



What's new in Microsoft Dynamics GP 2013 R2

Agenda

What's new

- System-wide features
- Financials
- Distribution
- Companion apps

Roadmap





Quick to implement, simple to use
business solution from Microsoft
with the power to support your business ambitions





Microsoft Dynamics GP 2013 R2 Benefits

Increase
productivity &
collaboration
with Office 365

Protect data with
enterprise-class
backup on
Microsoft Azure

Streamlined
workflow and
requisitions
capabilities

System Wide Features

Requisition

New design in core with workflow

Order items and goods

Combine requisitions to a single PO

The image shows two overlapping SAP windows. The background window is titled "Purchase Requisition Inquiry" and the foreground window is titled "Purchase Requisition Inquiry Zoom". Both windows show a requisition for a Dell Latitude 4710 laptop.

Purchase Requisition Inquiry Zoom Details:

Requisition Number	REQ000000001002	Requisition Date	4/12/2017
Description	Windows 8 Computer	Required Date	4/12/2017
Comment ID		Requested By	Theresa N.
Ship to Address	MAIN		

Line Items by Order Entered

Line	Item Number	U of M	Quantity Ordered	Unit Cost	Extended Cost
1	DELL 4710	EACH	1.0	\$2375.00	\$2,375.00
Dell Latitude 4710 - 32 GB RAM, 200 GB HD, Docking Station, DVD Driv			WAREHOUSE		DELL

Accounting and Shipping Details:

Account	100 - 1300 - 0000	Required Date	4/12/2017
Currency ID	Z-US	Requested By	Theresa N.
Shipping Method	OVERNIGHT	Freight	\$0.00
Ship to Address	MAIN	Tax	\$0.00
Comment ID		Status	New

Summary: Total \$2,375.00

Status: Saved

Workflow

Replace existing workflow inside Core

Four Approval Workflows:
Purchase Order
Requisition
Project Time
Time and Attendance

Email Approval

The screenshot shows the 'Workflow Maintenance' application window. The title bar reads 'Workflow Maintenance'. The ribbon contains the following groups and items:

- Actions:** Save Workflow, Clear, Delete Workflow, Copy
- New:** Workflow, Step
- Help:** Help, Add Note

The main area is divided into a left-hand tree view and a right-hand configuration panel.

Tree View:

- Customer Credit Limit Override Approval
- Customer Entry Approval
- General Ledger Batch Approval
- Purchase Order Approval
 - PO Approval Workflow 1
 - PO Approval Workflow 2** (selected)
 - Check existing orders
 - Supervisor approval
 - Manager approval
- Requisition Approval
- Sales Order Approval

Configuration Panel:

- Workflow Name:** PO Approval Workflow 2
- Description:** Dual-step approvals for POs
- Workflow Type:** Purchase Order Approval
- Active

Step Table:

Step	Condition	Assignment
Check existing orders	Always run	Workflow originator
Supervisor approval	PO Subtotal Amount > 2500	Originator's direct manager
Manager approval	PO Subtotal Amount > 5000	Originator's skip-level manager

Options:

- Allow approver to manually delegate tasks
- Allow originator to be an approver
- Always require at least one approver
- Use alternate final approver: Task owner's direct manager

When a task is overdue:

- Take no action
- Delegate to next approver
- Delegate to: Task owner's direct manager
- Automatically reject the overdue task

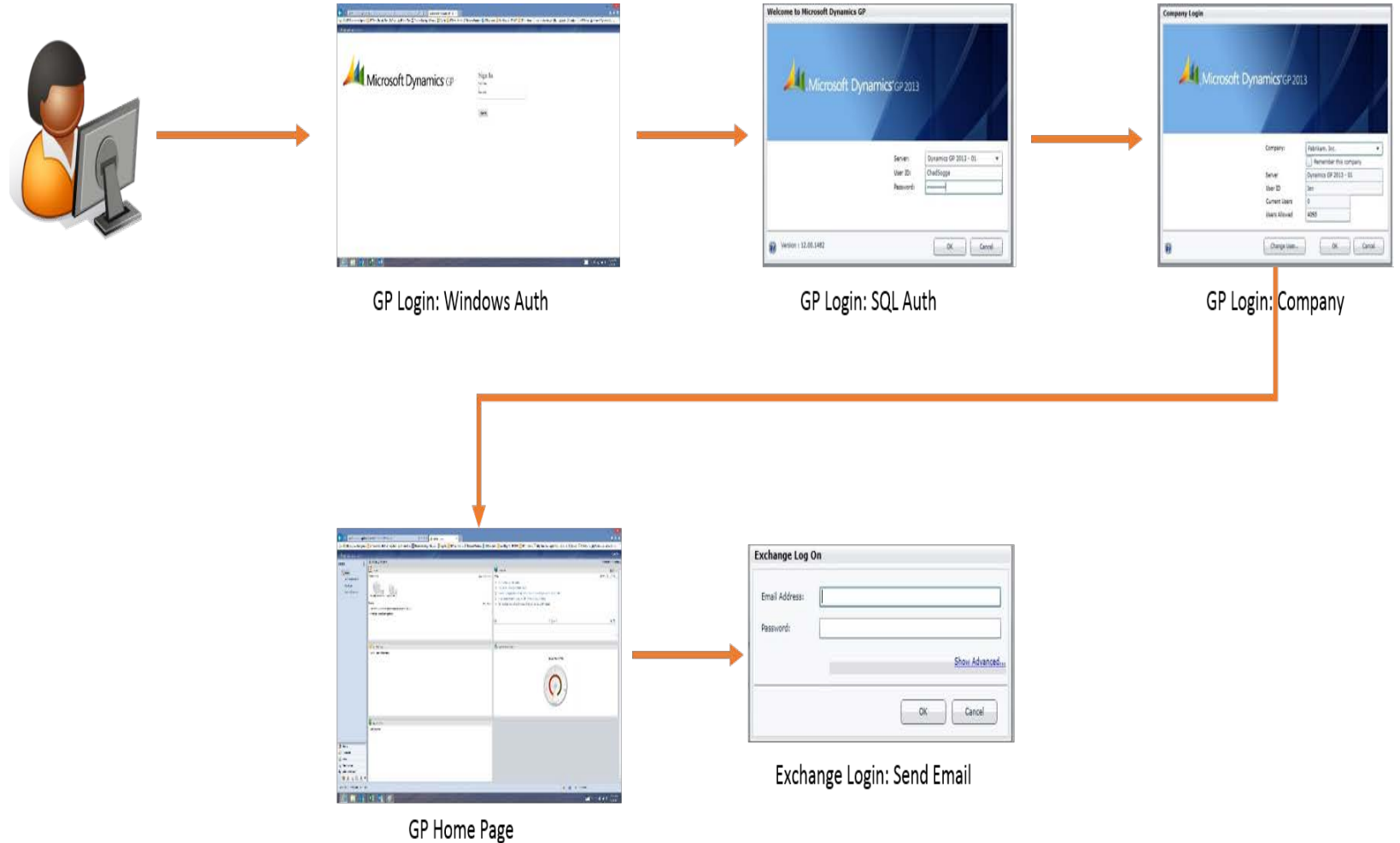
Identity Management

Simplify Web Client login

Reduce Identity Maintenance between apps

Support companion app and Service Based Architecture scenarios

Microsoft Dynamics GP 2013



Web Client Functionality

Self Service Home Page

Time & Attendance

Project Time

Requisitions

Workflow

Identity Management

The screenshot displays the Microsoft Dynamics GP Web Client interface for Theresa's Home page. The browser address bar shows the URL <https://gpweb2.gpwithazure.com/GP/Views/GPWeb.aspx> and the user is logged in as Fabrikam, Inc.

Home

- Home
- User Preferences
- Shortcuts
- Report Shortcuts

Theresa's Home

Procurement

PURCHASE REQUISITIONS STATUS

9	5	8	0
Saved	Pending User Action	Ready For Purchase	Rejected

I NEED TO

- Enter a Purchase Requisition
- View all Purchase Requisitions
- Find a Purchase Requisition

REQUISITIONS LIST

Description	Requisition Number	Date	Required Date	Total	Req Status	Assigned To	Task Due	Workflow Status
Office Supplies	REQ000000000000035	5/2/2017	5/4/2017	\$284.60			0/0/0000	Not Submitted
	REQ000000000000032	5/1/2017	5/1/2017	\$2,846.00			0/0/0000	Completed
	REQ000000000000034	5/1/2017	5/2/2017	\$2,846.00			5/8/2014	Pending User Action
	REQ000000000000033	4/12/2017	4/12/2017	\$284,600.00			5/8/2014	Completed
Computer Supplies	REQ000000000000004	4/12/2017	4/12/2017	\$100.00			5/8/2014	Completed
Computer Supplies	REQ000000000000009	4/12/2017	6/1/2017	\$100.00			5/8/2014	Completed

Time Management

TIMECARDS

2	0	1
Saved	Rejected	Pending User Action
0	0.00	0.00
Paid	Vacation Balance	Sick Leave Balance

I NEED TO

- Enter Time for a Pay Period
- Recall a Submitted Timecard

CURRENT WEEK (4/9/2017 - 4/15/2017)

Pay Code	Sunday	Monday	Tuesday	Wednesday	Thursday
HOLI					
HOUR		8.00	8.00	8.00	8.00
SICK					
VACN					

4/12/2017 Fabrikam, Inc. Theresa

Connected

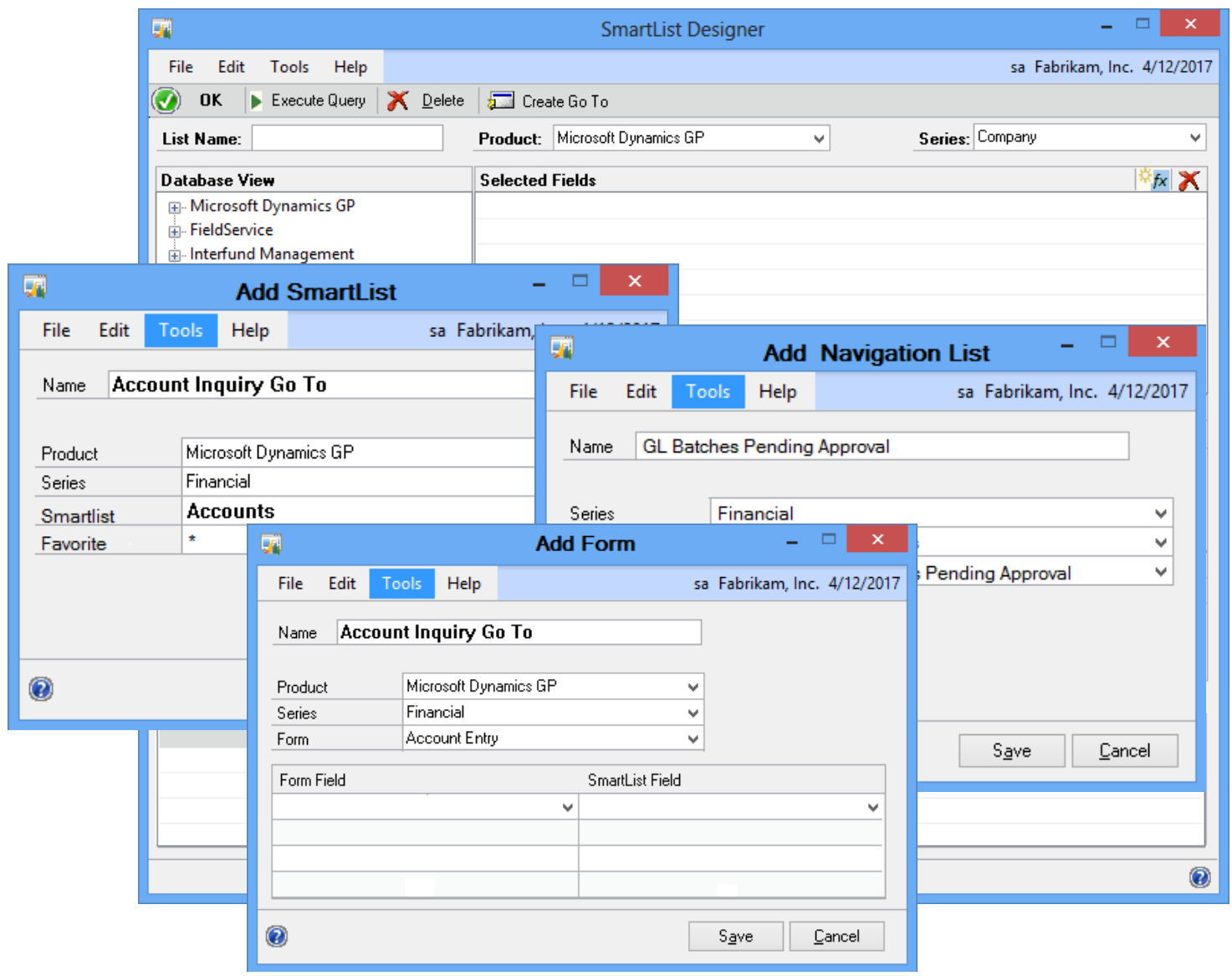


SmartList Designer Additions

Create New Go To

Integrate with Existing Go To Options

Open Form, Navigation List, SmartList, or Web Page



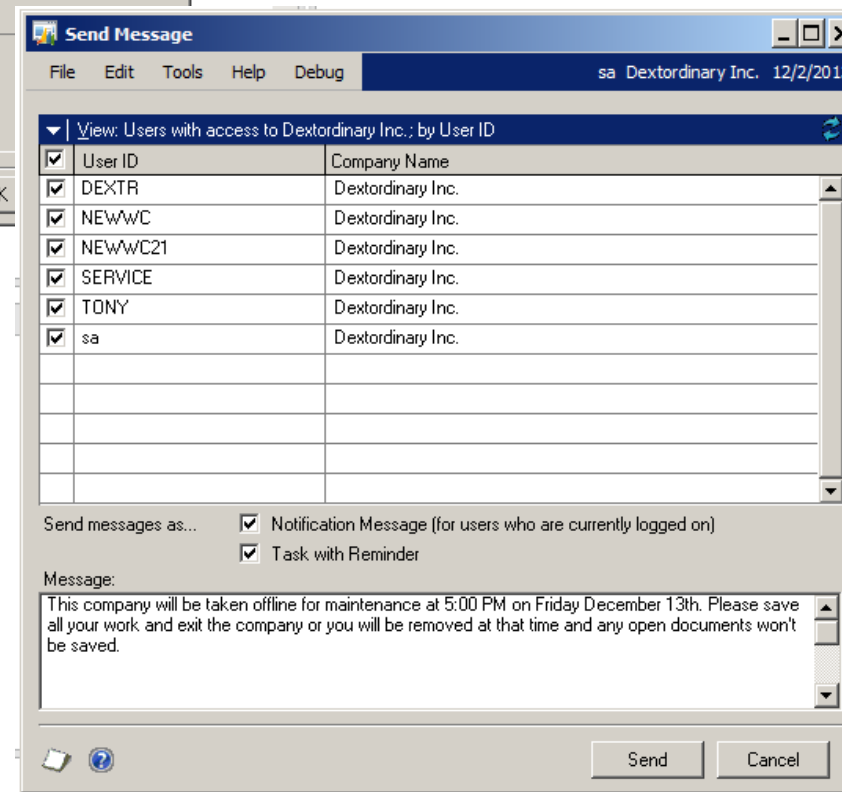
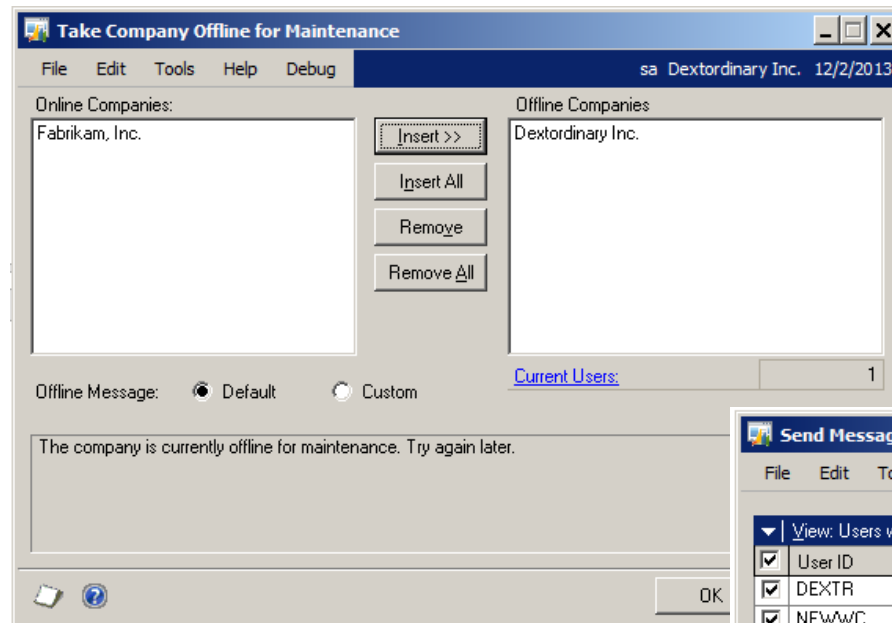


Take Company Offline

Limit company access for maintenance

Assign user with access

Message users





Microsoft Azure Backups

Disaster recovery

Restore directly to/from
Windows Azure Storage

Option in Microsoft Dynamics
GP window

Back Up Company sa Fabrikam, Inc. 4/12/2017

File Edit Tools Help

Select the company to backup.

Company Name: System Database

Database Name: DYNAMICS

Use local storage

Use Windows Azure storage

Storage account name:

Access key:

URL to container:

File Name:

Use compression

Verify account

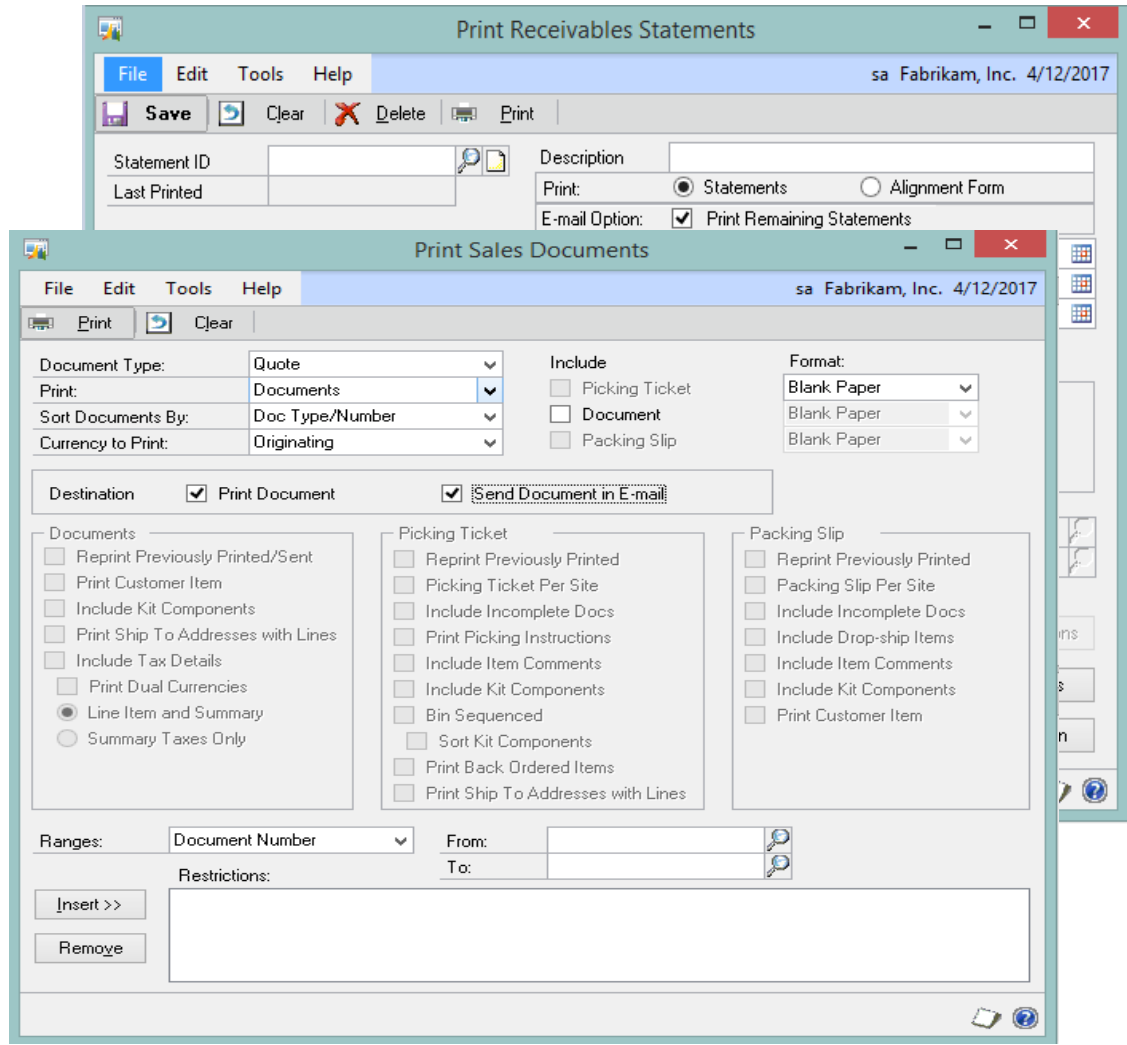
OK Cancel

Print Reaming Docs for Email

Print and E-mail in one step

Available for E-mail batch Process

Available for E-mail Statements Process

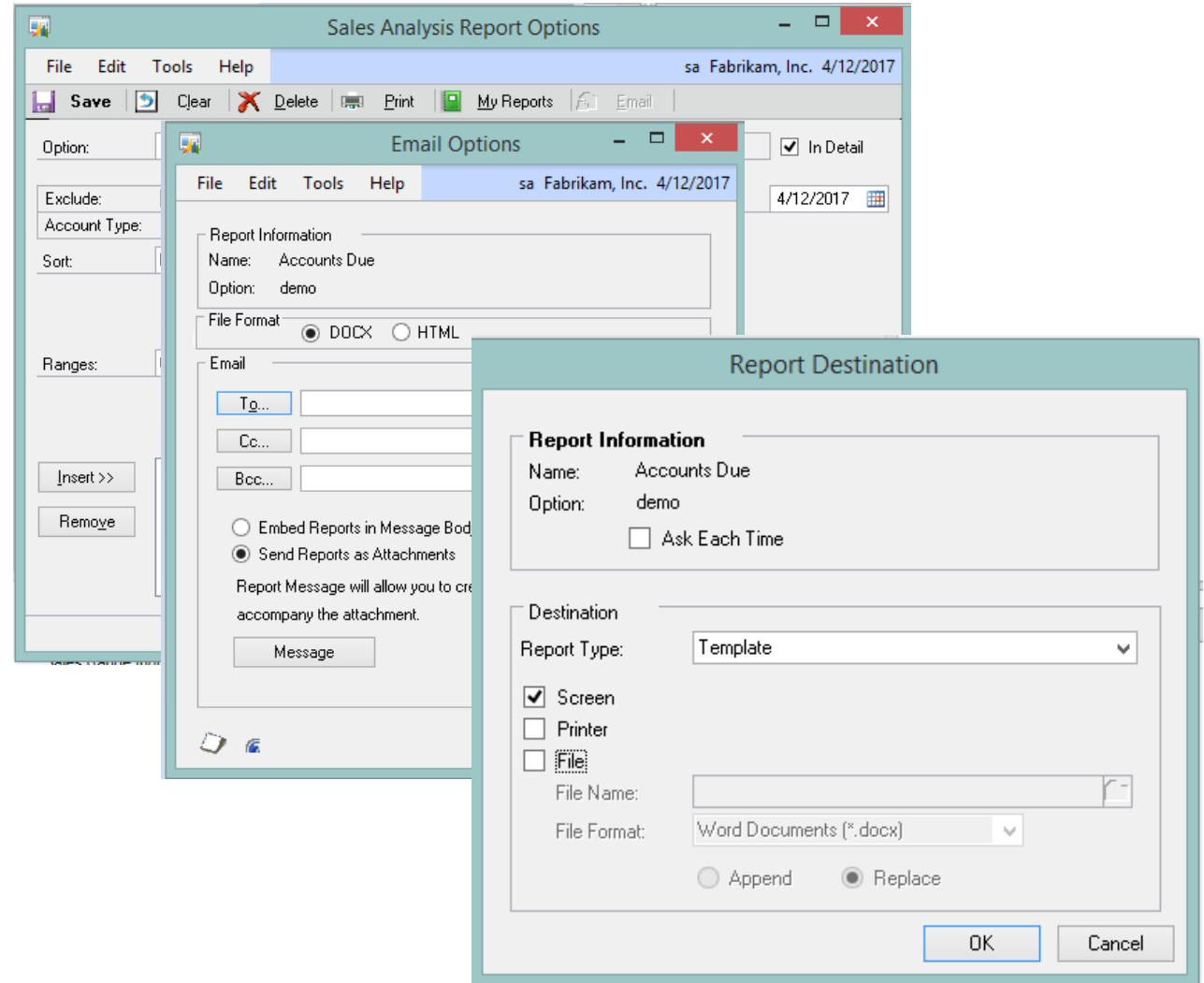


Email or Print any report in Microsoft Word

Ability to send reports in Word format

Ability to print reports as Word templates

Use Word tools to modify the reports



Email based on document type

Allow Customer's to Email documents based on the on specific document type

Can Enable or Disable the feature

Customer ID: AARONFIT0001 Name: Aaron Fitz Electrical

Select Document Options

Send Documents as Attachments Embed Document in Message Body

Attachment Options

Multiple Attachments per E-mail

Set Maximum File Size: 0.00 Megabytes

Email Address based on Doc Type

Enable Disable

Send Forms as E-mail

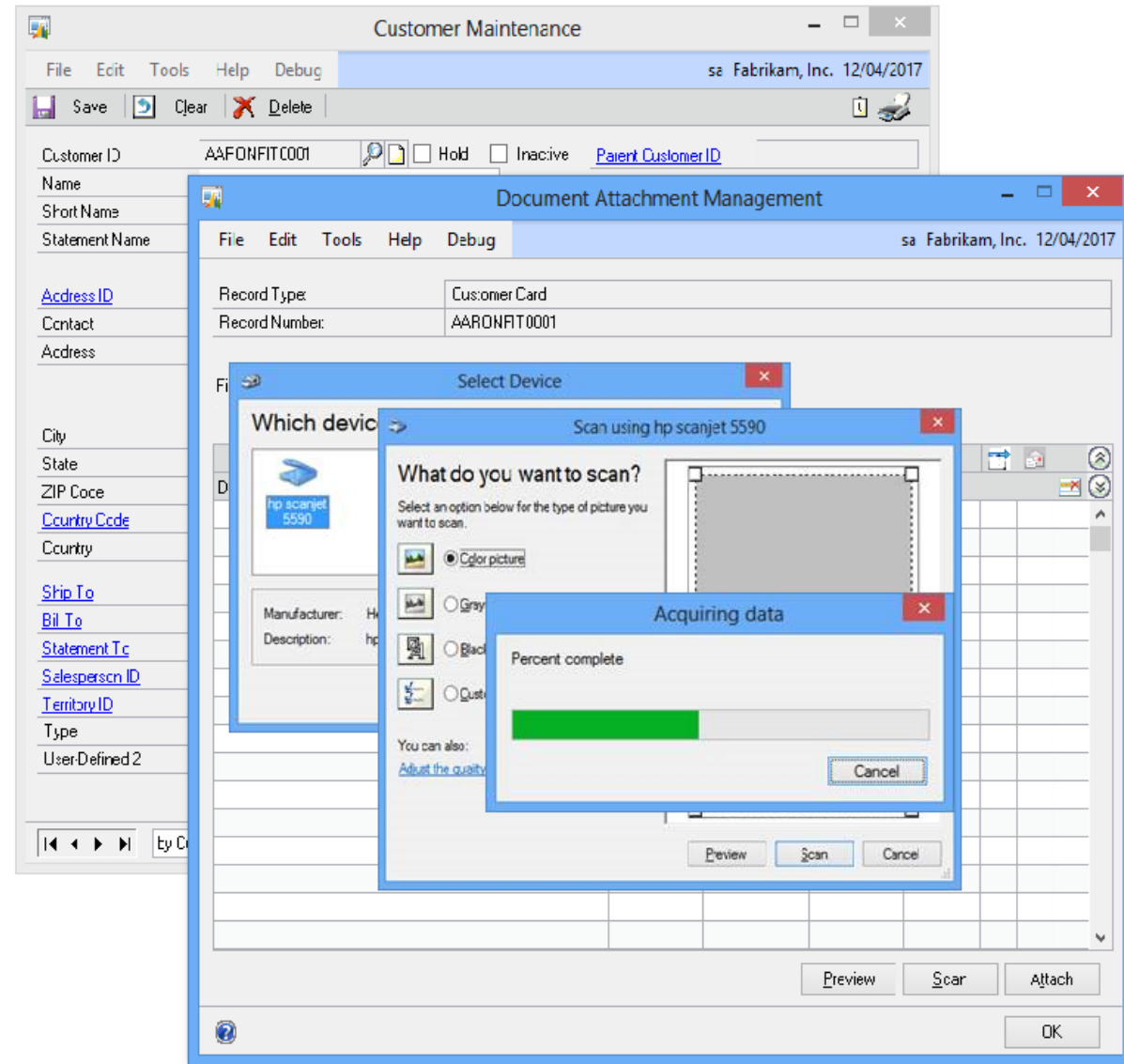
Enable	Message ID	Format	Email Address
<input checked="" type="checkbox"/>	Sales Quote	DOCX	csogge@microsoft.com
<input checked="" type="checkbox"/>	Sales Order	DOCX	csogge@microsoft.com
<input checked="" type="checkbox"/>	Sales Fulfillment Order	DOCX	bmeier@microsoft.com
<input checked="" type="checkbox"/>	Sales Invoice	DOCX	igrant@microsoft.com
<input checked="" type="checkbox"/>	Sales Return	DOCX	igrant@microsoft.com
<input checked="" type="checkbox"/>	Sales Back Order	DOCX	bmeier@microsoft.com
<input checked="" type="checkbox"/>	Packing Slip	DOCX	igrant@microsoft.com
<input checked="" type="checkbox"/>	Receivables Invoice	DOCX	igrant@microsoft.com
<input checked="" type="checkbox"/>	Receivables Return	DOCX	bmeier@microsoft.com
<input checked="" type="checkbox"/>	Receivables Debit Memo	DOCX	igrant@microsoft.com
<input checked="" type="checkbox"/>	Receivables Credit Memo	DOCX	igrant@microsoft.com
<input checked="" type="checkbox"/>	Receivables Finance Charge	DOCX	bmeier@microsoft.com
<input checked="" type="checkbox"/>	Receivables Service/Repairs	DOCX	igrant@microsoft.com
<input checked="" type="checkbox"/>	Receivables Warranty	DOCX	igrant@microsoft.com
<input checked="" type="checkbox"/>	Customer Statement	DOCX	bmeier@microsoft.com

OK Cancel

Document Attach Additions

Scan Documents Directly to Doc Attach from Scanner

Add Doc Attach to Payables
Convert OLE Notes to Doc Attach

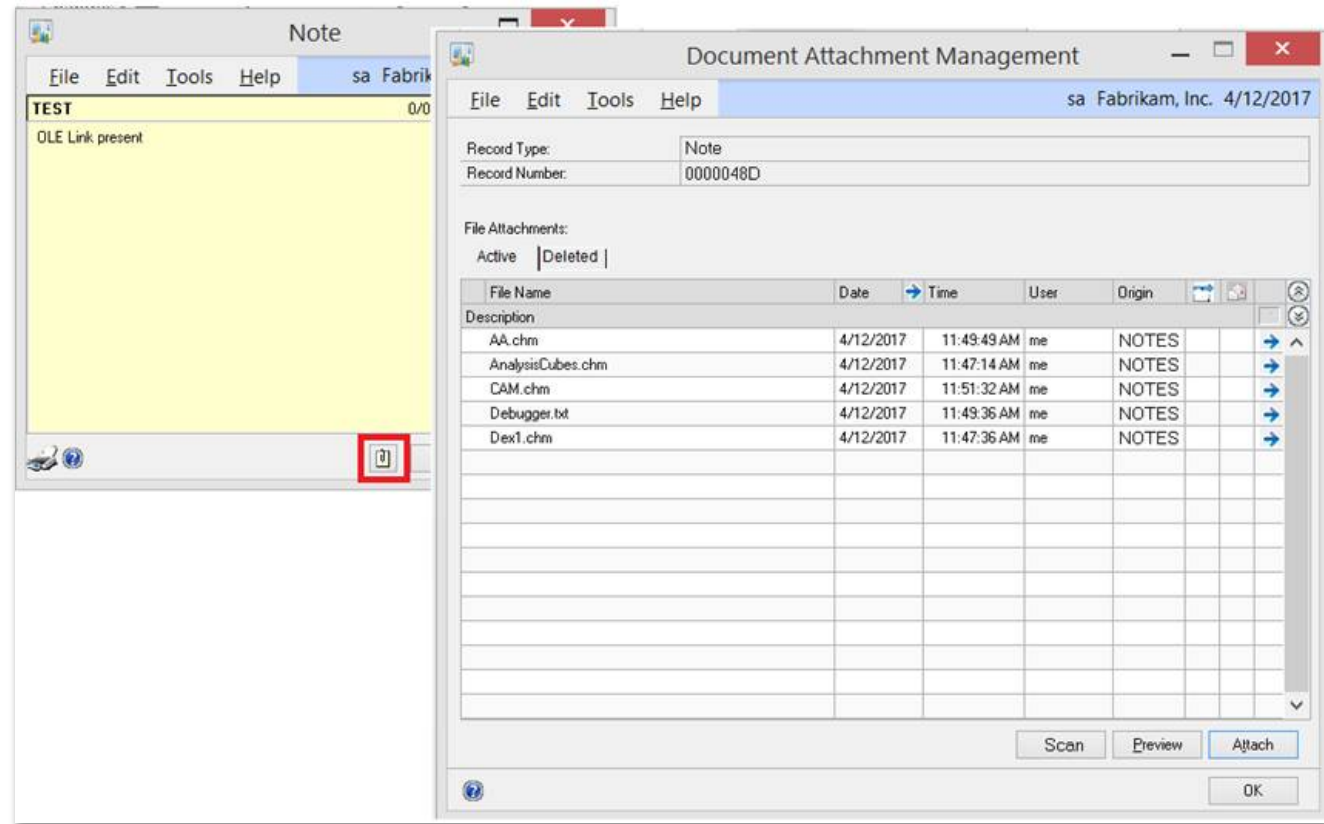


Document Attach - OLE Notes

OLE File Attachments replaced with Doc Attach

Available on both Desktop Client and Web Client

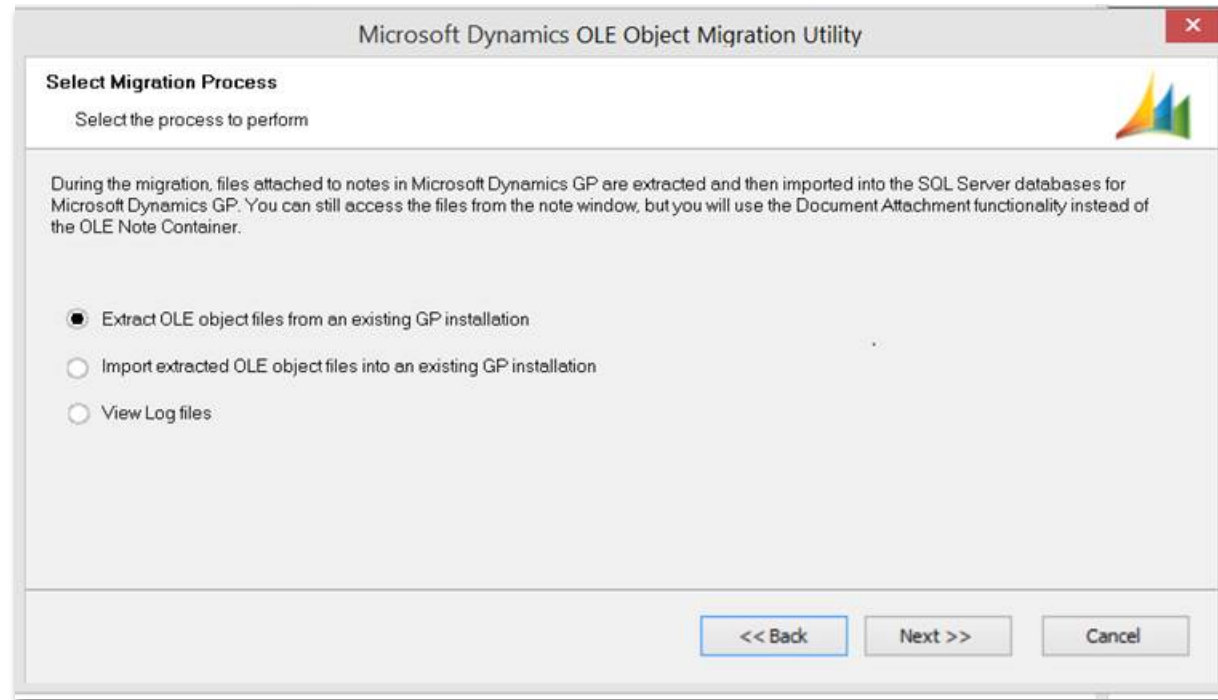
Attachments saved in the SQL database



Document Attach: OLE Object Migration Utility

External, one time utility for existing users to extract existing OLE attachments and import into Doc Attach files

For Core Dynamics GP, HR, and Manufacturing



Microsoft SQL Reporting Services on Transaction Forms

Enables Report Rendering from Transaction Windows

Personalized SSRS Reports Based on Your BI Needs

Sales Transaction Entry

Sales Transaction Entry | Customer Detail Entry | Item Detail

Save | Actions | AA | Attach | Options | View | Additional | Go To | Print | Available Reports | E-mail | Help | Add Note

Type/Type ID: Quote | STDQTE | **Date:** 15

Document No.: | **Batch ID:** | **Default Si:**

Customer ID: | **Customer:**

Customer Name: | **Currency:**

[Ship To Address](#)

Current Balance (default)
Customer Information
Sales Per Month
Assign Reports...

Line Items by Order Entered

Item Number	D	U of M	Quantity Quoted	Unit Price	Extended Price
-------------	---	--------	-----------------	------------	----------------

Amount Received: \$0.00
Terms Discount Taken: \$0.00
On Account: \$0.00

Subtotal: \$0.00
Trade Discount: \$0.00
Freight: \$0.00
Miscellaneous: \$0.00
Tax: \$0.00
Total: \$0.00

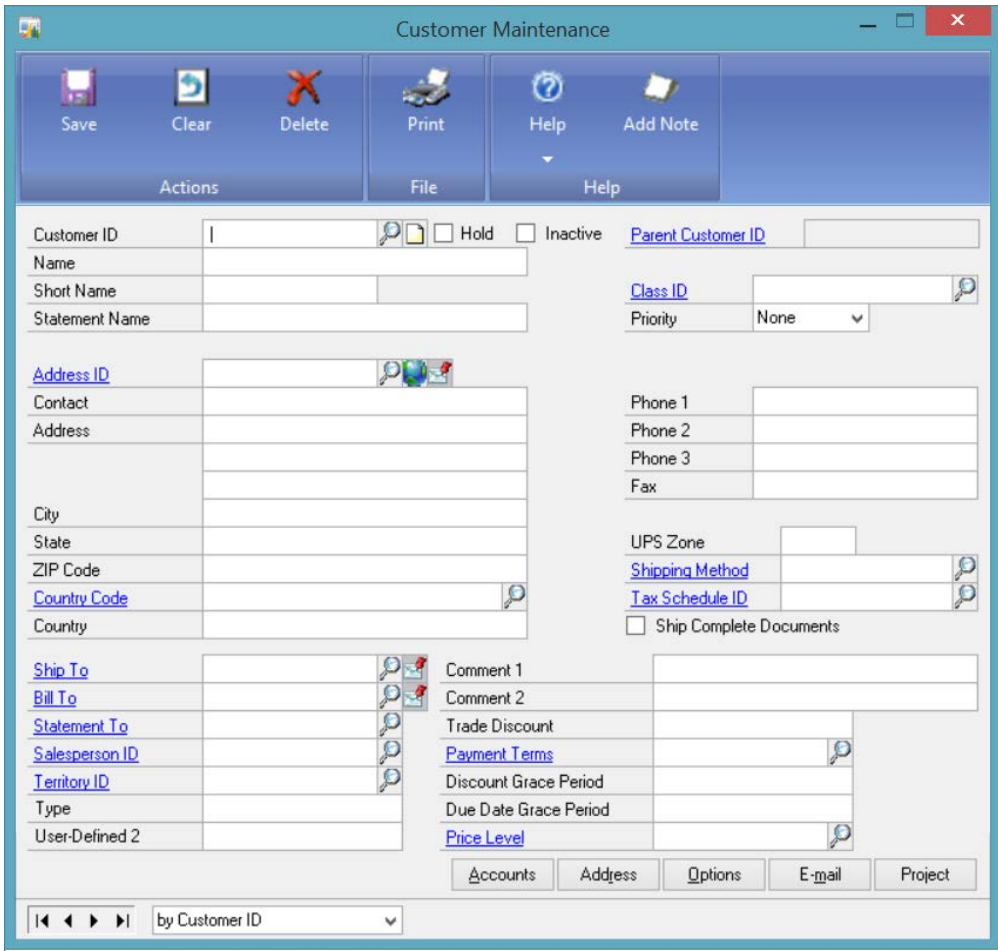
by Document No. | Document Status

Ribbons in Desktop Client

Refresh Desktop Client UI

Include ribbons on all forms

Update desktop font



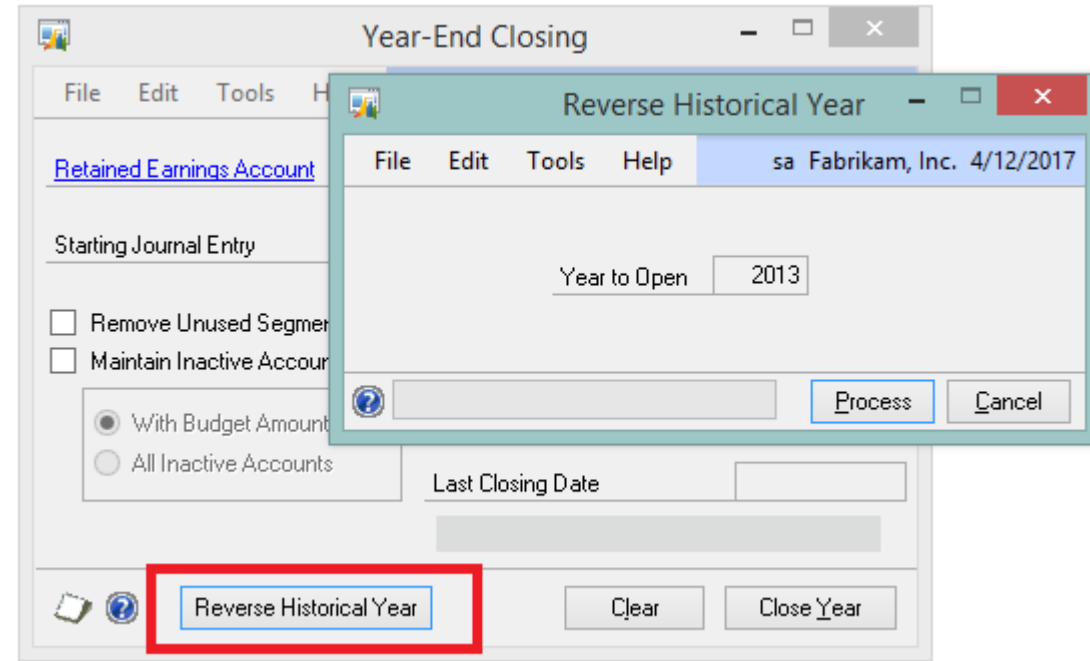
Financials

Reverse Fiscal Year

Ability to reverse the GL Year End Close process

Will open the previously closed fiscal year

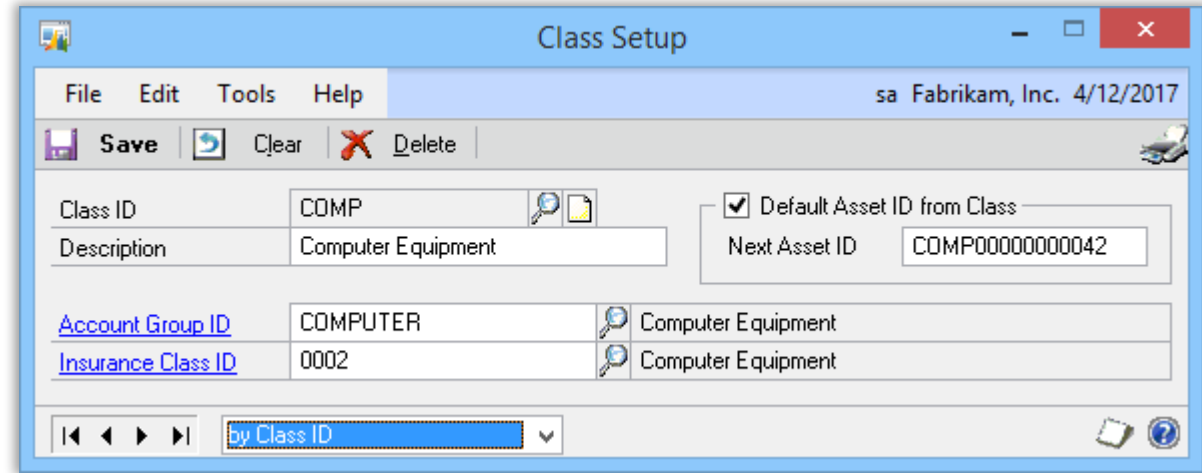
Will warn users to create backups and verify all users out of GP prior to process



Fixed Assets Default Asset ID from Asset Class

New option for Asset IDs

More quickly set up asset records



Integration of Multicurrency revaluation with Analytical Accounting

Multicurrency revaluation now be linked with AA

AA codes on the original transaction can now be updated per the revaluation process

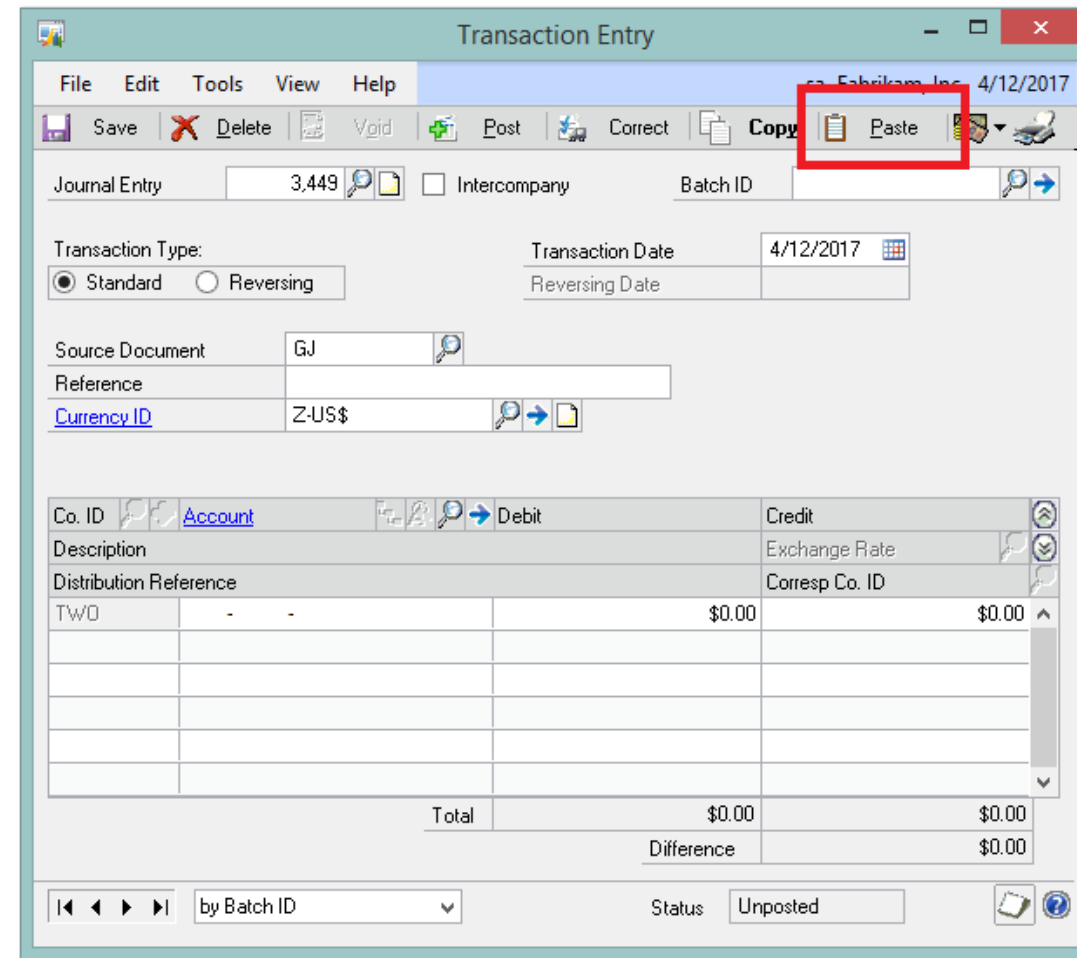
The screenshot shows the 'Multicurrency Revaluation' window for 'sa Dextordinary Inc.' on '01/01/2000'. The interface includes a menu bar (File, Edit, Tools, Help) and a toolbar with 'Save', 'Delete', and 'Revalue' buttons. The main area contains several configuration fields: 'Revalue Option' (dropdown), 'Results' (radio buttons for 'Post' and 'Print Report Only'), 'Series' (dropdown set to 'Financial'), 'Calculate Gain/Loss' (radio buttons for 'Unrealized' and 'Realized'), 'Posting Date' (01/01/2000), 'Reversing Transaction' (checked), 'Reversing Date' (01/02/2000), 'Current Year' and 'Year' (dropdowns), 'Current Period' and 'Period' (dropdowns), and 'Rate Types' (dropdown set to 'by Currency ID'). There are 'Mark All' and 'Unmark All' buttons. Below these is a table with columns: 'Currency ID', 'Rate Type ID', 'Use Date From', 'Date', 'Exchange Rate', 'Currency Description', 'Exchange Table ID', and 'Calculation Method'. The table is currently empty. A 'Restrictions' button is located at the bottom right of the table area.



Copy and Paste to General Ledger

Ability to paste from Excel to General Ledger

Will validate the data that is being pasted into the Transaction Entry



Reprint outstanding transactions report from Bank Reconciliation

Reprint Outstanding
Transactions Report

Print posting report after
posting

System:	10/4/2013	10:18:26 AM	Fabrikam, Inc.	Page:	1
User Date:	4/12/2017		OUTSTANDING TRANSACTIONS REPORT	User ID:	sa
			Bank Reconciliation		
Checkbook ID:	FLEX BENEFITS				
Description:	Flex Benefits-Lakes Bank				
Sorted By:	Type				
Audit Trail Code:	8000000129100				
Type	Number	Date	Paid To/Rcvd From		Trx Amount
-----	-----	-----	-----		-----
DAJ	DAJ000000014	1/30/2014			(\$600.00)
DAJ	DAJ000000015	1/30/2014			(\$1,520.00)
	2 Transaction(s)				
Totals:					
Number of Payments				2	
Amount of Payments			\$2,120.00		
Number of Deposits				0	
Amount of Deposits			\$0.00		

Default Sort Order for Payables Checks

Sort Checks by option will be found in the Payables Management setup

Sort options: Payment Number, Name, State-City or Zip Code

Time-saving feature

The screenshot shows the 'Payables Management Setup' window for 'sa Fabrikam, Inc.' dated 4/12/2017. The window has a menu bar with 'File', 'Edit', 'Tools', and 'Help'. The main area is divided into several sections:

- Aging Periods:** A table with columns for 'From' and 'To' dates. The 'Due Date' radio button is selected.
- Apply By:** Radio buttons for 'Document Date' (selected) and 'Due Date'.
- Defaults:** A section with a red border around it, containing:
 - Default Summary View: Amounts Since Last Close
 - Sort Checks By: Payment Number
 - Checkbook ID: UPTOWN TRUST
 - Check Format: Stub on Top
- Options:** A list of checkboxes including 'Override Voucher Number at Transaction Entry', 'Track Discounts Available in GL', 'Print Historical Aged Trial Balance', etc.
- Allow Duplicate Invoices Per Vendor:** Radio buttons for 'Yes', 'No', and 'Recurring Transactions Only' (selected).

Buttons for 'Options', 'Classes', '1099 Setup', 'OK', and 'Cancel' are visible at the bottom.

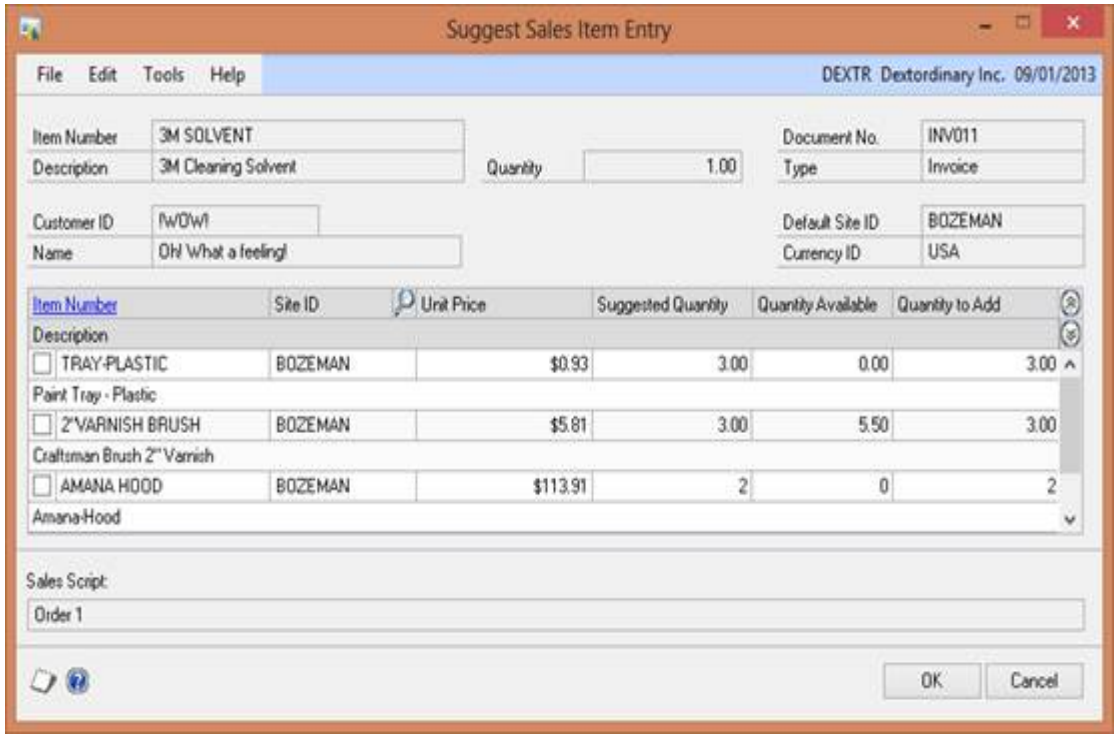
Distribution

Suggested Item

Sales script for each item

Analyze option to suggest quantities

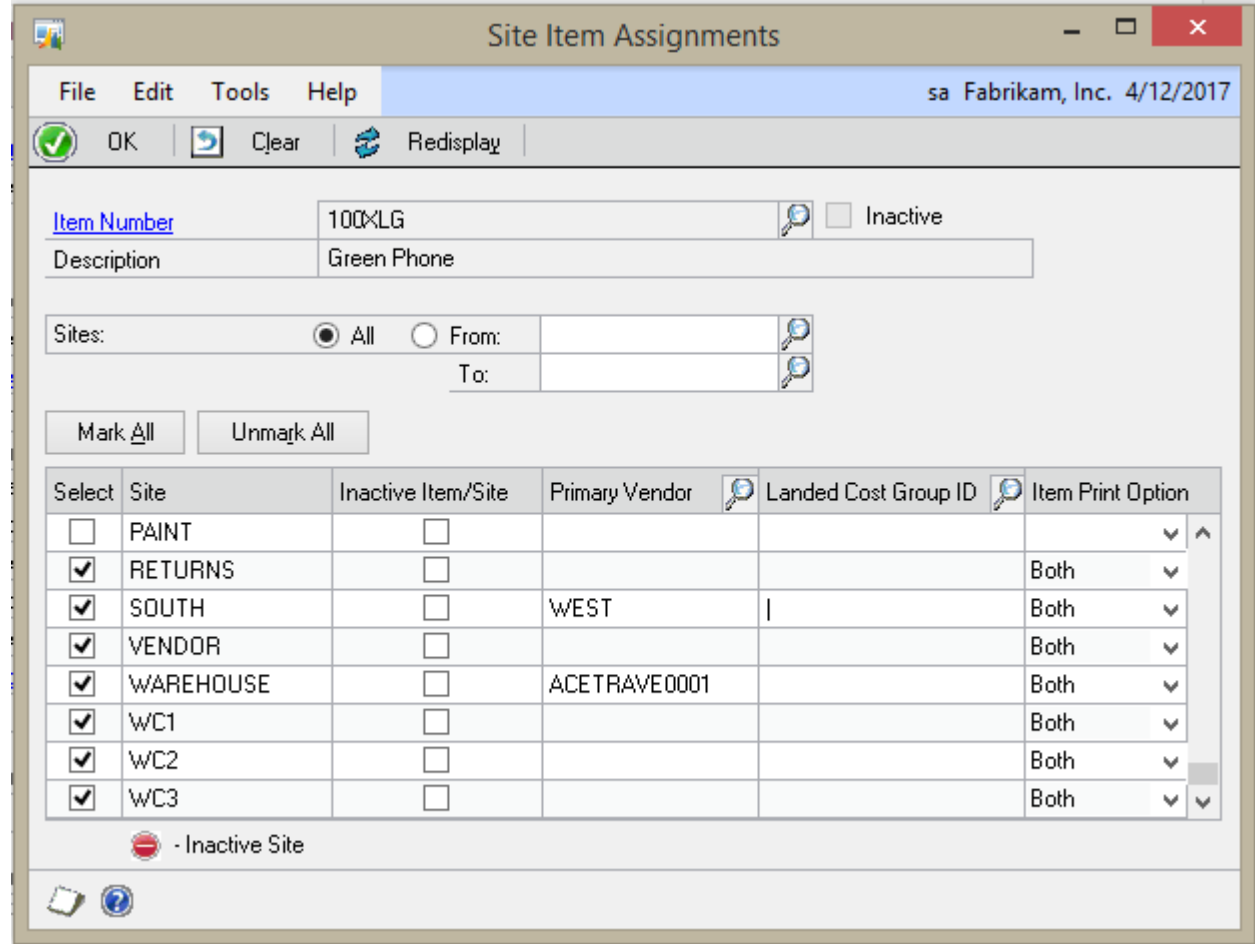
New fields: Price, Qty. Available, Site ID



Assign Item to multiple Sites

Assign an Item to multiple Sites

Available from Site Maintenance



Payables Prepayment Additions

Integrate with Analytical
Accounting, Multi-Dimensional
Analysis, Cash Flow
Management and Project
Accounting

Show PO Number in Check
Inquiry

The screenshot shows a software window titled "Payables Payments Zoom" with a menu bar (File, Edit, Tools, View, Additional, Help) and a status bar (sa Fabrikam, Inc. 4/12/2017). The main area contains a form for entering payment details:

Payment No.	00000000000000439	Batch ID	sa
Date	4/12/2017	Date Voided	0/0/0000
Vendor ID	ACETRAVE0001	Currency ID	Z-US\$
Check Name	A Travel Company		

Payment Method: Check Credit Card Cash EFT Electronic

	Amount
Unapplied	\$100.00
Applied	\$0.00
Total	\$100.00

Checkbook ID	UPTOWN TRUST	Terms Discount Taken	\$0.00	Writeoff	\$0.00
Document No.	20058	Terms Discount Available	\$0.00		
Amount	\$100.00				
Comment					
PO Number	PO2078				

Buttons: Revaluation, Apply, Distribution, Re-create Check Stub

New Encumbrance SQL Reporting Services Reports

SSRS Reports that display Encumbrance data

Summary and Detail Reports

Enable Print SSRS Reports from Encumbrance forms

View By: Budget Budget ID/Year: Budget 4
 From Account: 000-1300-01 To Account: 000-1300-01
 Display: Net Change Exclude Prebudget in Total: No

Encumbrance Summary Inquiry

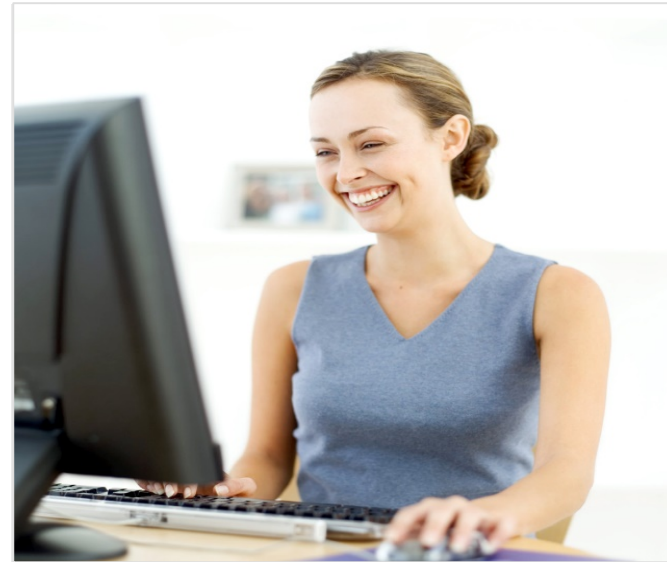
BUDGET	Account Number	Period ID	Actual	Pre-Budget	Pre-Encumbered	Encumbered	Total	Budget	Variance	Variance %
BUDGET 4	000-1300-01	Beginning Balances	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
		2017 PERIOD 1	(\$24,132.62)	\$0.00	\$0.00	\$0.00	(\$24,132.62)	\$10,000.00	\$34,132.62	341.32%
		2017 PERIOD 2	\$95,054.70	\$0.00	\$0.00	(\$11,653.62)	\$83,401.08	\$10,000.00	(\$73,401.08)	(734.01%)
		2017 PERIOD 3	(\$80,223.52)	\$0.00	\$0.00	\$0.00	(\$80,223.52)	\$10,000.00	\$90,223.52	902.23%
		2017 PERIOD 4	(\$32,263.94)	\$3,322.90	\$0.00	\$680.48	(\$28,260.56)	\$10,000.00	\$38,260.56	382.60%
		2017 PERIOD 5	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10,000.00	\$10,000.00	100.00%
		2017 PERIOD 6	\$0.00	\$0.00	\$5,980.00	\$598.00	\$6,578.00	\$10,000.00	\$3,422.00	34.22%
		2017 PERIOD 7	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10,000.00	\$10,000.00	100.00%
		2017 PERIOD 8	(\$4,430.00)	\$0.00	\$0.00	\$0.00	(\$4,430.00)	\$10,000.00	\$14,430.00	144.30%
		2017 PERIOD 9	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10,000.00	\$10,000.00	100.00%
		2017 PERIOD 10	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10,000.00	\$10,000.00	100.00%
		2017 PERIOD 11	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10,000.00	\$10,000.00	100.00%
		2017 PERIOD 12	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10,000.00	\$10,000.00	100.00%
		Total	(\$45,995.38)	\$3,322.90	\$5,980.00	(\$10,375.14)	(\$47,067.62)	\$120,000.00	\$167,067.62	139.22%

View By: Budget Budget ID/Year: Budget 4 Report Rendered: 10/14/2013 3:48:38 PM
 Beginning Account: Ending Account:
 Display: Net Change Exclude Prebudget in Total: No

Business Portal Replacement Strategy

Replace Business Portal with employee self service functionality within GP web client

Business Portal will not be released for GP 2015



Web Client

- Limited User Role
- Requisition Management
- Employee Self Service
- Project Time
- Project Expense



Apps

- Business Analyzer
- Procurement
- Time Management
- Others (tbd)

Self Service Home Page

New Home Page Content Page

Quick & Simplified Navigation

Preview Important Information

Employee Self Service

TIME MANAGEMENT

2 Saved Time Cards	12 Submitted Time Cards	14 All Time Cards	80 Vacation	40 Sick Time
-----------------------	----------------------------	----------------------	----------------	-----------------

I NEED TO...
[Change My Address](#)
[View Paystub](#)
[Update Emergency Contact Information](#)
[Change My W4](#)
[Edit Direct Deposit Information](#)

CURRENT TIME CARD

PAY CODE	DEC 1	DEC 2	DEC 3	DEC 4	DEC 5	DEC 6	DEC 7	TOTAL
Hourly		8.00						8.00
Hourly - Dept. A			8.00					8.00
Hourly - Dept. B				4.00				4.00
Hourly - Dept. C				4.00				4.00
Vacation					8.00	8.00		16.00



New Companion Apps

Microsoft Dynamics GP Workspace

Easily create and securely share executive dashboards

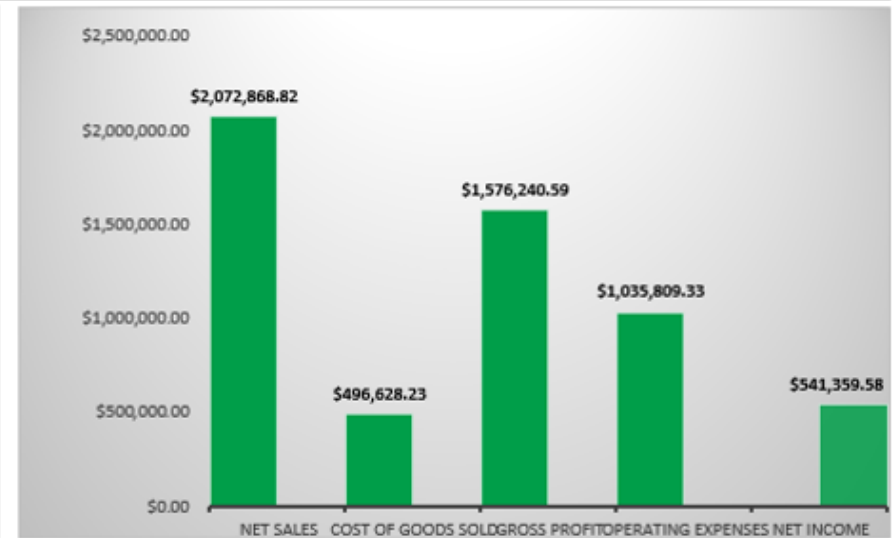
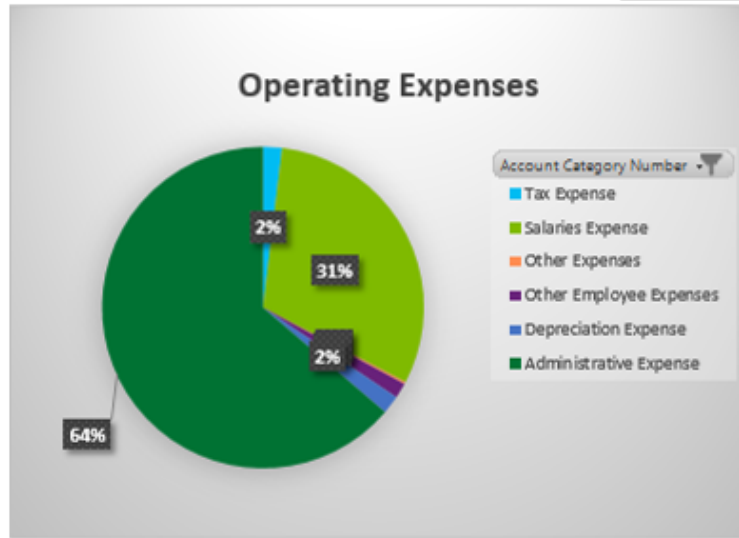
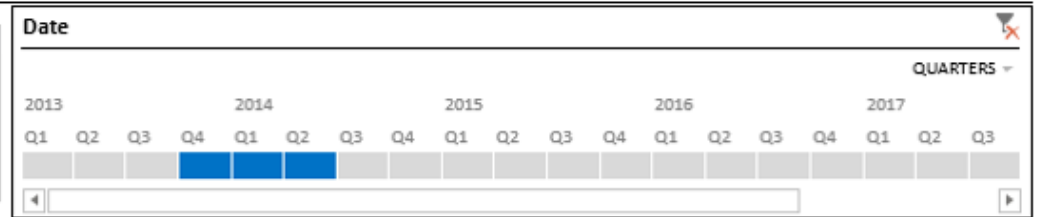
Seamlessly click-through to Dynamics GP client for rich data

Coming soon ! Office 365 app to simplify set up.

[Click here to Test drive](#)

Financial Dashboard

Indicator	Current
Net Sales	\$2,072,868.82
Cost of Goods Sold	\$496,628.23
Gross Profit	\$1,576,240.59
Operating Expense	\$1,035,809.33
Net Income	\$541,359.58



Financial Ratios	This Period	Last Period	% Change
Current	1.82	0.83	119.28%
Quick	3.46	1.05	229.52%
AR Days Outstanding	28.36	32.52	12.80%
Debt to Equity	0.00	0	0.00%
Receivables Turnover	1.14	1.62	29.63%

Checkbook	Checkbook ID	Currency ID	Current Balance
Computer-Uptown Trust	UPTOWN TRUST	Z-US\$	65,994.14
Flex Benefits-Lakes Bank	FLEX BENEFITS	Z-US\$	345.32
Payroll - Lakes Bank	PAYROLL	Z-US\$	227,136.29
Petty Cash-Uptown Trust	PETTY CASH	Z-US\$	4,316.51
FIRST BANK	FIRST BANK	Z-US\$	0.00

Business Analyzer R6

Supports Excel Content within the app

Windows 8 Design

Business Analyzer R7 is planned to be released soon.

BUSINESS ANALYZER
CONTOSO ENTERTAINMENT SYSTEM USA - CHIEF FINANCIAL OFFICER

KPIS [+ Add](#)

Net sales - Daily

Day	Net sales (thousands USD)
Tue	230
Wed	170
Thu	150
Fri	190
Sat	130
Sun	100
Mon	140

Today's bank balances - Summary view

Days inventory outstanding
622.49
Goal: 200.00
Status: ♦
Trend: ↑

Receivables vs payables
\$3,168,330
Goal: \$1,500,000
Status: ●
Trend: ↑

Liquidity: quick ratio
1.90
Goal: 1.60
Status: ●
Trend: ↓

Liquidity: working capital
\$28,989,771
Goal: \$23,968,667
Status: ●
Trend: ↓

Open accounts payable
\$3,755,540
Goal: \$5,000,000
Status: ●
Trend: ↓

REPORTS [Show All](#) ▼

- Departmental Income Statement** 1/21/2014
- Financial Matrix** 1/21/2014
- Weekly Material Usage** 1/21/2014

Liquidity: working capital
\$28,989,771
Goal: \$23,968,667
Status: ●
Trend: ↓

Open accounts payable
\$3,755,540
Goal: \$5,000,000
Status: ●
Trend: ↓

Procurement

(planned to be released soon)

Self-Service user App

Request Items

Windows 8 Design

Tightly integrate with DynGP

Cross Platform

DYNAMICS PROCUREMENT - FABRIKAM, INC



REQUISITIONS

New Requisition

SAVED 2

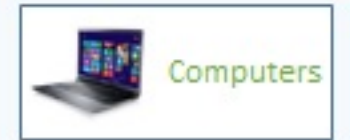
SUBMITTED 4

REJECTED 1

FEATURED ITEMS



CATALOG



Time Management

(planned to be released soon)

Self-Service user App

Enter Time Off

Windows 8 Design

Cross Platform

MICROSOFT DYNAMICS TIME MANAGEMENT

January 2014

Submit Cancel

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
29	30 8.00 Vacation	31 8.00 Vacation	1	2 2.00 Sick Time	3 8.00 Vacation	4
5	6	7	8	9 8.00 Vacation	10	11
12	13	14	15	16 8.00 Vacation	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

ATTENDANCE

1/1/2014

Vacation	Balance	104.00	0.00
Sick Time	Balance	62.00	0.00

TIME CARDS

Check Date	Hours Submitted
February 28, 2014	0.00
February 15, 2014	0.00
January 31, 2014	0.00
January 15, 2014	0.00
December 31, 2013	0.00

Microsoft Dynamics GP Roadmap

