Microsoft

Product Capabilities Guide in Microsoft Dynamics SL 2018

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Packaging of Functionality & Product Capabilities
in Microsoft Dynamics SL 2018

Focus on Growing Your Business, not Running It

Dynamics SL is a complete enterprise resource planning (ERP) solution for small to medium sized businesses. For more than 25 years, Microsoft Dynamics SL has delivered the functionality, performance, and ease of use that powers diverse small and mid-size businesses around the world. From financials and project management to distribution and services, Microsoft Dynamics SL brings people and systems together to support your business ambitions and help you run your business more efficiently.

Comprehensive out-of-the-box capabilities and rapid, flexible deployment options help you get up and running quickly and affordably. And our world-class network of Microsoft partners provides deep local and technical knowledge of specific industry requirements to help ensure that you have the best solution in place to meet your unique business needs.

With Microsoft Dynamics SL, you have access to powerful project and financial management capabilities designed to meet the unique needs of project-driven organizations. Microsoft partners have built on this platform to create solutions that can help you meet requirements that are industry specific; here are just a few examples:

• Professional services: Drive better decision making, manage people and finances, and maintain profitability for client services and projects.

• Government contracting: Complete projects on time, on budget, and to specification—while collecting and retaining the detailed information needed to comply with government regulations.

• Construction: Get the solution you need for improved sales, project management, job costing, materials management, and more— all integrated with your financial systems.

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

Dynamics Partners

Dynamics SL is sold exclusively through Dynamics Partners who are trusted advisors for your end-to-end business solution. Dynamics partners provide planning, implementation, customization, and support services aimed at optimizing your solution for your specific business needs beyond just accounting. They have the expertise to ensure your solution works for you.

Deploying Dynamics SL

Regardless of how the software is purchased it can be deployed where you choose. (On premises, private cloud, public cloud or a hybrid combination)

Buying Dynamics SL

Regardless of how and where the software is deployed, customers have the choice of purchasing their Microsoft Dynamics SL licenses up front or paying a monthly fee to a service provider.

Business Ready Licensing for Microsoft Dynamics SL

Microsoft Dynamics business management solutions are designed to help automate your unique business processes and accelerate your organization's success. This guide will take you through how each of the product modules available within Microsoft Dynamics SL can help propel your business forward—the components are grouped by the functional area they address to help you see the impact on your business.
Depending on the level of functionality your business needs, you have the choice of 2 Editions available in Business Ready Licensing:

> 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, mid-market, or high functional needs customers who are looking for an adaptive solution with a broad set of functionalities, including all functionality included in the Business Essentials Edition.

Additional 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.

Editions Overview

Microsoft Dynamics SL Editions Overview

Microsoft Dynamics SL is sold in two different editions. Below is a list of components available by edition.

Business Essentials		Advanced Management
Accounts Payable	Management Reporter Designer User	Analyzer
Accounts Receivable	Multi-Company	Bill of Materials
Bank Reconciliation	Order Management	Cash Manager
Crystal Reports	Purchasing	Flexible Billings
Currency Manager	Quick Query Viewer	Requisitions
General Ledger	Quick Query Editor	Project Allocator
Inventory	System Manager	Project Controller
Landed Cost	Web Services for Microsoft Dynamics SL	+ Business Essentials

A la carte components must be purchased individually.
Below is a listing of components available by edition.

Business Essentials	a la carte	Advanced Management	a la carte
Application Server		Shipping Management	Management Reporter: Designer User
Bill of Material		Application Server	Microsoft Project Connector
Cash Manager		Communicator	Orders to Purchase
Customization Manager		Contract Management	Payroll (United States)
eCommerce Connector		Customization Manager	Payroll Advanced (United States)
Financial Statement Translation		eCommerce Connector	Project Budgeting
Light User		Resource Management	Service Contract
Management Reporter Designer User		Equipment Maintenance	Service Dispatch
Work Order		Financial Statement Translation	Time and Expense for Projects
Payroll (United States)		Flat Rate Pricing	Tools for Visual Basic for Microsoft Dynamics SL
Advanced Payroll (United States)		Inventory Replacement	Work Order
Requisitions		Light User	Limited Device CAL
Tools for Visual Basic for Microsoft Dynamics SL			

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Functionality Overview

Microsoft Dynamics SL Functionality Overview

Financial Management	Business Intelligence and Reporting	Project Management	Field Service Management
Accounts Payable	Business Analyzer	Analyzer	Equipment Maintenance
Accounts Receivable	Quick Query	Communicator	Flat Rate Pricing
Application Server	Quick Query Web App	Contract Management	Service Contracts
Bank Reconciliation	Quick Query Editor	Employee Utilization	Service Dispatch
Cash Manager	Management Reporter	Flexible Billings	
Currency Management	SSRS Report Writer	Microsoft Project Contractors	
Financial Transaction Translation	Power BI	Project Allocator	
General Ledger		Project Controller	
Multi Company		Time and Expense for Projects	
Connector for Microsoft Dynamics CRM			

Payroll Management	Supply Chain Management	Manufacturing	Collaborative Workspace	Configuration and Development
Payroll (UNITED STATES)	eCommerce Connector	Bill of Material	Light User	Customization Manager
Advanced Payroll (UNITED STATES)	Inventory	Work Order	Limited Device CAL	Tools for Visual Basic for Microsoft Dynamics SL
	Inventory Replenishment			Web Services for Microsoft Dynamics SL
	Order Management			System Manager
	Orders to Purchase			
	Purchasing			
	Requisitions			
	Shipping Management			

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Think bigger than Dynamics SL

Dynamics SL works with many other technologies giving you more options to solve business problems beyond basic accounting. Our goal is to leverage tools you already know like Excel, combined with new technologies that expand through your entire organization.

When you purchase Dynamics SL you are getting much more than leading class accounting. You are getting a business solution from Microsoft

Community

Dynamics SL has an exceptional community that is vibrant and active, filled with experts. With online community forums and events, you can leverage how other companies are utilizing Dynamics SL to get new ideas on how to do business better. www.dslug.com

Microsoft Office 365

Dynamics SL works with Office and Office 365 to extend the value of your business solution with enhanced productivity, collaboration, mobility and business intelligence. Dynamics SL utilizes existing functionality to you give you more value such as sending document to SharePoint, word documents, refreshable excel reports, PowerBI reports.

Microsoft Cloud

Dynamics SL gives you the power to choose how you want to utilize cloud technologies. You can deploy in the Microsoft cloud on Microsoft Azure in either a public or private setting. If you aren't ready to fully go to the cloud you can do a hybrid. This flexibility gives you choices now and into the future. Azure gives you the flexibility and enterprise-class security, reliability and scalability.

Independent Software Vendors (ISV's)

Every business is different and has unique needs, some of these requirements are specific to your industry, location or size. Dynamics SL embraces our trusted and tenured ISV community to extend the solution to give you more value.

SQL SERVER

Dynamics SL utilizes full SQL Server technology including the Microsoft SQL Server database, and SQL Server Reporting Services.

Dynamics SL is optimized for a SQL database with built-in scalability plus you can take it further to improve performance for your specific business processes. It also utilizes SQL views to enable faster and easier reporting.

PowerBI

For many years, the Dynamics SL product strategy has focused on better reporting and giving you ways to turn your data from multiple sources into knowledge. PowerBI is a suite of business analytics tools that delivers business insights throughout your business. It enables you to aggregate, analyze and share data easily.

One Business Solution from Microsoft

Business Analyzer

A Windows application that provides business intelligence using Microsoft Dynamics SL, Microsoft SQL Reporting Services and Microsoft Excel charts.

Other specific functions planned to be released as companion applications include Microsoft Dynamics SL Workspace.

Application Access Choice

Microsoft Dynamics SL offers two methods of accessing the application: the Windows desktop client and Web Apps. The Web Apps enables secure access to Microsoft Dynamics SL using a browser thereby enabling anytime, anywhere access.

Web Apps

Microsoft Dynamics SL Web Apps give you access to Microsoft Dynamics SL data where and when it is needed: on a tablet, smartphone, as well as your desktop. Remote access via Web Apps are provided in Project, Resource Planning, Financial, Requisitions & Reporting areas of Microsoft Dynamics SL.

Quick Query

Allow your people to slice, dice and filter your business data to provide answers quicker through Quick Query, one of the most popular features in Microsoft Dynamics SL. Over a hundred Quick Queries are built into the application and you can also edit them and build your own.

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.

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

PowerBI Dashboards and Reports

Several premade dashboards and reports are available that connect directly the Dynamics SL and accessible through PowerBI.

Business Analyzer

Gain powerful, role-specific insight with charts and graphs both inside of Microsoft Dynamics SL client and outside through a companion application, plus perform tasks and collaborate with others. View SQL Reporting Services reports and Microsoft Excel charts & Management Reporter reports from one central location, giving you the ability to work with a preferred device and location.

Quick Query &
Quick Query Web App

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. Refreshable Excel documents and Pivot tables. Quick Query Web App provides easy remote access to information.

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Quick Query Editor ▮▮

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

Management Reporter Viewer & 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.

SSRS Report Writer

Included with Microsoft SQL Server are the capabilities to create, edit and host SQL Server Report.

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.

Resource Management ▮

A web app interface provides a graphical interface to assist in viewing resources and assigning them to projects.

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.

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. New enhanced multi-currency and multi-company features allow for further flexibility and ease of processing.

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.

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 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.

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.

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.

Supply Chain Management

eCommerce Connector

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 eCommerce Connector 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.

Shipping Management

Build the content to create shipping labels, build shipment detail, charge shipments, and do much more with Microsoft Dynamics SL Shipping Management.

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.

Collaborative workspace

Light User

Unlock business potential and enhance productivity by providing role-based access to information and processes from a single web- based portal. Microsoft Dynamics SL Web Apps integrate 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.

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.

Limited Device CAL

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

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.

Power Suite Integration

Power BI

Power BI is a suite of business analytics tools that deliver insights throughout your organization. Connect to hundreds of data sources, simplify data prep, and drive ad hoc analysis. Produce beautiful reports, then publish them for your organization to consume on the web and across mobile devices. Everyone can create personalized dashboards with a unique, 360-degree view of their business. And scale across the enterprise, with governance and security built-in.

SL Power BI Content Pack

The initial Dynamics SL Power BI Project content pack comes with instructions on how to connect and build reports using your SL Project data. Three Power BI dashboards, connected to Dynamics SL project data, are available.

OData Services

OData Services provide a way to deliver a consistent connection to Microsoft Dynamics SL data. These will be used to create installable packages to deliver Power BI reports to Dynamics SL customers.

Microsoft Power Apps

Build apps fast with a point-and-click approach to app design. Choose from a large selection of templates or start from a blank canvas. Easily connect your app to data and use Excel-like expressions to easily add logic. Next publish your app to the web, iOS, Android, and Windows 10.

Microsoft Flow

Microsoft Flow provides a way to create automated workflows between your favorite apps and services to get notifications, synchronize files, collect data, and more.

Microsoft Power Apps and Flow for Microsoft Dynamics SL

Microsoft Dynamics SL 2018 includes Power Apps and Flow built to connect to Microsoft Dynamics SL data. Initial release of Power Apps includes Accounts Receivable applications built for phone and one built for tablets/desktops. Initial release includes:

- Viewing Customer Receivables Due
- View and interact with customer information
- Run the Customer Aging Process to update balances
- Automated email of Aging Results to view

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Microsoft Resources

Microsoft Dynamics Website Learn about what Microsoft Dynamics solutions can do for your organization and how to get started. http://www.microsoft.com/en-us/dynamics/erp-sl-overview.aspx

Microsoft Dynamics SL Community Website Learn from others from the vast community of customers and partners. http://community.dynamics.com/sl/default.aspx

Microsoft Dynamics Marketplace Find the right experts, applications and services for your needs. http://dynamics-erp.pinpoint.microsoft.com/en-US/applications/search/id-d7?q=

Software License Terms Get product license terms. http://www.microsoft.com/en-us/dynamics/erp-buy-sl-software.aspx

CustomerSource

Microsoft Dynamics CustomerSource is a password-protected site for customers who use Microsoft Dynamics products. Included as a benefit of your service plan, CustomerSource allows you to search a powerful Knowledge Base for Microsoft Dynamics, view online training for Microsoft Dynamics, download updates, and find other timely information and resources virtually 24 hours a day. (Sign-in required.) http://www.microsoft.com/dynamics/customer/en-us/access-customersource/default.aspx