

Food and Beverage

Distribution

Competition and consolidation present new challenges

Today's food and beverage companies face real challenges. This industry is a highly competitive market, characterized by low margins, intense competition, and high customer-service expectations. As you move forward and grow your food and beverage business, you'll face many challenges, including:

- How to accurately trace production lots (track, trace, and product recall), since it is now both a regulatory requirement and a key component to maintaining customer satisfaction.
- Handling the complexities of catchweighted products, tracking inventory both by quantity and weight, for better inventory control and reporting.
- Working and delivering from a mixed environment with chilled, frozen, and ambient products.
- The lack of consumer information that retailers routinely enjoy.
- The importance of proactive order capture in a variety of media—e-commerce, mobile sales, telesales, etc.
- The challenge of effectively managing short-dated and perishable inventory.
- The threat of centralized buying (for smaller distributors).
- Ability to deliver profitably against very short lead-times—typically same day or next day.

To stay competitive, food and beverage distribution companies are adapting to the new realities of the market by improving efficiency and moving to automated-ordering inventory, warehouse, and management systems. The right technology can give your company the agility you need to stay competitive.



Better business management

Microsoft Dynamics™ GP offers integrated capabilities for financial management, distribution, manufacturing, project accounting, human resource management, business analytics, and customer relationship management. By delivering deep access to decision-driving information, a rapid return on investment, and expert, dedicated customer service, Microsoft Dynamics GP helps you grow and manage your business better.

Affordable Adaptability

With Microsoft Dynamics GP, you get easy, enterprise-wide coordination and agility. You'll improve operational efficiency, save time, and reduce costs by transforming time-consuming manual processes into automated tasks that can be executed quickly and accurately. Powerful new automation reaches across your entire business, so your employees can gain the control they need to keep the focus on efficient operations that boost profitability, rather than on entering data and chasing down information.

You'll gain flexibility to configure and reconfigure fulfillment services, try new strategies, and even scale the business without raising expenses. Plus, you'll also sharply reduce the time and effort needed to process all your transactions simply and efficiently right through to general ledger and management accounts.

Improved Visibility

When business processes are automated, businesses make better-informed decisions because data is usable in new ways. You can see the truth behind the numbers. This helps you reduce costs by minimizing inventory in distribution centers, negotiate better rates with suppliers, understand customer trends, and much more. Broad visibility of operations across warehousing, transportation, and customer service give you strategic power that can give you a competitive edge.

Microsoft Dynamics GP facilitates strategic decision-making on all levels. With enhanced viewing, drilldown, and inquiries for financial, manufacturing, and distribution information, employees can make firm promises today and plan more effectively for tomorrow.

Stronger Customer Service

Today's customers are demanding more value-added services, in addition to strong customer service. Powerful Microsoft Dynamics GP distribution management enables you to improve order fill rates and response time, and reduce stock outs, all leading to superior customer service. That means more satisfied customers, more repeat business, and positive word-of-mouth.

The Microsoft Dynamics GP Advantage

Microsoft Dynamics GP has the look and feel of Microsoft® Office, so users can work within a familiar, easy-to-use environment. List-based navigation and streamlined menus provide everyone in your organization with a clean, intuitive interface that's tailored to their roles.

A Microsoft Certified Partner can help you deploy the modules you need, and rich new integrations with Microsoft Office let your organization take full advantage of existing software investments. You'll enjoy low total cost of ownership, building on the productivity foundation that Microsoft Office offers. It's no wonder that installations of Microsoft Dynamics GP are growing. Thousands of businesses around the world already know how great technology can help build success.

Advanced features and capabilities

Stay agile with advanced distribution capabilities. Streamline your pick/pack/ship cycle, tailor workflow processes to meet your specific food and beverage company needs, and keep pace with competitive markets with Microsoft Dynamics GP. Advanced distribution helps you provide your customers with fast, accurate answers, firm delivery promises, flexible pricing, and efficient order fulfillment, so you get more repeat business.

Sales Order Processing

- Manage your order-to-fulfillment processes with pinpoint accuracy. Sales Order Processing with Advanced Distribution helps you monitor fulfillment and invoicing more accurately and helps you minimize shipping and labor costs.
- Control your sales with discount management, drop shipping, kit items, sales quantity status, and online sales tracking.
- Optimize order size and margin by better understanding customer buying patterns and offering effective promotions.
- Reduce order costs by offering a variety of media for order entry, including Web-based ordering and EDI.
- Speed time to delivery with multiple ship-to addressing and allocation of inventory from multiple sites for a single order.
- Tailor all stages of the sales cycle to meet your food and beverage organization's needs.



CUSTOMER PROFILE



Located in Northfield, Illinois, Triad Foods Group develops and markets fresh food supply programs specializing in the protein segment. Their customers consist of large “super store” organizations, convenience stores, and national grocery chains. The combination of technology and unmatched value enables Triad to garner a significant share of the large program meat business in the United States.

Prior to implementing Microsoft Business Solutions—Great Plains® [now known as Microsoft Dynamics GP] in 2000, Triad’s business operations were split into five companies, each with its own operating procedures and business management systems. Multiple operating system platforms and proprietary systems meant high-cost software contracts,

expensive maintenance commitments, and an inability to consolidate business information in a meaningful way.

Triad worked with Access Technologies, a Microsoft Gold Certified Partner, to bring all its business management operations together with Microsoft Great Plains. Because of the inherent integration and flexibility of the Microsoft suite of applications, Triad was able to achieve staff, hardware, and software cost savings of more than \$1 million, which includes the centralization of their business. Microsoft Great Plains is much easier to use, and training costs have decreased sharply. Triad also now has access to integrated analytical data from across its business, resulting in better information throughout the company.

“Putting Microsoft Great Plains [now known as Microsoft Dynamics GP] in allowed us to consolidate all our companies into Triad. The stability of Microsoft and the product support are big reasons for us to stay with Microsoft Great Plains.”

—Erwin Sendef
Senior VP, Finance
Triad Foods Group

Purchase Order Processing

- Control purchasing processes with cost variance tracking, receiving/invoicing against multiple purchase orders, comprehensive receipt information, and posting.
- Use your system to suggest what and when you should be buying, in order to achieve the best balance of inventory investment against customer service.
- Get instant answers with complete tracking of open or historical purchase order and receiving documents by order number, item number, or date.
- Understand your true costs by bringing together your vendor costs with landed costs and potential rebates.
- Maintain audit control with cancelled item tracking, line-item ordering and status information, document revision tracking, and customized landed cost definition.

Inventory Management

- Make informed decisions about your Food and Beverage distribution business with easy-to-use stock analysis tools and flexible reporting capabilities that give you unparalleled access to the mission-critical inventory information you need.
- Access inventory information easily, in clear views, and drill down for detail as needed. In one easy step, access supply and demand information to view item allocations.
- Create and track item information in the way that best fits your business needs, with default entries for each item class to speed data entry.
- Maintain control over your inventory with quantity tracking at the bin level, cycle counting, stock count calendars, and inventory snapshots. Increase visibility into serial/lot number life cycles with full-cycle serial/lot tracking.

Advanced Distribution

- Harness the pick/pack/ship process with user-defined procedures for more consistent, accurate workflow and improved control.
- Manage inventory more effectively with customized rules for shelf life and minimum stock levels.
- Provide better customer service with easy access to current distribution information, using lookup windows, document search, and update.
- Improve customer communication by linking your inventory and individual customer item codes to speed inquiries from service representatives and customers.

Advanced Picking

- Improve productivity and profitability for multi-site operations by determining preferred bulk and individual picking methods.
- Get maximum throughput and customer service by tailoring site-level operations with configurable picking rules.
- Increase picking productivity with shorter pick journeys and goods sent straight to the loading bay.
- Save time and effort with consolidated (bulk) picking lists across numerous orders for common items.

Extended Pricing

- Modify customer-specific pricing and promotions rules quickly and easily.
- Enable your sales team to personalize pricing to meet customer demand and beat the competition with advanced pricing functionality, including rebate tracking.
- Maintain your prices with easy-to-use tools and wizards that give you the flexibility to offer promotional prices, change pricing lists on the fly, or set date-sensitive restrictions when needed.
- Personalize prices for individual items, customers, or groups of customers, while maintaining standard pricing elsewhere.



Real-world functionality

Seamless integration provides a perfect fit for food and beverage distribution companies. Whether you're looking for employees to exchange information and collaborate effectively, improved demand forecasting, or other food and beverage distribution business process automation, Microsoft Dynamics GP gives you the flexibility and functionality you need. Additional Microsoft Dynamics GP modules are available for your food and beverage solution, and each is seamlessly integrated—so all your data flows freely, and deployment won't strain your budget or your IT staff.

Microsoft Business Portal

- Microsoft Business Portal integrates seamlessly with Microsoft Dynamics GP to deliver applications, information, and processes to employees, customers, and partners across your organization.
- Enhance employee productivity by providing role-based access to information and processes from a single browser-based portal.
- Improve purchasing management and reduce overhead by enabling users to enter their own requisitions online for manager approval and automatic transfer to Purchase Order Processing.
- Enhance customer satisfaction with Electronic Document Delivery, allowing customers and suppliers to view invoices, orders, returns, purchase orders, and other documents through the portal.

Materials Management

- Reduce costs by efficiently managing the entire chain of supply with firm control over purchasing and vendor management, and comprehensive inventory tracking and control.
- Expiration dates, serial and lot management, and multi-bin and multi-location management help food and beverage companies ensure that inventory is on-hand where needed and can be tracked from cradle to grave.

Demand Planner

- Generate reliable future demand forecasts based on your company's historical data with a library of selected forecasting algorithms that are applicable for the food and beverage business.
- Gain deep, multidimensional visibility into customer buying patterns by mapping your business data to the most relevant elements that drive forecasting—product, time, and markets.

Streamline financial management with easy-to-use automation. Microsoft Dynamics GP delivers the comprehensive financial management features and tools that food and beverage companies need to run their businesses with the greatest possible efficiency and insight. It sharply reduces time and effort for key accounting tasks, provides easy access and rich analysis of integrated, updated information, and connects smoothly with operations across your entire organization.

General Ledger

- Improve efficiencies with automated transaction processing and payment adjustments. Users can quickly verify, annotate, and record transactions, as well as copy, void, delete, or correct General Ledger entries with full audit control.
- Enhance financial controls with complete audit control, definition of up to 367 fiscal periods, and immediate access to high-level and deeply granular financial information.
- Organize financial information the way you want with flexible accounting structures and the ability to create Microsoft Office Excel®-based budget templates and build customized financial reports.
- Perform multidimensional analysis of financial, sales, and purchase transactions.

Financial Reporting and Business Intelligence

- Easily create, update, and modify all the reports and forms your food and beverage business uses with Microsoft Dynamics GP Report Writer.
- Extend the power of Business Insight throughout your organization using Microsoft Dynamics GP Analysis Cubes for Excel. Using prebuilt OLAP cubes, you can link information across your company and produce fixed-format reports as well as ad-hoc queries in a familiar Excel environment.
- Empower decision-makers to quickly assess performance by delivering online, personalized views of critical business metrics with Microsoft Business Portal Key Performance Indicators such as load profitability, salesman performance, promotional penetration, invoice to return ratios, and many more.
- Build customizable financial reports with Microsoft Dynamics for Analytics–FRx®, including personalized packages that consolidate Microsoft Office documents, Microsoft FRx Reports, Crystal Reports, and other formats into a single file for delivery to decision-makers.



CUSTOMER PROFILE

The logo for Cakes for the Connoisseur, featuring the company name in a white serif font against a dark blue background with a subtle pattern of diagonal lines.

Cakes for the Connoisseur supplies cakes and snacks to thousands of customers across the United Kingdom, with sales staff operating mostly from the field. Until recently, a lack of integration across the company's IT systems meant that order and supply relied on manual processes. Cakes for the Connoisseur deployed Microsoft Great Plains [now known as Microsoft Dynamics GP], along with Myridas distribution modules from Trinity, a Microsoft Gold Certified Partner. This integrated solution gives employees real-time access to the company's data systems on Microsoft

Windows Mobile™ devices. Now, staff can place orders on the devices, reducing order times from several days to a few minutes, while accessing valuable information from the field. The solution has virtually eliminated incidents of out-of-stock orders, and has given the finance team much greater control over the business, enabling them to deliver accurate, timely financial reports. Weekly physical inventory is no longer necessary. Credits raised in the field against stock that is nearing the end of its shelf life are now captured electronically and immediately updated on the system.

“Product costs are accurately matched to sales to provide reliable gross margin figures. And cost allocation takes half the time. These factors have transformed the financial management of Cakes for the Connoisseur.”

—Wendy Wroe
Financial Controller,
Cakes for the Connoisseur

Budgeting and Forecasting

- Meet demanding group reporting needs by tailoring data collection and reporting processes with Microsoft Enterprise Reporting, and deploy flexible budgeting processes business-wide with Microsoft Demand Planner.
- Use Microsoft Analytical Accounting to create budget trees that create a hierarchy of dimension-codes. Budgets can be created at a dimension-code level or a dimension/account combination providing greater flexibility by allowing budgeting at a summary or detail level.

Payables Management

- Minimize expenses and increase staff productivity with intuitive transaction entry, customizable automation of processes, and complete payment tracking.
- Manage vendors effectively and negotiate better prices with access to complete histories and instant recall of billing, payment, discounts, and other information.
- Simplify deferring payments or costs over multiple periods, and automate vendor installment payments.
- Manage payables control accounts by reporting segments, with automated reconciliation and a true picture of amounts owing by segment value.

Receivables Management

- Enhance your profitability by shortening receivables cycles, fine-tuning product and service offerings, and creating a predictable cash flow.
- Improve customer satisfaction and retention with customized information, history, and notes.
- Save time and reduce the potential for costly errors by automating receivables processing while maintaining full control.

Collections Management

- Minimize administrative workload for collections by automating correspondence, e-mail, statements, and invoices for customers, freeing staff resources for other tasks.
- Increase sales productivity by feeding collection contact notes and other customer details back to the sales force.
- Improve cash flow with streamlined, customizable, and highly-efficient collections activities.

Customized solutions

When it comes to deploying Microsoft Dynamics GP, you are not alone. Our network of Microsoft Certified Partners has proven expertise, and will install and customize your Microsoft Dynamics GP solution. Their experience streamlines deployment, minimizing downtime. Plus, they provide all the training and support you need to get and stay up and running.

Some of our partners have created integrated, specialized solutions for Microsoft Dynamics GP, providing versatile business software that addresses the specific functionality needs of food and beverage distribution businesses.

These solutions are a great complement to Microsoft Dynamics GP core functionality. The partners who develop them have a deep understanding of the challenges and opportunities that food distribution businesses face, and are focused on the business of creating solutions specifically for food and beverage distribution companies.

A comprehensive food and beverage distribution solution offered by one of our partners provides enhanced business benefit in a functional module approach. You can choose what you need, when you need it. With the food and beverage market, you may have sector-specific requirements. Solutions in areas such as catchweights, lot control, multiple inventory tracing methods such as FEFO, shelf-life reporting, container deposit tracking and reporting, and customer rebates mean that the solution can be adapted to all parts of the food and beverage distribution market.



CUSTOMER PROFILE



Arthur Schuman, Inc. is the largest importer of Italian and Italian-style hard-grating cheeses in the United States. They operate 80,000 square feet of warehouse space, supplying cheese to distributors, wholesalers, club stores, and industrial customers, including the nation's largest club retailer, restaurant chains, and industrial food processors.

Needing to improve distribution operations, Arthur Schuman implemented a full ERP system including Microsoft Great Plains, [now a part of Microsoft Dynamics] Financial Management, Distribution, and Manufacturing modules for 40 users, with wireless bar code scanners by Maximum Data.

Prior to implementing Microsoft Great Plains, Kevin Lehoullier, Vice President of Finance, estimated their complete pick rate at 70 percent. "It was like living in chaos because you would get an order for cheese and you never knew where it was," says Lehoullier. "You had people hunting through the warehouse for stuff." Bar code integration was implemented to improve inventory accuracy and to capture "catch" weights (random weights) of the cheese to properly pay suppliers and bill customers.

Among the benefits offered by this functionality are:

- Lot control and traceability: Detailed lot tracking and traceability, user-defined lot attributes to hold best-before dates, sell-by dates, receipt temperatures and markings, automatic checking of minimum shelf-life at receipt time, and easy track and trace (e.g., for product recall).
- Configurable business processes: Create quote, order, and invoice process flows. Optional online inventory allocation at line-item level, deliver from multiple sources, online credit card authorization, drop-ship, kits, call-off orders, back-to-back ordering, customer-specific pick instructions, lot selection, user-specific item numbers, and customer-restricted buying lists, plus many more advanced features.
- Fast, efficient order entry: Create regular customer call schedules for telesales contacts, generate call campaigns, measure telesales effectiveness. User-designed interface ensures orders can be entered at conversational speed using lightning-fast inventory searches. Item catalog, item aliases, item attributes, and standing orders. Further features such as linked item selling, promotional selling, analysis of buying trends, and intelligent filtering on availability all help to ensure that your order-taking program is really a sales tool.
- Flexible pricing: Sophisticated price control allows unlimited price lists, customer-specific pricing, date effectivity, price banding, cost-uplift pricing, quantity-break pricing, total order volume-based pricing, targeted promotions, and customer rebate deal tracking.
- Catchweights: Buy and sell in one unit, but price in another with a variable relationship between the two units of measure. For example, sell by the box, but invoice for the exact weight. Vital for many distributors of meat, fish, cheese, and produce, this solution provides complete dual tracking of inventory in both units, right down to lot level.
- Powerful delivery logistics: User-configurable workflow for the pick/pack/ship process including consolidated walk-round pick lists. Truck journey planning to improve delivery efficiency as well as consolidated invoicing options.
- Intelligent inventory replenishment: Helps you know when you should be ordering from which vendors and suggests economic order quantities, but also alerts you to quantity break opportunities and helps you to optimize order size and value. It will also track your vendor rebate agreement and ensure that you claim accurately and maximize your return from pricing and rebate agreements.

"We have taken an environment that was management by chaos and moved to an orderly, organized, and streamlined business process where everyone's life is much simpler than it used to be."

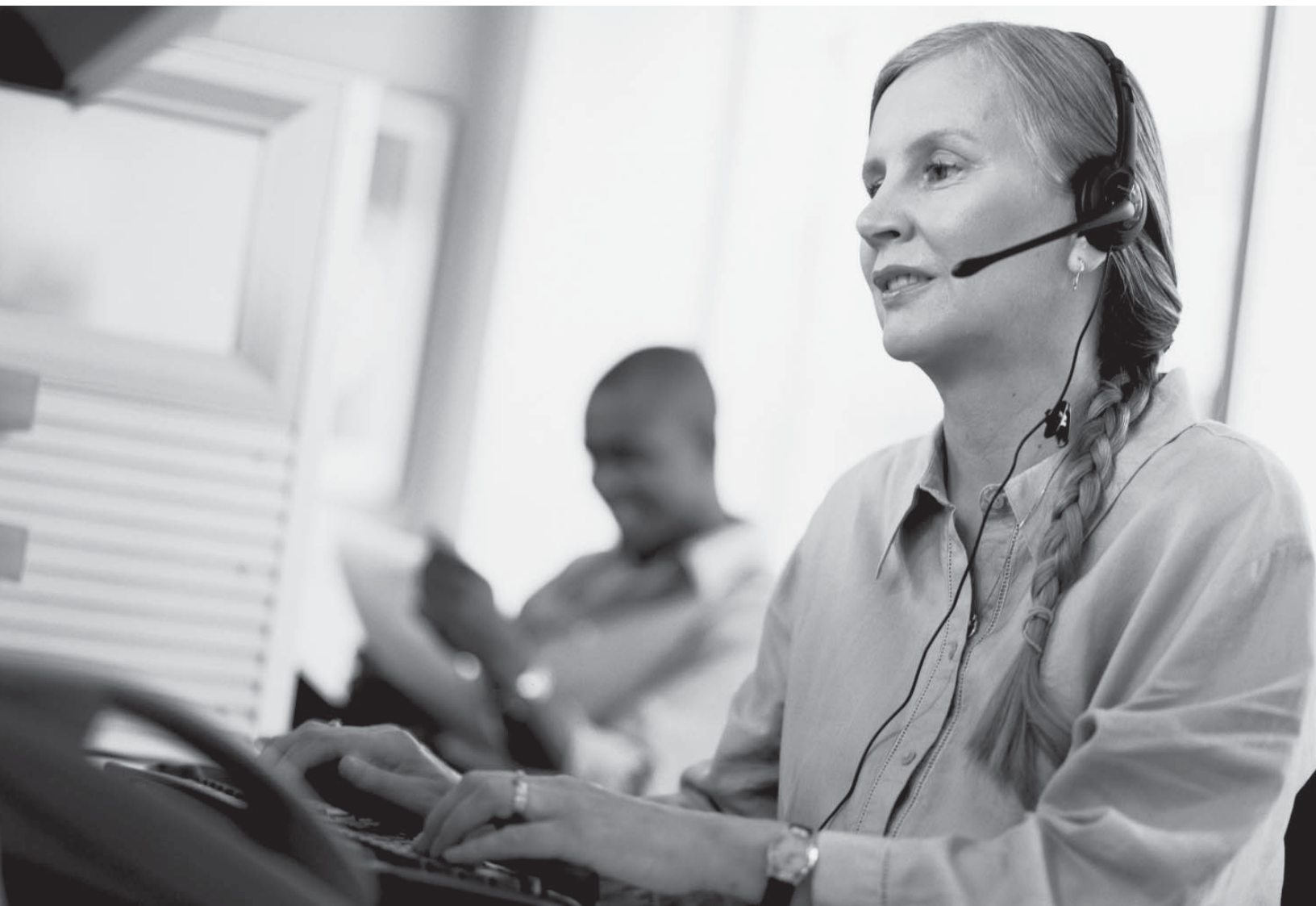
—Kevin Lehoullier
Vice President of Finance
Arthur Schuman, Ltd

Other industry-specific solutions include:

Route Accounting

Beat the competition where it counts, at the check-out counter. You can remove manual order processes, minimize human error, automate order entry, streamline daily settlement, lower reliance on credit lines, and control or eliminate shrinkage, all while improving customer service, collections, and inventory management. Functions include:

- Returns with reason codes
- Wireless order processing
- A/R control
- Route sequence management
- Serialized inventory
- Asset tracking with history
- Lot control (track and traceability)
- Scan-based selling
- And much more



CUSTOMER PROFILE



Based in the British Virgin Islands, Roadtown Wholesale LTD is the territory's largest and most successful wholesaler and retailer of food, beverages, liquor, cigarettes, and related products. Exclusive distribution rights for brands such as Kraft General Foods, M&M Mars, Kellogg's, Nabisco, Coca-Cola, Guinness Stout, Heineken, Beefeater Gin, Courvoisier, and Mount Gay Rum help to make up the company's impressive portfolio of brands.

Working with ePartners, a Microsoft Gold Certified Partner, Roadtown Wholesale has implemented a 60-user

system, featuring Microsoft Business Solutions [now known as Microsoft Dynamics] Financials, Distribution, and Payroll/ Human Resources applications, along with advanced landed cost, advanced item pricing, and inter-branch transfer capabilities. Roadtown also implemented industry solutions including the Trinity Myridas Distribution Suite, Compass Point of Sale, and a warehouse management system.

Roadtown Wholesale implemented a solution that touched and improved every part of the organization, bringing together six organizations in four time zones.

“ Our choice of Microsoft Business Solutions [now known as Microsoft Dynamics] has helped us tremendously in our quest for operational excellence. We are confident that this will allow us to expand our leadership position in the Food Distribution Industry beyond the British Virgin Islands.”

— Delma Maduro
Managing Director,
Roadtown Wholesale Trading

Warehouse Management

Meet FDA mandates for food and pharmaceuticals, including the new laws for Homeland Security lot-tracing. Functions include:

- Complete lot traceability for manufacturing, receiving, shipments, containers, pallets, and EDI/ASN
- Code date support
- Support for encrypted lot codes
- Food-grade trailer in/out inspections (temperature, etc.)
- Complete food-grade capable for 3PL logistics use
- Enterprise version allows transfers for food-grade logic
- Full audit trails for any QC/date code overrides
- Hold recalled inventory in warehouse
- RFID scanning solutions
- Determine if recalled product was shipped, and to which customers

Trade Promotion Management

- Add multiple promotion allowances to sales, either manually or via deal sheets/contracts
- Promotions included on the invoice or as reserve for future claims
- Extended commission capability

EDI

- Completely integrated within Microsoft Dynamics GP, making setup and operation as intuitive as possible
- Minimal setup procedures for both customers and items
- Import and export processes are single steps within Microsoft Dynamics GP
- Bar coded shipping labels can be printed directly
- Trading partner maps can also be created

These industry-specific food and beverage distribution solutions, available through Microsoft partners and resellers, complement your investment in Microsoft Dynamics GP, providing rich integration and extending capabilities to provide the features you need.



CUSTOMER PROFILE

The logo for Q.B. Food Trading, featuring the company name in a white serif font against a dark blue background with a subtle pattern of light blue lines.

Q.B. Food Trading, one of Singapore's leading delicatessen and commodity food traders, supplies a range of frozen and chilled products to retail grocery outlets, airlines, and other food services in Asia. With the help of Automatic Identification Technology (AIT), a Microsoft Certified Partner, the company implemented Microsoft Great Plains [now part of Microsoft Dynamics] to streamline business practices and provide better visibility into financial information.

Q.B. Food Trading built a customized multiple unit of measure (UOM) system that integrates with Microsoft Great Plains software to help manage order processing, sales, accounting, customer service, and inventory. Benefits include increased visibility into operations,

reduced support and reporting overhead, and improved employee productivity, as well as providing a clear path for company growth.

These combined benefits help Q.B. Food Trading respond more quickly to customer demand. For example, in 2004 the company experienced a sudden and huge increase in demand for one of its product lines. With Microsoft Great Plains the Q.B. Food Trading sales force was able to process the sudden influx in orders and accurately manage inventory levels. Staff maintained current statistics about the products in stock, as well as the products on order, through Microsoft Great Plains.

Food and beverage distribution

Microsoft Dynamics GP just makes sense.

The goal of Microsoft Dynamics GP is to deliver a compliant, broad-based, full-featured distribution and business management solution through our dedicated partners and ISVs.

Designed to meet the full range of business management needs, Microsoft Dynamics GP offers a solution as broad as it is deep, backed by a commitment you can count on for years to come. And our partners' third-party solutions enable key features and functionality that cover the entire spectrum of your business operations, giving you the power you need to streamline and simplify business processes, improve business insight, accelerate productivity, and make the most of existing technology investments.

Get more out of your business automation investment, including:

- Deep integrations with Microsoft products—including Microsoft Office, InfoPath®, SharePoint®, and SQL Server™.
- Integration that fuels productivity and collaboration, extending the reach of information and processes to customers, partners, and suppliers, and lets you build on existing technology investments.
- Familiar, Microsoft Office–like interface, streamlined navigation, and improved usability, which help everyone in your organization conduct business smoothly and efficiently.
- New Microsoft Office Solution Accelerators, which help take the pain out of managing processes such as Sarbanes-Oxley, Excel reporting processes, and more.

“Customers were placing huge orders. Within minutes of a customer's request, salespeople could view accurate inventory figures, so that orders could be fulfilled, even during the sudden increase in demand. We would never have been able to fill orders so successfully and easily with our previous system.”

—Kim Quah
Director
Q.B. Food Trading

Microsoft

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Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like familiar Microsoft software such as Microsoft Office, which means less of a learning curve for your people, so they can get up and running quickly and focus on what's most important. And because it is from Microsoft, it easily works with the systems your company already has implemented. By automating and streamlining financial, customer relationship, and supply chain processes, Microsoft Dynamics brings together people, processes, and technologies, increasing the productivity and effectiveness of your business, and helping you drive business success.

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