

ASI Client Connection

The Process of Partnerships: Developing ISV Relationships

Microsoft Dynamics partners are always looking for ways to offer solutions to help meet their customers' needs and ASI is no different. And for all the capabilities of the latest Dynamics products, often partners need a little help from Independent Software Vendors (ISVs) to meet all the requirements.

Typically referred to as third party applications, the add-on solutions marketplace for the Dynamics product line is filled with thousands of products offered by hundreds of ISVs. And while many of them are strong products created by teams with deep expertise, Dynamics value-added resellers (VARs) continually express the need for caution when it comes to adopting and bundling third party applications into their deals.

The primary thing to look at is if the ISVs' solutions can meet the customers' business needs. It is also crucial to make sure the ISVs' solutions integrate properly with the Microsoft Dynamics solutions. As a reseller, we pull together lists of ISVs that fit for specific implementations we do, then we take those and package them as a unified offering.



Associates Solutions, Inc.
Strength From Experience

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ASI Makes President's Club

ASI is very proud to announce that for the third year out of the last four, ASI has made Microsoft's President's Club. This honor is given to the top 5% of all Microsoft Dynamics Resellers. ASI also was in the top10 nationally in new customer adds and new customer sales revenue. Thank you to all of the great new customers who have made this possible!



Cover Story

Cont. from pg 1

As we engage companies in industry specific verticals, it is very important to create strong relationships with ISVs that have proven technologies in those industry verticals. This gives the customer good references in those industries so together we can sell and implement these ISV products and also go with the backing of a solid product that is targeted at these specific industries.

ASI also evaluates an ISV's ability to demonstrate best practices and their ability to partner with us as a company. They also have to demonstrate a willingness to train us on their products to help us in the sales process and the post sales process as we're going through and updating. And they have to have referencenable customers so we know that they've done it before.

Most all ISV's have training and certification programs so when ASI finds an opportunity we go to market together and bring our presales and implementation teams in with those partners and get trained on their products. When we are working on opportunities, we have our implementation consultants work hand in hand with the ISV's team so we learn from their technical experts. It is extremely important for ASI to create a real collaborative partnership. As we get better at knowing their products and how to sell and implement them over time, ASI then starts to take on more and more until we are able to be self sufficient.

One thing that never changes is that clients continually ask for the same things: What are you guys doing at other companies? What is the solution you recommend? What are the best practices that other companies in our industry are using that we should be taking advantage of? What is the solution that you recommend? ASI takes great pride in answering those questions and in most cases there are years of experiences behind those recommendations.

Microsoft Dynamics—Did You Know?

Here are some facts on Microsoft Dynamics

- 42,000+ customers are using Dynamics GP.
- About 30% of these 42,000 customers have either GP HR, GP Payroll or both.
- Microsoft has over 360,000 companies using Dynamics ERP and CRM solutions.
- Every day over 5 million employees use Dynamics products.
- Microsoft Dynamics revenue is over \$1.3B, and is growing faster than the market average.
- Microsoft has revenues of \$70B. and over 91,000 employees.

Joplin Tornado Relief

It may seem like a distant memory, but for the residents of Joplin, MO this has been a summer focused on recovery and rebuilding. Our own Linda Hartman was part of a relief team from Noland Road Baptist Church that spent the Memorial Day weekend doing tree removal and cleanup in Joplin. Linda's church is part of the Southern Baptist Association that reaches out to those in need after a disaster. Linda's team also spent time in St. Louis this summer doing tree cleanup after that area was hit hard. Way to go Linda, thank you for your service!



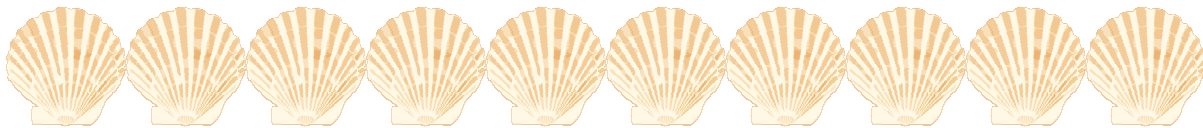
Residents and volunteers bonding during recovery efforts in Joplin, MO.

ASI Updates

Convergence Update

In April, almost 10,000 Microsoft Dynamics users swarmed to Atlanta for Convergence 2011. The event was a huge success again and had several great moments including showcases for the new Dynamics SL 2011 and Dynamics CRM 2011 products. Thank you to all of our customers who made the trip with us!

Next year Convergence 2012 will be held in March 18th-21st in Houston, TX so put your budget requests in early so you can join us. All research has shown that Convergence attendees find great value in all that is offered and ultimately attendance has been linked to higher overall satisfaction levels. Hope you can join us!



Upcoming Training

ASI is proud to announce the following Training Class and seminar schedule. If you are interested in attending, please contact Joy McRae or Chris Jarvis at 913-384-9677 to get scheduled.

- **Aug 10th – Dynamics GP Payroll & HR**
8:30am-4:00pm- Associates Solutions offices
- **Aug 11th – Dynamics GP Business Portal**
8:30am-12:00pm- Associates Solutions offices
- **Aug 17th – Dynamics GP Extender**
8:30am-12:00pm- Associates Solutions offices
- **Aug 24h – FRx/Management Reporter Training**
8:30am-4:00pm- Associates Solutions offices

Upcoming Events

ASI is proud to announce the following event schedule. If you are interested in attending, please contact the Sales team at 913-384-9677 to reserve your spot.

- **Aug 18th – A Taste of Beer & Technology**
4:00pm-7:00pm– Crown Room at Schlafly Bottleworks— 7260 Southwest Avenue— Maplewood, MO 63143. Learn more [here](#).



Product Spotlight

Smart Fill and Dynamics Report Manager By Rockton Software

Dynamics GP users have been using Rockton Software www.rocktonsoftware.com products since 1999. We love these two solutions, please contact the Sales Team at 913-384-9677 if you would like to learn more.

Many users of Dynamics GP often use non-intuitive numbering schemes for Customers, Items, Accounts, and other IDs. SmartFill allows you to type part of the Name, Description, or WHATEVER you know into any ID field, and then intuitively discovers the correct ID and types it in for you. No lookup required!

Find accounts by typing in part of their description or just a partial segment. Find Employees by typing in their first or last name, or even their address! Find customers by phone, address, name, or even information stored in outside databases!

Ever wish you could do a google-style search to find your key data in Dynamics GP? Tired of "looking up" a Customer when you know their name and not their ID? SmartFill makes data entry easy!

- Works with all Customer, Vendor, Item, Account, and Employee fields throughout Dynamics GP and any 3rd party product. Also works with any other Primary ID you can think of - including those in 3rd party products.
- Want to search by other fields? No problem. Search by city, phone, or whatever you want!
- Provides a short list of all matches if there is more than one match, so you can choose from a filtered list.
- Allows both Begins With and Contains lookups.

Besides fantastic ease-of-use for end users, you can save thousands on costly Crystal licenses, because Dynamics Report Manager does not require a Crystal license on deployed workstations.

With amazing flexibility, Dynamics Report Manager also allows you to launch any report from just about any work flow imaginable, from buttons to toolbars, menus and shortcut bars.

Now you can harness the power of Crystal and SQL Reporting Services Reports in your Dynamics GP solution! Dynamics Report Manager takes the headaches out of launching Crystal and SQL Reports by giving you fully customizable control to launch any report from within Dynamics GP, including 3rd party products.

- No Crystal Licensing required by using Dynamics Report Manager's royalty-free runtime components.
- Conveniently print reports to the screen, directly to a printer, or to a PDF file.
- Integrated SQL security for simple and secure deployment.
- Launch reports from ANY Dynamics GP window - including ANY 3rd party product.
- Group sets of report to launch together in an easy-to-use interface.
- Define report destinations by user, giving each user flexibility to work the way they want.
- Use built-in or user-defined lookups to help fill in needed report parameters.
- Report scheduling allows you to queue up and print reports when you want them.



Thought for the Quarter:

“Far and away the best prize that life offers is the chance to work hard at work worth doing.”

Theodore Roosevelt

Microsoft Dynamics CRM 2011: Inside System Charts and Dashboards vs. Personal Charts and Dashboards

Microsoft®

What's New at Microsoft?

Office 365

Office 365 is Microsoft's next generation of cloud productivity tools that brings together Microsoft Office, SharePoint Online, Exchange Online and Lync Online in an always-up-to-date cloud service. Office 365 makes it easier for organizations to get and use Microsoft's award-winning business productivity solutions via the cloud. With Office 365, people can work together more easily from anywhere on virtually any device, while collaborating with others inside and outside their organization in a simple and highly secure way. All of your employees—whether they're power users or casual workers—can easily and securely access the same Office tools and information. Office 365 tightly integrates cloud-based and on-premises workloads to enable you to maximize your current technology investments, deploy at your own pace, and get the benefits of the cloud in a way that works for your business.



So...who can see Dynamics CRM 2011 charts and dashboards, and who can create them? These kinds of things are determined by the security roles assigned to a user, and in order to configure security roles for charts and dashboards, you need to understand the distinction between **System** charts and dashboards, and **Personal** charts and dashboards.

Let's start with **System charts and dashboards**. In general most users cannot create system charts/dashboards. These are considered system customizations, and once created they are by default visible to all users. So...it's probably a good thing most users cannot create these things! The most obvious examples of these are the default dashboards you see in the Workplace, and charts like the Sales Pipeline chart exposed on those dashboards.

Now on to **Personal** charts and dashboards. If you click the new button, you will be creating a **Personal** dashboard. It can be confusing at first keeping track of whether you're creating a personal thing (chart or dashboard) or a system thing, so here is a good rule for how to remember the difference: *if you click a **New** button on one of the application ribbons in Dynamics CRM 2011, the thing you're creating is **personal***. You have to work harder to create a system thing, and again, since everybody will see it, that's a good thing. OK, so now we know there are two different types of charts and dashboards. How do we modify security so our sales reps don't spend time creating charts and dashboards? Well, we know they can't create system charts or dashboards, so we only have to prevent them from creating the personal (or user) variety. Since I'm picking on salespeople here, I'll use the Salesperson security role in the example:

1. Click **Settings**, and then click **Administration**.
2. Click **Security Roles**.
3. Select the **Salesperson** security role and double-click it to open the form. On the **Core Records** tab, remove the **Create** and **Read** privileges (the first two columns) for the **User Chart** and **User Dashboard** entities:

Now, suppose you not only don't want them wasting time *creating* personal charts or dashboards, but you don't even want them *looking* at system dashboards or charts. Security privileges can be used to prevent users from seeing these as well in much the same manner as locking down personal ones through the Administration windows.



CRM Tips & Tricks

ASI

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ASI Staff News

Congratulations to the following ASI employees who will celebrate anniversaries with us this summer!

Mike Scott-5 Years

Matt Winship-5 Years

Chris Jarvis-5 Years

Derrick Edmondson-4
Years

Dynamics CRM 2011 Mobile Express

Microsoft Dynamics CRM 2011 is designed with the mobile sales force in mind and includes CRM Mobile Express so users can instantly view, create and modify CRM data on any web capable device. No two mobile sales forces have the same needs so CRM Mobile Express is designed for easy customization, complete with publicly available source code so you can develop a mobile application that's tailored to your unique needs.

Dynamics CRM Mobile Express summary

- Compatible with any device that has a Web browser (HTML 4.0 compatible browser).
- Use a mobile Internet connection to work with critical Microsoft Dynamics CRM data.
- Gives mobile users easy access to marketing, sales and customer service tools on the road.
- Real time access with updates immediately applied so office based staff can follow up on assigned activities.
- Adapt the mobile experience to give mobile users the data they need.

A logo for ASI Associates Solutions, Inc. featuring a person's hands holding a globe, the company name, and a Microsoft Gold Certified Partner badge. Below the logo is the address and website.

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