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NEWS/EVENTS

* **MICROSOFT CONVERGENCE 2007: San Diego, CA March 11-14.....Join** (see back for details).

* **Tridea Partners offers classroom and individual training! Call us and schedule today.**

* **Call us now for more Dynamics CRM information and for new pricing information for existing Dynamics GP customers.**

Tridea Partners...Open House, CRM and new customers!

Our team at Tridea Partners would like to thank all of those who attended our **Open House** this past quarter. Special thanks must also be extended to our customers **Stone Brewing Company, Montesquieu Winery and Champagne French Bakery Café** for providing the excellent food and drinks at the event. We welcome all of you to stop by anytime to say "hello" and check out our new San Diego office space

in Solana Beach, CA.

Tridea has seen a tremendous increase in the activity around Microsoft Dynamics CRM over the past year. With major enhancements in the latest release and the tight integration to Microsoft Office and Outlook, it has become a major player in the CRM space. Find more on the following page or at www.microsoft.com/dynamics/crm

Tridea Partners would like to

welcome the following new clients: **The Corky McMillin Companies, NuVasive, Breach Security, San Diego Association of Realtors, Bid-Shift, Molecular Imaging, Caldwell Golf, Earthlite, Cogent Road, Catcher Holdings, Strategic Tax Resolutions and Kennon S. Shea & Associates.**

Check out our new and improved website at

www.trideapartners.com.

SiteLab: Managing Projects and Billing Effectively

Overview: SiteLab is a full service interactive agency, offering a broad suite of integrated marketing and engineering services designed to build your brand and increase your bottom line. Being a professional services organization, it is very important for them to properly control project costs and efficiently bill for all associated work for their clients.

Challenge: "The company was growing and we wanted a software package that would give us better project tracking and project accounting," explains Julie Stoll, Controller, SiteLab. After coming to the conclusion that they were outgrowing their current software, Clients & Profits, they realized they needed software that would support resources effectively, invoice timely and ensure that projects are completed on time and within budget.

Solution: After an extensive evaluation process, SiteLab chose to implement Microsoft Dynamics GP as their solution for their project management and accounting re-

quirements. Also important to the success of the implementation and support of the application was their selection of the right Dynamics GP partner. SiteLab decided on Tridea Partners because they had a unique blend of consultants that understood how to manage SiteLab's business processes, while also understanding the nuances of the professional services industry. The new project management and accounting application allows SiteLab the ability to connect project activities with company financials, provide extensive reporting capabilities previously difficult to capture and slow to create, and lastly, the Dynamics GP system helps ensure accurate accounting and billing processes throughout project lifecycles.

Drawing upon Tridea Partners Experience and Expertise:

"We now have an integrated project accounting system that enables us to run our billing procedures in a timely manner. We also are able to track our actual costs, which enables us to better determine efficiency and profitability," says Stoll.

With the project management and accounting capabilities in Dynamics GP the user can automate invoicing processes and ensure accuracy with flexible billing options, including billing by cycle or by percentage complete on a project, and by creating comprehensive billing histories for customers. "The automated billing routines in Dynamics GP help us to ensure that we do not fail to bill a client for any work performed, and also to send our invoices out quickly. By having this process it helps us to better manage our collections and cash flow," Stoll adds. In regards to Tridea Partners, Stoll says, "We have found Tridea Partners to be very knowledgeable and reliable. They respond to our calls and emails in a timely manner and we always feel that we learn something new about Dynamics GP every time they come in."

If you would like more information on this or other case studies from Tridea Partners contact us today!

Microsoft Dynamics CRM - Works the Way Your Business Does

Microsoft CRM not only slips right into your employees' lives without disruption, it also adapts easily to your existing business workflow and processes. You can quickly modify application forms, data fields, and relationships and add new activities and objects without writing a single line of code. This makes it easy to tailor Microsoft CRM to suit your needs and fit your business like a glove. You'll also find a number of elegant workflow innovations that speed use, including next-step suggestions and automatic task assignment. Microsoft CRM also includes capabilities such as:

A new marketing automation mod-

ule that makes it easy to build customer or lead lists, create targeted marketing campaigns, track the progress of those campaigns, and follow up on campaigns.

Quick Campaign wizard that allows marketers and salespeople to send out e-mail blasts to targeted lists and track response.

Service scheduling that allows you to centrally manage all aspects of a service request, from logging and dispatching to tracking and follow-up.

Easy customization of Microsoft CRM to your business workflow by adding custom objects and activities, designing

custom views for different users, and building business logic into the CRM so that Microsoft CRM automates repetitive tasks, tells users next steps, sends e-mails, and raises alerts for open items—nothing falls through the cracks, giving your customers a better experience.

Flexible reporting that enables managers to easily see how your business is doing—CRM data can be transferred into Microsoft Excel for analysis or into Microsoft SharePoint Portal Server for updating executive dashboards or collaborating on customer-related documents.

More at:

www.microsoft.com/dynamics/crm

Find out more about
Microsoft Convergence
2007 (March 11-14) by
visiting
www.msconvergence.com
or contact Tridea Partners
at 858-755-3700.

Microsoft Convergence 2007; San Diego, CA, March 11-14

Start planning for the Microsoft Dynamics GP and CRM event of the year! It will be in our backyard at the San Diego Convention Center on March 11-14th, 2007. It is the premier Microsoft Dynamics event, bringing customers, partners, team members and industry experts together in an environment created for you to discuss solutions, address business needs and establish a true community that can be leveraged throughout the year.

This is your opportunity to participate in an exceptional program including a variety of speakers, detailed product demonstrations and hands-on learning sessions. You will learn how to enhance your Microsoft investment now and in the future, and gain a stronger sense of community through interacting with industry leaders, Microsoft team members, partners and other customers.

Convergence Stats (Last Year):

- * Total attendance: 7,404
- * Thousands of repeat attendees, some in their 4th and 5th years of attendance.
- * 97% of attendees are completely satisfied with their experience at Convergence.
- 98% of attendees stated they would attend Convergence again.

Find out more at
www.msconvergence.com or
contact us at Tridea Partners
at 858-755-3700.

Microsoft Dynamics GP Sample Reports

Microsoft Dynamics GP provides reports that present data in formats helpful to drive smart business decisions. The application comes with many report layouts and report options already defined.

In addition to the predefined reports, dozens of modified versions based on customers' requests are available for customers to download from [CustomerSource](#), a support and resources site available as part

of Microsoft Business Solutions service offerings. Companies needing highly customized or specialized reports can use either the report writer included with Microsoft Dynamics GP or additional software to create new reports using industry-standard tools.

You can also take advantage of Microsoft SQL Server 2000 and 2005 Report Pack for Microsoft Dynamics GP—a set of reporting templates available for

download to help simplify your reporting tasks and get results quickly.

Call us at Tridea Partners to find out more information on SQL Reporting Services. If there are specific reports that may be important to your business, chances are we have an existing report that meets all or some of the requirements. We also have a growing list of Crystal Reports that are available as well.