

# Configuration and Development

## BENEFITS

**Configure your solution quickly and easily.** System Manager in Microsoft Dynamics GP offers efficient setup processes, easy-to-use navigation, and step-by-step help instructions.

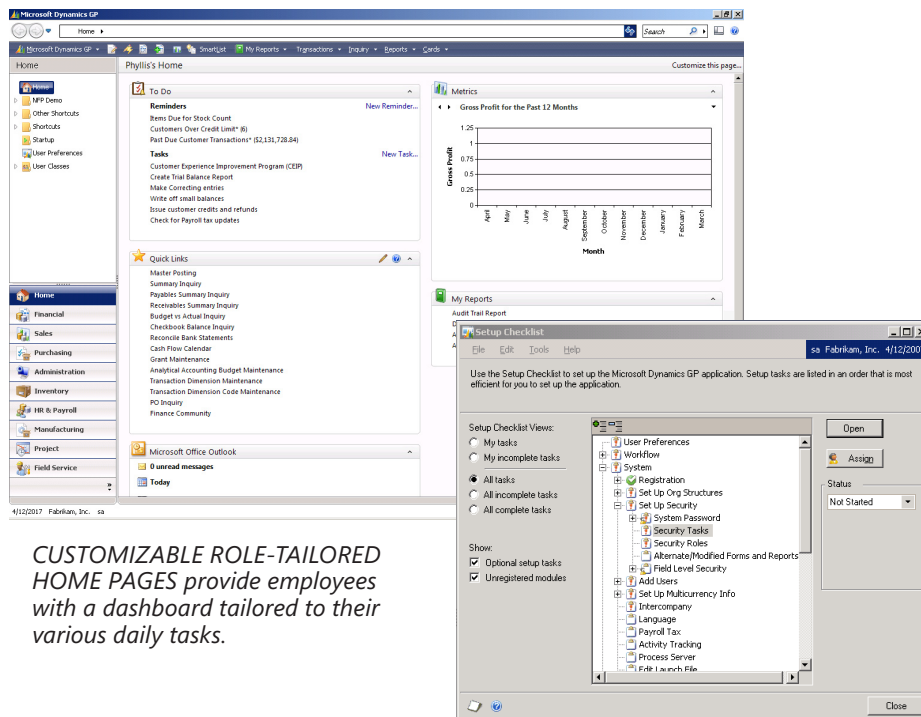
**Access information instantly and put it to work.** Instantly create queries against your data or access and export query results to Microsoft Office Excel® and Microsoft Office Word to create mailing lists, marketing initiatives, and filterable lists.

**Give employees immediate access to relevant information.** Role-tailored centers enable employees to find what they need right away.

**Expand your ability to recall data.** Easily manage and configure smart tags in your Microsoft Office system applications. User-interface icons automatically recognize customer names and other vital references and link you to further information in Microsoft Dynamics GP.

## System Manager in Microsoft Dynamics GP

Microsoft Dynamics GP captures the look and feel of Microsoft® Office Outlook®, along with list-based navigation with action panes and role-tailored menus and area pages that provide everyone in your organization with a clean, intuitive interface. Whether your employees are working in Microsoft Dynamics GP or the Microsoft Office system, they'll have a familiar user experience that boosts productivity and minimizes training costs.



*CUSTOMIZABLE ROLE-TAILORED HOME PAGES provide employees with a dashboard tailored to their various daily tasks.*

*PROCESS-BASED CHECKLISTS streamline setup and provide audit information to help users avoid missing steps and maintain user accountability.*

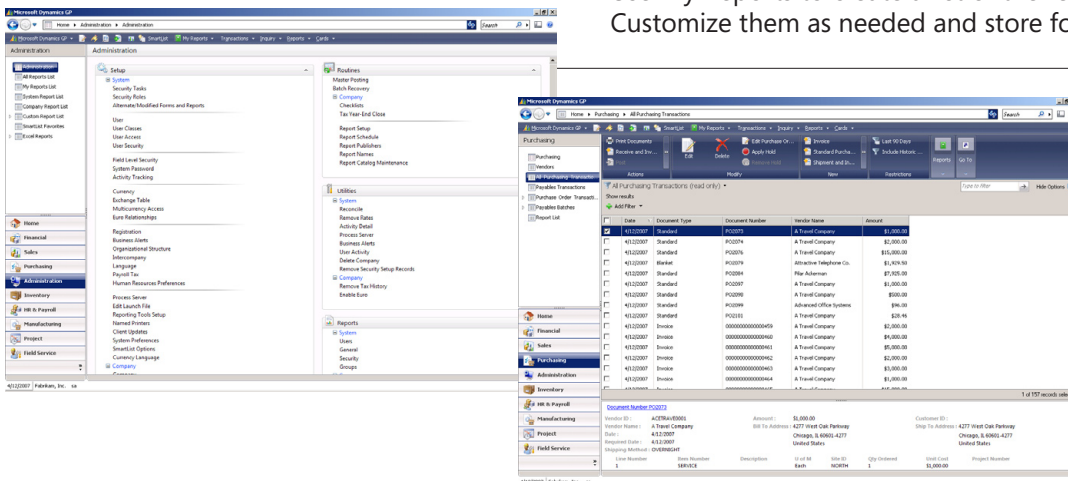
## SYSTEM MANAGER

### Rich Integration with the Microsoft Office System

- Share query and budgeting data with Office Excel and Office Word, with the ability to make full use of Office Excel-based reporting capabilities. Export Microsoft FRx® reports directly to Excel pivot tables.
- Publish Office Excel, Microsoft SQL Server™ Reporting Services reports, and other documents to Microsoft Office SharePoint® Server sites to increase collaboration and information sharing for more informed, efficient business decisions.
- Consolidate Office Excel, Office Word, and Microsoft Office PowerPoint® documents in Microsoft FRx reporting packages to deliver a single file that preserves all formatting and properties for each document type.
- Use the Letter Writing Assistant to build customized communications in Office Word.
- Send customer statements, invoices, and other documents via e-mail through Microsoft Office Outlook® and eliminate time-wasting, expensive paper mailing processes.
- Enter vacation requests through Microsoft Business Portal and have them automatically added to your Office Outlook calendar.
- Easily attach maps and directions for sales, delivery, and service call routes with single-click access to Microsoft MapPoint®.
- Link to Microsoft Dynamics GP data directly from Microsoft Office system applications, using smart tags to speed access to customer, vendor, inventory, the general ledger, and employee information.

### Intuitive Navigation Across Your Solution

- List-based navigation helps employees quickly locate a record or report once and then select and perform actions against that record or report.
- Simplified system navigation and action panes include an interface that shows buttons and paths only to those modules that an employee is authorized to use.
- Locate and launch reports from across your system quickly—including Microsoft Dynamics GP Report Writer reports, SmartLists, and SQL Server Reporting Services reports. Restrict and perform multiple actions for reports in the list.
- Use My Reports to create a list of the reports you use most often. Customize them as needed and store for one-click access.



AREA PAGES AND INTUITIVE ACTION PANES provide centralized navigation, security-based access, and streamlined task flow.

## SYSTEM MANAGER

<p>Information Tailored to Specific Industry Roles</p>	<p>Customizable role centers provide employees in professional services, distribution, retail, and public sector companies with a dashboard tailored to their daily tasks—including reminders, KPIs, and links to specific reports, feature guides, windows, or SmartLists. More than 20 customizable roles include:</p> <ul style="list-style-type: none"> <li>• Accounting Manager</li> <li>• Grant Manager</li> <li>• Warehouse Manager</li> <li>• Production Manager</li> <li>• Payroll Administrator</li> <li>• Shipping and Receiving</li> <li>• Human Resources Manager</li> <li>• Accounts Receivable Administrator</li> <li>• Accounts Payable Coordinator</li> <li>• Order Processor</li> <li>• Purchasing Agent</li> <li>• Bookkeeper</li> <li>• Production Planner</li> <li>• IT Operations Manager</li> <li>• Credit and Collections Manager</li> <li>• Shop Supervisor</li> <li>• Customer Service Rep</li> <li>• Accountant</li> <li>• Purchasing Manager</li> <li>• Operations Manager</li> <li>• Materials Manager</li> <li>• Dispatcher</li> </ul>
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## FEATURES

<p><b>Setup Checklists</b></p>	<p>Streamline setup with a clearly defined setup structure, a suggested order for completing setup steps, and the ability to assign windows or groups of windows to users for completion.</p>
<p><b>Intuitive User Interface and Action Panes</b></p>	<p>Initiate tasks quickly and easily using the intuitive navigation and user interface.</p>
<p><b>Mass Deployment</b></p>	<p>Create an installation package for a customized, configured version upgrade that can be installed across the organization by running a single file. Partners and IT staff can then use familiar tools and applications to push the deployment out to all clients.</p>
<p><b>Automatic Client Updates</b></p>	<p>Select, approve, and post Service Packs for automatic deployment across all client workstations. Employees are notified by e-mail alert when an update is posted.</p>
<p><b>Shortcuts</b></p>	<p>Improve productivity by grouping commonly used tasks in a convenient shortcut navigation bar.</p>
<p><b>To-Do Lists</b></p>	<p>Build online to-do lists and routine checklists for multi-step tasks.</p>
<p><b>Integration with Reporting Tools</b></p>	<p>Integrate smoothly with Report Writer and SQL Server Reporting Services to create professional-looking reports containing the exact information you need.</p>
<p><b>Online Contact Tools</b></p>	<p>Attach Internet addresses to employee records, items, customers, and vendors.</p>

## FEATURES

## SYSTEM MANAGER

<b>Notes</b>	Attach detailed information to master records and transactions for improved control and audit capabilities.
<b>Modify Data Entry Windows</b>	Use Modifier with Microsoft Visual Basic® for Applications (VBA) to add business-specific functions into data entry and inquiry windows.
<b>Reminders</b>	Schedule task reminders and assign reminders to specific users for follow-up actions.
<b>Type Ahead</b>	Auto-fill customer IDs, shipping methods, tax IDs, and any other field that has an associated lookup window in Microsoft Dynamics GP.
<b>Microsoft Office Smart Tags</b>	
<b>Link to Microsoft Dynamics GP</b>	Drill back instantly to key information with context-sensitive links between Microsoft Office documents and accounting and business management records.
<b>Smart Tag Viewer</b>	Enable users who don't run Microsoft Dynamics GP applications to access information through the Smart Tag viewer.
<b>Access Control</b>	Leverage your existing Windows NT® authentication routines, reducing administration and ensuring that only authorized personnel have access to your business management information.
<b>User Permissions</b>	Set up access rights easily. Define permissions via several pre-defined roles and tasks. User-friendly functions help you to copy and create your own roles and tasks, streamlining your data security and user access. New security reports make it easier to determine access privileges and comply with Sarbanes-Oxley auditing requirements.
<b>SmartLists</b>	
<b>Create and Modify Lists</b>	Instantly create sophisticated queries to find detailed customer, vendor, general ledger, inventory, employee, and salesperson information.
<b>Share and Save Lists</b>	Share saved queries with others in the organization.
<b>One-Click Export to Office Excel and Office Word</b>	Quickly update spreadsheets, create letters and reports with the Letter Writing Wizard, or create mailing lists for sales and marketing initiatives with a single click to import queries into Office Excel and Office Word.
<b>SmartList Favorites</b>	Access more than 100 SmartList queries that make it even easier to track and analyze the information that helps you run your business more efficiently.

For more information about System Manager in Microsoft Dynamics GP, visit [www.microsoft.com/dynamics/gp](http://www.microsoft.com/dynamics/gp).