

MICROSOFT BUSINESS SOLUTIONS FOR

# Customization

TOOLS  
- GREAT PLAINS

**Microsoft**  
*Business  
Solutions*

A blurred background image showing a person's hands typing on a laptop keyboard. The person is wearing a grey long-sleeved shirt. The image is out of focus, emphasizing the motion and activity of working on a computer.

MICROSOFT BUSINESS SOLUTIONS-GREAT PLAINS

# Customize, Integrate and Extend

## NO TWO COMPANIES ARE ALIKE

Whether your business requirements include more timely data, specialized processes, or multiple location capabilities, Microsoft® Business Solutions–Great Plains® can be tailored to match those needs. Great Plains is highly customizable, and dozens of industry-specific solutions are readily available.

The Customization Tools series also provides a suite of powerful industry-standard tools and technologies familiar to millions of developers. With these tools, data and processes can easily be shared with other applications, and functionality can be added or changed. Using tools such as eConnect, developers can integrate outside data sources such as Web storefronts, Web services, and

legacy applications with your solution. Developers also can work with Modifier with Visual Basic® for Applications (VBA), Dexterity, and Continuum to customize Great Plains to fit your needs. And with Integration Manager and Integration Assistant for Microsoft Excel, end-users can add customizations as well.

You know where you want to take your business. Take hold of a solution that's designed to meet your specific needs—  
**MICROSOFT GREAT PLAINS.**

SOLUTIONS FOR **Pursuing** YOUR BUSINESS VISION

Designed for rapid time-to-benefit  
and low cost of ownership,

Microsoft Business Solutions–Great Plains offers integrated solutions for financials, business analytics, e-commerce, supply chain, manufacturing, project accounting, field service, customer relationship management, retail management and human resource management. By delivering unparalleled access to decision-driving information, a rapid return on investment, and the finest customer service in the world, Microsoft Great Plains helps you grow and manage your business better.

*“Using Microsoft technologies has been a real strength. By investing in [Microsoft Business Solutions] we know we will always have a leading edge by utilizing the latest technology.”*

TOM WURSTER

VICE PRESIDENT OF OPERATIONS

H.M. STAUFFER & SONS, INC.

## LEVERAGE INDUSTRY-STANDARD TECHNOLOGIES

Integrate data from any source—even those not based on Microsoft platforms—using industry-standard technologies such as Microsoft BizTalk® Server, Component Object Model (COM), Microsoft Message Queuing (MSMQ), Simple Object Access Protocol (SOAP), and Extensible Markup Language (XML).

## WORLD-CLASS SUPPORT

Recognized as one of the most responsive and innovative service teams in the industry, Microsoft Business Solutions backs your investment in Microsoft Great Plains by working with your local reselling partner to offer remarkable training and support services.

You also have access to a vast network of independent software vendors (ISVs) that can give you any additional support you need and tailor your solution to your specific requirements. At Microsoft Business Solutions, serving the customer for a lifetime is more than a commitment—it's a mission.

## Components of the Customization Tools Series

### CUSTOMIZATION TOOLS SERIES

- eConnect
- Modifier with Microsoft Visual Basic for Applications (VBA)
- Continuum for Visual Basic (VB) and Delphi
- Dexterity
- Software Development Kit (SDK)

### INTEGRATION

- eConnect
- Integration Manager
- Integration Assistant for Excel
- Software Development Kit (SDK)

“ I WANT TOOLS THAT **extend** THE REACH OF MY BUSINESS. ”

eConnect is a series of programmable tools that allow development teams to design custom solutions for high-volume, high-speed programmatic integration between Microsoft Great Plains and external applications. eConnect's application programming interface (API) enables real-time, transactional connections both within your business and with outside organizations.

With eConnect, developers can design integration packages that permit outside data sources such as Web storefronts, Web services, legacy applications, and more to interact with Microsoft Great Plains applications. Accessing business objects using eConnect allows full data integration from data sources based on non-Microsoft platforms.

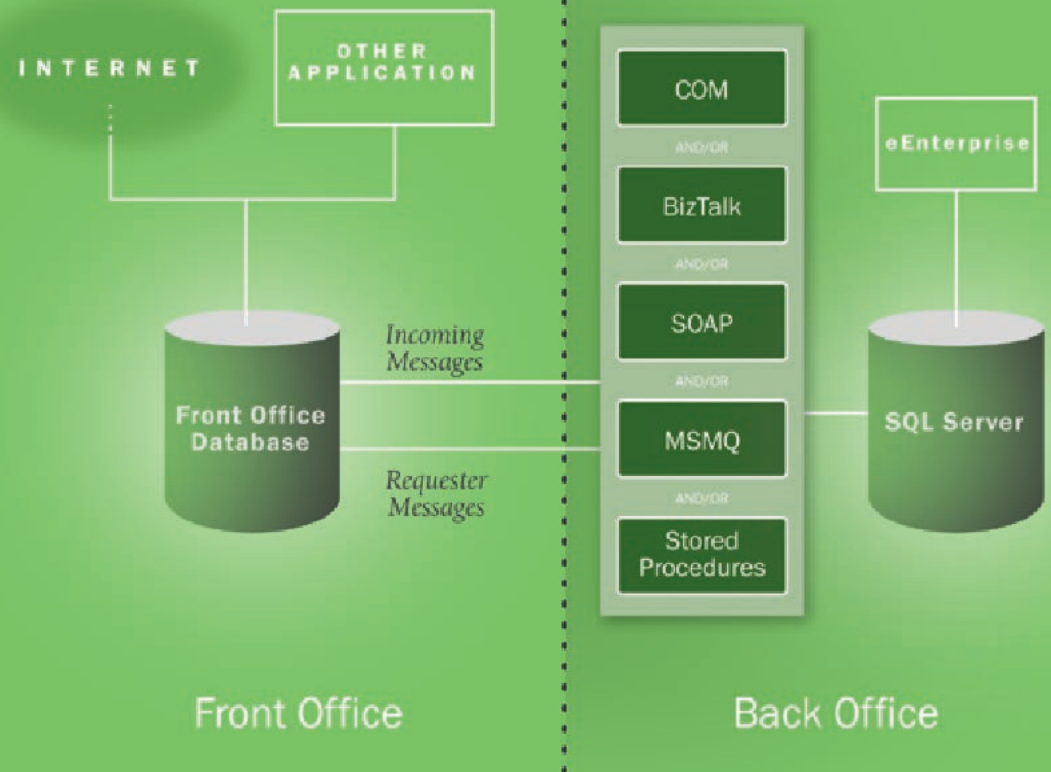
## ECONNECT

- Instead of rebuilding transportation protocols, developers can focus on XML and business logic development. By enabling efficient customizations of your existing infrastructure, eConnect helps reduce IT costs and increases your return on investment.
- Utilize latest industry-standard technologies, including Visual Basic objects, stored procedures, BizTalk Server AIC adapters, COM integration, MSMQ, and XML documents exchange. By using eConnect and your own development tools you can seamlessly integrate your applications, including Web services, with Great Plains. This allows you to automate business processes, tightly integrate applications within your enterprise, build reliable, fault-tolerant systems, and automate data exchange with your external trading partners.
- Integrate with business objects that act as a doorway for imported data, helping ensure data validation and returning well-formed XML.
- Reduce your development costs by utilizing existing investments. Combining industry-standard technologies with eConnect enables integrations with the business logic stored in Microsoft Great Plains. Because the business logic is isolated from the applications themselves, developers can select the tools they work with best for connectivity.
- Extend business logic to suit the specific needs of your business. eConnect provides multiple methods of adding new business logic appropriate to your organization, including adding additional XML nodes, pre- and post-SQL procedures, and custom middleware to expand your business logic.
- With open access to eConnect's extensive integration tool kit, developers can implement eConnect quickly and design customizations for your business solution.

## eConnect Configuration

Using eConnect to design your customized business solution provides advantages for your end-users as well.

- Eliminate duplicate effort by using eConnect to pass XML documents in and out of Microsoft Great Plains, streamlining data entry processes, reducing re-keying of information, and tying your systems together.
- Make better business decisions with easier access to powerful information. eConnect supports the ability to build applications that connect to your financial management data and support many different models for data access. You can share information back and forth across multiple applications, giving you the information you need, when you need it.



“ I WANT A **reliable,** FAMILIAR DEVELOPMENT ENVIRONMENT. ”

Designed for both developers and end-users, the Modifier with Visual Basic for Applications (VBA) is the most widely-used development and customization environment in the software industry.

## MODIFIER WITH VBA

Maximize flexibility while maintaining the total integrity of business rules and data. Two specific tools are included:

- Great Plains Modifier provides the ability to quickly customize Microsoft Great Plains windows. This includes rearranging window layout and customizing the look and feel of individual data entry windows, as well as making global changes to prompt and message text.
- Visual Basic for Applications allows you to embed business rules within Great Plains application logic, integrate custom ActiveX controls with Great Plains forms, or tightly integrate Great Plains with popular productivity and business packages such as Microsoft Excel, Microsoft Word or Microsoft Access.

Distributed together, this suite of tools provides you with unprecedented levels of customization to provide maximum benefit to your organization. They allow you to:

- Streamline data entry for each user. Modifier with VBA provides extensive capabilities for altering the display of information in a window, or changing the way information is entered and processed, depending on the needs of the individual user. These may include default field values, tab and control order, field level security, and disabling buttons or hiding information based on the current user's permissions.

- Leverage existing resources. The same version of VBA built into Great Plains is also found throughout Microsoft Office, making it easier and more cost-effective to leverage development resources for creating custom solutions. Because this is the same VBA environment found in other applications used every day within your business, the learning curve is shortened and many customizations can be created with minimal training.
- Take advantage of new technologies. Microsoft Great Plains supports Microsoft COM standards and ActiveX Data Objects (ADO) in addition to VBA, so new components and applications are always available. These include controls as diverse as bar code printers, credit card authorization controls, and zip code databases. You can extend your solution with custom controls, as well as integrate your solution with new products and tools that provide support for COM.
- Share customizations across the organization. Modifier with VBA allows you to quickly “package” any customized forms, reports, or screens, and e-mail them to colleagues for fast and simple import and installation.



“ I WANT TO **simplify** DATA INTEGRATIONS. ”

Integration Manager allows end-users to easily integrate data from virtually any database or desktop application into Microsoft Great Plains. These include comma and tab-delimited text files, XML, and most Open Database Connectivity (ODBC) data sources.

## INTEGRATION MANAGER

- Define your integration without in-depth knowledge of the underlying data structures or tables. Integration Manager's intuitive tools make it easier to map external data fields to fields within Microsoft Great Plains. You can also customize data processing to meet your specific needs, using advanced SQL query support and built-in Microsoft VBScript.
- Verify the accuracy and integrity of external data before committing it to your database. Integration Manager encapsulates the complex logic found in Great Plains in a series of business objects. All data that you choose to import is processed through these business objects, helping ensure that data meets your validation criteria.
- Easily upgrade your integrations from version to version without significant effort. All business objects are based upon the COM standard, providing you with a platform for quickly delivering additional business objects as the Microsoft Business Solutions product line grows.
- Define recurring integrations by using Integration Manager to automatically load data from external applications into Great Plains.
- Build integrations in hours, not days, by sidestepping the time it takes to research complex database queries or massive data models. Because Integration Manager works with business objects, no knowledge of the database structure is needed. As part of each defined integration, Integration Manager produces default data behaviors and processing rules for the best results. You can override these rules or define your own to alter or modify data.
- Review integrations quickly and easily with Integration Manager's Object Browser. System administrators have easy access to all components of an integration, making ongoing maintenance—including extensive error checking and logging—a simple task.
- Fully automate and customize integrations with Integration Manager. Once you've defined an integration, you can launch it directly from the Great Plains environment, from a command line, or from a batch file. Additionally, you can set integrations to run at specified times with Integration Manager support for most Microsoft Windows® NT®-based schedulers.



# “ I WANT TO TAKE FULL ADVANTAGE OF MICROSOFT Excel.”

By taking advantage of the Integration Assistant for Excel, users with little technical expertise can quickly and easily integrate data directly from Microsoft Excel into Microsoft Great Plains.

The Integration Assistant for Excel is made up of three distinct wizards—the Build Business Object Integration Wizard, the Build Desktop Application Integration Wizard, and an Inquiry wizard.

## BUILD BUSINESS OBJECT INTEGRATION WIZARD

The Build Business Object Integration Wizard will walk you through creating simple integrations into specific Microsoft Great Plains modules. For example, companies that track depreciation within Microsoft Excel can use this wizard to integrate that information as a General Ledger Transaction.

- Use easy “point and click” mapping capabilities to define integrations from Excel to Great Plains. No knowledge of ODBC database is required.
- Help ensure data integrity by validation through the Great Plains business logic during the integration.
- Create integrations in minutes and save them for reuse with a few clicks.
- Perform and create integrations within Excel quickly and with minimal effort.

## BUILD DESKTOP APPLICATION INTEGRATION WIZARD

The Build Desktop Application Integration Wizard enables integrations of data into any module within Microsoft Great

Plains. For example, companies that create expense report forms in Excel can update those forms as Payables Transactions within Great Plains Financials.

- Enable integration into virtually any module or application written in Dexterity. Integration code is generated automatically, so you don't have to spend time learning Great Plains program objects.
- Help ensure data integrity by validating information through the Great Plains business logic during integration.
- Perform integrations from within Excel with a single click.

## INQUIRY WIZARD

With the Inquiry Wizard, you can run queries of General Ledger data directly from Excel with the click of a button. There's no need to export information into a report or perform those lookups from within Microsoft Great Plains.

- Run SQL queries with an easy-to-use wizard that provides up-to-date, refreshed information.
- Add-in integration functions are provided for Excel.
- Work with the familiar Excel interface to retrieve current data from Great Plains and manipulate the queried data, using Excel-based formatting, charting and graphing features.

“ I WANT TO KNOW I CAN **keep pace** WITH CHANGING NEEDS. ”

The Customization Tools Series includes components designed to help developers create, implement, and fine-tune extended customizations and integrations.

#### CONTINUUM FOR VBA AND DELPHI

The Continuum products allow developers to use their tool of choice for extending Microsoft Great Plains. Using Continuum, developers can integrate new or existing business applications written in Visual Basic or Delphi into the interface, providing users with a solution that is custom fit to their business needs.

- Reuse current development resources by integrating new or existing business applications written in Visual Basic or Delphi.
- Streamline customization tasks with wizards that generate the code required for integration.
- Build custom applications using a set of programmable objects written to COM standards. Continuum tools provide programmers with direct access to Great Plains tables, windows, and reports.
- Extend your solution cost-effectively and quickly by using industry-standard tools that free developers to spend less time familiarizing themselves with the Great Plains data schema, and more time developing custom solutions that optimize business performance.

#### DEXTERITY

Dexterity provides developers with an integrated macro language for customization of Microsoft Great Plains applications. Especially suited for new modules or customizations that access the Great Plains database extensively, Dexterity is also an excellent choice for creating new forms that are linked to the underlying database.

- Create the same look and feel as Great Plains by leveraging an easy distribution and implementation method for stand-alone or integrated applications.
- Speed custom application development by taking advantage of an integrated macro language for regression analysis testing of applications.
- Utilize Great Plains resources with access to all utilities within the Great Plains development environment.

#### SOFTWARE DEVELOPMENT KIT (SDK)

The SDK helps developers work directly with data tables to create extended customizations and integrations. Comprehensive documentation includes an outline of the Great Plains data model, while essential tools further aid customizations and integrations.

# Zachys

WINE AND LIQUOR, INC.

## SITUATION

Considered one of the finest Italian wine shops in the country, Zachys Wine and Liquors, Inc., began as a corner store in 1944 by Zachy Zacharia in Scarsdale, New York. While maintained as a family business, each generation has EXPANDED THE BUSINESS TO NEW AREAS OF DOMINANCE: from an online retailer, to a wine storage facility, to an auction house specializing in wine and spirits.

However, bound by internal systems, ZACHYS WAS UNABLE TO BRING CURRENT FINANCIAL INFORMATION TO EACH AUCTION to collect payments on outstanding invoices or for the current auction. Invoices were printed after the close of an auction, with collection processes taking up to two weeks and delaying shipments to customers.

## SOLUTION

Zachys purchased Microsoft Business Solutions–Great Plains to carry out their auction business, with plans to continue to the storage and retail arms of the company. To complement Microsoft Great Plains, Zachys built their own .NET-connected auction management application. It is used during all phases of the auction processes: collecting lot information, printing auction books, recording bids at the auction, and shipping product once invoices have been paid. After the completion of an auction, the application sends the information to Microsoft Great Plains via the eConnect module.

Additionally, a Disconnected Payment application, built by Cole Systems, enables the printing of customer statements, reflecting open balances from prior auctions as well as new purchases. The application accepts payments during the auction and later transports the receipts into Microsoft Great Plains via the eConnect module.

### BENEFITS

In addition to having a true financial package with Microsoft Great Plains, Zachys' use of technology has expanded their business from servicing only their local area to servicing elite clientele from all over the world. With the establishment of a Web site, over 70 percent of their sales are now shipped worldwide.

#### STRONGER FINANCIAL CONTROLS

The number of staff required to process the collection and payment of consignment items has been reduced, due to stronger financial controls. By managing their auctions with their own staff and eliminating their reliance on a partnered auction house, Zachys receives a greater portion of the proceeds from each auction.

#### SPEEDIER TRANSACTIONS LEADS TO HAPPIER CUSTOMERS AND CONSIGNORS

Using eConnect, developers integrated the .NET application with Microsoft Great Plains. Data re-entry across the two systems is virtually eliminated. As a result, payments are collected more efficiently and product shipments are faster.

With payments collected onsite, purchases are shipped the first business day after the auction, resulting in higher customer satisfaction. Consignors are more likely to receive prompt payments because transactions are processed accurately and efficiently.

Microsoft Business Solutions ApS, which includes the businesses of Great Plains, FRx Software Corporation and Microsoft bCentral™, offers a wide range of business applications designed to help small and midmarket businesses become more connected with customers, employees, partners and suppliers. Microsoft Business Solutions applications automate end-to-end business processes across financials, distribution, project accounting, electronic commerce, human resource management, manufacturing, supply chain management, business intelligence, sales and marketing management, and customer service and support.

## MICROSOFT BUSINESS SOLUTIONS—GREAT PLAINS

A solid foundation for building business success.

More information about Microsoft Business Solutions can be found at  
<http://www.microsoft.com/BusinessSolutions>

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