

# STRATEGIC

## ***Statement of Direction***

### ***Microsoft Dynamics GP***

*Date*  
**October 2008**

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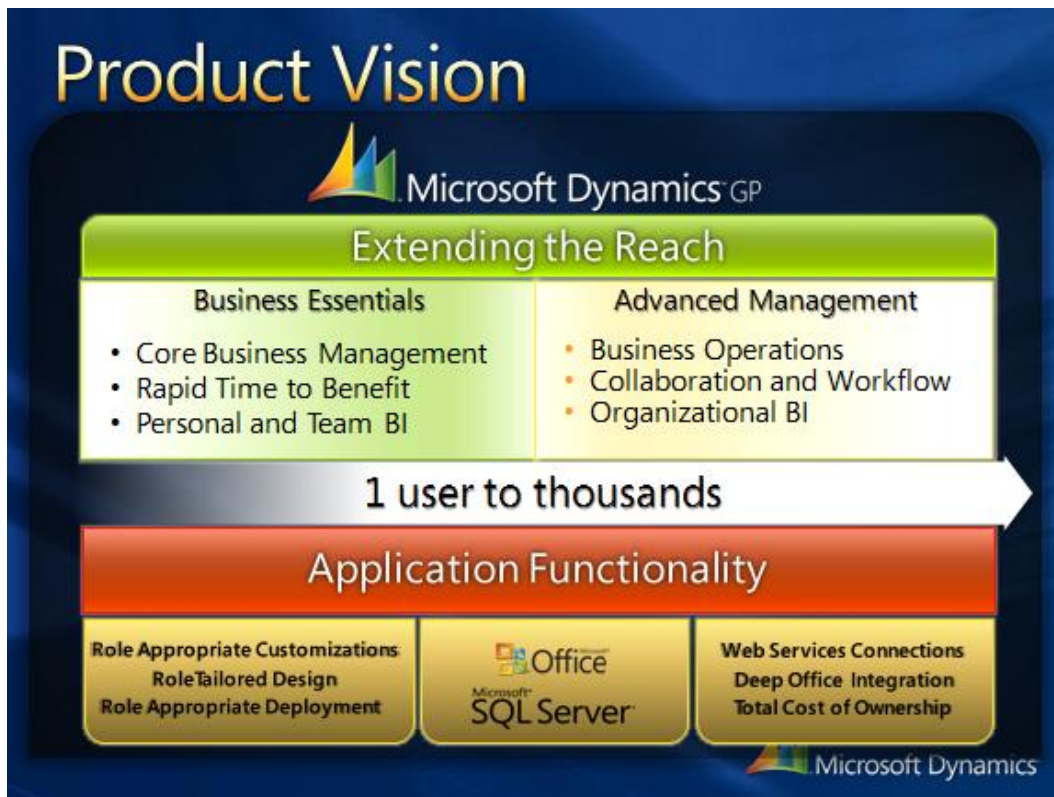
## Executive Summary

This statement of direction brings Microsoft Dynamics customers and partners up-to-date on the product development road map for Microsoft Dynamics® GP through 2010. This document replaces all previous versions and provides relevant information about:

- Our product vision, including more details around our guiding principles, our “solution that fits,” and extending the reach of Microsoft Dynamics GP
- Our product development strategy including:
  - A full overview of the recently released Microsoft Dynamics GP 10.0 Feature Pack
  - A brief overview of our development goals for Microsoft Dynamics GP “11”
- Geographic Availability and Localizations

## Product Vision

Businesses need solutions that go beyond financial management to reflect the way people really work—the tasks they perform, the information they use, the tools and formats that make sense for their individual jobs and that help them work more productively. The guiding principles behind Microsoft Dynamics GP are designed to meet those needs. They are the foundation for what we refer to as a RoleTailored solution, one that offers a personalized user experience, deep integration with the applications people use every day, and functionality and deployment options that fit customers’ specific organizational needs.



## Guiding Principles

Microsoft Dynamics GP accommodates different ways of working and extends process flow and information to every person in the organization. The guiding principles behind our product vision include:

### RoleTailored Design

Our user experience looks and feels like the Microsoft® Office system and gives people fast access to the tools and information they need to excel at their individual jobs. Built-in Role Centers give every user a highly personalized experience that maximizes productivity. Deep integration with the Microsoft Office system and Microsoft SQL Server® enable people to find, share, and use data with their preferred tools.

### Role-Appropriate Customizations

Our RoleTailored design makes it faster and easier for everyday users to tailor their experience and access to information and tools, reducing IT efforts from the start. Developers and ISVs can take advantage of new Web Services and industry standard tools to integrate new solutions into the core Microsoft Dynamics GP solution—without touching source code.

### Role-Appropriate Deployment

Microsoft Dynamics GP helps customers realize the Total Cost of Ownership (TCO) that fits their business needs, budgets, and growth plans. We “keep it simple,” and at the same time, help organizations meet specialized needs efficiently and cost-effectively. We offer built-in tools for rapid installation, configuration, and data migration—ideal for smaller companies with straightforward requirements, and a critical time-saver for companies that require more complex implementations. Integrations with Microsoft Dynamics Sure Step methodology further reduces implementation time and costs.

## A Solution That Fits

We give customers a true “solution of choice” by enabling them to license the package that meets their specific needs.

**Microsoft Dynamics GP Business Essentials** is packaged and priced for companies looking for built-in business management and business intelligence functionality that’s fast to install and ready to use from the start. Our Business Essentials package delivers core financial management functionality and personal and team-based business intelligence, and at the same time drives rapid time to benefit and the ability to change seamlessly to Microsoft Dynamics GP Advanced Management.

**Microsoft Dynamics GP Advanced Management** is designed to help companies proactively manage a wide range of business operations and performance. Our Advanced Management package increases the depth and breadth of functional capabilities, offers enhanced built-in collaboration and workflow capabilities, and delivers business intelligence tools that reach beyond individual and team-based analytics to span the entire organization.

### Scalability

Transaction processing speed and system scalability are critical to growing business environments. Customers need systems that can easily handle existing transaction loads, with the ability to manage significant increases should your business experience exponential growth. Microsoft Dynamics GP is designed to work with Windows® operating systems and SQL Server to provide high-volume transaction processing at low costs, as validated by the Transaction Processing Performance Council benchmarks, with the ability to scale from 1–1000 users. [Learn more](#) about scalability with Microsoft Dynamics GP.

## Extending the Reach

Microsoft Office SharePoint Server 2007 is a platform for integrating and developing solutions that extend the traditional ERP system to the entire organization. With a strong emphasis on Web Services, Microsoft Dynamics GP enables businesses to dissolve boundaries across applications and systems by extending information to employees, customers, suppliers, and partners. The goal is to help increase access to relevant Microsoft Dynamics GP information without complicated implementation efforts.

Businesses also can add new capabilities by extending Microsoft Dynamics GP through online services, mobile devices, and application integration. Workflow and business processes can be tailored to specific organizational needs, dramatically increasing operational efficiency. In addition, the solution can be deployed on premise or in hosted environments.

[Learn more](#) about utilizing Web Services and Service Oriented Architecture for Microsoft Dynamics GP.



### Online Services

For companies that want to move a particular business process online using Web Services, Microsoft Dynamics offers a cost-effective customization option that aligns with Microsoft Software plus Services strategies. In addition, development plans for Microsoft Dynamics GP "11" include consideration of the following online services offerings: Marketplace services such as eBay and OL commerce; online payment services such as CPS, PayPal, VeriSign, Vital, and FDC; and online credit monitoring services such as Equifax.

## **Mobile Devices**

Microsoft Dynamics GP offers a comprehensive mobile solution with Field Service Anywhere. The Microsoft Dynamics GP ISV community also offers a range of mobile solutions; the integration between a mobile device and Microsoft Dynamics GP is created using Web Services. For more information, visit [Solution Finder](#).

## **Application Integrations**

Microsoft Dynamics GP enables ISVs to extend the application into many industries and specific vertical markets. Using tools available for Microsoft Dynamics GP, partners and customers can build integrations and data synchronization with other business applications to ensure data integrity and consistency, minimize duplication of effort, and maximize business efficiency. [Learn more](#) about developing application integrations.

Integrations developed by Microsoft are available for applications such as Microsoft Dynamics Retail Management System (RMS). [Learn more](#) about Microsoft Dynamics RMS integration. Integration for Microsoft Dynamics GP 10.0 and Microsoft Dynamics CRM 4.0 is being developed and is targeted for availability in the second half of Calendar 2009. Third-party solutions also are available. To learn more visit [Solution Finder](#).

## **Workflow and Processes**

Many business processes involve multiple steps that must be coordinated to ensure accuracy and efficiency. Microsoft Dynamics GP workflows automate a number of team-based tasks, reduce data entry errors by requiring approval for specific operations, and increase the ability to audit processes by maintaining historical approval information.

Web Services extend workflow management to other applications by enabling Microsoft Dynamics GP integrations for Microsoft Office SharePoint® Server 2007 and other products, including Office Outlook and Microsoft Office InfoPath® 2007. Workflow can also be customized to meet business-specific needs. [Learn more](#) about Software Development Kits (SDKs) for Microsoft Dynamics GP.

## **Partner-Hosted Deployments**

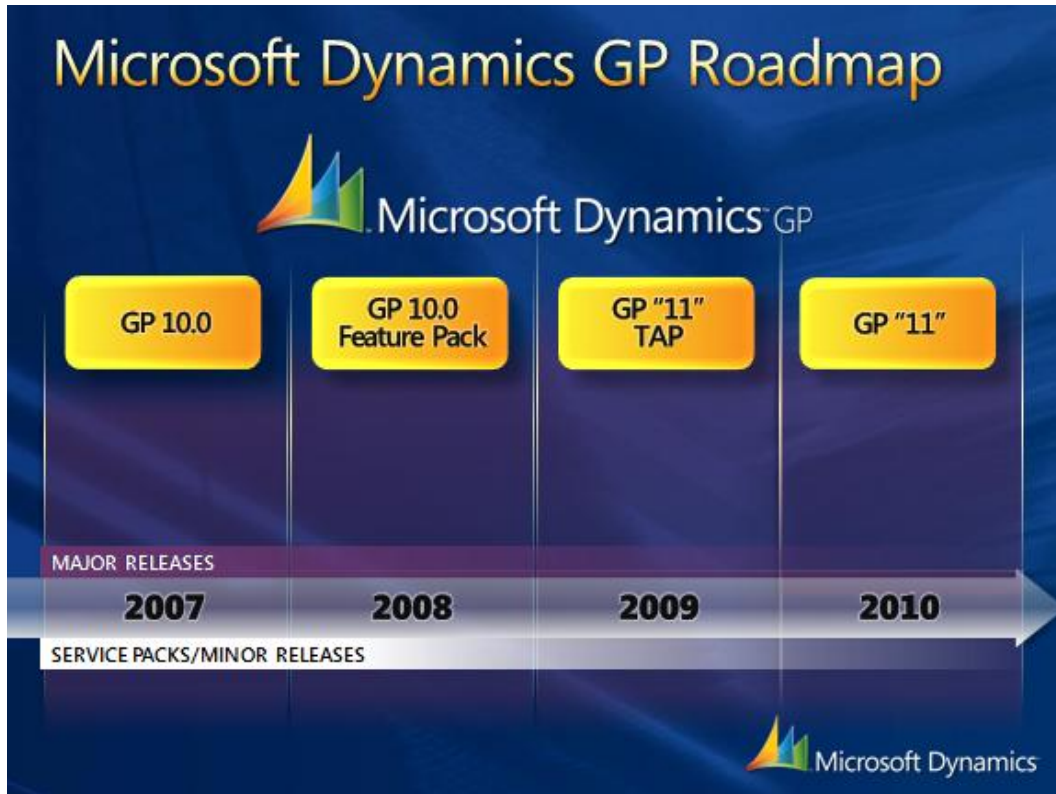
Through the Microsoft Software plus Services initiative, customers looking for alternatives to on-premise implementations can choose a partner-hosted deployment for Microsoft Dynamics GP. Because the hosted deployment is managed by a service provider, companies can free IT resources to focus on more strategic business and technology goals. [Learn more](#) about partner-hosted deployments and the different licensing options.

## **Virtualization**

Finding ways to reduce costs and increase utilization of resources is at the forefront of every business. Virtualization not only increases computing efficiency and reduce IT management complexity, but also conserves space, electricity, peripheral costs, and more. Microsoft Dynamics GP supports [Windows Server 2008 Virtualization](#), including Hyper-V, as well as [Microsoft SoftGrid Application Virtualization](#). [Learn more](#) about virtualization. [Learn more](#) about supported environments and systems.

## Microsoft Dynamics GP Product Development Roadmap

A major goal of our product development road map is to help protect the investments of customers by helping them move to new versions of Microsoft Dynamics GP when it makes sense for their business, while realizing the full benefits of technology innovations.



### Timeline for worldwide Microsoft Dynamics GP releases

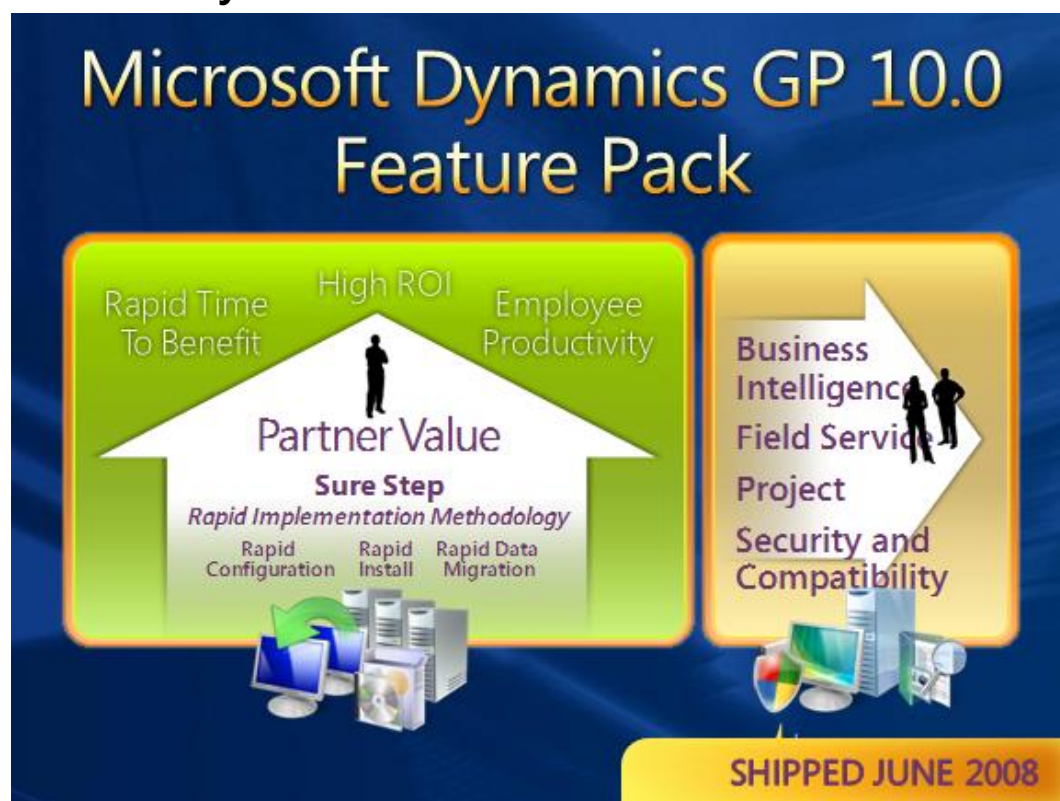
Since 2005, Microsoft Dynamics GP has delivered two major releases and two extension releases. In addition, Microsoft Dynamics GP and the Microsoft Office system will continue to share technologies. Both customers and partners have expressed concern about their ability to keep pace with this aggressive release cycle. To address customer and partner needs and work in concert with the Microsoft Office system, we will now schedule our major release cycle around future Microsoft Office system releases, which generally occur every 24–30 months.

### Microsoft Dynamics GP 10.0

For a detailed overview of Microsoft Dynamics GP 10.0, please see the following brochures:

- [Microsoft Dynamics GP 10.0 Enhancements](#)
- [Microsoft Dynamics GP Business Essentials](#)
- [Microsoft Dynamics GP Advanced Management](#)

## Microsoft Dynamics GP 10.0 Feature Pack



Microsoft Dynamics GP already offers a solution designed for rapid installation and straightforward configuration and data migration. With the Microsoft Dynamics GP 10.0 Feature Pack, we delivered implementation tools that decrease time, complexity, and costs for solution deployments. New capabilities for business intelligence, reporting, field service, and project accounting help businesses tailor analytic and operational functionality to specific needs. System enhancements enable role-based security management, increase ability to work with development and customization tools, and ensure immediate compatibility with SQL Server 2008 and Windows Server 2008.

The Microsoft Dynamics GP 10.0 Feature Pack shipped in June 2008. The following charts offer a comprehensive view of new features and functionality.

Business Intelligence/Reporting	
Feature	Description
Integration with Microsoft Office PerformancePoint™ Server 2007	A new data connection supports Office PerformancePoint Server 2007 planning functionality. Dynamics GP currently utilizes Office PerformancePoint Server 2007 scorecarding\analysis functionality through integration with SQL Server Analysis cubes.
Office Excel Report Builder	Automate report generation with the Office Excel Report Builder. Create charts and graphs based on real-time, refreshable data from Microsoft Dynamics GP.
Workflow Archiving	Improve system-wide data management and reporting. Completed workflow history records are now stored in Microsoft SQL Server databases.
Historical Inventory Trial Balance Report	Tie inventory to General Ledger by a specified date or period, broken out by quantity groups such as Available for Sale or Return.
Analytical Accounting Alias	Increase speed and accuracy with an alias that defaults account dimensions.

<b>Rapid Implementation Tools</b>	
<b>Feature</b>	<b>Description</b>
Rapid Installation	Ensure fast, straightforward installation with the Basic option in Microsoft Dynamics GP Utilities. Installation includes default settings for the database and account framework, offers simplified set-up screens, and automatically populates settings to help eliminate confusion.
Rapid Configuration Tool	Quickly configure core Microsoft Dynamics GP modules with a user-friendly tool. Advanced staff can work with 13 customizable Office Excel templates that include all configuration settings and data (such as fiscal years and payment terms) for the core modules, as well as create new templates.
Rapid Migration Tool	Simplify the move to Microsoft Dynamics GP from QuickBooks, specifically 2003–2008 versions of QuickBooks Basic, Professional, Premier, and Enterprise 3.0–8.0 editions. Users can mark specific information for migration to Microsoft Dynamics GP, including master records, open transactions, and setup. Once the data is exported from QuickBooks, the master records can be sent to Office Excel, giving users the option to change data before importing it into Microsoft Dynamics GP.
Microsoft Dynamics Sure Step Documentation	Rapid Implementation tools work with Microsoft Dynamics Sure Step, an easy-to-use methodology that includes tools, proven best practices, and customizable templates that help ensure reliable implementation, migration, and upgrades.

<b>Field Service Management</b>	
<b>Feature</b>	<b>Description</b>
Sales Order Append Window	Add items from Sales Order Processing to an existing open contract.
Consolidated Service Call Billing	Create one invoice per customer that includes all service calls invoices for a given range of time.
Reconcile Service Totals Report	This new report shows any service calls that were corrected and can be printed after reconciliation.
Contract Move for "Quote" contracts	Improvements to Contract Move functionality will allow users to work with Quote contracts as well as Open contracts.
Sales Order link with Equipment Maintenance	Drill down to the original sales order used for the item shipped.
Contract Type	Add the Contract Type field to the Service Call Entry/Update window.
Depot Inquiry Drill-Back	Change all Depot Inquiry drill-backs to the Work Order Inquiry window.

<b>Project Accounting</b>	
<b>Feature</b>	<b>Description</b>
Post Payroll Burden to Projects	Payroll benefits are now included in Project Accounting to reflect true project costs.
Cost Allocation	Allocate costs from one project to another based on unit, dollar amount, or percentage.
Globally Add Cost Categories to Projects	Automate project setup time with a routine to automatically add the cost category to the budget line of multiple projects or project templates.
Project Creation on Open Contracts	Create Projects under Open Contracts without having to change the Contract status to Estimate.

System and Tools Enhancements	
Feature	Description
New Web Services for Payroll Employee	Two New Payroll Web Services enable import for new employee information and views of existing employee data.
Dynamics Security Synchronization Utility	The Security Synchronization Utility enables synchronization of roles automatically or on an as-needed basis across Business Portal for Microsoft Dynamics GP, Office SharePoint Server 2007, and Web Services for Microsoft Dynamics GP.
XML Source Adapter for Integration Manager	Directly import XML documents into Microsoft Dynamics GP.
Dexterity Updates	New documentation offers instructions for adding customizations similar to new features in Microsoft Dynamics GP 10.0, including Navigation Pane buttons and Area Pages.
Visual Studio Tools for Dynamics GP	New documentation offers detail for upgrading to Visual Studio 2008, as well as updated information on templates and enhanced information for the Dictionary Assembly Generator (DAG.exe).
SQL Server 2008 Compatibility	Microsoft Dynamics GP 10.0 Feature Pack is compatible with SQL Server 2008.
Windows Server 2008 Compatibility	Microsoft Dynamics GP 10.0 Feature Pack offers built-in compatibility with Microsoft Windows Server 2008, including Hyper-V Virtualization.

## Microsoft Dynamics GP "11"

Microsoft Dynamics GP "11" development will focus on increasing depth and reach for core functionality, enriching integrations with the Microsoft Office system, extending external connections through Web Services, and ensuring faster Return on Investment (ROI) for customers.

***Development goals for Microsoft Dynamics GP "11" are still in process and subject to change.***

The infographic features a dark blue background with the title "Microsoft Dynamics GP '11'" in large, glowing yellow and orange letters at the top. Below the title are four vertical columns, each with a colored header and a list of bullet points. At the bottom of each column is a small icon representing the goal. The Microsoft Dynamics logo is in the bottom right corner.

Make it easier to pursue new opportunities	Enable your people to be more productive	Better connections with suppliers & customers	Accelerate GP Implementations
<ul style="list-style-type: none"> <li>• Deep Functionality</li> <li>• Industry Enablement</li> </ul>	<ul style="list-style-type: none"> <li>• Optimized for Office 14</li> <li>• Extend Workflow</li> <li>• Role-Tailored BI</li> </ul>	<ul style="list-style-type: none"> <li>• Web Services</li> <li>• Vendor Portal</li> <li>• Customer Portal</li> <li>• Software + Service</li> </ul>	<ul style="list-style-type: none"> <li>• Rapid "2"</li> <li>• Reduce Complexity of Portal Deployment</li> </ul>

### **Make it easier to pursue new opportunities**

Our goal is to offer deeper functionality for both core and specialized processes and enable key industries. Development plans include built-in features and enhancements that span many product areas—including, but not limited to, Financials, Human Resources and Payroll, Supply Chain Management, and Service Management. New business intelligence capabilities will enable companies to consolidate, personalize, and expand the reach of analysis and reporting across the organization.

### **Enable people to be more productive**

Enhanced integration with the Microsoft Office system will include built-in capabilities for stronger integration, reporting drill back, and new workflow processes. The workflow and business intelligence infrastructure will allow companies to extend processes and share information in relevant formats with every person in the organization.

### **Better connections with suppliers, customers, and partners**

Companies looking to extend specific business processes and connect more easily with suppliers, customers, and service providers can take advantage of improvements to hosted deployments, built-in vendor and customer portals, and additional Web Services.

### **Accelerate Microsoft Dynamics GP "11" implementations**

With Microsoft Dynamics GP "11" we plan to continue investments in implementation tools to create the business management solution of choice for fast and easy deployment, including installation, data migration, and configuration. We will also focus on achieving full 64-bit compatibility.

**The following features list is a partial list that does not fully represent the significance of this major release. Enhancements and new features are still under development and subject to change.**

<b>Business Intelligence/Reporting</b>	
<b>Feature Area</b>	<b>Description</b>
KPI Metrics	New KPI Metrics will allow users to create charts and graphs that can display from Office SharePoint Server or the Microsoft Dynamics GP Home Page.
Office Forms	Create, modify, and deploy reports—for example, Invoices or Picking Tickets—from Office Word or Office Excel.
Drill-back	Drill back into Microsoft Dynamics GP from Office Excel and SQL Reporting Services.
Workflow	<ul style="list-style-type: none"><li>• Step workflow, attaching documents, and approval groups</li><li>• New workflows including:<ul style="list-style-type: none"><li>○ Onboarding Employees</li><li>○ Terminating Employees</li><li>○ Vendor Approval</li></ul></li></ul>

<b>Financial Management</b>	
<b>Feature Area</b>	<b>Description</b>
Encumbrance Management	Set up Encumbrance Management integration with Purchase Order Approvals and Workflow for separation of duties.
Payables Management	Limit Payable vouchers and credits within a specific range when selecting checks.
Receivables Management	LockBox capabilities enable import of a single payment that can be applied to multiple customers/invoices.

<b>US Payroll</b>	
<b>Feature Area</b>	<b>Description</b>
Payroll	<ul style="list-style-type: none"><li>• Blended overtime rate calculation</li><li>• Ability to map earnings, deductions and benefits to multiple W-2 boxes</li></ul>

Supply Chain Management	
Feature Area	Description
Inventory	Automate lot numbering.
Purchase Order Processing	<ul style="list-style-type: none"> <li>• Vendor Portal: Vendors will have ability to view and update relevant information (sales history, open orders, history, contact information, and addresses)</li> <li>• PO Returns and Encumbrance Management integration</li> </ul>
Sales Order Processing	<ul style="list-style-type: none"> <li>• Print back order line items on picking ticket.</li> <li>• Customer Portal: Ability for customers to update their account information (contacts, address, phone, e-mail)</li> </ul>
Manufacturing	<ul style="list-style-type: none"> <li>• Improved navigation within the Sales Forecasting window</li> <li>• Multi-site material requirements planning</li> </ul>

Service Management	
Feature Area	Description
Project Accounting	Additional SQL Reporting Services project reports
Field Service Management	<ul style="list-style-type: none"> <li>• Ability to assign multiple service hour ranges on contracts</li> <li>• Integration of labor information with Payroll</li> <li>• Option to generate preventive maintenance service calls for contracted equipment</li> <li>• Ability to add non-inventory items to a service call</li> </ul>

System	
Feature Area	Description
System Management	<ul style="list-style-type: none"> <li>• Lookup limits: Filter inactive records from lookup windows</li> <li>• Column lists: Enable ISV's to add columns to lists using a utility</li> <li>• Rapid migration for additional products, offering new options for ISVs</li> <li>• Ability to e-mail documents individually or by batch, with scheduling functionality</li> </ul>
Web Services	30+ new Web Services focusing on connectivity areas requested by customers
Security	Sorting and enhanced copy functionality within security windows for increased usability
Dexterity	<ul style="list-style-type: none"> <li>• Ability to store strings in an external DLL for use by dictionaries</li> <li>• Enhancements to Microsoft Visual Studio tools for working with .NET and Microsoft Dynamics GP, including unsubscribe from events, table buffers as parameters, procedure/function triggers, and list box enhancements</li> </ul>

## Geographic Availability and Localizations

Microsoft Dynamics GP is available in US English, International English, French-Canadian, and Latin American Spanish. Microsoft Dynamics GP offers a number of localization features designed to meet requirements specific to a country or region. We also offer language translations with each release. In addition, ISV providers offer localizations for specific country requirements. The extent of the localization varies per language and release. Languages other than International English are normally released after the major release. Legal requirements per country can vary widely and the localizations developed by Microsoft may not meet all localization requirements.

Microsoft Dynamics GP has been sold in 50+ countries across the world, primarily in North America, South America, and English-speaking countries. Because Microsoft Dynamics GP offers flexible reporting and broad functionality, many organizations deploy the solution around the world without additional localization needs.