

# Microsoft Dynamics GP User Group: Unlocking the Power of GP

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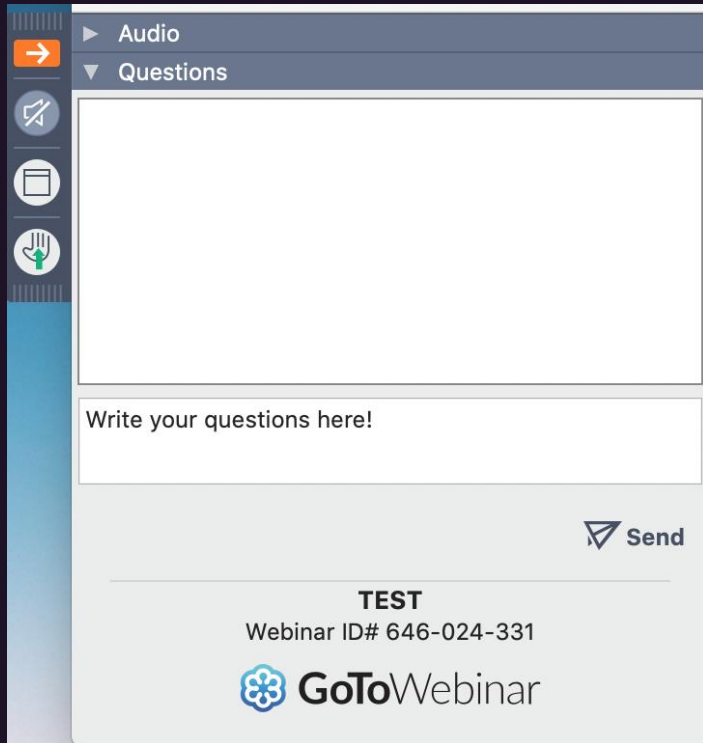
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# At this user group, you'll learn:

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1. How to unlock the new features in GP 18.2 and 18.3
2. How to take GP to the cloud and access your information remotely
3. How to automate your AP Workflow
4. What the new GP product lifecycle means to you and your organization



# Submit Your Questions

If you have a question during the presentation or demo, please submit your question to us via the chat box located in your GoToWebinar panel.



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# New Product Life Cycle



# New Product Life Cycle

- » Begins with GP 18.2 (October 2019 release)
- » Commitment to three updates per year
- » Brings Dynamics GP support and updates in line with hosted offerings
- » Continuous, long term support for Dynamics GP

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**What are the benefits of  
the new life cycle?**

A man with short hair and glasses, wearing a white long-sleeved shirt, is seated at a desk in an office. He is looking at a laptop screen and has his hands on the keyboard. The desk is cluttered with various items, including a printer, a keyboard, and a mouse. In the background, there are several computer monitors on a shelf and a brick wall. The overall lighting is dim, suggesting an indoor office environment.



# New Product Life Cycle: Benefits for You!

- » Receive new features faster
- » Shorter, less complex and less expensive upgrades
- » Allows for easier planning and budgeting of updates
- » Updated support website
- » Important reminder: support for GP 2016 will end in July 2021
  - » For more information, go to <https://docs.microsoft.com/en-us/dynamics-gp/terms/lifecycle>

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**What are the new features?**

A man with short hair and glasses, wearing a light blue long-sleeved shirt, is seated at a desk in an office. He is looking at a laptop screen and has his hands on the keyboard. The desk also has a large monitor on the right, a keyboard, and a mouse. In the background, there are office cubicles with glass partitions and a brick wall. The lighting is dim, suggesting an indoor office environment.



# Financials



# 1. Financials (October 2019)

- » Expanded fiscal year view
- » Paste from Excel in web client
- » Long description for payables transaction entry\*
- » Show user who posted journal entries on inquiry
- » Add Class ID to fixed assets transfer window
- » Document Attach in Bank Reconciliation
- » Visual Cue for EFT in Edit Payment Batch\*
- » See check number when applying RM payments



# 1. Financials (October 2020)

- » User defined fields in GL entry window\*
- » Import credit card transactions\*
- » Automate financial reconcile process
- » Form 1099 NEC and MISC form updates
- » DBA field for vendors
- » Copy/paste PM transactions from Excel\*

# Distribution





## 2. Distribution

- » Filter item stock inquiry window by date
- » Exclude inactive items on price list
- » Show user who added/updated an item in Smartlist
- » New options when saving a PO to speed up data entry
- » Export/import stock counts from Excel (October 2020)

# PR and HR

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### 3. PR and HR

- » Exclude additional withholding from PR batch build
- » Separate remittance address for PR to PM integration (and a new edit list)
- » Quick assign feature for deductions and benefits\*
- » Capture employment history reason for all date changes (Hire, Adjusted Hire, Last Day Worked)
- » Reprint pay stub for entire PR check run
- » Mask SSN in HR reports (October 2020)

# System

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## 4. System (October 2019)

- » Compatibility with SQL Server 2019, Windows 2019 and Office 2019
- » New data search options in Smartlist (Prior Month/Next Month)
- » Sort and filter in User Access setup
- » Copy report option
- » Workflows for user setup and security changes
- » Workflow delegation for active workflow tasks

## 4. System (October 2020)

- » Schedule check links
- » Multi-factor authentication for email
- » TLS 1.2
- » Updates to saving home page settings
- » Disable print dialogue when printing to Word
- » Updates to user preferences for self-service users
- » Bulk edit Smartlist columns\*



# GP New Features Demo



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GP Web Client





# How Can We Access GP Remotely?

- » Two delivery options
  - » Remote desktop connection
  - » GP web client
- » Three hosting options
  - » Local servers
  - » Host on Azure
  - » Use 3<sup>rd</sup> party hosting provider

# Delivery Options

- » Remote desktop connection
  - » Full Dynamics GP client
  - » Supports VBA and Integration Manager
  - » Desktop experience
- » Web client
  - » Full Dynamics GP client
  - » Available on multiple devices and OS
  - » No VBA or Integration Manager
  - » Easier file management and integration to Excel



# Hosting Options

- » Local servers
  - » Control over your environment and updates
  - » Must maintain your own hardware
  - » Must perform your own updates
- » Host on Azure
  - » Control over your environment and updates
  - » No hardware to maintain
  - » Easy to scale up or down depending on workload
- » Host with 3<sup>rd</sup> party
  - » No hardware or software to maintain
  - » Updates happen automatically
  - » Special add-ons and reporting just for GP

# GP Web Client Demo





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# GP Workflow



# Workflow Features

- » Financial

- » GL Account
- » GL Batch

- » Sales

- » Receivables Batch
- » Sales Transaction

- » Purchasing

- » Payables Batch
- » Payables Transaction
- » Purchase Order
- » Purchase Requisition
- » Purchasing Invoice
- » Receiving's Transaction

- » Payroll

- » Employee Profile
- » Employee Skills
- » Payroll Direct Deposit
- » Timecard
- » W4

- » Project

- » Employee Expense
- » Employee Timesheet

- » Administration

- » Security Roles
- » Security Task
- » Smartlist Designer View
- » User
- » User Security



# GP Workflow

- » Workflow steps for both approvals and tasks
- » Criteria can be set for all aspects of a transaction/record
- » Workflow users do not need to be GP users
- » Users can approve from email
- » Attachments can be included in workflow emails
- » Delegation available

# Vendor Approval Workflow Demo





# Questions?



**Save the Date**  
**GP Year-End Webinar**  
**December 3 | 1:00-2:00 PM EST**

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