

QUARTER

04

DECEMBER

QUARTERLY  
NEWSLETTER  
FOR OUR NAV  
CUSTOMERS

# The Advisor

## Contemplating Purchasing Additional Users for NAV?

Now is the time to buy! Microsoft is offering a promotional discount on additional system manager users now through December 19, 2008.

Buy 2 system manager users and get 1/2 off the 3rd (limited to one purchase).

Buy 5 system manager users and get 1 free (limited to a total of 10 free system manager users per customer).

Interested or want to know more about this offer? Contact Gilbert & Associates at



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## Microsoft Dynamics NAV 2009

### Simple. Smart. Innovative.

December 1, 2008

Not only did today mark the first of the month but also the public release of Microsoft's latest and greatest version of Microsoft Dynamics NAV. Microsoft saw the demand for a new release and a big change in the user experience. They responded with NAV 2009; simple, smart and innovative, this latest version offers a comprehensive business management solution that helps you work faster and smarter, providing flexibility to adapt to new opportunities and growth.

NAV 2009 is ideal for small and midsized organizations and offers a new user interface creating a unique user experience. The latest version also offers technology innovations that can simplify access to information, improve organizational agility, and enhance reporting capabilities.

One enhancement from earlier versions is that NAV 2009 offers RoleTailored views and business processes through Role Centers. This gives employees the information and tools they need specific to their jobs and tasks. Out of the box, NAV 2009 offers 21 Role Centers optimized for different key employee functions. Personalization allows users to adapt menus to reflect their personal work styles. With NAV 2009 your employees can quickly organize and prioritize their tasks to increase productivity and effectiveness.

What's better is that this is just the beginning of the features in NAV 2009. Does this sound like something you want to learn more about? Then give us a call! We would love to provide you with more information and talk with you about how NAV 2009 might work for you. Watch [www.GilbertAssociates.com](http://www.GilbertAssociates.com) for more information and demos for NAV 2009, available soon!

## Referral Rewards

Do you know of a company that is struggling with their business information systems, not getting enough support with their current system, or both?

Let your colleagues know that Gilbert & Associates is available to assist them and that we would be honored to have an opportunity to earn their business. Our customers get personal attention, prompt support and solutions that match their needs. We can save the day and you can be a hero! Plus, there's a little something "extra" special in it for you too!

For your first referral that turns into a new customer, we will send you a \$500 Visa Gift Card.

For the second referral that turns into a new customer, we will send you a \$1,000 Visa Gift Card.

For the third (fourth, fifth, and so on) referral that turns into a new customer, we will send you a \$2,000 Visa Gift Card.

Now, wouldn't that be useful for that new workstation you've had your eye on? Contact us for more information or to make an introduction to someone you know with business automation needs.



## Kitting in Microsoft Dynamics NAV

Many companies will pre-build or pre-package existing items into a kit for resale or production. Did you know that you don't need a full-fledged manufacturing program for this? The Kitting Granule for NAV is available for just \$500.

Microsoft Dynamics NAV supports assembly and disassembly of kits and order processing with kits including rollup pricing, kit components on documents, and order promising, reservations, and item tracking at the kit component level.

Benefits of kitting in NAV include the ability to create flexible bills of materials (BOMs). Salespeople can change the BOMs to fit customer needs when orders are made. You can also incorporate and track resources and improve inventory management and capture costs.

Need better control over your inventory? Kits enable you to better manage your inventory. Track kits as inventoriable items or build the kits at order time with full support for item setup, tracking, component reservations or allocation, costing, order promising, and gross purchasing requirements calculations.

Other benefits of implementing the Kitting Module include improving visibility on kit margins and kit availability. This is possible through enhanced reporting and enabling more accurate pricing. You can even configure NAV to automatically roll up component prices, ensuring the latest prices are included in the kit.

Implementation of the Kitting Granule provides your business with features including robust

BOM functionality. It allows you to make more effective make-or-buy decisions by enabling you to create separate kit BOMs for assembly and disassembly, defining the allocation of resources.

In addition, you receive integrated item tracking of individual components, assembled kits, or both. This visibility into your inventory helps you empower your salespeople through enhanced visibility and access to pertinent information. Increasing efficiency between your sales and inventory management helps you limit wasted resources.

In an era where business intelligence has taken a key spot in the road to growth, kits can be a beneficial addition to your current system. Contact Gilbert & Associates today to find out more on how kitting can fit with your system!



## Utilizing Your Resources: CustomerSource

**Microsoft Dynamics CustomerSource offers an efficient way to access useful information at your convenience, 24 hours a day.**

Did you know that one of the benefits of being on a service plan for Microsoft Dynamics is access to CustomerSource- a vast resource of tools and information that can help you increase efficiency and productivity? CustomerSource provides you with information useful to you as a Microsoft Dynamics

NAV customer. If you are enrolled in the Business Ready Enhancement Plan you can login to CustomerSource and have access to resources such as self-help tools, product updates, newsgroups, training, documentation, and online newsletters, all at your convenience.

CustomerSource can save you time by providing a one-stop resource for quick and easy access to Microsoft Dynamics NAV information that

helps you maintain and expand your business management solution.

Learn more about CustomerSource by calling us at 206-285-4348. Or if you are already enrolled in the Business Ready Enhancement Plan start using CustomerSource today! Visit <https://mbs.microsoft.com>, enter your Microsoft Business Solutions Account Number, confirm your organization name, update your user accounts, and enjoy the benefits of CustomerSource.

### This Month's Q&A Technology Tip

**Q: I have tasks I repeat often, is there any way I can add my own customized shortcuts to Microsoft Dynamics NAV?**

A: Yes, actually you can save several clicks by creating shortcuts in Microsoft Dynamics NAV for the tasks you do most often. You can right-click on any folder or task in the Navigation Pane and select "Send to Shortcuts". The Shortcuts menu is the very bottom menu in your Navigation Pane.



In addition to standard NAV tasks and folders, you can add shortcuts to any document or web site. Right-Click in the Shortcut Pane and select "Create Shortcut", and enter the location of the shortcut. This can be a hyperlink to a web site, an Excel spreadsheet, a Word document or any other file that you may need to open.

Useful examples: A link to your bank's website or shortcuts to commonly used procedure documents.

## Check it Out!

Don't forget to check out our website. We are constantly adding new content and resources that might be valuable to you!

Keep your eyes open for new content, webcasts, whitepapers, and news pertaining to you and your business.

And while you're at it, let us know what you think of [GilbertAssociates.com](http://GilbertAssociates.com). What would you like to see on the website? What tools would be useful for you? We would love to hear your feedback!

## Expand Your Knowledge with E-Learning

If you are a Microsoft Dynamics customer enrolled in the Business Ready Enhancement Plan you have unlimited access to E-Learning for Microsoft Dynamics at no additional charge.

Visit <https://www.microsoftlearning.com/dynamics/> for more information.





## Did You Know?

In gambling language, for a gambling house a "sure-thing" is a wager that a player has little chance of winning; "easy money" is their profit from an inexperienced bettor, an unlucky player is called a "stiff." (from

[www.DidYouKnow.org](http://www.DidYouKnow.org)).

Don't be a "stiff" and bet on a "sure-thing" by gambling with another solution provider looking at you for "easy money"! Gilbert & Associates is different ... contact us today to learn why we are a safe bet.



## Upcoming Microsoft Webcasts

- **Wednesday, December 17th, 11:00am | Learn How Microsoft Dynamics NAV Can Help You Leverage Technology to Optimize and Connect Your Business**

Visit [GilbertAssociates.com/events.html](http://GilbertAssociates.com/events.html) and click on the Click-To-Attend link to register for the webcasts today!

## Upcoming Excel Tips Webcasts from Jet Reports

- **Wednesday, December 10th, 8:30am | "Paste Special"**
- **Wednesday, December 17th, 8:30am | Databars and New Conditional in 2007**

These are short 15 minute presentations designed to help you catch up on your Excel skills over your morning coffee. Jet Reports offers these free of charge. Visit the link to register at [GilbertAssociates.com/events.html](http://GilbertAssociates.com/events.html).

## Meet the Team: Kristen Dormaier



If you have called the office lately, you may have heard a new voice on the other side of the phone. Kristen Dormaier recently joined the team at Gilbert and Associates, taking on the role of Marketing and Sales Associate. Kristen is a recent graduate of Whitworth University in Spokane and worked previously as a Marketing Specialist for a software consulting firm selling CAD software based out of Colville, Washington. Gilbert and Associates had a need for an individual enthusiastic about marketing and who could help assist marketing campaign development; Kristen was a great match.

Kristen enjoys spending time outdoors, being active and exploring the world with friends and family. While at Whitworth, Kristen competed on the Varsity Track and Field team and is enjoying trying out all of the things she didn't have time for while competing in college. Although she cannot totally abandon track and is hoping to find a part-time coaching position in the spring. Over the past couple months she has filled much of her free time with running, wakeboarding, hiking, geocaching, and mountain biking. She recently moved to Seattle and is enjoying time spent exploring the city with friends.



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