

**Microsoft®**  
**Business**  
**Solutions**



Microsoft® Business Solutions–Great Plains®

**What's New**

Release 8.0

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# Introduction

What's New is your guide to enhancements in Microsoft® Business Solutions–Great Plains® Release 8.0.

We add enhancements based on feedback we receive from customers, as well as on market research. Your willingness to help us build better products makes this a more complete solution for small and medium-sized businesses, putting you in a better position to manage your organization successfully. We encourage you to share your thoughts and reactions with us at any time.

Some enhancements described in this documentation are optional and can be purchased through your Microsoft Business Solutions partner. If you currently have a license for one of these modules and have an active enhancement program, you will automatically receive the enhancements contained in that module.

This document describes enhancements that were added to Great Plains since Release 7.0. In some cases, enhancements that were made to the product for Release 7.5 have been further refined for Release 8.0.

Descriptions of the enhancements are divided into the following chapters:

[Chapter 1, “Foundation Enhancements,”](#) describes enhancements to System Manager, the installation program, Dexterity®, and Integration Manager.

[Chapter 2, “Financial/HRP Enhancements,”](#) describes enhancements to General Ledger, Payables Management, Receivables Management, Bank Reconciliation, Human Resources and Payroll, Cash Flow Management, Collections Management, and Analytical Accounting.

[Chapter 3, “Distribution Enhancements,”](#) describes enhancements to Inventory Control, Sales Order Processing, Purchase Order Processing, Bill of Materials, Purchase Order Enhancements, which includes Purchase Order Commitments and Purchase Order Returns, and Demand Planner.

[Chapter 4, “Manufacturing Enhancements,”](#) describes enhancements to Manufacturing, which includes the Bill of Materials and Manufacturing Orders modules. Enhancements that improve Manufacturing's usability and integration with the Purchase Order Processing and Inventory modules also are listed.

[Chapter 5, “Project Management Enhancements,”](#) describes enhancements to the Project Management Series, which includes Project Accounting and Personal Data Keeper.

[Chapter 6, “Field Service Series Enhancements,”](#) describes enhancements to the Field Service Series, which includes Service Call Management, Contract Administration, Returns Management, as well as describing enhancements to the integration with Sales Order Processing.

Refer to the documentation for Microsoft Business Solutions–Business Portal for information about enhancements to Business Portal.

# Chapter 1: Foundation Enhancements

This part of the documentation describes enhancements to System Manager, as well as Dexterity and Integration Manager. The following topics are discussed:

- [\*Installation and deployment\*](#)
- [\*System Manager\*](#)
- [\*SmartList\*](#)
- [\*Security\*](#)
- [\*Dexterity\*](#)
- [\*Integration Manager\*](#)
- [\*Documentation\*](#)

## Installation and deployment

### Integrating products installed automatically

Some commonly used integrating products now are installed automatically. In addition to Great Plains, SmartList, Advanced Security, Report Scheduler, Sales Order Processing Returns, Excel-Based Budgeting, Purchase Order Enhancements, Cash Flow Management, the Copier Series, and the Learn 2 Stream Player are installed automatically.

Where appropriate, VAT Daybook Reporting, the Business Activity Statement, and A4 report formats also are installed.

### Current update instructions available online

Documentation for the update process will be revised periodically and made available online. Updated instructions will be available in Acrobat PDF format. For additional information about documentation changes, see [\*Documentation\*](#) on page 7.

## System Manager

### Microsoft Office 2003 look and feel

Buttons and controls used in Dexterity applications now look and work in a manner similar to the controls used in Office 2003.

## **Letter Writing Assistant integration with Word**

Enhanced integration with Microsoft Word includes a wizard interface to assist you in generating personalized letters to customers, vendors and employees. For more information, refer to the System User's Guide.

## **Reminders**

The Reminders window lists receivables and payables documents that are overdue. You also can have be reminded of groups of transactions in recurring batches that should be posted. The Reminders window will open when you log on to Great Plains and there are pending reminders that are assigned to you. For more information, refer to the System User's Guide.

## **MapPoint® integration**

An integration with Microsoft MapPoint allows you get directions or build a delivery route from within Great Plains. MapPoint gives you the ability to get directions to virtually any address in the United States. For more information, refer to the System User's Guide.

## **Type-ahead**

As information for a field with an associated lookup window is typed, Dexterity applications will automatically fill in the information. These fields include, but are not limited to, those for customer and vendor IDs, shipping methods, and tax IDs.

## **Multimedia tutorial**

The training tools available from the Help menu have been updated to provide a multimedia tutorial that introduces users to the basic information required to use Great Plains effectively. To access this tutorial, select Help >> Orientation Training. Additional tutorials are available for purchase.

## **GST tax details**

A setup option has been added to the Company Options window that allows you track Canadian tax details. If you mark the Canadian Tax Detail option, you can specify the general ledger account to post Canadian Goods and Services taxes (GST) to. You can view and print amounts that are included on purchases tax details, as well as viewing taxes that are included in Purchase Order Processing receivings, and Invoicing.

## **Updated sample data**

Dates used in the sample data have been moved further into the future. Some names used within the sample data, including the name of the sample

company, have been changed to be more useful for a greater variety of businesses. The name of the sample company has been changed to Fabrikam, Inc.

**Blank password removed from sample company logon**

You no longer can log on to the sample company using a blank password, which helps to ensure the security of your business data.

**SmartList**

**Additional SmartList favorites**

More than 40 default SmartList favorites have been added to make it easier to find information you need. You can modify default favorites to produce the exact information you need for specific situations, while removing data that might be clutter in those situations.

The following table lists the new SmartList favorites.

Object	New favorite
Account Transactions	Current Financials Journal* Current Inventory Journal* Current Payroll Journal* Current Purchasing Journal* Current Sales Journal* History Financials Journal* History Inventory Journal* History Payroll Journal* History Purchasing Journal* History Sales Journal*
Customers	Customer Balance* Customer Contact List* Customers on Hold* Customers Over Credit Limit* Inactive Customers* NSF Customers* Past Due Customers*
Item Quantities	Back Ordered Items* Items Below Order Point Quantity*
Payables Transactions	Cash Requirements* Today's Purchases* Transactions by Vendor*

<b>Object</b>	<b>New favorite</b>
Purchase Line Items	Items Past Required Date* PO Line Items Promised This Week*
Purchase Orders	Open Purchase Orders* Purchase Orders On Hold* This Week's Purchase Orders*
Receivables Transactions	Customer Returns* Past Due Customer Transactions* This Month's Sales* Today's Sales* Transactions by Customer* Unapplied Documents*
Sales Transactions	Open Invoices* Open Orders* This Week's Back Orders* This Week's Invoices* This Week's Orders* This Week's Quotes* This Week's Returns*
Sales Line Items	Back Ordered Line Items* Drop-Ship Line Items* Items Past Requested Ship Date*
Vendors	1099 Vendors* Inactive Vendors* Vendor Balance* Vendor Contact List*

## Security

Security has been enhanced so you can more effectively control which users have access to your Microsoft SQL Server™ database and to specific windows and fields within Great Plains.

### Set access to fields, as well as windows

Advanced Security is available to all Great Plains users. This program allows you to set access to specific fields, as well as windows, within Great Plains.

### Assign SQL Server roles

Great Plains uses Microsoft SQL Server fixed and database roles for more effective security management.

### **Reduce dependence on "sa" user**

Dependence on the "sa" user has been reduced. (The "sa" user is the system administrator account for SQL Server.) Most tasks that could be completed only by the "sa" user in previous versions now can be completed by a Great Plains administrator. Examples of these tasks include making backups, creating companies, and creating new user IDs.

### **Remove stranded users at logon**

Users that have active user records in Great Plains after they've exited (sometimes referred to as "stranded" users) now can remove that record when they log on.

## **Dexterity**

### **Option to report errors**

Dexterity applications now support Watson error reporting that allows users to send data to Microsoft Business Solutions if the program ever stops working unexpectedly. Watson reporting in Microsoft Windows®, Microsoft Office and other applications has provided data that has enable us to improve the stability and reliability of Microsoft programs. This option is available only if you're using Windows XP.

### **Adobe Reader version 6**

The most recent version of Adobe Reader is included on the Great Plains CD; you can install it using the Additional Products installation window. Adobe Reader allows you to open, read and print documents PDF (portable document format) files. If either Acrobat Distiller Version 6 or later, or the PDFWriter printer driver is installed, you can print reports directly to PDF files.

## **Integration Manager**

### **Project Accounting adapter**

The new destination adapter for Project Accounting automates the process of importing timesheet and employee expense data into Project Accounting.

## **Documentation**

### **Documentation Web site**

Documentation—especially that pertaining to updates and installation—will be updated on an ongoing basis and made available for download from

the following site: <https://mbs.microsoft.com/customersource/greatplainsdocumentation>.

Instructions for updating to Great Plains 8.0 are available exclusively at the following site: <https://mbs.microsoft.com/customersource/gp80update>.

### **Contents page for printable manuals**

Access to printable manuals in PDF format has been updated through a new Contents document that includes expandable lists, to make it easier to find specific manuals. The new Contents document makes it easier to see Great Plains windows when the Contents document is open, because its size is automatically adjusted based on your screen resolution settings.

### **Option to send feedback from help**

Each help topic now includes a Feedback button that you can use to send e-mail to Microsoft Business Solutions about whether the topic was helpful or not. Using this mechanism requires an e-mail client application.

## Chapter 2: Financial/HRP Enhancements

This part of the documentation describes enhancements to Great Plains financial modules, as well as Human Resources/U. S. Payroll. The following modules are discussed:

- [General Ledger](#)
- [Bank Reconciliation](#)
- [Payables Management](#)
- [Receivables Management](#)
- [Human Resources/U.S. Payroll](#)
- [Cash Flow Management](#)
- [Collections Management](#)
- [Analytical Accounting](#)

### General Ledger

#### Void saved transactions

You can void transactions that have been saved, but not posted, including standard, reversing, clearing, and quick journal transactions. By default, you can delete saved transactions. You can change this default behavior so that you must void transactions instead of deleting them.

#### Back out and correct posted transactions

You can back out posted transactions. When you back out a transaction, a new transaction is created that reverses the debits and credits of the original transaction. You also have the option to create a correcting transaction using the debits and credits of the original transaction as a starting point for the new transaction. Posted transactions that you can back out include standard, reversing, clearing, and quick journal transactions.

You also have the option to allow users to reverse transactions that originated in other modules. However, if you reverse or void a transaction in General Ledger that was originally entered in another module, that transaction is reversed or voided only in General Ledger.

#### Copy posted transactions

You can copy posted transactions using the debits and credits of the original transaction to create a new transaction. You can copy standard, reversing, clearing, and quick journal transactions, as long as they've been posted.

## **Inactivate posting and unit accounts regardless of balance**

You can make posting and unit accounts inactive without regard to whether the account has a balance. Inactive accounts will be included in the year-end closing process.

## **Bank Reconciliation**

### **View historical checkbook balances**

You can use the Checkbook Balance Inquiry window to view the cumulative balance of a checkbook or view the checkbook balance as of a specific date.

## **Payables Management**

### **Print checks by default**

In the Print Payables Checks window and the Print Payables Transaction Check window, the default selection is to print checks. Previously, the default selection was to print alignment forms.

### **Print two-stub checks**

A new check format is available that prints a full sheet, single-feed Stub/Stub/Check format, primarily used by businesses that use vendors based in Canada.

### **Use updated 1099-DIV**

Form 1099 - DIV has been updated to reflect tax changes as a result of the Jobs and Growth Tax Relief Reconciliation Act of 2003. The general rate of tax applicable to net capital gain for individuals has been reduced from 20% to 15% and 10% to 5% for certain individuals on or after May 6th, 2003. Box 1b is used to report dividends that qualify for the 15% and 5% capital gains rates. Box 2b is used to report dividends that qualify for the 15% and 5% capital gains rates on or after May 6th, 2003. Box 2f is used to report sales or exchanges of collectibles at a 28% capital gains rate.

## **Receivables Management**

### **Write off outstanding debit or credit amounts**

You can use the Write Off Documents window to write off outstanding credit or debit balance amounts for one or more customers. You can specify

a writeoff limit and cut-off date, and whether to create a credit or debit memo for each customer or document. Use the Write Off Preview window to mark or unmark customers to include in the writeoff process.

### **Issue refund checks to “parent” or “child” of a national account**

You can specify whether to pay the vendor that is associated with a “child” customer's parent when creating a refund check for the child customer in a national account.

### **Set customer priorities**

You can assign from one to 99 priorities to your customers; 1 is the highest priority and None is the lowest. When you allocate items in the Sales Automatic Order Allocation window, you can choose to allocate items by customer priority.

### **Select default order fulfillment shortage option**

You can select a default order fulfillment shortage option—None, Back Order Remaining, or Cancel Remaining—for each customer.

For example, suppose you create an order for widgets and enter 10 in the Original Quantity field, 10 in the Qty Ready to Fulfill field, and 0 in the Qty Fulfilled field. However, when you fill the order, there are only 8 widgets available, so you enter 8 in the Qty Fulfilled field. The Qty Ready to Fulfill field also will display 8.

The default entry for the remaining quantity will be backordered or cancelled, depending on the option you selected. You can override the default entry when a shortage occurs.

### **Track additional customer address information**

You can enter site, salesperson, territory, and additional user-defined information for each address. If salespeople are assigned to specific locations, such as states, it's possible that a customer might have different salespeople for different locations.

### **Ship complete orders only**

If the customer doesn't accept partial shipments of Sales Order Processing documents, you can mark the Ship Complete Documents option in the Customer Maintenance window. Partial line item quantities won't be

transferred in Sales Order Processing if the customer doesn't accept partial shipments.

## **Human Resources/U.S. Payroll**

### **401(k) Employer Maximum match**

An Employer Maximum field has been added to several windows to allow you to keep track of employee contributions to 401(k) funds in excess of the employer match. In the past, this information had to be tracked with two separate deduction codes and two separate benefits codes. The information entered in the field will be applied to all benefits that have a maximum match from the employer, making it possible for employers to complete all the calculations for benefits with a maximum match with only one code. This new field corresponds to an existing field in Human Resources.

### **Use overtime and double time as a factor**

A pay code factor field has been added to several windows. Employers will be able to enter a factor for multiplying an employee's pay when he or she works overtime or double-time. Previously this was tracked by manually entering the overtime and double-time pay rates. Specifying an overtime factor helps ensure that overtime and double-time pay rates are current, without having to be updated manually.

### **Select by Payroll transaction numbers**

In the Payroll Transaction Entry window, users can look up individual transactions in a batch based on the transaction number or other search parameters. Users also can select and view multiple transactions in a batch. Only computer check transactions are available in the lookup window. A lookup button has been added to the TRX field in the Payroll Transaction Entry window, and the Payroll Transactions lookup window is new. This feature restores the same option that was available to users in releases prior to 6.0 for looking up individual payroll transactions by number.

### **Automatic Download for Tax Updates**

Keep your payroll tax tables current and avoid ordering and installing updates with automatic tax table downloads for Great Plains Payroll.

### **Enhanced Manual Check Transaction Entry**

Enter specific taxable wage amounts for various transaction types, increasing data entry flexibility and making beginning balance entry more efficient.

### **Enhanced Human Resources sample data install**

Additional sample data for Human Resources is available. The installation process has been revised to make it easier to install this data.

## **Cash Flow Management**

### **Add accounts from Cash Flow Management**

The integration between Cash Flow Management and General Ledger has been enhanced to enable you add new accounts as you enter Cash Flow Management transactions.

### **View blanket purchase orders**

The effect on cash flow of blanket purchase orders is now reflected in Cash Flow Management reports. For more information about blanket purchase orders, see the enhancement descriptions for [Purchase Order Processing](#) on page 15.

## **Collections Management**

### **Assign multiple signatures to a collector**

Custom signatures for collectors allows a block of text to be used as a signature, similar to an Outlook® signature.

### **Enhanced query options**

Collections Management for 8.0 offers enhanced ability to query by Reminder Level and to print letters based on a specific reminder level.

## **Analytical Accounting**

This new financial management module lets you analyze data by whatever criteria you require, introduce greater flexibility with reporting, and analyze transactions efficiently.

### **Gain deep visibility into accounting transactions**

Achieve a detailed view into your accounting transactions by grouping transaction dimension codes into any number of hierarchical trees for multilevel reporting capabilities.

### **Analyze and effectively present reports**

Facilitate financial analysis and effective report presentation with wizard-driven inquiries that seamlessly integrate with Microsoft Excel and SmartList.

### **Include the information you need**

Focus on the financial data that's important to your reporting needs by including or suppressing zero-value data, running subtotals at each level, or restricting report content as needed.

### **Take control of accounting processes**

Streamline account and transaction classifications with an unlimited number of user-defined transaction dimension codes, such as cost center, profit center, region, and hours, and line unlimited user-defined account classes to the chart of accounts.

### **Reduce data entry and user error**

Improve analysis and reporting accuracy by sharply reducing data entry and user error with user-defined, valid transaction dimension code combinations that can be preset or created as you need them.

### **Analyze data with precision**

Analyze transactions across your entire organization with seamless integration across other Microsoft Great Plains modules, including General Ledger, Receivables Management, Payables Management, Inventory Control, Sales Order Processing, Purchase Order Processing, and Bank Reconciliation.

# Chapter 3: Distribution Enhancements

This part of the documentation describes enhancements to distribution modules. The following modules are discussed:

- [\*Purchase Order Processing\*](#)
- [\*Purchase Order Commitments\*](#)
- [\*Purchase Order Returns\*](#)
- [\*Sales Order Processing\*](#)
- [\*Inventory Control\*](#)
- [\*Bill of Materials\*](#)
- [\*Demand Planner\*](#)

## Purchase Order Processing

### Set up buyers as contingent users

You can set up buyers who have more limited access to Great Plains windows than regular users. Buyers don't have to be existing users, although they can be. You can create buyers based on location, a family of items, and so on. This allows you to transition purchasing activities to another person if the buyer is on vacation or leaves the company. You still can use existing users as buyers.

### View on-order quantities

An On Order Qty field has been added to the Purchase Order Processing Item Inquiry window to view the on-order quantities for each line item.

### Print historical purchase orders

You can print a historical purchase order, which is a closed or canceled purchase order that has been moved to history. To print a historical purchase order, you must use the Purchase Order Inquiry Zoom window to open the Purchase Order Print Options window. You also can print a range of historical purchase orders using the Print Purchasing Documents window.

### Track dates of lots

You can use the Lot Attribute Entry window to enter a manufactured date and an expiration date for an item that tracks lots even if you aren't using lot categories.

### **Limit transactions displayed in the Purchasing Receipt Numbers lookup window**

You can limit the number of transactions that are displayed in the Purchasing Receipt Numbers lookup window. For example, if you enter June as the batch ID, the transactions for the June batch will be displayed in the Purchasing Receipt Numbers lookup window.

### **Add “Ship To” addresses per line item**

Each line item of a purchase order includes a unique shipping address that can be used to print a separate purchase order for each address.

### **Enter blanket purchase orders**

You can enter blanket purchase orders or drop-ship blanket purchase orders to make long-term agreements with vendors to purchase the same item—for example, to receive a volume discount or to be sure of obtaining items that are hard to get. The agreement you make with the vendor can be based on the total cost or total quantity of the item. You also can print estimated delivery schedules for blanket and drop-ship blanket purchase orders.

### **Copy purchase orders**

A Copy button is now available in the Purchase Order Entry window. Use this button to create a new purchase order from an existing one, or to copy line items from one purchase order to another.

## **Purchase Order Commitments**

### **Commit unposted GL amounts on commitments**

Unposted GL amounts can be committed to budgets using Purchase Order Commitments.

## **Purchase Order Returns**

### **Returns Inquiry windows**

Inquiry windows that display information for purchase order returns are now accessible from Purchase Order Processing.

### **Use more options for printing returns documents**

Additional options are available for printing returns documents.

## Sales Order Processing

### Change average cost for returned items

You can change the unit cost of an item that uses returned average perpetual valuation method if the Override Item Unit Cost for Returns option is marked in the Sales Return Setup window for return type documents. When posting a return document with one or more average perpetual items, the average cost (current cost) for the items will be updated using the unit cost specified for the returned item.

### Print historical sales documents

You can print a range of historical documents using the Print Sales Documents window. Documents are moved to history when they are transferred to another document, posted, or voided. You can't reprint packing slips and picking tickets for documents that have been moved to history.

### Reprint picking tickets and packing slip

If picking tickets or packing slips have been printed before, you can choose to reprint those picking tickets or packing slips. If you choose not to reprint previously printed picking tickets or packing slips, only the picking tickets or packing slips that haven't been printed before will be printed.

### Selling discontinued items

A setup option has been added to the Sales Order Processing Setup Options window to allow you sell discontinued items in Sales Order Processing. This option must be marked to enter discontinued items on orders, back orders, or invoices. If this option isn't marked, you can't sell discontinued items. If you decide to sell discontinued items, you won't be able to override the quantity shortage for discontinued items. The quantity allocated for discontinued items will be the balance of the quantity in inventory.

### View quantities that are available to promise

Available to promise (ATP) means that an item is in stock and can be promised to a customer. You can see how much inventory or projected inventory is not committed to customer orders and is available. ATP is calculated for an item from the latest document date to the earliest document date for all supply orders, including sales orders, sales fulfillment orders/invoices, purchase orders, inventory transactions, inventory adjustments, inventory transfers, and manufacturing orders.

You can view available to promise information for items in the following windows.

- Sales Transaction Entry window
- Sales Item Detail Entry window
- Inventory Batch Entry window
- Inventory Available to Promise Inquiry window
- Item Transfer Entry window

### **Enter or change back ordered or canceled quantities**

You have the option to enter or change information in the Qty to Back Order and Qty Canceled fields in the Sales Order Fulfillment window by marking one or both of the following options in the Sales Order Setup window, the Sales Invoice Setup window, and the Sales Fulfillment Order/ Invoice Setup window:

- Enable Quantity to Back Order in Sales Order Fulfillment
- Enable Quantity Canceled in Sales Order Fulfillment

### **Ensure that quantity to invoice equals quantity fulfilled**

You can mark the Override Quantity to Invoice with Quantity Fulfilled option in the Sales Order Setup window, the Sales Fulfillment Order/ Invoice Setup window, and the Sales Invoice Setup window to display the same quantity in the Quantity to Invoice field in the Sales Transaction Entry window as is displayed in the Quantity Fulfilled field in the Sales Order Fulfillment window. This ensures that the quantity invoiced equals the quantity fulfilled for orders.

### **Ensure that bill quantity equals quantity fulfilled**

If you mark the Override Billed Quantity with Quantity Fulfilled option in the Sales Invoice Setup window, the billed quantity on a fulfillment order will always be equal to the quantity filled when the quantity filled is greater than zero. This ensures that the quantity billed equals the quantity fulfilled for fulfillment orders/invoices.

### **Track sales workflow with fulfillment orders**

A document used to track workflow capability when a customer has agreed to make a purchase. You can transfer sales information from a quote, back order, or order to a fulfillment order. After you've tracked the fulfillment order through workflow, the fulfillment order becomes an invoice. You also

can transfer a fulfillment order to a back order. This document is only available if you're using sales workflow.

For more information about workflow, see the description of Line item workflow in the Sales Order Processing section.

### **Assign document statuses to fulfillment orders**

If you're using sales workflow, you can set up document statuses to assign to fulfillment orders. These document statuses indicate typical document processes, such as printing picking tickets, picking out goods from inventory, printing packing slips, packing and shipping goods, and sending invoices to customers.

You also can reverse the document status of fulfillment orders. You can move the document status back one status at a time. For example, suppose you printed a picking ticket for a customer order, but didn't verify that the items were removed from inventory. Suppose also that your customer calls to add an item to the order. You can reverse the document status from Status 2 to Status 1, and then continue with the regular process. Fulfillment orders can have up to five statuses.

Orders will have a status of New, In Process, or Complete. See the Sales Order Processing documentation for more information.

### **Track line item workflow**

The term workflow, which referred to in the documentation as *sales workflow*, refers to the automation of a business process, during which tasks are completed and documents are passed from one participant to another to complete the next task in the process. You can implement workflow capability into your sales cycle by using a type of sales document called a fulfillment order. You can create a fulfillment order from quotes, back orders, and orders, and you can create an invoice from a fulfillment order.

You'll assign up to six workflow document statuses to a fulfillment order. You can use these statuses to track the document processes, such as printing a picking ticket, retrieving items from inventory, printing a packing slip, packing and shipping the goods, and sending an invoice to the customer.

### **Control workflow processing with process holds**

You can mark an option to stop the advancement of workflow document statuses until the hold is removed.

## Use named printers at picking sites

If you're using advanced picking, you can specify a default printer for a site. This is necessary only if you want a different printer to be used for a specific site for one of the following picking tickets or packing slips:

- Sales Orders - Bulk Picking Ticket
- Sales Orders - Packing Slips Printer - Blank
- Sales Orders - Packing Slips Printer - Short
- Sales Orders - Packing Slips Printer - Long
- Sales Orders - Picking Tickets Printer - Blank
- Sales Orders - Picking Tickets Printer - Short
- Sales Orders - Picking Tickets Printer - Long

For more information about advanced picking, see the description of Picking tickets enhancements in the Sales Order Processing section.

## Picking ticket enhancements

Additional picking ticket features allow you to:

- Print indicators when a picking ticket has been previously printed
- Print bulk picking tickets
- Sort picking tickets by bin

Picking ticket enhancements are referred to in the documentation as *advanced picking*.

**Previously printed indicators** When you reprint a picking ticket, the word REPRINT will print at the top of the report. If you print a bulk picking ticket and then an individual picking ticket, items displayed on both picking tickets will be displayed with two asterisks (\*\*) and a reprint icon.

**Bulk picking** You can print bulk picking tickets for fulfillment orders and invoices. A bulk picking ticket displays the items and quantities needed to fulfill more than one fulfillment order or invoice and the location of each item for a batch of items. A summary line for each item and the total quantity required is displayed on the picking ticket.

**Sort by bin** If you're using advanced picking, you can select to sort individual picking tickets by bin sequence. If you're using advanced picking and multiple bins, you can select to print default bins or all available bins when a default bin isn't found.

## Picking instructions IDs

If you're using advanced picking, you can set up instruction IDs and enter picking instructions. Picking instructions can include information such as the sequence that items should be removed from inventory.

You can assign the instruction IDs to a customer record and item record. When you print a picking ticket that includes the customer ID and item ID, and you marked the Print Picking Instructions option in the Print Sales Documents window or the Sales Document Print Options window, the instructions also will be printed.

## Picking ticket and packing slip options

You can choose from the following seven options for printing picking tickets and packing slips.

- Reprint previously printed
- Print picking instructions
- Include or exclude drop-ship items
- Include kit components
- Bin sequenced
- Sort kit components
- Print customer item

**Reprint previously printed** If picking tickets or packing slips have been printed before, you can choose to reprint those picking tickets or packing slips. If you choose not to reprint previously printed picking tickets or packing slips, only the picking tickets or packing slips that haven't been printed before will be printed.

**Print picking instructions** If you're using advanced picking, have created picking instruction IDs, and assigned the IDs to customers and items, you can choose to print the instructions on the picking tickets.

**Include or exclude drop-ship items** You can choose to include or exclude drop-ship items when you print packing slips.

**Include kit components** You can choose to print the components of the kit on the packing slips or picking tickets.

**Bin sequenced** You can choose to sort the items on the picking tickets by site, bin, and item.

**Sort kit components** You can choose to sort kit components on the picking tickets by site, bin, and item.

**Print customer item** If you use customer item names, you can choose to print the customer item on the packing slips.

### **Track customer item numbers and substitute item numbers**

You can set up customer item numbers to make entering orders easier. You can enter item numbers your customers use and relate them to the item numbers your business uses, making it easier to enter orders and allowing your business to adapt itself to your customers needs. When you enter an order using the customer's item number, the appropriate inventory item number will be displayed in place of the customer item number.

You also can set up substitute item numbers to sell an item in place of another item. For example, suppose a specific keyboard is on sale, but your inventory is sold out before the sale is over. You can substitute another keyboard rather than back ordering the keyboard that is on sale.

### **Set up user-defined fields for customers and items**

User-defined fields in customer and item maintenance windows allow you to track information your business needs about your customer item numbers. For example, to track the distributor with the fastest delivery time for an item, enter Quickest Distributor in a customer/item maintenance field. You can enter information in these fields in the Customer Item Maintenance window.

### **Limit transactions displayed in the Sales Document Numbers lookup window**

If you are using advanced lookup windows, you can limit the number of transactions that are displayed in the Sales Document Numbers lookup window. For example, if you enter June as the batch ID, the transactions for the June batch will be displayed in the Sales Document Numbers lookup window.

### **Consolidate lot numbers**

If a transaction decreases lot number quantities, you can consolidate lot numbers by selecting to sort them by lot number or expiration date in the Sales Lot Number Entry window.

### **Enter negative quantities for an invoice**

You can enter a negative invoice quantity for a line item, which enables you to enter returned items and sales items on the same invoice. You can't enter a negative invoice quantity for a drop-ship line item.

### **Enter negative prices on sales transactions**

You can enter a negative unit price and extended price for an item in the Sales Transaction Entry window and the Sales Item Detail Entry window. For example, you may want to track a discount or promotion with a negative price. A negative commission amount is calculated for a negative price.

### **Ship only complete documents**

You can mark the Ship Complete Documents option in the Sales Customer Detail Entry window if the customer doesn't accept partial shipments of sales documents. Partial line item quantities won't be transferred if the customer doesn't accept partial shipments. You can choose whether or not to print partial shipments on packing slips and picking tickets.

### **Copy sales transactions**

A Copy button is now available in the Sales Transaction window. Use this button to copy lines items from sales document for use on another.

## **Inventory Control**

### **Manufactured dates and expiration dates**

You can use the Lot Attribute Entry window to enter a manufactured date and an expiration date for an item that tracks lots even if you aren't using lot categories.

### **Item and vendor item descriptions**

You can enter up to 100 characters of text for item and vendor item descriptions. You'll have to modify reports to view the entire 100-character description.

### **Trace serial numbers and lot numbers**

Use the Serial/Lot Trace Inquiry window to track the life cycle of serial or lot numbers. A life cycle trace allows you to view all the transactions that include serial- or lot-numbers by their document date. This shows how a serial- or lot-numbered item was used from the day it was received to the day it left your business. You can use a life cycle trace to find a specific

serial or lot number, find items with serial or lot numbers received from a specific vendor, or find items that use serial or lot numbers shipped to a specific customer.

You also can use the Serial/Lot Trace Inquiry window to trace the recall of serial or lot numbers. A recall trace can show which customers purchased an item with a specific serial or lot number. You can use a recall trace to show the location of items with serial or lot numbers, including the bin.

If a transaction in a life cycle trace is a manufacturing or assembly transaction, you can use the Serial/Lot Bill of Materials Trace window to view the serial- or lot-numbered items that were consumed (used) in creating a serial- or lot-numbered item. You also can view serial- or lot-numbered items that were produced (assembled) that use serial- or lot-numbered items.

### **On-order quantities**

You can click the On Order link in the Item Quantities Maintenance window or in the Item Inquiry window to open the Purchase Order Processing Item Inquiry window. An On Order Qty field has been added to the Purchase Order Processing Item Inquiry window to view the on order quantities for each line item.

### **Allocated quantities**

You can click the Allocated link in the Item Quantities Maintenance window or in the Item Inquiry window to open the Item Allocation Inquiry window. The Item Allocation Inquiry window shows how item quantities have been allocated.

### **Available to promise**

Available to promise (ATP) means that an item is in stock and can be promised to a customer. ATP information shows how much inventory or projected inventory is not committed to customer orders and is available. ATP is calculated for an item from the latest document date to the earliest document date for all supply orders, including sales orders, sales fulfillment orders/invoices, purchase orders, inventory transactions, inventory adjustments, inventory transfers, and manufacturing orders.

You can open the Available to Promise window and view ATP information for items by using expansion buttons in the following windows.

- Sales Transaction Entry window
- Sales Item Detail Entry window
- Inventory Batch Entry window
- Inventory Available to Promise Inquiry window
- Item Transfer Entry window

### **Limit transactions displayed in the Inventory Document Numbers lookup window**

If you are using advanced lookup windows, you can limit the number of transactions that are displayed in the Inventory Document Numbers lookup window. For example, if you enter June as the batch ID, the transactions for the June batch will be displayed in the Inventory Document Numbers lookup window.

### **View item stock information**

You can use the Item Stock Inquiry window to view a current balance of the total stock quantity for an inventoried item and the transactions that affected the stock quantity of that item. You also can view the balance of each quantity type for the item, such as the quantity on hand and quantity allocated.

### **Assign minimum shelf life attributes**

If you are using sales workflow and the item is tracking lots, you can assign minimum shelf life attributes to the item and use those attributes to determine whether or not the item meets the minimum shelf life when the item is received.

### **Adjust prices by percent of list**

If you are using extended pricing, the price type of Percent off has been changed to Percent of List. If you use Percent of List as a price type, you can increase prices to an amount greater than the list price.

### **Enter multiple manufacturer's numbers**

You can enter manufacturer's item numbers for an inventoried or discontinued item and select the manufacturer's item number that you purchase most often. For example, assume that a vendor obtains the same interchangeable item from several manufacturers, but you want to purchase items made by a specific manufacturer. By entering a manufacturer's item

number for the item and selecting it as the primary number, the manufacturer's item number you specified will be printed on the purchase order.

### **Consolidate lot numbers**

If a transaction decreases lot number quantities, you can consolidate lot numbers by selecting to sort them by lot number or expiration date in the Item Lot Number Entry window, Item Transfer Lot Number Entry window, or the Item Bin Transfer Lot Number Entry window. You also can consolidate lot numbers in the Lot Number Inquiry window.

### **Enter negative prices in price sheets**

If you are using extended pricing, you can enter a negative net price in the Price Sheet Detail Maintenance window.

### **Copy item records**

A Copy button was added to the Item Maintenance window that can be used to copy an existing item record as a starting point for creating a new one.

## **Bill of Materials**

### **Limit transactions displayed in the Assembly Document Numbers lookup window**

If you are using advanced lookup windows, you can limit the number of transactions that are displayed in the Assembly Document Numbers lookup window. For example, if you enter June as the batch ID, the transactions for the June batch will be displayed in the Assembly Document Numbers lookup window.

### **Consolidate lot numbers**

If a transaction decreases lot number quantities, you can consolidate lot numbers by selecting to sort them by lot number or expiration date in the Assembly Serial/Lot Entry window.

## **Demand Planner**

Quickly establish a well-defined process for demand planning, or simplify your current process and improve the quality of forecasts, with the Microsoft Demand Planner module. This new module offers an intuitive, easy to-learn interface that's similar to Microsoft Excel. Demand Planner is

distributed separately from Great Plains. See your Microsoft Business Solutions partner for details.

### **Create forecasts applicable to your business**

Generate reliable future demand forecasts based on your company's historical data with a library of selected forecasting algorithms that are applicable in a variety of business contexts, such as stable or seasonal demand, or increasing or decreasing sales trends.

### **Improve automatically generated forecasts**

Save money by building a flexible plan that allows users to manipulate automatically generated forecasts and compare different scenarios.

### **Reduce uncertainty in demand**

Gain multidimensional visibility into buying pattern with the ability to map data to the most relevant axes that drive forecasting, such as products, time, and markets.

### **Work together with stakeholders**

Equip stakeholders to make valuable contributions to the forecast with collaboration features for sharing forecasts, synchronizing modifications, and controlling process workflow to consolidate agreed plans.

### **Run forecasts more frequently**

Reduce the planning cycle time with integration between Microsoft Demand Planner and your enterprise resource planning system.



# Chapter 4: Manufacturing Enhancements

This part of the documentation describes enhancements to Manufacturing modules. The following modules are discussed.

- [\*Bill of Materials\*](#)
- [\*Manufacturing Orders\*](#)
- [\*Usability enhancements\*](#)
- [\*Integration with the core distribution product for sales workflow features\*](#)

## Bill of Materials

### Assign BOM reference designators

Reference designators allow you to assign a value to a component that indicates the location of the manufactured item in which that component is used.

### Update multiple of bills of materials

You can add, remove or edit components on multiple bills of materials in a single step.

### Enhanced bill of materials

A redesigned graphical interface to Bill of Materials entry and inquiry windows makes it easier to enter and find information about what's included on an order.

## Manufacturing Orders

### Update multiple manufacturing order statuses

You can select a range of manufacturing orders and change their status. For example, you can release a group of MRP-planned manufacturing orders, or close a group of completed manufacturing orders.

### Select serial/lot in Quick Manufacturing Order

You can select specific serial numbers or lot numbers when entering a quick manufacturing order, instead of having to accept the default entries.

## **Create manufacturing orders from phantom subassemblies**

You can create manufacturing orders for phantom subassembly items. In the past, phantom subassemblies could be built only if they were part of a larger manufacturing order for the finished good that included the subassembly.

## **Usability enhancements**

The following enhancements have been added that make Manufacturing easier to use. These enhancements are based customer input:

- Information is saved each time a standard cost is updated. You can print a report to see a record of changes over time to the cost of a standard cost item.
- Calculate manufacturing lead times for an item selected in Item Engineering will be treated as “either.”
- Edit Release Date and Quantity Required (Firm) in Purchase Request Resolution, as well as selecting a vendor in the Item Inquiry window.
- Include raw material usage from the manufacturing process in the ABC Analysis.

## **Integration with the core distribution product for sales workflow features**

The following sales workflow features are available in Manufacturing:

- Advanced distribution
- Assign shipping addresses to line items
- Available to promise
- Lot number consolidation
- Negative pricing in Sales Order Processing
- On order/allocation drill down
- Purchase Order blanket orders
- Serial/lot number trace
- Link serial numbers and lot numbers to finished products
- Track multiple manufacturer’s part numbers

For more information about these enhancements, see [Chapter 3, “Distribution Enhancements.”](#)



# Chapter 5: Project Management Enhancements

This part of the documentation discusses enhancements to the Project Management series. The following topics are discussed:

- [Returns](#)
- [Distribution](#)
- [Payroll](#)
- [Transactions and billing](#)

## Returns

### Use separate windows for returns

Separate windows now are provided for returning items from a project directly back to the vendor and for returning items from inventory to the vendor.

Returns to a vendor are no longer entered using the Inventory Transfer Entry window.

In addition, drop-shipped items now can be returned from a project to the vendor.

## Distribution

### Track landed costs

You now can use landed costs for Project Accounting purchase orders. Landed costs are the additional costs that might be associated with purchasing a product, such as freight costs or import duties.

Line-by-line detail of all the information entered on each receipt is kept, including landed costs, if you're keeping shipment and invoice receipt history. When you delete receipt history, the documents in the range you've deleted won't be printed on the Receivings Transaction History Report.

### Use multiple bins with Project Accounting

You can use multiple bins with Project Accounting purchase orders to add another level of detail to item quantity tracking. In addition to tracking items within inventory sites, you can track item quantities in bins within

each site. Bin quantities are processed and displayed in the base unit of measure for the item.

You can set up bin information after multiple bins functionality has been installed and registered. However, you must also make this feature available in Inventory before you can use bins to track items.

### **Enter negative quantity for line items in miscellaneous logs**

You can enter a negative quantity for a line item in the Miscellaneous Log Entry window if the project type is Time and Materials. The total cost now might have a negative value.

## **Payroll**

### **Default pay codes**

You can use the Timesheet Setup window to set up default pay codes based on the employee, budget, or cost category. When you select a rate table to use with a project, the pay codes used for timesheet entries for a project will depend on the corresponding employee-pay code combination in the rate table. The unit cost for the pay code will be used in the timesheet transaction.

### **View and remove inactive employee records**

You can choose whether to view or delete inactive employee records using two options in the Employee Access List Wizard window.

### **Calculate commission on retainer fees**

You can specify whether to calculate commission on a retainer fee. If you mark the Calculate retainer commission option in the Billing Setup window, commission is calculated for the retainer fee based on the default commission percentage.

## **Transactions and billing**

### **Apply taxes on retainer fees**

You can specify whether to apply taxes on retainer fees. If you mark the Retainer fee taxable option in the Billing Setup window, you can choose a tax schedule ID for retainer fees. If the option is not marked, tax is not calculated for the fee amount.

### **Include previously billed fees on invoices**

You can mark the Include fully billed fees option in the Billing Setup window to include fee billing details on printed invoices, even if the fees have been billed previously.

### **Limit cost categories displayed during transaction entry**

While entering transactions, you can view all cost categories or only cost categories assigned to the project budget. You can select an option for the Display field in the Cost Categories lookup window when entering timesheet, employee expense, equipment log, miscellaneous log, inventory transfer, and Project Accounting purchase order, receiving, and purchasing invoice transactions.

### **Limit inventory items displayed during transaction entry**

You can view all inventory items or only those assigned to the project budget when entering inventory transfer, purchase order, and Project Accounting receivings and purchasing invoice transactions.

### **Close incomplete Time and Materials projects**

Mark the Allow Proj Closing checklist override for TM proj option in the Project Setup window to close a Time and Materials project, even if the checklist of project closing requirements is not complete.

### **Track profit/billing margins in Project Maintenance**

The Project Maintenance window now includes a Profit/Billings Margin field. The following profit margin calculations will be used to display the amounts in the two profit margin fields:

- Profit/Cost Margin = (Billings To Date - Cost To Date) / Cost To Date
- Profit/Billings Margin = (Billings To Date - Cost To Date) / Billings To Date

### **Update periodic budgets using document date or posting date**

The Update Periodics Using field has been added in the Billing Setup window and to the Purchasing Invoice Setup window. You can use the document date or the posting date to update amounts in the Project

Periodic Budget window for billing and purchasing invoice transactions. For example, if the Document Date option is marked in the Billing Setup window, billings will be updated for the corresponding period based on the document date when you post billing transactions.

# Chapter 6: Field Service Series Enhancements

This part of the documentation describes enhancements to the Field Service Series. The following topics are discussed:

- [Service Call Management](#)
- [Contract Administration](#)
- [Returns Management](#)
- [Enhanced integration to Sales Order Processing](#)

## Service Call Management

### Service call billing for contract service calls

The following fields will be updated to the respective contract for all contract service calls regardless of the Contract Liability Type:

- Total Value of Calls
- Actual Calls
- Value of Time and Retainage Consumed

### View service call history by Customer Inquiry

You can view all service calls for a customer that are both invoiced (but not moved to history) and historical in the same window.

## Contract Administration

### Recognize revenue for monthly contracts

Now you can recognize revenue for monthly contracts. To defer revenue recognition from the contract billing process to the revenue recognition process, mark the new Create Revenue option in the Contract Entry/Update for Monthly Contracts window.

### Print revenue recognition posting report

A Revenue Recognition Posting Report will print after the revenue recognition posting process has run. Information on the report is grouped by fiscal year and period, and includes the contract number, contract type and the amount of revenue that's been recognized.

### **Contract billing filters**

The Contract Billing window now includes an option to filter records by contract type, customer ID, and contract number. Lookup windows are available to streamline the contract billing process.

### **Create monthly contracts**

Now you have an option to recognize revenue for monthly contracts. By marking the new Create Revenue option in the Contract Entry/Update window, you can defer revenue recognition from the contract billing process to the revenue recognition process.

## **Returns Management**

### **Return items at zero cost**

The Item Extensions window now allows you to specify a zero cost for a returned item. A zero (0.00) entered in the Returned Item Cost field now sets the cost of a returned item to zero. Previously, entering zero in this field resulted in the item's current cost being used. You can choose to use the item's current cost by marking the new Use Current Cost option in this window. During the update process, the Use Current Cost option in the Returned Item Cost field will be marked by default.

### **Automatically post returns**

A new Return Stock button on the RMA Entry/Update window allows you to automatically post an inventory transfer from the returns warehouse to the main (Site ID) warehouse in the Service Setup window. This enhancement speeds up processing of returns when the returned item is resellable and needs only to be returned to inventory.

### **Return to stock option added to RMA Entry/Update**

A Return to Stock feature from RMA Entry/Update now allows an item on a return merchandise authorization to be moved from the returns warehouse to another warehouse by completing a warehouse transfer if the customer chooses the Return to Stock button.

### **Inactive vendor message**

A message will be displayed in the RTV Entry/Update window when you create an RTV for a vendor who is set to an Inactive status. The message is informational only; it will not prevent entering the RTV.

## Enhanced integration to Sales Order Processing

### Sales Order Processing posting routine

When sales orders are created from the Service Call Management module, the following information will be entered on the invoice:

- Service call number
- Service call line number
- Service entry date
- Service complete date
- Service line item number
- The first serial number, if applicable

When invoices are created from the Returns Management module, the following information will be entered on the invoice:

- RMA number
- RMA entry date
- RMA return date/complete date
- RMA line number
- The first serial number, if applicable

### Contract creation routine

When contracts are created from Sales Order Processing, the contract record source on the contract will be set to Sales Order and the contract source document will be set to the invoice number.



# Documentation Comment Form

## Great Plains What's New

June 2004

We welcome your comments and suggestions regarding the quality and usefulness of this What's New. Your comments help us improve the documentation to better meet your needs.

- Did you find any errors?
- Is the information clearly presented?
- Are the examples correct? Do you need more examples?
- What features do you like most (and least) about the documentation?

If you find errors or have specific suggestions, please note the topic, chapter, and page number.

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