

ASI Client Connection

New Releases Provide Value Through System Upgrades

Slowly but surely, we continue to see signs of life in the economy. Job-less numbers appear to be improving and IT budgets seem to be loosening. While companies have learned to do more with less, they are extremely dependent on technology to help them do so. As we look into our crystal ball for the remainder of 2011 and into 2012, we are seeing strong indicators that companies are ready to invest in technology. There are some very compelling reasons to upgrade their current ERP systems and get on board with the latest versions of Microsoft Dynamics GP and SL. We will try to cover some of the highlights for you here. These latest releases make it easier for people to make fast, informed decisions using business intelligence that's personalized to their roles and available through familiar Microsoft Office applications. New capabilities continue to streamline and automate business processes, simplify setup and maintenance, and let you tailor your solution to meet specific user and business needs.



Associates Solutions, Inc.
Strength From Experience

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ASI Attains Highest ERP Designation

ASI is very proud to announce that we have achieved the Gold level status for the Enterprise Resource Planning competency from Microsoft.

To earn a Microsoft Gold Competency, partners must complete a set of tests to prove their level of technology expertise, submit customer references and employ or contract required number of MCPs who are skilled on current technology relevant for the competency. Thank you to all who have made this possible!

Cover Story

Cont. from pg 1

Microsoft Dynamics GP 2010 R2 builds upon the solid 2010 release. Some of the key features include:

- New Word document templates make it easier to create Invoices, Packing Slips, and other items pulling data from Dynamics GP.
- New Report Deployment Wizard for SQL Reporting Services reports.
- Over 250 SRS reports and 200 Excel based reports.
- Ability to Copy Security across the Microsoft stack using the Microsoft Dynamics Security Synchronization Utility.
- Take advantage of Navigation Lists, now 380 percent faster when working with larger data sets.
- Use Electronic Signatures to approve simple data changes for any field or document in Microsoft Dynamics GP 2010. Enable users to sign off on changes from within Microsoft Dynamics GP 2010 or through SharePoint.
- Designate IFRS or GAAP when posting ledger transactions using a new reporting ledger.
- Choose from more than 350 web services that deliver streamlined processes for both simple and complex integrations, to simplify integration deployments and improve usability and performance.

Released April 1st Dynamics SL 2011 builds on the updated interface and improves the user experience. The activity panes, search functionality, and role based menus improve adoption rates and lower training costs. Other features include:

- The new Quick Query tool provides predefined views of accounting data that can quickly be sent to programs like Excel and Word for further analysis.
- For those who use multi-company, the hot new feature will be the ability to open multiple company screens within a single session. You will now also be able to color code companies to eliminate confusion during data entry.
- The DocShare feature allows employees, customers, and vendors the ability to share and collaborate on documents using Microsoft SharePoint technology.
- Users of Dynamics SL 2011 will now have the ability to attach documents directly to screens allowing companies to save on printing and document storage costs.
- The Business Portal for Dynamics SL 2011 allows users to key in time and expenses, set up projects, assign resources, create budgets, and more, all through the web.
- If you need to allocate inventory to projects, Dynamics SL 2011 gives you the tools to meet project demands and stay on track and on budget.
- Also new for Dynamics SL 2011 are web services for customer and project data. Users can now use web services to connect to other solutions such as Dynamics CRM or other in-house products. Web services will allow for better performance and tighter integrations while bringing together the front and back offices.

If you would like to take a look at either of these exciting new releases, please contact the sales team at 913-384-9677.



ASI Updates

Welcome Aboard

We've had some new additions here at ASI and are proud to introduce these new employees.

Meri Linhardt is from Fairbanks, Alaska and learned early that she doesn't care for snow and ice. Thankfully, her family moved to Kansas in 1991. She likes to read and seems to be perpetually in school for something. She has her Bachelor's degree in Physical Science, Environmental Sciences, and Psychology and is currently pursuing certifications in PC Applications, Database, and Web Development. Meri works on our Dynamics CRM team.

- Formerly a Principal Consultant of AML Business Services and a Marketing & Communications Specialist / Business Analyst at Black & Veatch
- 4 years of experience in business analysis and process improvement, including user requirements gathering, business process modeling, data migration, and training

Robin O'Neal was born and raised in Kansas City, Missouri. She spends most of her free time out in the garden or playing with her dogs. She has a daughter ready to graduate college in December and a son that lives at home with her and the dogs. Robin works on our Dynamics ERP team.

- Over 30 years' experience in accounting
- Over 15 years' experience in business software industries
- Recent experience includes 4 years' experience as Project Implementation Manager for a world-wide company.
- Software experience includes Microsoft Dynamics, FRx, Management Reporter, data conversion/Integration Manager, on/off site training, project management

Amy Foster was raised in Kansas City, Kansas but has lived in many corners of the United States, returning to KC in 2009. She attended college at Park University in Parkville, MO. Amy enjoys cooking and baking, domestic and international travel, live music and dancing. She is currently the caretaker for her younger sister and 2-yr old niece, as well as a big dog and a fat cat. Amy works on our Dynamics ERP team.

- 20+ years of accounting and banking experience, including CPA work
- Worked on Microsoft Dynamics SL since DOS versions
- Has experience with several other accounting, payroll and customer relationship management software and services

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.

- **Nov. 10th – Management Reporter Training**
8:30am-4:00pm- Associates Solutions offices
- **Dec. 16th – Dynamics GP Year-End Processing**
8:30am-12:00pm- Associates Solutions offices
- **Dec. 16th – Dynamics SL Year-End Processing**
8:30am-12:00pm- 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.

- **Nov. 17th – Project Management Roundtable**
11:30am-1:00pm—Associates Solutions offices—
13228 W. 99th St.—Lenexa, KS 66215
This event is designed to give executives and project managers the opportunity to discuss problems and solutions to the challenges project driven organizations face.

Microsoft Dynamics CRM 2011: How Email Marketing Campaigns Help Ease Tight Budgets

Microsoft®

What's New at Microsoft?

Here is a common scenario for a Sales or Marketing Manager. You receive an email announcing it is time to register to exhibit at an upcoming trade show. You immediately ask yourself: "Should we exhibit at this show again? Is this show worth the time and expense?" Then you begin to think: "Did we get any good leads from the show? If we did, maybe we should go back. What happened to all those leads from last year's show anyway? Did any of them turn into anything? Microsoft Dynamics CRM software can help you answer these questions!

Dynamics CRM Marketing Campaigns enables you to build a marketing campaign around a trade show or any other event designed to bring you leads. Dynamics CRM Campaigns also give you a way to plan and track both the expenses and the results for any other marketing event. In Dynamics CRM, under Campaigns you can set up the activities to market the show and organize all the supporting activities such as the giveaways and the mailings. All the required activities are assigned and all the costs documented. To sweeten the pot, the Events Accelerator (a free module for Microsoft Dynamics CRM) provides a detailed framework with which to plan and track the activities and expenses of attending the event. But now comes the best part: all the marketing campaign responses are recorded and can be traced back to the marketing activity that generated them.

Now you have the tools to analyze what really happened:

- Did the mailing generate responses?
- Did the giveaway bring people to the booth?
- How much did the giveaway promotion end up costing?
- What was the total financial investment for doing the tradeshow?
- And in the end, did these tradeshow leads generate business?
- How does this tradeshow compare to other shows?
- Should we exhibit again next year?



The next time you ask yourself if it is worthwhile to participate in a tradeshow or any other marketing activity, consider how Microsoft Dynamics CRM provides the detailed information you need to make the right decision.

Microsoft Lync 2010

For those of you familiar with Microsoft Office Communicator, Lync 2010 builds upon that product with many great features and enhancements. Basic features include instant messaging, Voice Over IP and Video Conferencing inside the client software. Advanced features are related to integration with other Microsoft software. The main new features of this version are the addition of real-time multi-client Collaborative software capabilities. These allow teams of people to see and simultaneously work on the same documents and communications session and include:

- Collaboration through Whiteboard documents.
- Collaboration through Power Point documents.
- Polling lists, where Presenters can organize polls and all participants can vote and see results.
- Desktop sharing, usually by allowing participants to see and collaborate on your windows screen.
- Windows applications sharing, by allowing participants to see and collaborate on a specific application.

From controlling costs to managing compliance, Microsoft Lync delivers value that speaks to the needs of today's organizations.

CRM Tips & Tricks

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ASI Staff News

Charley Pogue – 13 Years
Terrie Johnson – 13 Years
Don Cumbie – 9 Years
Scott Matteson – 9 Years
Linda Hartman – 6 Years
Tim Lamkin – 4 Years
Sharon Schnare – 4 Years
Leslie Krekovich – 3 Years



Dynamics CRM 2011 Filtering Capabilities

In Dynamics CRM 2011 new functionality provided that allows us to filter our views same as Microsoft Excel filtering functionality. We can filter the columns from within the Grid as shown in below screen shot.



Click on **Filter** button that enables filtering for each column as shown in below screen shot.

| Topic | Potential Customer | Est. Close Date | Est. Revenue | Probability | Rating |
|--------------------|--------------------|-----------------|--------------|-------------|--------|
| New Golden SG ball | BCCI | | | | Warm |
| test | last | | | | Warm |
| Test | santel | | | | Warm |
| test11 | 7Feb1 | 2/8/2011 | | | Warm |

The drop down shows the following options for filtering.



By Choosing **Custom Filter** you can create filters based on your specific criteria and even save the Filters. Simply specify the name of your view and it will be shown to your views list.



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