



Business Portal for Dynamics GP

Presented by:
Charles Allen
BKD Technologies
Managing Consultant

Introduction – Charles Allen

Microsoft
GOLD CERTIFIED
Partner



- Managing Consultant
- More than 20 years experience
- Microsoft MVP

Agenda

Microsoft
GOLD CERTIFIED
Partner

- ◆ What is Business Portal?
- ◆ What can you do with Business Portal?
- ◆ Additional Applications for Business Portal
- ◆ Server or WSS/Foundation?
- ◆ New in BP 5
- ◆ Q & A

What is Business Portal?

Microsoft
GOLD CERTIFIED
Partner

Company Overview Pages - Company Overview Dashboard - Windows Internet Explorer

http://gp2010-srv-02:81/BP/Executive/Company%20Overview%20Pages/Company%20Overview%20Dashboard.aspx

Company Overview Pages - Company Overview Dash...

Fabrikam, Inc. > Fabrikam, Inc. Business Portal

Welcome System Account

Executive Center

Home Employee Manager Executive Company Financial Sales Purchasing Inventory Human Resources Payroll Manufacturing Project Administration Site Actions

Fabrikam, Inc. Business Portal > Executive Center > Company Overview Pages > Company Overview Dashboard

View company overview metric information.

Company Overview Dashboard

Company: Fabrikam, Inc.

Gross Profit Margin

This Period	Current	Previous	Change	% Change
vs. Last Period	0.52	0.50	0.02 ↑	4.00%
vs. This Period Last Year	0.52	0.00	0.52 ↑	0.00%

Cash Position

This Period	Current	Previous	Change	% Change
vs. Last Period	(8321)	(96039)	87718 ↑	91.34%
vs. This Period Last Year	(8321)	14213	22534 ↓	158.54%

Receivables Turnover

This Period	Current	Previous	Change	% Change
vs. Last Period	0.97	1.34	0.37 ↓	27.61%
vs. This Period Last Year	0.97	0.00	0.97 ↑	0.00%

Quick Ratio

This Period	Current	Previous	Change	% Change
vs. Last Period	3.15	0.34	2.81 ↑	826.47%
vs. This Period Last Year	3.15	2.20	0.95 ↑	43.18%

Debt To Equity

This Period	Current	Previous	Change	% Change
vs. Last Period	0.00	0.00	0.00 →	0.00%
vs. This Period Last Year	0.00	0.00	0.00 →	0.00%

Sales Per Employee

This Period	Current	Previous	Change	% Change
vs. Last Period	7673	3481	4192 ↑	120.43%
vs. This Period Last Year	7673	0	7673 ↑	0.00%

Done

start

Company Overview P...

Local intranet

100%

8:35 PM

What is Business Portal?



- ◆ Business Portal is a SharePoint-based tool that provides collaboration, data entry and reporting using your browser
- ◆ Additional applications provide data entry for timesheets, requisitions, HR self-service and orders

What is Business Portal?

Microsoft
GOLD CERTIFIED
Partner

◆ Includes these series

- Financial
- Sales
- Purchasing
- Inventory
- Manufacturing
- Project Accounting

What is Business Portal?

Microsoft
GOLD CERTIFIED
Partner

◆ Series Included (Continued)

- Human Resources
- Payroll
- Service*
- Executive*
- Company*
- Employee*

What is Business Portal?

Microsoft
GOLD CERTIFIED
Partner

- ◆ Series Included (Continued)
 - Orders*
 - Manager*

What Business Portal is Not

Microsoft
GOLD CERTIFIED
Partner

- ◆ It is not a way to enter data that would normally be done in a GP window
- ◆ No journal entries or vouchers done here!

What is Business Portal?

Microsoft
GOLD CERTIFIED
Partner

- ◆ Queries
- ◆ Reports
- ◆ Key Performance Indicators
- ◆ Document Management
- ◆ Other Web Parts

Business Portal Tour

Microsoft
GOLD CERTIFIED
Partner



Queries

- ◆ Similar to SmartList
- ◆ Can be exported to Excel
- ◆ Queries can be created and saved by user
- ◆ Based on security assigned to the user in Business Portal
- ◆ Use a wizard to create and modify

Queries

New Query Modify Query Save Query Copy to Excel Parameters Find Refresh

Queries

Organize...

- Shared Queries
 - Samples
 - Sales
 - Top Items Year to Date
 - Sales Manager
 - Salesperson
- Center Queries
 - Account
 - Customer
 - Item

Item	Quantity	Sales	Cost	Margin
S01	108	\$265,754.60	\$135,607.84	\$130,146.76
S13	19	\$263,149.05	\$131,362.54	\$131,786.51
SOFT-PHM...	2	\$138,219.90	\$69,100.00	\$69,119.90
S12	1	\$70,009.95	\$35,000.00	\$35,009.95
S17	6	\$35,999.70	\$18,369.54	\$17,630.16
S19	22	\$29,438.90	\$14,790.22	\$14,648.68
B01	1	\$20,000.00	\$16,000.00	\$4,000.00
S16	24	\$14,638.80	\$7,264.68	\$7,374.12
S04	8	\$14,079.60	\$7,132.15	\$6,947.45
S02	12	\$11,519.40	\$5,748.60	\$5,770.80
B08	1	\$8,000.00	\$7,250.00	\$750.00
PHON-ATT...	42	\$7,977.90	\$3,917.58	\$4,060.32
PHON-ATT...	38	\$7,218.10	\$3,509.50	\$3,708.60
S18	1	\$6,929.95	\$3,379.25	\$3,550.70
S03	5	\$6,749.75	\$3,372.50	\$3,377.25
S14	1	\$6,589.95	\$3,290.55	\$3,299.40
PHON-ATT...	32	\$6,078.40	\$2,939.50	\$3,138.90
PHON-ATT...	28	\$5,318.60	\$2,576.52	\$2,742.08
B02	88	\$5,275.60	\$4,884.00	\$391.60
E12	43	\$4,727.85	\$2,160.75	\$2,567.10
E07	40	\$3,198.00	\$1,350.65	\$1,847.35

Query "Top Items Year to Date" has finished processing. Displaying 45 of 45 rows.

Web Parts

- ◆ There are dozens of web parts that ship with Business Portal
- ◆ A web part is used to display data, such as your inbox, an RSS feed or a vendor's record
- ◆ Web parts are the content that a page displays

Web Parts

- ◆ There are four kinds
 - BP Result Viewer – Displays the results of real-time queries of GP data.
 - BP Tab – Organize information into multiple tabs
 - WSS – Display announcements, surveys, document libraries and other content types
 - Business Data – Display data from the Business Data Catalog in MOSS

Reports

Microsoft
GOLD CERTIFIED
Partner

- ◆ Dynamics GP reports can be published to Business Portal
- ◆ GP Reports can be scheduled using Report Scheduler in GP
- ◆ Business Portal will store an instance of each publication
- ◆ Reports can be viewed and printed

Reports

Microsoft
GOLD CERTIFIED
Partner

- ◆ If using SharePoint Server 2010, Enterprise Edition then the Reports Center is available.
- ◆ If using SharePoint Foundation, then the Reports Catalog is used.

Additional Applications

Microsoft
GOLD CERTIFIED
Partner

- ◆ Employee Self Service
- ◆ Order Management
- ◆ Project Time and Expense
- ◆ Requisition Management
- ◆ Field Service

System Requirements

◆ 32-bit

- Windows Server 2003 or Windows Server 2008
- IIS
- SQL Server 2005 or SQL Server 2008
- Office SharePoint Server 2007, Enterprise Edition or Windows SharePoint Services 3.0

System Requirements



◆ 64-bit

- Windows Server 2008 or Windows Server 2008 R2
- IIS
- SQL Server 2005 or SQL Server 2008
- SharePoint Foundation 2010 or SharePoint Server 2010, Enterprise Edition

Server vs. Foundation/WSS

Microsoft
GOLD CERTIFIED
Partner

- ◆ Search
- ◆ List Pages
- ◆ Report Center
- ◆ Field Service Suite

New in BP 5

Microsoft
GOLD CERTIFIED
Partner

- ◆ Dynamics GP Report Viewer Web Part
- ◆ Application Administration
- ◆ Business Portal help
- ◆ Internet Explorer 8.0 Support
- ◆ SQL 2008 Metrics Support for the Executive Center
- ◆ Workflow for WSS and Server

BKD Technologies Support Center



- ◆ Monday - Friday, 8 a.m. - 5 p.m., call our Support Center toll free at:

- ◆ **Dynamics GP - 877.253.7778**
GPsupport@bkd.com

Where to Get More Information



- ◆ BKD Technologies - 877.253.7778 or gpsupport@bkd.com.
- ◆ Reporting Services Admin Guide
- ◆ System Manager Setup Guide
- ◆ eLearning through CustomerSource
- ◆ <http://www.microsoft.com/sqlserver/2008/en/us/reporting.aspx>

Q&A

Microsoft
GOLD CERTIFIED
Partner



What's New In Dynamics GP HR & Payroll



- ◆ Integrity Data HR & Payroll Solutions
- ◆ Day: November 18, 2010
- ◆ Register at:

www.bkdtechnologies.com/attend

Save The Date!

- ◆ Dynamics GP Year-end Webinar
- ◆ Day: December 16, 2010
- ◆ Coming Soon - register at:

www.bkdtechnologies.com/attend

Contact Info



Charles Allen
BKD Technologies
713.499.4629
callen@bkd.com

Thank You For Attending Our Webcast.