

# Microsoft® Business Solutions—Great Plains®

FOR FOUNDATION

## System Manager

Make your business processes work for you with the backbone of Microsoft® Business Solutions—Great Plains® System Manager. Boost productivity by configuring your system to meet your business needs, sharing information across your organization, and by providing employees with an intuitive work environment, streamlined navigation, and productivity tools that speed access to information and let you take advantage of integrations with Microsoft Office.

SELECTING AN ACTION from the actions menu opens the appropriate task window and populates it with the relevant data.

The screenshot displays the Microsoft Business Solutions—Great Plains System Manager interface. The main window shows a list of customers with columns for Customer ID, Phone Number, and Contact Name. A context menu is open over the list, showing actions like 'New Receivables Transaction', 'New Invoicing Transaction', and 'New Cash Receipt'. A 'SmartList' window is also visible, showing a list of customers with columns for Customer Name, Address 1, and Address 2. The interface includes a navigation pane on the left with categories like Sales Lists, Financial, Sales, Purchasing, Inventory, Manufacturing, and HR\_Payroll.

Customer ID	Phone Number	Contact
AARONFT0001	(425) 555-010	Bob Fitz
ADAMPARK0001	(317) 555-010	Roberta Mascoutas
ADVANCED0001	(313) 555-010	Murray Monal
ADVANCED0002	(416) 555-010	Gwen Laake
ALTONMAN0001	(313) 555-010	Jennifer Rossini
AMERICAN0002	(313) 555-010	Sue Almassy/Vickler
AMERICAN0001	(314) 555-010	Andrew Mach/Wilms
ASSOCIAT0001	(402) 555-010	Orvaly Rodin
ASTORSU0001	(218) 555-010	Business Office
ATMORE0001	(308) 555-011	Jane Donato
BAKERSEM0001	(218) 555-011	Arthur Holmes
BERRYMED0001	(414) 555-011	Development Office
BLUEYOND0001	(316) 555-016	Lt. James Wilkison
BOYLES0001	(308) 555-011	Sarah Parnell
BREAKTHR0001	(504) 555-011	Nancy Dutchak
CASTLEINN0001	(613) 555-011	Helen Chotakis
CELLULAR0001	(312) 555-011	Michael Hajjak

EASILY LOCATE THE DATA YOU WANT with a familiar Microsoft Office interface.

DEFINE CUSTOMIZED QUERIES EASILY and export them to Excel for further analysis.

Microsoft®  
Business  
Solutions

*Configure your solution quickly and easily*

Get started fast with your Great Plains solution. Efficient set-up processes and easy-to-use navigation tools help you personalize your solution to meet your business needs quickly and with minimal effort.

*Enhance usability*

Provide users with a seamless working experience with a familiar Microsoft Office interface, list-based navigation, and streamlined menus.

*Access information instantly*

Instantly create queries against your data or access more than 100 modifiable SmartList queries to find customer, vendor, inventory, or other vital information and then share saved queries with others.

*Put your information to work*

Export query results to Microsoft Office Excel and Microsoft Office Word with a single click, so that you can update spreadsheets quickly or create mailing lists for sales and marketing initiatives.

*Make your business management solution work for you*

Manage your data quickly and effectively with easy-to-use tools that configure your system to the way you work. A minimal learning curve and intuitive interface mean your employees are working productively right from the start.

*Expand your ability to recall data*

Easily manage and configure smart tags in your Microsoft Office System applications with user-interface icons that automatically recognize customer names and other vital references and link you to further information within Great Plains.

## System Manager

### Microsoft Office User Interface

Microsoft Great Plains 8.0 captures the look and feel of Microsoft Office Outlook, along with list-based navigation and streamlined menus that provide everyone in your organization with a clean, intuitive interface. Whether your employees are working in Microsoft Great Plains or Microsoft Office, they'll have a seamless user experience that boosts productivity and minimizes training costs.

### Rich Microsoft Office Integration

Combine the power of Microsoft Office System 2003 and Microsoft Great Plains to take full advantage of existing software investments. Building on the productivity foundation that Microsoft Office offers, you can speed access to key business information, strengthen reporting capabilities, foster teamwork and collaboration, and much more.

- **Share query and budgeting data** with Microsoft Excel and Microsoft Word, with the ability to make full use of Excel-based reporting capabilities and export Microsoft FRx reports directly to Excel pivot tables.
- **Consolidate Microsoft Excel, Microsoft Word, and Microsoft PowerPoint documents** in FRx reporting packages to deliver a single file that preserves all formatting and properties for each document type.
- **Use the new Letter Writing Assistant** to build customized communications in Microsoft Word.
- **Send customer statements, invoices and other documents via e-mail** through Microsoft Outlook and eliminate time-wasting and expensive paper mailing processes.
- **Enter vacation requests** through Microsoft Business Portal and have them automatically added to your Outlook calendar.
- **Easily attach maps and directions** for sales, delivery, and service call routes with single-click access to Microsoft MapPoint®.
- **Link to Microsoft Great Plains data directly** from within Microsoft Office applications, using smart tags to speed access to customer, vendor, inventory, general ledger account, and employee information.

## System Manager

## FEATURES OVERVIEW

	System Manager
Interview-Style Setup Wizard	Configure the accounting system with a simple interview-style wizard that steps through the set-up procedures.
Intuitive User Interface	Initiate tasks quickly and easily using the intuitive navigation and user interface.
Shortcuts	Improve productivity by grouping commonly used tasks in a convenient shortcut navigation bar.
To-do Lists	Build online to-do lists and routine checklists for multi-step tasks.
Integration with Reporting Tools	Integrate seamlessly with Great Plains Report Writer and Crystal Reports® to create professional-looking reports containing the exact information you need.
Online Contact Tools	Attach Internet addresses to employee records, items, customers, and vendors.
Notes	Improve control and audit capabilities by attaching detailed information to master records and transactions.
Modify Data Entry Windows	Use Modifier with Microsoft Visual Basic® for Applications (VBA) to add business-specific functions into data entry and inquiry windows.
List-Based Navigation	Speed performance for routine tasks with list-based navigation that let users locate a record once and then select and perform actions against that record. For example, an employee can create and save a list of their customers, and when a customer's records need updating, the employee simply selects the appropriate customer from the list.
User-Specific Navigation	Simplify system navigation with an interface that shows buttons and paths only to those modules that an employee is authorized to use.
Reminders	Schedule reminders for tasks, then assign reminders to specific users for follow-up actions.
Type Ahead	Auto-fill customer IDs, shipping methods, Tax IDs and any other field that has an associated lookup window in Microsoft Great Plains.
Dr. Watson Error Reporting	Use Dr. Watson to help detect, decode, and log errors that are encountered when Microsoft Windows® or Windows-based programs are running, and automatically submit error logs to Microsoft.
Business Alerts	Use business alerts to automatically warn a pre-defined list of decision makers via a customized e-mail message when a specified business condition, such as reaching a checking account balance, is met.

AVAILABLE WITH:



GREAT PLAINS



GREAT PLAINS STANDARD

# System Manager



## FEATURES OVERVIEW

### Microsoft Office SmartTag Manager

#### Link to Great Plains Data

Drill back instantly to key information with context-sensitive links between Microsoft Office documents and accounting and business management records.

#### Smart Tag Viewer

Enable users who don't run Great Plains applications to access information through the Smart Tag Viewer.

#### Access Control

Leverage your existing Microsoft Windows NT® authentication routines, reducing administration and ensuring only authorized personnel have access to your business management information.

#### User Permissions

Set up access rights easily, defining permissions by individual or group and type of information.

### SmartLists

#### Create and Modify Lists

Instantly create sophisticated queries to find detailed customer, vendor, general ledger, inventory, employee, and salesperson information.

#### Save and Share Lists

Share saved queries with others in the organization.

#### One-Click Export to Microsoft Excel and Microsoft Word

Quickly update spreadsheets or create mailing lists for sales and marketing initiatives with a single click to import queries into Microsoft Excel and Microsoft Word.

#### SmartList Favorites

Access more than 100 SmartList queries that make it even easier to track and analyze the information that helps you run your business better. New SmartList Favorites added in Release 8.0 include:

- **Customers:** Customer Balance, Customer Contact List, NSF Customers, Customers on Hold, Inactive Customers, Customers Over Credit Limit, Past Due Customers, Customers by Year-to-Date Sales.
- **Receivables Transactions:** Unapplied Documents, Transactions by Customer, Customer Returns, Past Due Customer Transactions, This Month's Sales, Today's Sales.
- **Vendors:** Vendor Balance, Vendor Contract List, 1099 Vendors, Inactive Vendors, Year-to-Date Purchases.
- **Payables Transactions:** Cash Requirements, Transactions by Vendor, Today's Purchases.
- **Advanced Distribution:** Order Fulfillment Shortage Default, Priority, Document Status, Substitute Item.