

# ACHIEVE RESULTS

*Microsoft Dynamics™ SL Overview Brochure*

Achieve more with solutions designed  
to help you drive business success.



Designed for forward-thinking organizations, Microsoft Dynamics SL is an integrated, adaptable business management solution that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics SL works like and with familiar Microsoft software, automating and streamlining financial, project, service, and supply chain processes in a way that helps you drive business success.

## *A Relevant Tool*

### **Familiar to your people**

Microsoft Dynamics SL works like other Microsoft products you and your people are familiar with, helping reduce the time required to learn how to use it, and freeing up time to focus on what matters most.

### **Fits with your systems**

Microsoft Dynamics SL works the way your current technology works so it fits easily into your systems, helping to maximize your investment in Microsoft technology.

### **Fuels your business productivity**

Microsoft Dynamics SL helps fuel the productivity of your business by automating your business-critical operations and adapting to fit into your type of business ensuring the most relevant insight.

### **Enables confident decision making**

Microsoft Dynamics SL helps you respond rapidly to the changing demands of your business, providing you with more complete insight across your organization so you and your people can make timely and informed decisions with increased confidence.

### **Integrated applications that WORK the way you do.**

Ideal for project-centric and distribution-focused organizations, Microsoft Dynamics SL is a line of integrated, adaptable business management solutions that include reporting and analysis, financial management, payroll, project management and project accounting, distribution management, field service, and comprehensive customization tools.

*“We determined that Microsoft Dynamics SL was the only mid-market product able to meet all our accounting and reporting needs.”*

Dean Poirier,  
Treasurer,  
Edco



# Microsoft Dynamics SL Modules

## FINANCIAL MANAGEMENT AND PAYROLL

Accounts Payable  
Accounts Receivable  
Bank Reconciliation  
Cash Manager  
Currency Manager  
Financial Statement Translation  
General Ledger  
Multi-Company  
Payroll/Direct Deposit  
Advanced Payroll

## REPORTING AND ANALYSIS

BIO™ for Microsoft Dynamics SL  
Microsoft Business Solutions FRx®  
Microsoft Business Solutions Forecaster  
Crystal Reports® Professional

## PROJECT MANAGEMENT AND ACCOUNTING

Allocator  
Analyzer  
Communicator  
Contract Management  
Employee Utilization  
Flexible Billings  
Project Budgeting  
Project Controller  
Microsoft Office Project Connector  
Time and Expense for Projects

## DISTRIBUTION

Advanced Shipment Management  
Bill of Materials  
e-Commerce Gateway–EDI Edition  
Inventory  
Inventory Replenishment  
Landed Cost  
Order Management  
Order to Purchase  
Purchasing  
Requisitions  
Work Order


## FIELD SERVICE

Equipment Maintenance  
Flat Rate Pricing  
Service Contracts  
Service Dispatch

## FOUNDATION

Application Server  
Business portal for Microsoft Dynamics SL  
Customization Manager  
System Manager  
Shared Information  
Tools for Visual Basic®


*These applications serve as the core foundation of your business management system to help you see a common, connected view of your company to help you seize opportunities with confidence.*





ACHIEVE





*"The ability to make work orders look exactly how we want them to look has added more value than any other software we looked at could provide."*

Melodie Young,  
IT Director,  
Kirkwood Electric.

# IMPROVE

# Customer Success Story

## MICROSOFT DYNAMICS SL AT WORK

*Kirkwood Electric, Inc.*

Kirkwood Electric provides services to customers in four categories in Southwest Florida: residential, commercial, service (ranging from residential work to commercial projects such as colleges and gated communities), and home technologies.

With the goal of providing a measure of customer satisfaction that builds lasting relationships with those clients, Kirkwood is known for unparalleled service.

## IMPROVING BUSINESS PROCESSES

Kirkwood's COBOL based accounting package was not keeping pace with the company's growth nor was it easy or efficient to use. Kirkwood needed a solution that would not only cover all the usual accounting areas to include accounts payable, accounts receivable, payroll, limited job costing, and general ledger but would also generate work orders, dispatch crews, track their current location, and provide an overview of the work in progress. Implementing Microsoft Dynamics SL brought the much needed changes to Kirkwood:

### Accountability

Before, it was extremely difficult for employees to tell where one service technician was, much less where all of the service technicians were. The Field Service module, with its graphical dispatch board, shows the location of all the technicians at a single glance, enabled Kirkwood to improve on accountability.

### Reporting

Previously, Kirkwood had been forced to bring data out into Microsoft Excel spreadsheets before they could use it, and this data had to be manipulated before it was usable. Now, Microsoft Dynamics SL provides Kirkwood staff with instant reports based on actual data, and weekly reports are completed in a fraction of the time previously needed.

### Customizability

Kirkwood employees appreciate that the new solution can be made into whatever they need it to be. The screens of both the Field Service and Project Management and Accounting modules have been customized to hide fields that Kirkwood employees don't use and to create additional fields they need. Kirkwood has also customized the setup for both invoices and work orders.

### Customizing the Solution

Kirkwood Electric turned to a Microsoft reselling partner, to find and implement Microsoft Dynamics SL. The company needed a solution capable of easily tracking service technicians for this division and employees and managers wanted easier reporting and improved tracking of job profitability throughout the company.

Today, the Kirkwood solution includes several modules, including:

#### Field Service Management

The graphical dispatch board in the Field Service Management series allows Kirkwood staff to quickly shift crews from jobs of lower priority to those of the highest priority.

#### Project Management and Accounting

These modules offer Kirkwood one of the biggest benefits of the new solution: ease of adding change orders and addendums to contracts. This ability to add change orders, as they are generated, provides Kirkwood with a clear picture of the revised project totals.

#### Customization Tools

Microsoft consultants worked with Kirkwood to customize the solution. These enhancements provided integration with Microsoft MapPoint® business mapping software, which enables employees to print maps showing the location of a customer's residence for Service division staff.

### Return On Investment

- **Time savings:** Reports take less time to produce, and need no editing before they are ready to be circulated. What used to take six to eight hours a week now only requires 30 minutes a week — a significant reduction.
- **Increased efficiency:** Dispatching and tracking crews for the Service division was a juggling act, but Microsoft Dynamics SL helps Kirkwood staff follow crews and their work orders from dispatch to final profitability.
- **Room to grow:** One goal from the outset was to find a solution that could grow with the company. With Microsoft Dynamics SL, the Kirkwood is now able to increase revenue without having to increase the support staff at the same rate.





ADAPT



## Works Like and With Familiar Microsoft Software

Reduce training and development time, to see an immediate return on investment. **With Microsoft Dynamics SL, you can get your people up and running quickly and easily.**

Map activities to people's tasks for an individualized experience. **Microsoft Dynamics SL has a role-based design** that helps keep people focused and simplify tasks, while delivering the powerful functionality you need. Customize and automate based on people's own preferences and work style. Give them the insight to help fuel business productivity.

### **Microsoft Dynamics works with Microsoft products you already use.**

- Enables your people to work in familiar Microsoft Office software while accessing data from your business management solution
- Leverages other Microsoft product innovations such as SQL and Windows

### **Automate your business-critical operations so you and your people can be more effective.**

Microsoft Dynamics SL has been deployed in hundreds of industries with the necessary, specialized functions and ability to cost-effectively tailor the solution to meet a specific need. The solution is especially ideal for project-centric and distribution-focused organizations.

- Connect employees within and from outside the office to project data, timesheets, and more for improved efficiency.
- Engineer cost out of labor intensive processes by automating activities like order fulfillment: planning, picking, packing, and shipping.
- Create an efficient bridge between structured and unstructured work.

### **Exchange information between employees, vendors and customers.**

Foster collaboration across lines of business with a common employee web portal for all business information. Help people be more productive and service customers better by providing for mobility and remote access. Connect to vendors and customers with built-in EDI (Electronic Data interchange).

By building on your current investments in Microsoft technology, Microsoft Dynamics helps ensure greater return on investment.

## A Platform for Insight

With Microsoft Dynamics SL, you can respond more rapidly to the changing demands of your business. Access a current, consolidated view of your business data to help people answer the question:

**"Where do I need to focus today to have the biggest impact on my business?"**

- Amplify the impact people can have with role-based views for analyzing business activities across the company.
- Focus in quickly on trends such as rising and falling performance and then drill down to really understand the underlying causes.
- Analyze data in near real-time in familiar tools like Microsoft Office Excel.

Produce presentation-ready reports for managers, executives, and board meetings. Easily distribute period and year-end closing and ad-hoc reports to the right people, at the right time, in the right format. Get exactly the view you want with the drill-down detail you need.

### **Designed to adapt to fit into your type of business.**

Configuration tools are built in standard Microsoft technology, so they are familiar to your people and easy to use. People can configure their own screens the way they want. Unique business functions can be built in without changing source code. Entirely new applications can be built in the same toolset used to develop the product so that deployment to people is seamless and familiar and the data is integrated.

### **Built to change and evolve with your business and technology needs.**

Microsoft Dynamics SL is built to change and evolve with your business and technology needs. Customizations and configurations can be made for all people, groups, or individuals. Custom business processes can be developed to work with the standard Microsoft Dynamics SL applications without modifying source code, so your long term cost of supporting modifications is minimized. What's more, there is a large ecosystem of finely tailored offerings from independent software vendors to ensure you can create a solution that fits your type of business.

### **Meet industry-specific needs with confidence.**

Microsoft Dynamics SL has designed standard product applications for many specific industries, including:

- **Professional Services**
- **Management Consulting**
- **Architectural and Engineering Firms**
- **General and Specialty Contractors**
- **Homebuilders**
- **Distributors and Retailers**
- **Non-profit organizations**
- **Healthcare and social services organizations**
- **Companies that want to track costs and bill for project-based operations**
- **and many more.**

Seize the opportunity to excel within your industry by integrating with third-party applications and industry-specific solutions to give you the leading edge over the competition.



## Financial Management/ Project Accounting

### STEP AHEAD WITH COMPLETE FINANCIAL AND BUSINESS MANAGEMENT

Take hold of accounting and financial management applications that enable you to handle every aspect of your organization's finances from core general ledger to complex payroll requirements, whether you're a single company with a small financial staff or have multiple accounting departments spread across several companies.

Account views and transaction processing can be tailored to meet your business needs. Full integration with other Microsoft Dynamics SL product suites and with solutions such as Microsoft Office Project ensures that critical financial data is updated and available across your organization at all times. You'll be able to represent the impact of other operations, from distribution to project management, in a consolidated ledger for easy management, reporting, and retrieval. Plus, native support for e-business functionality gives you the power to extend information anywhere, from any location.

### REALIZE PROFIT POTENTIAL WITH INTEGRATED PROJECT MANAGEMENT AND ACCOUNTING

When you bring together accounting and project data into one integrated system, you can free employees to focus on what matters most – providing great service and delivery.

The Microsoft Office Project Connector integrates project and financial data between Microsoft Dynamics SL and Microsoft Office Project Enterprise Edition, providing deep visibility into project financial and schedule data and virtually eliminating data reentry. The result is Project Managers and Accounting can work from the same set of numbers, greatly reducing the traditional, arduous reconciliation.

Project-driven organizations can increase project efficiency and realization with unlimited work breakdown structures and budgets, complex allocations, proactive alerts and work flow, and much more. Integrated time and expense entry insure that billable activities are quickly passed on to the customer to reduce revenue leakage and improve cash flow. Automated processes streamline accounting, billing, and reporting for all project-related activity.

Sophisticated budgeting capabilities let you test the "what if" scenarios key to effective planning. And whether employees are working onsite or remotely, they'll be able to update and analyze project information via their Web browser.

*"We needed software with true multi-company capabilities and strong project accounting. As a not for profit educational collaborative which receives funding from federal, state and local sources, we have a legal and moral responsibility to properly manage and account for these public dollars. Microsoft Dynamics SL was able to help us meet both our accounting and reporting needs."*

Dean Poirier,  
Treasurer,  
EDCO

## Customer Success Story

### IMPROVING THE BOTTOM LINE

#### *Omicron Consulting*

Through amplifying the impact that people can have on the business, reducing mistakes, finding greater efficiencies, and achieving better planning, Microsoft Dynamics SL can have a positive impact on the bottom line. One customer found this out first hand.

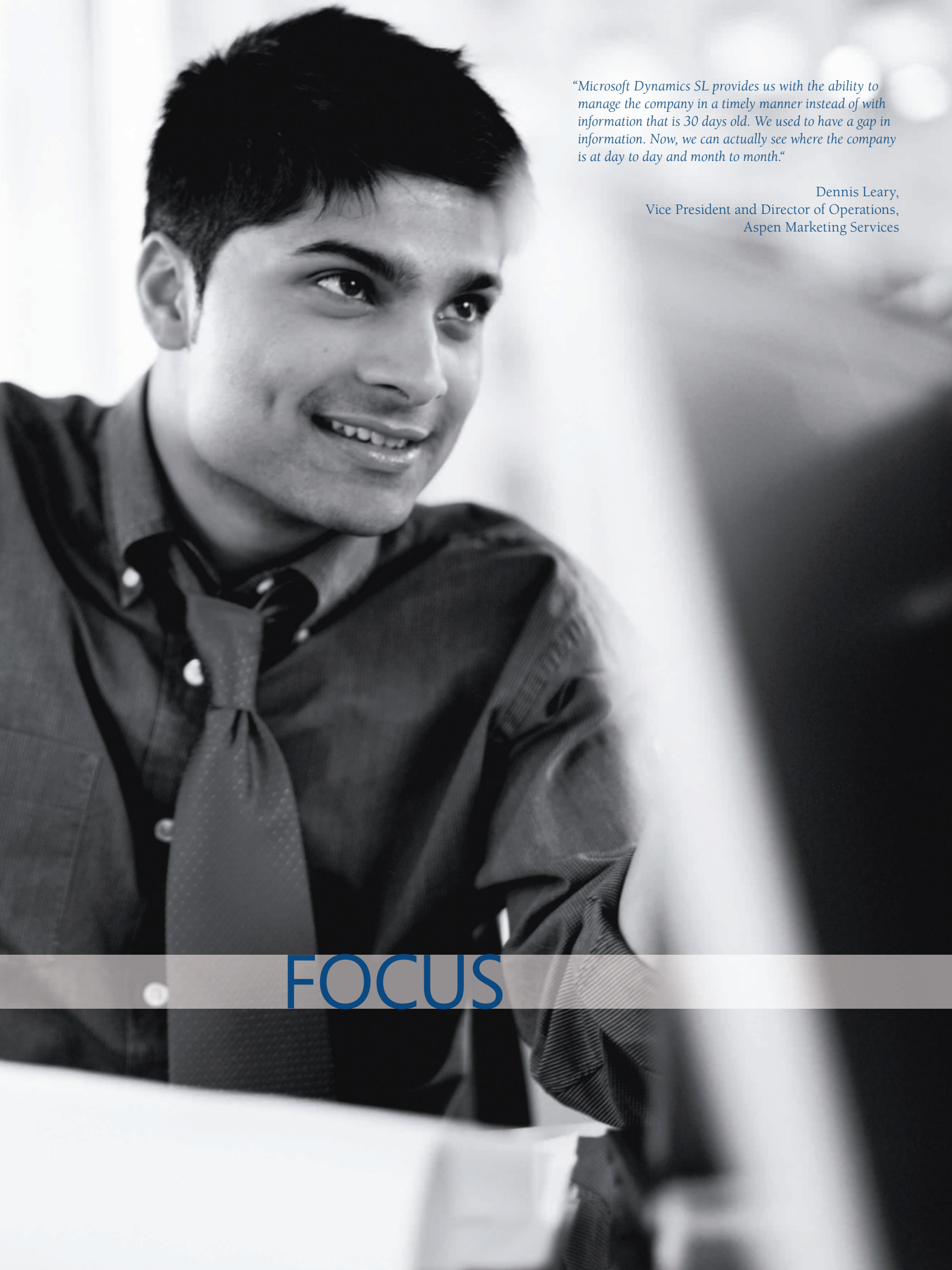
Omicron Consulting is an IT solution provider of software development and network services based in Philadelphia, Pennsylvania. Engaging an independent firm, Nucleus Research, Inc., to help them measure their success, Omicron was able to measure the results. With Microsoft Dynamics SL, Omicron Consulting has improved its cash flow, increased the productivity of its project managers, and streamlined its project reporting and accounting operations for a net return of 375% and payback period of three months.

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INTEGRATE





*"Microsoft Dynamics SL provides us with the ability to manage the company in a timely manner instead of with information that is 30 days old. We used to have a gap in information. Now, we can actually see where the company is at day to day and month to month."*

Dennis Leary,  
Vice President and Director of Operations,  
Aspen Marketing Services

FOCUS

## Reach Further

### DRIVE STRATEGIC DECISIONS WITH THE RIGHT INFORMATION

Because applications are integrated, you can drill back instantly to information from any module. For example, if you need to know labor costs for evaluating a project budget, you can simply pull up costs in Project Controller—where costs have been updated from Payroll. And with BIO™ for Microsoft Dynamics SL, you'll be able to access relevant analysis from your system while working within Internet Explorer, Microsoft Excel, and Microsoft Outlook. The result? Employees and management are freed from chasing down information to focus on driving your business forward and giving your customers the fast, accurate answers that build loyalty.

### DELIVER INFORMATION ANYTIME, ANYWHERE

Wherever your employees are, they can have access to detailed, current business information. Whether you want to schedule automated delivery of reports by e-mail or provide employees with secure, Web-based access to applications and information, Microsoft Dynamics SL delivers.

### CREATE AND CUSTOMIZE REPORTS TO MEET YOUR EXACT NEEDS

Utilizing BIO for Microsoft Dynamics SL you can create knowledge out of data for your people to understand next steps they should take. Provide all people in the organization with perspectives on the correlation between relevant trends, such as billings, revenue recognized, and project profit. Then, provide the command and control needed for on-going management of the business such as for budgeting and audits.

Equipped with FRx Financial Reporter and Forecaster, you can build and distribute comprehensive financial reports with extensive drill-down capabilities, as well as work with reliable, fast budgeting processes that adapt to meet changing needs. You can also export and import information to and from Microsoft Excel.

*"Microsoft Dynamics is powerful enough to grow with our needs and has provided us the technology to work towards a more efficient operation."*

Justin Osborne,  
Vice President,  
Industrial-Irrigation

## Distribution and Field Service

### BALANCE SUPPLY AND DEMAND WITH MAXIMUM FLEXIBILITY

Superb customer service begins and ends with your ability to maintain control over every aspect of your distribution processes, from purchasing and maintaining inventory to processing and shipping orders. Distribution capabilities let you configure your distribution cycle to optimize sales and ordering processes and put inventory to the most strategic use—while keeping an eye on cash flow with integrated customer credit checking.

Tight integration means that employees enter information once—orders, inventory, costs, and revenue are automatically updated throughout your entire system. The chance for data entry errors are reduced. Ledger accounts and inventory quantities stay in balance. Customer and vendor payments are processed easily. You're able to turn information about sales and expenditures into strategies that let you outdistance the competition.

### BUILD LONG-TERM PROFITABILITY WITH LASTING RELATIONSHIPS

Provide your customers and vendors with the information and services they want. Respond immediately to customer requests with instant access to inventory and order information.

Negotiate pricing discounts that increase customer satisfaction, yet still protect your margin goals. Match customers' complex shipping requirements for a single order with a few clicks. And with electronic data interchange (EDI) capabilities and Web-based access to order information, you'll be able to work with customers and vendors across disparate systems, regardless of location.

Your goal is to serve customers based on their needs, without worrying about your software requirements. Microsoft Dynamics SL helps make that real.

### DO BUSINESS AT THE SPEED OF LIGHT

A fast and effective alternative to traditional paper-based communications, Electronic Data Interchange (EDI) lets you integrate and automate electronic transactions with customers and vendors. Efficiently process orders without the errors and time delays associated with manual processes. eCommerce Gateway—EDI Edition and advance shipment management functions offer tight integration with Order Management, Inventory, and Purchasing applications, providing the seamless extension of your solution demanded by your customers and vendors.





## *Connect Information, Processes, and People*

### **FIELD SERVICE THAT WORKS FOR YOU**

When your business is about customers, you want to spend your time helping them and maximizing profits, not managing multiple systems for dispatch, service maintenance, and billing.

Field Service applications support all fundamental aspects of service call processing and dispatching. For example, the Week-at-a-Glance Graphical Dispatch Board allows dispatchers to manage technician time and schedule calls more efficiently, while integration with Microsoft MapPoint® helps ensure that technicians arrive at the right location at the right time. The result? Billable time and customer satisfaction can both be improved.

Ideal for service companies and construction firms such as heating, ventilating, and air conditioning contractors, Field Service applications also support full management of service contracts from quotation to renewals; equipment management, including both routine and unscheduled maintenance; and full invoicing capabilities, including contracts, time and materials, and flat rate pricing. Engineers and technicians can stay focused on responding to customers, while your business stays focused on maximizing revenue from contracts.

### **REMOVE BARRIERS BY EXTENDING THE REACH OF INFORMATION, APPLICATIONS, AND PROCESSES**

Increase the velocity of your business transactions by taking your accounting, project management, and distribution operations to the Web. Business portal for Microsoft Dynamics SL provides role-based access applications and information through a personalized Web portal solution, delivering anytime, anywhere access, along with the flexibility to tailor information views and workflow processes to meet your exact needs. Amplify the impact your people have on the business by providing easy access to necessary information. Reduce the stream of requests for custom reports and simple business facts. By extending key information to customers and suppliers, you'll be able to capitalize on business opportunities in real-time.

*"Microsoft Dynamics SL has worked out phenomenally well for us. What we've done has proven that we can put a fully automated process in a complex business environment."*

Mike Maksymic,  
General Manager,  
A-1 Cement Contractors

# CONNECT



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## **Microsoft®**

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