

## ***Statement of Direction***

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

***Date***

***January 2010***



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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. 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 Service Pack
  - An overview of our development goals for Microsoft Dynamics GP 2010
  - A brief overview of our development goals for beyond Microsoft Dynamics GP 2010
- Geographic Availability and Localizations

## What is Microsoft Dynamics GP?

For mid-sized companies that struggle with a lack of functionality or are overwhelmed by an overly complex system—Microsoft Dynamics® GP delivers a **comprehensive** ERP solution that goes **beyond basic business management and reporting** to meet your unique needs. Unlike many ERP systems, Microsoft Dynamics GP is easy to implement and use, enables **all** your people to work with information in ways that are familiar to them, and delivers innovation now and into the future.

## Market Focus

Microsoft Dynamics® GP delivers enterprise resource planning (ERP) software and targets midmarket customers in the Americas, and English speaking countries, with a sweet spot of companies with 50 to 1,000 employees and divisions of global enterprises. Target markets focus on organizations in the following primary industries: distribution, manufacturing, retail, professional and financial services, not for profit and public sector (including state and local government, healthcare, and education). Our competitive edge across verticals and micro-verticals is greatly strengthened by the domain expertise and complementary software provided by our partners. For more information on vertical solutions, visit [Solution Finder](#).

## 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 Role Tailored 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.

# Product Vision



## Extending the Reach

### Business Essentials

- Core Business Management
- Rapid Time to Benefit
- Personal and Team BI

### Advanced Management

- Business Operations
- Collaboration and Workflow
- Organizational BI

Role Appropriate Customizations  
RoleTailored Design  
Role Appropriate Deployment

Office  
Microsoft  
SQL Server

Web Service Connections  
Deep Office Integration  
Total Cost of Ownership

## Guiding Principles

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 Web Services and industry standard tools to integrate new or existing solutions with the 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–Many users. [Learn more](#) about scalability with Microsoft Dynamics GP.

## Extending the Reach

Microsoft Office SharePoint Server is a platform for integrating and developing solutions that extend the traditional ERP system to the entire organization. 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 2010 include consideration of the following online services offerings: Marketplace services such as eBay and ecommerce; online payment services such as CPS, PayPal, VeriSign, Vital, and FDC; and online credit monitoring services such as Equifax.

**Mobile Devices**

The Microsoft Dynamics GP ISV community 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 vertical markets. Using available programming and customization tools, 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) and Microsoft Dynamics CRM 4.0. [Learn more](#) about Microsoft Dynamics RMS integration. [Learn more](#) about Microsoft Dynamics CRM integration. 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.

## **Business Intelligence**

The goal of business intelligence for Microsoft Dynamics GP is to extend access to information to everyone in your company. Delivering on that goal requires providing the role-relevant charts, graphs, KPI's, reporting and financial information in a familiar analysis environment for each role. Microsoft Dynamics GP provides 80+ charts, graphs and KPI's using standard Microsoft BI tools allowing you to receive value immediately while providing the environment for your specific needs. For many, doing detailed data analysis in Microsoft Excel is the preferred method. Microsoft Dynamics GP provides over 200 refreshable Excel reports and an Excel Report builder that will deliver all the information you require in the environment you prefer.

## **Partner-Hosted Deployments**

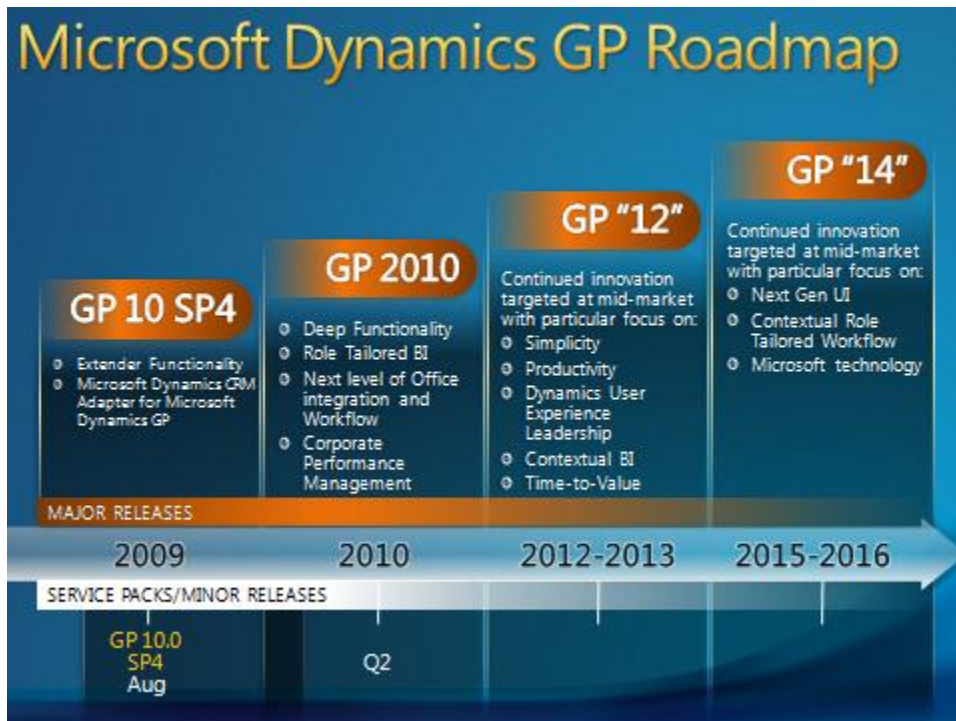
Through the Microsoft Software plus Services initiative, customers looking for alternatives to on-premise implementations can choose a partner-hosted deployment for Microsoft Dynamics GP. Because the hosted deployment is managed by a service provider, companies can free IT resources to focus on more 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

From 2005–2008, Microsoft Dynamics GP delivered two major releases and two extension releases. In addition, Microsoft Dynamics GP and the Microsoft Office system will continue to share technologies. To address customer and partner needs and work in concert with the Microsoft Office system, we will schedule our major release cycle around future Microsoft Office system releases, which generally occur every 24–30 months.

## Microsoft Dynamics GP 10.0

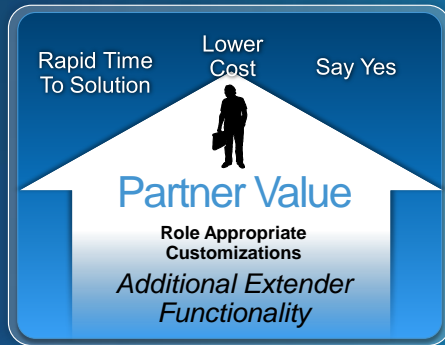
For a detailed overview of Microsoft Dynamics GP 10.0, please see the following brochures:

- [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 10.0 Service Pack 4

Microsoft Dynamics GP 10.0 Service Pack 4 will focus on problem report resolutions and much, much more. Two strategic functionality enhancements will be added for Extender and an Adaptor for Microsoft Dynamics GP and Microsoft Dynamics CRM.

# Microsoft Dynamics GP 10 SP4 and More!



**Announcing—Extender Price Change:**  
\$2450 August 1, 2009

**Target Release Date: Calendar Q3 2009**

## Extender

Extender is an easy-to-use product that allows you to add data fields, notes, macros, lookups and much more, without writing a single line of code. Develop strong business processes and enrich your reporting power for Microsoft Dynamics® GP with this powerful functionality.

### Feature List

#### Forms Features

- |   |   |
|---|---|
| <ul style="list-style-type: none"> <li>• Create Standalone Forms for Data entry</li> <li>• Auto-generate next Master ID Numbers</li> <li>• Create Lookups to be used on other Extender Objects</li> <li>• Create Multicurrency Forms</li> <li>• Add Additional Windows</li> <li>• Add Note and Note List Windows</li> </ul> | <ul style="list-style-type: none"> <li>• Add Form Information to SmartList</li> <li>• Create Templates and Views</li> <li>• Add Default Values</li> <li>• Import Data into Forms</li> <li>• Add to Home Page as Quick Link</li> </ul> |
|---|---|

#### Detailed Forms Features

- |  |  |
|--|--|
| <ul style="list-style-type: none"> <li>• Create Standalone Forms with Scrolling Windows</li> <li>• Auto-generate next ID Numbers</li> <li>• Create Lookups to be used on other Extender Objects</li> <li>• Create Multicurrency Forms</li> <li>• Add Additional Windows</li> <li>• Add Note and Note List Windows</li> </ul> | <ul style="list-style-type: none"> <li>• Add Detail Header and Line Information to SmartList</li> <li>• Create Templates and Views</li> <li>• Default Values and Line Items</li> <li>• Import Data into Detail Forms</li> <li>• Add to Home as Quick Link</li> </ul> |
|--|--|

#### Detailed Forms Features

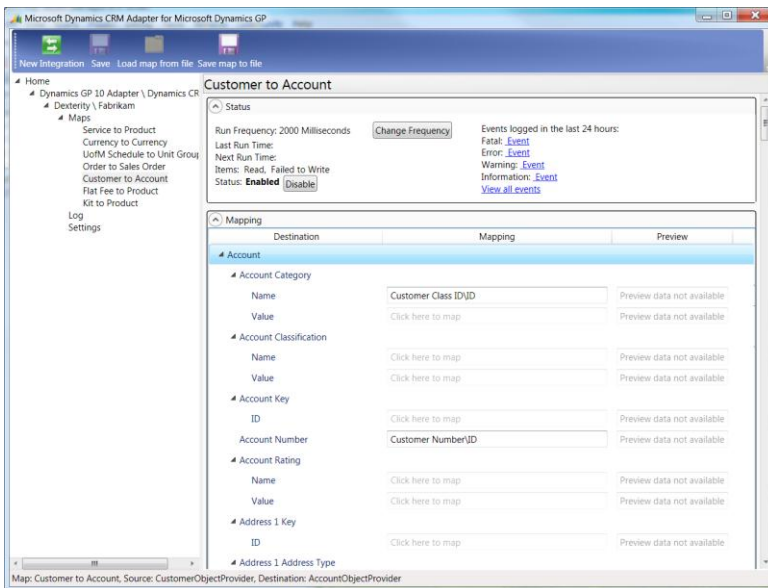
- Create New Menus
- Add Forms, Detail Forms, and Imports

## Microsoft Dynamics CRM Adapter for Microsoft Dynamics GP

The Microsoft Dynamics CRM 4.0 Adapter for Microsoft Dynamics GP 10.0, otherwise known as the “Adapter” is an extensible, multi-directional integration platform with a built-in integration between Dynamics GP and Dynamics CRM. The adapter is a simple and easy integration solution that enables developers to create independent integrations. At its core, the Adapter is all about moving data from one place in one shape to another place in a different shape. Adapters do the moving from place to place, and the transformation engine does the maps from one adapter to the other.

To ease in map configuration, a set of map templates will be provided which support the integration of a particular version of Dynamics products that can be modified to meet a particular customer's needs using the map authoring subsystem in the Adapter client. The Adapter service is responsible to monitor the runtime state of each integration map and report on its success or failure via logging messages in the Adapter data store.

The Adapter solution is capable of integrating products using a pull or a push model. A pull model will look for changes and run the adapter pulling only pieces that have changed. The push model gives the adapter a list of data to run the adapter with.



## Microsoft Dynamics GP 10.0 SP4

For a detailed overview of Microsoft Dynamics GP 10.0 SP4, please see the following brochures:

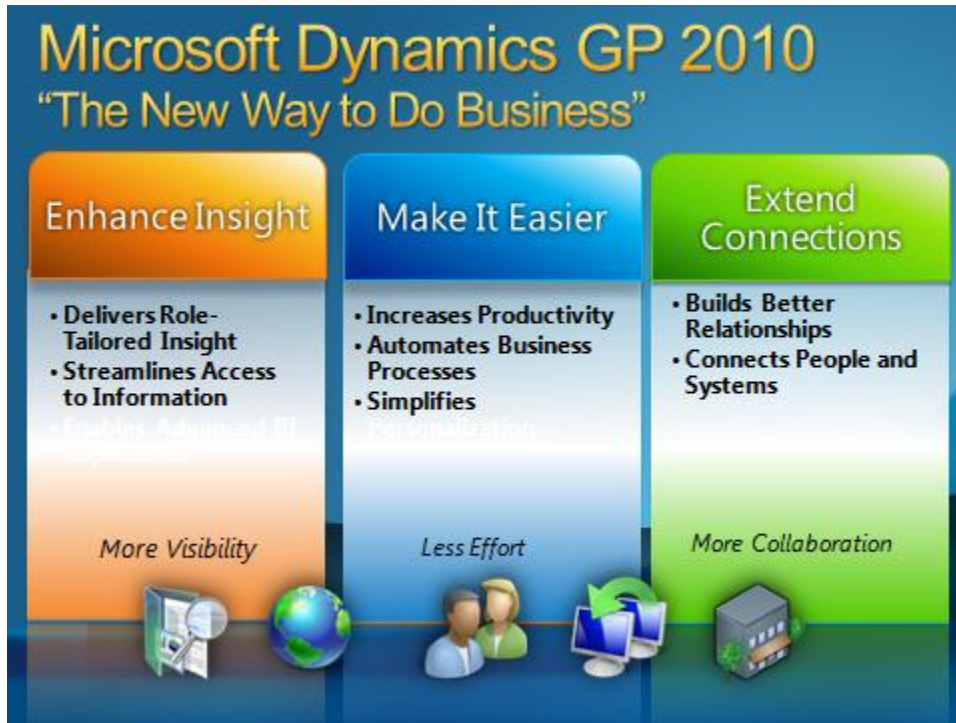
[Microsoft Dynamics GP Extender](#)

[Microsoft Dynamics CRM Adapter for Microsoft Dynamics GP \(CustomerSource\)](#)

[Microsoft Dynamics CRM Adapter for Microsoft Dynamics GP \(PartnerSource\)](#)

## Microsoft Dynamics GP 2010

Microsoft Dynamics GP 2010 extends the reach of insight, productivity, and collaboration across your entire business, helping ensure that people—and the different ways they work—are your most powerful asset. New capabilities deliver faster access to personalized business intelligence, enhanced ways to streamline business processes, and new ways to build better business relationships. Microsoft Dynamics GP 2010—The New Way to Do Business.



### Enhance Insight

Bring personalized business insight to key roles in your organization and extend access to information to everyone in your company

#### Deliver role-tailored insight

- Stay connected, speed planning, and fuel performance with role-based, personalized dashboards and KPI's that include charts, graphs, and gauges relevant to people's roles.
- Drill-back views enable fast access to of the right level of data, from a KPI down to the specific record source.
- Leverage additional reports with the enhanced library of built-in Microsoft® SQL Server® Reporting Services and Office Excel® reports.

#### Speed access to information

- Turn everyone into a power user—even if they're not Microsoft Dynamics GP users—with the ability to directly access and share information through the Office SharePoint® Server 2007 Reports Library.
- Give people a centralized, Web-based source for viewing consolidated resources—and reduce administrative work—by deploying SQL Server Reporting Services Reports to Office SharePoint Server 2007.
- Enhance the user experience within easy-to-use Action Panes and List Pages by connecting multiple data sources, such as ISV or custom fields.
- Tailor information access and delivery to meet specific user and business needs with enhanced Web Services.
- SQL Server views make it easier to retrieve data for simplified report creation. Extender views create SQL Server views that link Dynamics GP, ISV, or custom application for simplified reporting.

## **Deliver advanced business intelligence**

- Easily create refreshable Office Excel reports that include multiple sources of data, including ISV and custom applications, with the Excel Report Builder.
- Simplify delivery of business intelligence with new Web Services that connect with Microsoft Office applications.
- Perform advanced analytics, such as predictive analysis, by connecting Office Excel data mining with Microsoft Dynamics GP.

## **Make it Easier**

Automate business processes with rich new features that make it easier to work faster and smarter.

### **Increase productivity**

- Take advantage of Office Word to quickly create well-designed invoices, packing slips, and other customer-facing documents that draw information directly from Microsoft Dynamics GP.
- Connect with your customers more efficiently: Send batch and individual emails with invoices, picking lists, AP documents, and more.
- Improve financial efficiency and accuracy by tracking detailed information when budgets change.
- Streamline logon processes and reduce “password fatigue” with default logon settings.
- Make it easier to manage SharePoint-based, Web Services, and Business Portal security using the Dynamics Security Synchronization Utility.
- Help ensure that people get started fast with tools for fast installation, setup, and data migration.

### **Automate business processes**

- Reduce steps for routine tasks with enhanced workflow, including new workflows for onboarding employees, terminating employees, and vendor approvals.
- Create consistent processes with workflow approval steps.

### **Simplify personalization**

- Stop juggling multiple sources of information by linking windows—existing or new ones you build—to create your own business-specific application.
- Track specific issues by attaching multiple notes to any Microsoft Dynamics GP window. Connect notes from one document to another for easy communication and access.

## **Extend Connections**

Dissolve traditional boundaries to build business relationships that connect people, information, and processes across applications and systems.

### **Strengthen business relationships**

- Simplify portal deployments that connect and extend applications, information and processes—without complicated and costly implementation efforts.
- Know when your customers are online and save time with instant messaging through Microsoft Dynamics GP—from ad hoc communications through entry and delivery of sales orders.

### **Connect people and systems**

- Connect sales, service, and back-office information using built-in, two-way integration with Microsoft Dynamics CRM.
- A new, straightforward integration platform based on Web Services technology connects applications to/from Microsoft Dynamics GP, and enables internal or external developers to create independent integration adapters.
- Take full advantage of innovation with a new Web Services architecture that offers better performance and easier integrations.

- Benefit from more flexible integrations by using Web Services to create two-way connections that are not dependent on IIS.
- Capture business-specific information that connects your systems and streamlines your business processes with a fast, easy configuration that doesn't require writing new code.

**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> |

| <b>Supply Chain Management</b> |   |
|--------------------------------|---|
| <b>Feature Area</b>            | <b>Description</b>  |
| 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>  |

| <b>Service Management</b> |  |
|---------------------------|--|
| <b>Feature Area</b>       | <b>Description</b>   |
| 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>                  |

## Microsoft Dynamics GP “12”

This release will be consistent with our overall product vision for Microsoft Dynamics GP incorporating key deliverables in business intelligence, role-tailored user experience, and productivity enhancements that will allow organizations to receive a faster return on investment. Our goal for contextual BI will deliver business intelligence in the context of what roles of users work on during their day. This allows users to see the relevant information at the point of activity thus improving efficiency by limiting navigation away from their tasks to separate reporting or analytic functions. Microsoft Dynamics GP “12” will also extend our role-tailored design and role-appropriate customizations to allow all users to have a unique and meaningful user experience.

## 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.