
Summit 2009

A Microsoft Dynamics User Conference



Microsoft Executive Briefing Center :: Fargo, ND
October 29, 2009

Conference Agenda:

8:30–9:15 Welcome and Opening Session :: Dakota West ■

9:15–4:00 Support Help Desk :: EBC Focus South and EBC Focus North ■

9:25–10:20 Concurrent Sessions ■

- SQL Reporting Services for Microsoft Dynamics (GP/CRM) :: Dakota West
- Integrating Dynamics CRM with Office SharePoint Server (CRM/SharePoint) :: EBC East

10:30–11:00 Micro Sessions ■

- Extender for Dynamics GP (GP) :: Dakota West
- Workflow/Automation with Dynamics CRM (CRM) :: EBC West
- Introduction to Business Portal (GP/SharePoint) :: EBC East

11:10–12:05 Concurrent Sessions ■

- Introduction to Dynamics CRM (CRM) :: Dakota West
- Make Collecting Sales Tax Easy with AvaTax (GP) :: EBC East
- Workflow for Dynamics GP (GP/SharePoint) :: EBC West

12:10–1:00 Lunch with table topics :: Dakota West ■

1:00–1:30 Micro Sessions ■

- Dynamics GP 11.0 Sneak Preview (GP) :: Dakota West
- What's xRM? (CRM) :: EBC West

1:40–2:35 Concurrent Sessions ■

- Tips and Tricks for getting more out of Dynamics GP (GP) :: Dakota West
- Bringing it together with Office Communication Server (CRM) :: EBC West

2:45–3:40 Concurrent Sessions ■

- Integration tools for Microsoft Dynamics (GP/CRM) :: Dakota West
- Reporting Options for Dynamics GP (GP) :: EBC East

3:45–4:00 Closing Session :: Dakota West ■

4:01–6:00 Thursday 4:01s... the unknown tradition ::
:: Summit Group Software; 23 Broadway Suite 400 ■

Welcome and Opening Session

8:30–9:15 :: Dakota West

In this session, kick off the day by learning about some exciting new changes coming for Summit Group Software customers – including information on our new Managed Services options and customer portal..Meet the Summit Group Software team – and hear about and see the new addition to the Fargo Microsoft campus.

Support Help Desk

9:00–4:00 :: EBC Focus South and EBC Focus North

Have a question about Microsoft Dynamics? Come to our support help desk and get your questions answered. We'll have people available all day to answer your technical questions and provide you the info you need.

SQL Reporting Services for Microsoft Dynamics

9:25–10:20 :: Dakota West

Presenters: *Tyler Sand and Rhonda Hawley*

In this session, you will be exposed to the advantages and endless possibilities of using Microsoft SQL Reporting Services (SRS) in conjunction with Microsoft Dynamics. The session will include information and a demonstration on the new SRS reporting package for Microsoft Dynamics GP, discuss the Microsoft Dynamics CRM Report Wizard which allows users to generate custom reports, and demonstrate several non-traditional ways of using SRS with Microsoft Dynamics CRM.

Integrating Microsoft Dynamics CRM with Office SharePoint Server

9:25–10:20 :: EBC East

Presenter: *Joseph Tews*

Access to key business data is important to you. You have implemented Microsoft Office SharePoint Server to take advantage of robust KPI and Enterprise Searching capabilities. You have also implemented Microsoft Dynamics CRM to take advantage of the customer and lead management functionality. Do you want a way to tie these two systems together but don't want to spend a lot of time developing a custom application or integration? In this session, you'll find out how easy it is to bring Microsoft Dynamics CRM information into Microsoft Office SharePoint web parts, and integrate the two systems together to give you even better access to your key business data.

Extender for Microsoft Dynamics GP

10:30–11:00 :: Dakota West

Presenter: *Rhonda Hawley*

Need an extra field on your Microsoft Dynamics GP window to track information? In this session, learn how Microsoft Dynamics GP Extender can quickly give you flexibility to add fields to your Dynamics GP windows, and the ability to report on the information.

Workflow/Automations with Microsoft Dynamics CRM

10:30–11:00 :: EBC West

Presenters: *Matt Gronbeck and Betsy Stadick*

In this session, we will discuss some of the ways that your organization can automate tasks that are a part of your business processes. You will gain insight and ideas on ways to utilize the power of the Microsoft Dynamics CRM platform, and to eliminate some administrative overhead in the process.

Introduction to Business Portal

10:30–11:00 :: EBC East

Presenter: *Joseph Tews*

Do you ever wish that you could display Microsoft Dynamics GP data to other people in your company, but don't have the need for another concurrent Dynamics GP user? Do you have users who really only need Read-Only access to critical Dynamics GP data? Business Portal for Microsoft Dynamics GP offers companies an inexpensive way to display read-only Dynamics GP data to users in an organization. Join us to learn about the benefits of implementing Business Portal, and for a demonstration of some of the information that can be shared with employees.

Introduction to Microsoft Dynamics CRM

11:10–12:05 :: Dakota West

Presenter: *Kevin Spaulding*

In these challenging times keeping better track of your customer's needs, sales pipeline, and customer service goals need to be a top priority. Come to this session and learn about Microsoft Dynamics CRM. Dynamics CRM is a powerful platform designed from the ground up to be a flexible solution that can meet your exact needs. Learn how many companies are using this product to better manage their customers and drive greater profitability.

11:10 Concurrent sessions continued on next page

Make Collecting Sales Tax Easy with AvaTax

11:10–12:05 :: EBC East

Presenter: *Jason Warren (Avalara)*

If your company collects sales tax in one state or many states, don't spend another second creating tax schedules, researching taxability rules, filling out tax returns or storing exemption certificates in a filing cabinet. Avalara's AvaTax module (available from Summit Group Software) can be installed within your Dynamics GP system. Attend this session to learn more about the various statutory requirements from state to state and see an AvaTax product demonstration. Your questions will be answered throughout the session.

Workflow for Microsoft Dynamics GP

11:10–12:05 :: EBC West

Presenter: *Joseph Tews*

Are there manual processes in your organization that you are looking to automate? Does it seem like a struggle to track down approvers in your organization? Then you might be in need of Workflow for Microsoft Dynamics GP. This session will outline the benefits of implementing a Workflow solution, as well as demonstrate some of the processes that can be automated with Workflow, including Purchase Order Approvals and Batch Approvals.

Microsoft Dynamics GP 11.0 Sneak Preview

1:00–1:30 :: Dakota West

Presenter: *Andy Westby (Microsoft)*

Come to this session and see some of the exciting new features being put into Microsoft Dynamics GP 11.0.

What's xRM?

1:00–1:30 :: EBC West

Presenters: *Josh Hoper and Betsy Stadick*

In this session, we will explore how you can put the Microsoft Dynamics CRM platform to work for your organization in ways you might not have considered before. You will learn how companies are putting custom solutions to work that are built within the Dynamics CRM platform. From very simple to quite complex, xRM solutions redefine how many organizations approach their IT strategy.

Tips and Tricks for getting more out of Microsoft Dynamics GP

1:40–2:35 :: Dakota West

Presenters: *Rhonda Hawley and Janelle Montplaisir*

Come to this fast paced session and see numerous ways to get more out of Microsoft Dynamics GP. We'll provide some end user suggestions on navigation and troubleshooting as well as show you a number of ISV products that can make you more efficient.

Bringing it together with Microsoft Office Communication Server

1:40–2:35 :: EBC West

Presenter: *Jason Boutwell (Marco)*

Microsoft Office Communications Server (OCS) 2007 is the platform for presence, instant messaging, conferencing, and enterprise voice for businesses around the world. One advantage of OCS is that businesses can embed communications capabilities into existing line-of-business applications and use communications and workflow capabilities to automate business processes, which saves money, saves time, and improves customer service. Come to this session to learn the basics of OCS and understand how it can be tied seamlessly into Microsoft Dynamics CRM.

Reporting Options for Microsoft Dynamics GP

2:45–3:40 :: Dakota West

Presenter: *Rhonda Hawley*

Come to this session to learn about all the reporting options with Microsoft Dynamics GP. We'll briefly show you how to use analysis cubes for Dynamics GP. We'll show you how to create charts and graphs with FRx. Finally, we'll show how to use Excel Reports. These powerful reports can be easily refreshed within Excel.

Integration Tools for Microsoft Dynamics

2:45–3:40 :: EBC East

Presenters: *Tyler Sand and Joe Tews*

In this session, you will be exposed to a full spectrum of application integration options. Everything from one-way, batch integration options using the tools built into the Microsoft Dynamics CRM and Microsoft Dynamics GP platforms, as well as real-time, bidirectional integration options using Scribe Insight and custom .NET development. The session will include a demonstration of a Dynamics CRM/GP integration built using Scribe Insight.

Closing Session

3:45–4:00 :: Dakota West

We'll quickly wrap up the day's events while giving away some great prizes! Looking to go to Convergence next year? Stick around because you might get a lot of those costs covered.



Thursday 4:01s... the unknown tradition

4:01–6:00 :: 23 Broadway Suite 400

An unknown tradition is our standing weekly 4:01 invite to our customers every Thursday! After we leave Microsoft everyone is invited to swing by our downtown office for a social hour. Beverages and snacks will be provided.