirements.

Manage Bank Accounts Effectively

The new Bank Reconciliation module allows financial staff members to quickly and easily reconcile your company bank statements. This module complements the full suite of financial applications available with Microsoft Dynamics SL to meet your account management needs—from the simple to the complex. Users can define bank accounts to correspond to accounts and sub-accounts in the General Ledger. Then, when batches are released from the integrated modules (General Ledger, Accounts Payable, Accounts Receivable, and Payroll), the transactions are displayed in the Bank Reconciliation screen. Reconciliation is as simple as checking off the cleared items.

Maintain Security and Efficiency

The enhanced functionality in the Application Server module gives you the ability to schedule reports to run as frequently as needed—even to the minute—within the same business day. Security has been enhanced allowing you to provide only specific individuals in the organization with access to the Application Server computer without interrupting the production and completion of Application Server requests.

Manage Data Access from Anywhere

Microsoft Dynamics SL Business Portal 3.0, built on the Windows SharePoint Services collaboration and document management solution, helps increase the productivity of your company with many new features, including extranet access functionality. Now, you can provide access to Business Portal from an Internet connection—without requiring a virtual private network. Giving your employees the flexibility to update records while they are away from the office makes it easier to meet your company's mobile business demands. Multi-company enabled queries, item request entry, item request approval, Inventory Lookup, and new access roles for customers and vendors are just a few of the additions to the already powerful Business Portal feature set.

Primary New Features in Microsoft Dynamics SL 6.5

Foundation

- New features within Business Portal 3.0
- Application Server enhancements
- Compatibility support for Microsoft SQL Server 2005
- Performance improvements throughout the system
- Enhanced schema help content
- Support for Microsoft Visual Studio 2005

Financial Management

- New Module: Bank Reconciliation

Project Management and Accounting

- Addition of a 3rd Rate Key in Allocations
- Changes in Purchase Order automatically update Project Commitments (in real-time)

Distribution

- New Module: Requisitions
- Ability for Consolidated Invoices to flow through EDI (Electronic Data Interchange)
- Delayed Order Total Updating option enabled in Order Management

Microsoft Dynamics SL Business Portal

- Extranet functionality
- Item Request Entry connected to the new Requisition Module
- Item Request Approval connected to the new Requisition Module
- Inventory Lookup capability
- Multi-company enabled queries
- Mass Import of Users
- Copy a Business Portal Role
- Role-based Home Page
- Customer data access policies
- Vendor data access policies
- Support for Windows SharePoint Services v2 SP2
- Manage Data Permissions in Admin Console
- Improvements to Site Settings page

Reporting and Analytics

- Microsoft FRx 6.7 SP4

This release will be of special interest to:

- Companies with remote employees, multiple accounting departments or those with a number of legal entities customers
- Small to mid-sized businesses, contractors of the US Government, and especially project-centric firms in the following industries:
 - Professional Services
Organizations that provide management consulting, IT consulting, architectural, engineering, and surveying services; research, development, testing services, 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
Trade services contractors who provide heating, ventilating, air conditioning, electrical, and mechanical services.
 - Any project-driven business that delivers billable contracts for their customers.
 - Wholesale Trade (Durable Goods)
This major group includes establishments primarily engaged in the wholesale distribution of durable goods.
 - Any business that distributes inventory and uses Microsoft Dynamics SL to manage customers' orders and the inventory.

Details of New Features in Microsoft Dynamics SL 6.5

A. Foundation Enhancements

FEATURE	DESCRIPTION	BENEFIT
ENHANCED Application Server	Ability to schedule reports to run at defined intervals, down to the minute, on the same business day and to allow the machine where Application Server is installed to be secured (locked down) programmatically.	The new scheduling capabilities give users more flexibility in report execution scheduling. The Application Server may also be locked systematically to provide for a more secure environment.
NEW Compatibility support for Microsoft SQL Server 2005	SQL Server 2005 has been successfully tested to ensure Microsoft Dynamics SL compatibility.	Keep your SQL Server versions current to take advantage of its new features.
ENHANCED Performance throughout the system	Performance of the following applications was improved: 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.	These improvements allow the system to process more data in less time, allowing users to work more efficiently.
ENHANCED schema help content	Online schema help files contain more detailed information about the new tables added for Requisitions and Bank Reconciliation, as well as previously existing tables.	Extending and configuring Microsoft Dynamics SL becomes easier with better information about the structure of the Microsoft Dynamics SL database and its data content.
ENHANCED Solomon Object Model	A Cancel method has now been added to the Microsoft Dynamics SL Object Model. The Cancel Method acts the same as when a User selects the Refresh button on an Application or presses the Escape Key. Updates to the screen are reverted back to what was saved to the database.	Enhancements give developers more control over how other applications can interact with Microsoft Dynamics SL.
NEW Microsoft SQL Server 2005 "Yukon" support	Support for the latest version of Microsoft SQL Server.	Ensure your system is maintained and secure by staying current with the latest Microsoft releases.
NEW Microsoft Visual Studio 2005 support	Support for the latest version of Microsoft Visual Studio.	Ensure your system is maintained and secure by staying current with the latest Microsoft releases.

B. Financial Enhancements

FEATURE	DESCRIPTION	BENEFIT
NEW Module: Bank Reconciliation	This new module enables importing bank statements from common bank formats. Imported statements can be easily reconciled against transactions in the GL, AP, AR and Payroll with a simple click of the mouse for each transaction. Once set up, Bank Reconciliation requires only three steps every month: import transactions from the current period, record items as cleared, and close the current period.	Managing your bank accounts is streamlined, reducing effort and errors, when your bank statement can be quickly reconciled against the transactions in your system.

C. Project Management and Accounting Enhancements

FEATURE	DESCRIPTION	BENEFITS
NEW Addition of a 3rd Rate Key in Allocations	Added a third rate key for looking up allocation and Time & Expense rates from the Allocation rate table.	When a single employee has different mark-up rates based on the nature of his work, the Allocation module now allows the markup rate to be retrieved based on three key data fields.
NEW Purchase Order automatically update Project Commitments	Active Purchase Orders are automatically updated into the Project System as Commitments without having to manually run the Financial Transaction Transfer process.	Real time commitment updates allow project managers to more accurately assess project spending and how a project is progressing.
NEW Extranet access with Business Portal	Add support for accessing Microsoft Dynamics SL Business Portal through an Internet connection.	Employees, vendors, and customers are given the power to access Microsoft Dynamics SL Business Portal from any internet connection, allowing project-related employees more flexibility to enter and record billable time and expenses, such as from the client location; and provide managers more flexibility to approve those time and expense sheets and subsequent invoices.
ENHANCED Increased decimal precision in Project Allocator.	Modified Allocations to calculate a more precise rate for Billings and Allocator transactions.	Allocations rounding up too early in the calculation process can cause the calculation of fee rates to not be as precise as is required in some instances. The enhanced precision insures billing transactions reflect exactly what was entered in multi-level rate entry.

D. Inventory and Order Management

FEATURE	DESCRIPTION	BENEFITS
NEW Module: Requisitions	<p>This new Requisitions module provides for the entry and approval of requests submitted by an employee. This module provides online approval and rejection or requisitions through Dynamics SL applications or Business Portal Web Item Request Entry and Approval. Encumbrance and Budget validation</p> <p>Tracks costs from submission of the requisition for approval. (committed cost) The cost remains "committed" until the item is received, vouchered, and posted to the General Ledger. For funds encumbered against a project, cost remains "committed" until requisition becomes a Purchase Order. The status/budget update process relieves the committed amount.</p> <p>Approval Paths for a requisition are: By Project ID (requires Project Controller) OR By Department/Cost Center (defined manually or by a subaccount segment) Or as determined by a user-defined corporate policy.</p>	<p>The new Requisitions module provides the ability to automate the procurement process for a company by providing a flexible request, bidding and approval system.</p> <p>Eliminate the possibility of losing paper requests. The solution gives users the ability to track all requests, approved and rejected, within the system. This enables companies to manage procurement expenses in a more cost-efficient method, as well as reducing costs by performing price shopping before submitting a requisition.</p>

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FEATURE	DESCRIPTION	BENEFITS
	<p>Approved requisitions requests can be consolidated and sent for bids to multiple suppliers.</p> <p>Required Modules include: General Ledger, Accounts Payable, and Purchasing. Optional Modules include Inventory, Project Controller, Business Portal</p>	
NEW Consolidated Invoices flow through EDI	Consolidated invoices may flow to EDI (Electronic Data Interchange).	Expedite the billing process and increase billing efficiency by electronically transmitting consolidated invoices to suppliers.
NEW Delayed Order Total Updating option enabled in Order Management	Added the ability to define Order Management to re-calculate the order total after all shippers have been created.	When your business depends on getting orders processed quickly, using the Delayed Order Total Updating option let's you finish the order process <i>after</i> all shippers are processed, allowing Process Manager to handle the critical needs of your business first.

E. Solomon features in Microsoft Business Portal 3.0

FEATURE	DESCRIPTION	BENEFITS
NEW Extranet access without a Virtual Private Network	Access Microsoft Dynamics SL Business Portal through an Internet connection without requiring the user be authenticated on a Virtual Private Network first.	Employees, vendors, and customers are able to access Microsoft Dynamics SL Business Portal from an internet connection without requiring a Virtual Private Network, allowing your business to operate 24x7 from remote locations.
NEW Item Request Entry application	Employees have the ability to enter their requests for supplies, furniture, goods and services electronically and submit them for approval.	Provide a cost-effective solution for employees to enter a requisition for supplies, furniture, goods, services, etc. and allow them to leverage all or part of a past request when the need arises. Eliminate the possibility of paper item requests getting lost on someone's desktop.
NEW Item Request Approval application	Managers can view and approve item requests as they are submitted.	Provide a cost-effective solution for manager to respond quickly to approve or deny item requests as well as evaluate best prices on purchases proactively. This helps to save time and costs on securing bids.
NEW Inventory Item Lookup application	Search for an inventory item within Business Portal based on description or attribute parameters. After an item is found, you can view additional information, such as an item's supply and demand quantities and cost information.	Search and view inventory items from within Microsoft Dynamics SL Business Portal to expedite checking availability for quotes, and evaluating stocking levels which increases your customers' satisfaction with your services.
NEW Multi-company enabled queries	Queries may be restricted to data that is specific to one or more companies within a single application database.	Be more accurate with queries in a multi-company environment. View data for all or specific companies to analyze business information.
NEW Mass Import of Users	The ability to set up multiple Microsoft Dynamics SL users with similar rights in Business Portal in one session is now supported.	Setup of users is simplified by enabling the administrators to reduce the time required to setup groups of users with Microsoft Dynamics SL Business Portal access.
NEW Copy a Business Portal Role	Ability to copy an existing Role as the starting point to defining a new role.	Save time in defining new roles in Business Portal to match the similar roles already

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FEATURE	DESCRIPTION	BENEFITS
		defined in your company.
NEW Role-based Home Page	The ability to define internal vs. external home pages by role(s).	Business Portal users who are assigned to a role designated as "internal" to the company, such as an employee, will see the internal home page. Users who are assigned to a role designated as "external", such as a customer or vendor, will see the external home page. This allows you to control what information Business Portal users are permitted to view.
NEW Microsoft Windows SharePoint Services v2 SP2 support	Support for the latest version of Microsoft Windows SharePoint Services	Ensure your system is maintained and secure by staying current with the latest Microsoft releases.
NEW Manage Data Permissions in Admin Console	The ability to manage data permissions in the Administrative Console, as well as support the reverse lookup of queries.	Administrators save time setting up new Microsoft Business Portal users; updating Microsoft Business Portal users when employees roles change within the organization and removing Microsoft Business Portal users when employees move on, keeping your data protected and secure.
ENHANCED Site Settings page	Each defined role now displays within the Roles and Permissions page, providing ease of maintenance in one convenient location.	Re-designed the Manage Users, Manage Roles, and Manage Data Permission pages to improve usability and allow applications to extend their application-specific properties accordingly.

F. Analytics and Reporting Enhancements

FEATURE	DESCRIPTION	BENEFITS
NEW Microsoft FRx 6.7 SP4	Service pack enabling Microsoft FRx 6.7 to be compatible with the password changes made in 6.0 SP1.	Your reporting functionality leverages the same security improvements implemented in the core Microsoft Dynamics SL product.

Haven't Upgraded in a While?

Microsoft Solomon 5.0 and Microsoft Solomon 5.5 Provided

Foundation Series

- Office XP Smart Tag Manager
- Company Name displayed in Title Bar
- Online User Manuals

Financial Series

- Enhanced Time Entry Screens
- Print multiple checks per employee per pay period or payroll run

Advanced Distribution

- Inventory Replenishment
- Order to Purchase
- Landed Cost
- Work Order

Payroll capabilities for Construction and other businesses

- Union Reciprocity and Portability
- Service Dispatch Integration to Advanced Payroll
- Time & Expense Integration to Advanced Payroll
- Web Advanced Payroll Time Entry

Enhanced Reporting and Budgeting

- Microsoft FRx Report Writer 6.5

- Microsoft Forecaster 6.5

Project Series

- Multi-Currency Invoicing
- Utilization expense cost tracking
- Redesigned Web Time and Expense entry screens
- Integration with Microsoft Project Server 2002
- US Government contractor enhancements for DCAA compliance
 - Indirect rate calculation
 - Time and expense audit trail capability
- Revenue allocation rules based on a maximum
- Solomon Desktop Web Time Entry modifications
- Data entry ease of use enhancements

Service Series

- Week-at-a-Glance Graphical Dispatch Board
- Microsoft MapPoint integration

Solomon Desktop

- Multi-Company Solomon Desktop

Microsoft Solomon 6.0 Provided

Foundation Series

- Enhanced User Interface and User Experience
- Group customizations
- Enhanced tools for complying with Sarbanes-Oxley Act
- Customer Feedback tool in Help system
- Support for Microsoft Watson error logging

Financial Series

- Advanced Timecard Entry for Business Portal

Advanced Distribution

- Consolidate Multiple Shippers on a Single Invoice
- Improvements in efficiency and performance

Enhanced Reporting and Budgeting

- Crystal 10
- Microsoft FRx 6.7
- Microsoft Forecaster 6.7
- Microsoft FRx Report Manager 6.7

Project Series

- Resource Assignment
- Government contractor invoice formats 1034 and 1035
- Historical Budgets by Period, Budget labels, AIA improvements
- Cash Manager integration to Project Management and Accounting
- Timecard Entry for Business Portal
- Timecard Approval for Business Portal
- Expense Report Entry for Business Portal
- Expense Report Approval for Business Portal
- Project Analyst for Business Portal
- Solomon Communicator for Business Portal
- Invoice Approval for Business Portal
- Task Inquiry for Business Portal