



"Our mission is to empower every person and every organization on the planet to achieve more."

Microsoft Dynamics GP18.9 October 2026

Features for Microsoft Dynamics GP



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Microsoft Dynamics GP

- This course/module is intended for Partners and Customers. It introduces the application and system features in Microsoft Dynamics GP 18.9.
- The features for Microsoft Dynamics GP are built around ease of use, customer requests, and extending functionality.
- After this course, you will be able to understand the Microsoft Dynamics GP features and identify the windows, setup options, and upgrade considerations associated with the release.
- It will take approximately 60 minutes to train the features in Microsoft Dynamics GP 18.9.

Microsoft Dynamics GP Lifecycle

Understand the Lifecycle Policies for Dynamics GP:

[Software lifecycle policy - Dynamics GP | Microsoft Docs](#)

[What Does Modern Lifecycle mean for Dynamics GP?](#)

[Discontinuing support for Microsoft Dynamics GP](#)

[Announcing End of Support for Dynamics GP - Microsoft Dynamics 365 Blog](#)

Discontinuing support for Dynamics GP - Announced September 2024

As Microsoft continues focusing on innovation and investments in cloud solutions and technologies, we will end Dynamics GP support on December 31, 2029, for product enhancements, regulatory (tax) updates, and technical support. Security updates/patches, if needed, will be made available until April 30, 2031. As we expand investment in Dynamics 365 cloud solutions, customers and partners are encouraged to upgrade systems and software to work with Dynamics 365 cloud offerings, which provide superior security and business management features.

[June 2, 2025, Microsoft Announced End Dates for Subscription and SPLA for Dynamics GP and SL.](#)

End of Life Timeline for Subscription and SPLA

April 30, 2031: End of Subscription Billing and use of product.

As previously announced:

December 31, 2029: End of product enhancements, regulatory (tax) updates, service packs and technical support.

April 30, 2031: End of security updates.

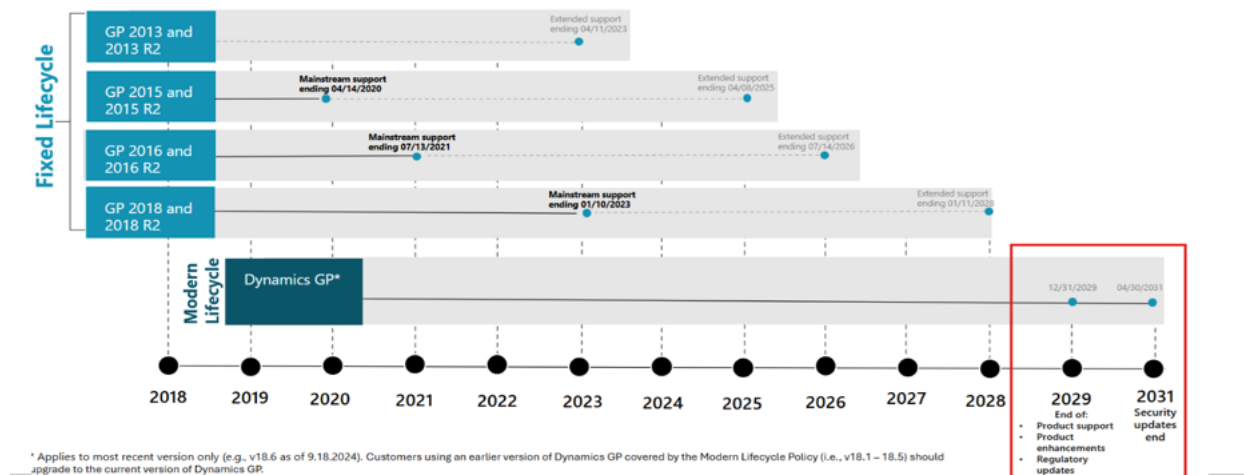
April 1, 2025: No new customers for GP perpetual licenses.

April 1, 2026: No new customers for GP subscription licenses.

Modern Lifecycle

Lifecycle page:
[Software lifecycle policy - Dynamics GP | Microsoft Docs](#)

Dynamics GP versions governed by Fixed and Modern Lifecycle



End of support announced for Dynamics GP

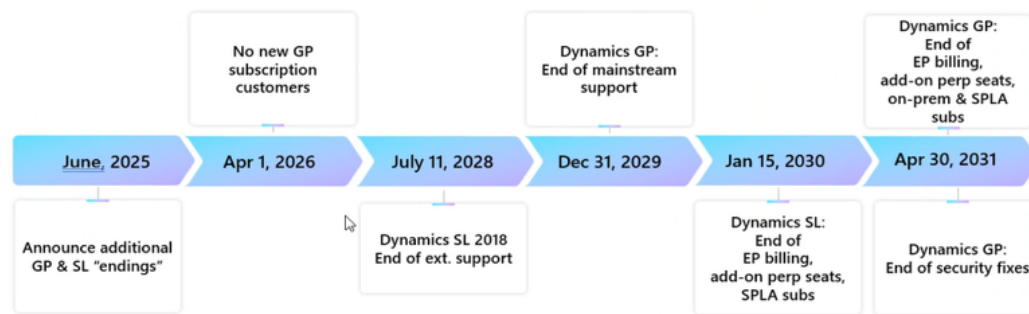
On September 25, 2024, Microsoft announced the timeline for ending support for Dynamics GP.



End of support announced for Dynamics GP Subscription & SPLA

On June 5, 2025, Microsoft announced the timeline for ending support for Dynamics GP Subscription & SPLA

GP and SL Product Availability Roadmap



System Requirements Updates

The following changes have been made to the Dynamics GP System Requirements for 18.9 release.

[Microsoft Dynamics GP System Requirements](#)

Here is a summary of the supported SQL versions based on Microsoft Dynamics GP version.

- GP 2013 supports SQL 2014, 2012 and 2008
- GP 2015 supports SQL 2014 and 2012
- GP 2016 supports SQL 2016, 2014 and 2012
- GP 2018 supports SQL 2017, 2016 and 2014
- GP 18.2 and later supports SQL 2019 plus SQL 2017, 2016 and 2014
- GP 18.5 & 18.6 supports SQL 2022, 2019, 2017 and 2016 (SQL 2014 dropped)
- GP 18.7 & 18.8 supports SQL 2022, 2019, 2017 (SQL 2016 dropped)
- GP 18.8.1941 (January 2026 hotfix) and later supports SQL 2025, 2022, 2019, and 2017
- GP 18.9 supports SQL 2025, 2022, 2019, 2017

Upgrading to Microsoft Dynamics GP 18.9

[Upgrade Hot Topic](#)

The only supported upgrade path to the current release is from the release 1 year back from current in accordance with the [Modern Lifecycle](#) noted above.

You must be on GP 18.7 RTM (18.07.1756) and higher to upgrade to 18.9 (October 2026)



Note: As an example of a supported (tested by Microsoft) upgrade path to 18.9 (October 2026 Release) would be from GP 18.7.1756 or later.

No other System Requirement changes for this release.

Features

Critical System Enhancement

While many system enhancements in Dynamics GP are not directly visible to users, they play a critical role in ensuring the platform remains secure, stable, and compatible with modern technologies. These critical enhancements are the invisible backbone of Dynamics GP.

There are no critical system changes for this release.

Application Features

SmartList Track Users

Feature Overview

SmartList user tracking makes it easier to see who last saved a SmartList and when the saved change occurred. It applies to SmartLists delivered with Microsoft Dynamics GP, SmartList Builder SmartLists, and SmartList favorites.

The feature tracks create, modify, and delete actions. It does not track each time a SmartList is run. Changes to filters, sorting, or display options do not update the last modified user and date unless the SmartList is saved.

Changes to Windows

The last modified user and date appear at the bottom of the SmartList window after a saved add or edit. Existing SmartLists remain blank until they are modified and saved after upgrade.

SmartList - TWO (sa)

New

Modify

Search

Refresh

Columns

Favorites

Print

Excel

Word

Stop

Go To

Publish

Export/Import

SmartList

File

Tools

Help

ActionsOptionsFileToolsHelp

Company

FieldService

Financial

Inventory

Inventory Purchase

Inventory Transaction

Item Classes

Item Quantities

Items

Landed Cost Group

Landed Cost ID

Sales Inventory

Vendor Items

Manufacturing

Payroll

Purchasing

Sales

Item Number	Item Description	Item Type	Inactive	Item Number	Item Description	Nc
1-A3261A	Multi-Core Processor	Sales Inventory	No	1-A3261A	Multi-Core Processor	!
1-A3483A	SIMM EDO 72	Sales Inventory	No	1-A3483A	SIMM EDO 72	!
100XLG	Green Phone	Sales Inventory	No	100XLG	Green Phone	1!
128 SDRAM	128 meg SDRAM	Sales Inventory	No	128 SDRAM	128 meg SDRAM	!
1GPROC	1 Ghz Processor	Sales Inventory	No	1GPROC	1 Ghz Processor	3:
2-A3284A	Dual Core Server	Sales Inventory	No	2-A3284A	Dual Core Server	!
24X IDE	24x CD-ROM	Sales Inventory	No	24X IDE	24x CD-ROM	!
256 SDRAM	256 meg SDRAM	Sales Inventory	No	256 SDRAM	256 meg SDRAM	!
2GPROC	2 Ghz Processor	Sales Inventory	No	2GPROC	2 Ghz Processor	3:
3-A2440A	Operating System	Sales Inventory	No	3-A2440A	Operating System	1!
3-A2969A	1 TB SCSI Raid	Sales Inventory	No	3-A2969A	1 TB SCSI Raid	1!
3-A2990A	HSC 2 Expansion Slot	Sales Inventory	No	3-A2990A	HSC 2 Expansion Slot	1!
3-A2998A	Rackmount UPS	Sales Inventory	No	3-A2998A	Rackmount UPS	1!
3-A3294A	ECC Memory	Sales Inventory	No	3-A3294A	ECC Memory	1!
3-A3416A	Internal CD-ROM Drive	Sales Inventory	No	3-A3416A	Internal CD-ROM Drive	1!
3-A3542A	DDS Drive	Sales Inventory	No	3-A3542A	DDS Drive	1!
3-B3813A	Keyboard	Sales Inventory	No	3-B3813A	Keyboard	1!
3-B3897A	CD-ROM Media	Sales Inventory	No	3-B3897A	CD-ROM Media	1!

228 Item Classes

Completed

sa

10/5/2026

First 1000 records with no search criteria.

Functionality Described

A saved create or modify action records the SmartList name, user, and modified date. The SmartList information shows the most recent saved change. When SmartList Activity Tracking is enabled, create, modify, and delete actions are also recorded in activity history.

To review the activity, go to Administration > Inquiry > System > Activity Tracking. The activity detail shows the activity type followed by up to 80 characters of the SmartList name. SmartLists with the same name in different series are not distinguished by series in the activity detail.

Activity Tracking Inquiry - TWO (sa)

OK

Redisplay

File

Print

Tools

Tools

Help

Add Note

Actions

File

Tools

Help

Company: All

Activity Type: All

User ID: All

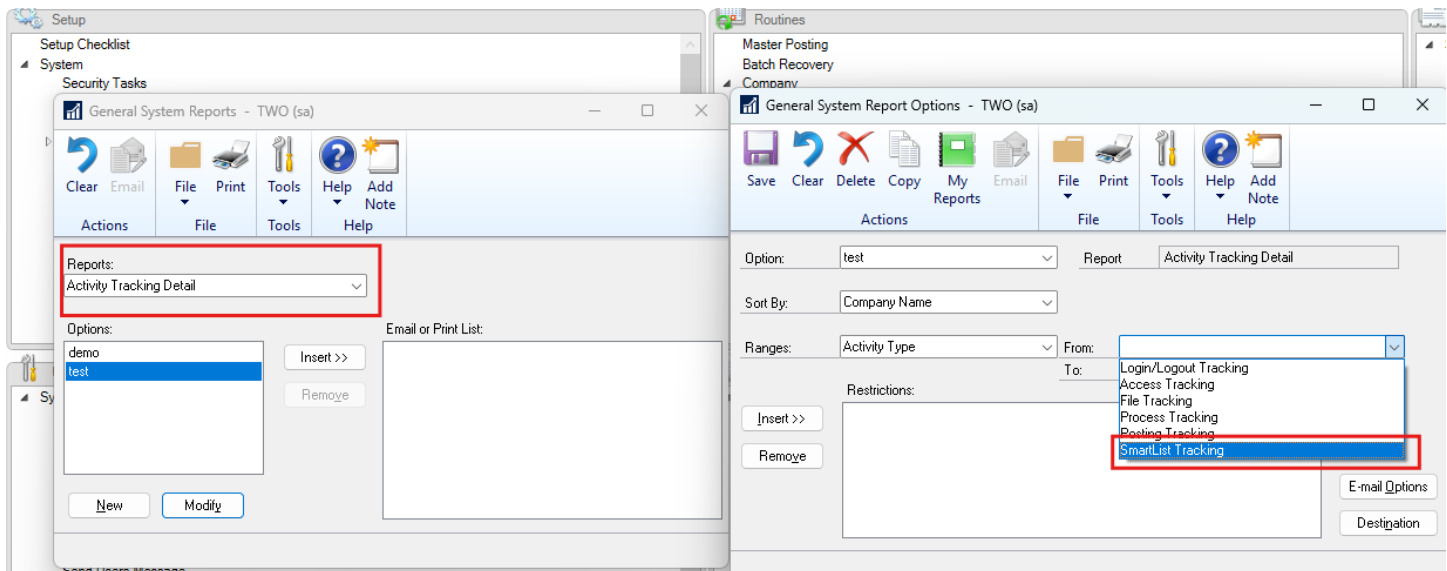
Activity: All

by Company

Company	User ID	Date	Time
Description			
Fabrikam, Inc.	sa	10/5/2026	10:22:47 AM
Create SmartList *			
Fabrikam, Inc.	sa	10/5/2026	10:22:47 AM
Create SmartList Item Classes			

Activity Tracking Detail report

To print activity details, go to Administration > Reports > System > General > Activity Tracking Detail > New or Modify, then print the report. A new SmartList Tracking option is available under the Activity Type Range.



Screen Output - Activity Tracking Report

File Edit Tools Find Help

Print Send To Modify 100% Completed 1 Page

System: 10/6/2026 9:16:36 AM Page: 1
User Date: 4/12/2027 User ID: sa

ACTIVITY TRACKING REPORT

Company Name	User ID	Description	Date	Time
Fabrikam, Inc.	sa	Create SmartList *	10/5/2026	10:22:47 AM
	sa	Create SmartList Item Classes	10/5/2026	10:22:47 AM

Setting up Activity Tracking

Go to Administration > Setup > System > Activity Tracking. Mark the SmartList create, modify, and delete options you want to track. Activity history is recorded only when the appropriate tracking options are enabled.

The screenshot shows the 'Activity Tracking Setup - TWO (sa)' window. The 'Activity Type' dropdown is set to 'SmartList Tracking'. Below this, a table lists activities to be tracked:

Activity	Track
Create SmartList	☒
Delete SmartList	☒
Modify SmartList	☒

To the right of the table are 'Mark All' and 'Unmark All' buttons. Below the table, the 'Users' section shows a list of users: DYNsa, LESSONUSER1, LESSONUSER2, and sa. The 'Company Name' and 'Activate' table is as follows:

Company Name	Activate
Fabrikam, Inc.	☒
TEST Company	☐

Again, 'Mark All' and 'Unmark All' buttons are present to the right.

Activity Tracking Setup report

To review the options being tracked, go to Administration > Reports > System > General > Activity Tracking Setup > New or Modify, then print the report. The report includes the SmartList Tracking activity options.

The screenshot shows two windows side-by-side. The left window is 'General System Reports - TWO (sa)' with the 'Reports' dropdown set to 'Activity Tracking Setup'. The 'Options' list contains 'SmartList'. The right window is 'General System Report Options - TWO (sa)' with the 'Print' button highlighted. The 'Option' dropdown is set to 'SmartList', and the 'Report' is 'Activity Tracking Setup'. The 'Sort By' is 'Activity Type'. The 'Restrictions' section is empty.

Screen Output - Activity Tracking Setup Report		
File Edit Tools Find Help		
Print Send To Modify 100% Completed 2 Pages		
Company: Fabrikam, Inc. System: 10/5/2026 11:34:10 AM Page: 1 User Date: 4/12/2027 User ID: sa		
ACTIVITY TRACKING SETUP REPORT		
Activity Type		
Description		Track
Login/Logout Tracking		
Failed Attempts to Log In		No
Successful Attempts to Log In		No
Successful Attempts to Log Out		No
Access Tracking		
Failed Attempts to Access a File		No
Failed Attempts to Open a Window		No
Failed Attempts to Print a Report		No
Successful Attempts to Open Modifier		No
Successful Attempts to Open Report Writer		No
Successful Attempts to Open a Window		No
Successful Attempts to Print a Report		No
Successful Attempts to Execute a Service		No
Failed Attempts to Execute a Service Proc		No
Payroll: Revenue Recognition Entry		No
Payroll: Project Closing		No
Payroll: PA Returns Trx Entry		No
SmartList Tracking		
Create SmartList		Yes
Delete SmartList		Yes
Modify SmartList		Yes
User ID	Company Name	Track
DYNSA	Fabrikam, Inc.	Yes
DYNSA	TEST Company	No
LESSONUSER1	Fabrikam, Inc.	No
LESSONUSER2	Fabrikam, Inc.	No
sa	Fabrikam, Inc.	Yes
ACTIVITY TRACKING SETUP REPORT		
sa	TEST Company	Yes

Changes to Microsoft Dynamics GP Tables

Table or Field	Description
SmartList table	Stores the last modified user and last modified date for saved SmartList changes.
SY05000	Stores Activity Tracking history when SmartList activity tracking is enabled.
Index1	Value 6 identifies SmartList activity.
INQYTYPE 24	Create SmartList activity.
INQYTYPE 25	Modify SmartList activity.
INQYTYPE 26	Delete SmartList activity.

Technical details

For partners and administrators who want to validate the data behind this feature, the SmartList table will store the last user and last modified date when a SmartList is added or edited and then saved. This information is always maintained after the upgrade, but existing SmartLists will not be populated retroactively. The user and date values will remain blank until the SmartList is modified and saved after the upgrade.

When Activity Tracking is enabled, SmartList create, modify, and delete activity is recorded in the Activity Tracking table, SY05000. Partners can review this table when they need to confirm SmartList activity history, including the user, date, and activity type associated with the change.

The activity detail will include the SmartList name, with up to 80 characters displayed after the activity description. If SmartLists in different series use the same name, Activity Tracking may not differentiate them by series in the activity detail, so partners should keep that in mind when reviewing results.

Upgrade Considerations

Existing SmartLists are not backfilled with historical last modified users or dates. Those values remain blank until the SmartList is modified and saved after upgrade. Tracking is forward-looking; historical activity is not inferred.

Item Stock Inquiry Redisplay Date

Item Stock Inquiry no longer loads document details immediately when an item is entered. Users first define the inquiry criteria and date range, then select Redisplay to retrieve matching details. This avoids automatically retrieving many years of history, which could make the window appear slow or unresponsive.

The change affects only when inquiry details are displayed. It does not change inventory quantities, transaction history, posting logic, item setup, or inventory costing. For an item with many years of history, select the narrower dates you need before choosing Redisplay.

How to use Item Stock Inquiry

1. Open Inquiry > Inventory > Item Stock.
2. Enter an item that has transaction history.
3. Note that document details do not load automatically when the item is entered.
4. Set the desired date range and other inquiry criteria.
5. Select Redisplay to retrieve the matching document details.
6. Review the displayed details.

Item Stock Inquiry - TWO (sa)

OK

Clear

Redisplay

File

Print

Tools

Help

Add Note

Actions

File

Tools

Help

Item Number

1000.G

Green Phone

Bin Number

Dates:

All

From:

0/0/0000

To:

0/0/0000

Base Unit of Measure

Each

Display Unit of Measure

Each

Site ID:

All

Site ID:

Sort By

Document Date

Doc. Date	Document Type	Document Number	Qty In	Qty Out	Balance
Module	Customer/Vendor ID	Customer/Vendor Name	Site	To Site	Audit Trail Code
3/22/2026	Receipt	RCT1071		1	0
3/23/2026	Sale	STDINV2108		0	1
3/24/2026	Sale	STDINV2109		0	8
3/2/2027	Receipt	RCT1140		11	0
3/13/2027	Receipt	RCT1144		16	0
3/14/2027	Receipt	RCT1142		5	0
3/21/2027	Receipt	RCT1148		11	0
3/22/2027	Receipt	RCT1146		1	0
3/23/2027	Sale	STDINV2215		0	1
3/24/2027	Sale	STDINV2216		0	8

Quantities:

Back Ordered

0

Requisitioned

0

On Order

0

Returned

0

In Use

0

In Service

0

Damaged

0

Total Stock

30

On Hand

30

Allocated

4

Available

26

by Item Number

Item Stock Inquiry: set the desired criteria before selecting Redisplay.

PM Void Reason Code

In Microsoft Dynamics GP Fall 2026, a new option in Payables Management tracks the reason a payables check or invoice is voided. Set up void reason codes and select a reason code when voiding transactions from the Void Open Payables Transactions or Void Historical Payables Transactions windows.

Setup

To use this feature, select Microsoft Dynamics GP > Tools > Setup > Purchasing > Payables. In the Payables Management Setup window, mark Enable Void Reason Code to turn on the feature. If you want users to select a reason code before they can complete the void process, mark Require Void Reason Code. Enabling the feature also enables the new Reason Code Setup button.

If Require Void Reason Code is marked, Enable Void Reason Code will also be marked. If Enable Void Reason Code is cleared, Require Void Reason Code will also be cleared.

Payables Management Setup - TWO (sa)

Actions: OK Cancel File Print Tools Help Add Note

Aging Periods: ☒ Due Date ☐ Document Date

Current Period	From:	To:	
1 - 30 Days		1	30
31 - 60 Days		31	60
61 and Over		61	999

Apply By: ☒ Document Date ☐ Due Date

Defaults:

Default Summary View: Amounts Since Last Close

Checkbook ID: UPTOWN TRUST

Check Format: Stub on Top

Sort Checks By: Payment Number

List Documents on Remittance: All Documents

☒ Print Previously Applied Documents on Remittance

Payables Void Reason Code Setup:

☒ Enable Void Reason Code ☒ Require Void Reason Code

Options:

☒ Override Voucher Number at Transaction Entry

☒ Track Discounts Available in GL

☒ Print Historical Aged Trial Balance

☐ Delete Unposted Printed Documents

☐ Print Tax Details on Documents

☐ Print Dual Currencies

☐ Age Unapplied Credit Amounts

☐ Exclude Expired Discounts from Payments

☐ Warn if Vendor has Existing Purchase Order

☐ Enable Long Description in Payables Transaction Entry

☐ Allow Summary Post to Checkbook for EFT/CC

Allow Duplicate Invoices Per Vendor:

☐ Yes

☐ No

☒ Recurring Transactions Only

Reason Code

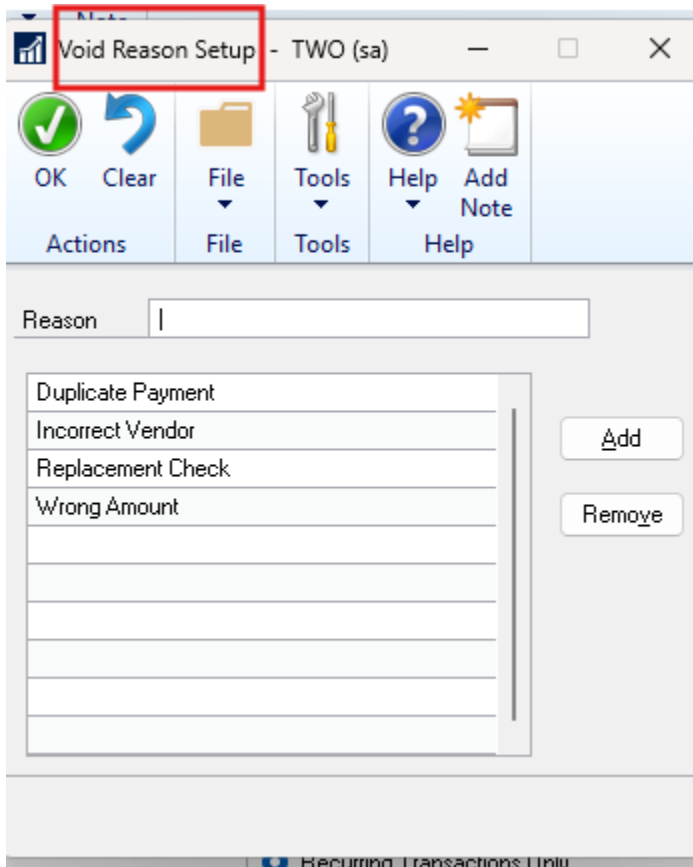
Payables Management Setup: enable void reason codes and choose whether a reason is required.

Void Reason Code Setup

After Enable Void Reason Code is marked, click the Reason Code button to open the Void Reason Setup window. Create the reason codes that users can select when they void a transaction.

The reason code field can contain up to 30 alphanumeric characters. Reason codes should be clear and meaningful for your organization, such as Duplicate Payment, Incorrect Vendor, Wrong Amount, or Replacement Check.

You can add, edit, or remove reason codes as needed. If a reason code is edited or removed later, it does not change the reason code that was previously saved with a voided transaction.



Void Reason Setup: create clear, meaningful reason codes for your organization.

Voiding transactions

When you void a payables transaction, select Transactions > Purchasing > Void Open Transactions or Void Historical Transactions.

Voucher Number	Date	Vendor Name	Document Number	Document Amount	Void Date	Currency ID	Posting Date	Void
0000000000000000014	6/26/2023	A Travel Company	1000	\$657.68	6/26/2023	Z-US\$	1/1/2024	☒
0000000000000000015	7/9/2023	A Travel Company	1001	\$553.81	7/9/2023	Z-US\$	1/1/2024	☐
0000000000000000016	8/20/2023	A Travel Company	1002	\$430.72	8/20/2023	Z-US\$	1/1/2024	☐
0000000000000000017	9/17/2023	A Travel Company	1003	\$796.03	9/17/2023	Z-US\$	1/1/2024	☐
0000000000000000018	10/24/2023	A Travel Company	1004	\$605.45	10/24/2023	Z-US\$	1/1/2024	☐

Void Open Payables Transactions and Void Historical Payables Transactions support void reason codes.

When the feature is enabled, the Reason for Void window opens when a transaction is marked to void. Select the reason code that explains why the transaction is being voided.

Reason for Void

Choose a Void Reason for voiding this Voucher

Reason for Void

- Duplicate Payment
- Incorrect Vendor
- Replacement Check
- Wrong Amount

Cancel

Reason for Void: select the reason code that explains why the transaction is being voided.

If reason codes are enabled but not required, you can cancel out of the Reason for Void window and continue with the void. If reason codes are required, you must select a reason code before the void can be completed.

If you use Mark All, the same reason code can be applied to the selected transactions. If you unmark a transaction before completing the void, the reason code selection is removed for that transaction.

Reviewing the void reason code

After the transaction is voided, the selected reason code is saved with the voided transaction. Use it for reporting or review so users can better understand why transactions were voided.

To review the void reason, select Purchasing > Inquiry > Transaction by Vendor. Choose the voided document and zoom into the Document number to open Payment Entry Zoom or Payables Transaction Entry Zoom. The Void Reason Code field displays the actual reason selected for the void. If there is no reason selected, the field is blank.

OK

Options

View

Additional

File

Print

Tools

Help

Add Note

ActionsOptionsViewAdditionalFileToolsHelp

Voucher No.	00000000000000302		Batch ID	JAN-98
Document Type	Invoice	☐ Intercompany	Doc. Date	1/28/2024
Description	EXP REP 4573-4574		Date Voided	1/28/2024
			Void Reason	Incorrect Vendor
			P.O. Number	

Vendor ID	ACETRAVE0001	Currency ID	Z-US\$
Name	A Travel Company	Document Number	11006
Address ID	PRIMARY	Shipping Method	OVERNIGHT
Remit-To ID		Tax Schedule ID	
Payment Terms	Net 30		

Purchases	\$878.66	1099 Amount	\$0.00
Trade Discount	\$0.00	Total Payments	\$0.00
Freight	\$0.00	Terms Disc Taken	\$0.00
Miscellaneous	\$0.00	On Account	\$1,054.39
Tax	\$175.73		
Total	\$1,054.39		

Revaluation

Apply

Distributions

Payment Entry Zoom and Payables Transaction Entry Zoom display the saved Void Reason Code.

Report notes

The Payables Setup report includes the void reason code setup options. Individual void reason codes are not included in the setup report.

If you need to report on voided transactions and the reason they were voided, use SmartList or another reporting option to include the saved void reason code with the transaction information.

Complete Workflow when Canceling a PO

Feature Overview

This enhancement applies when Purchase Order Workflow is enabled and a purchase order has already been submitted to workflow. For example, a PO awaiting approval may no longer be needed. Previously, canceling its lines could leave workflow pending or active, with the canceled PO still in approval queues and requiring manual cleanup. In Microsoft Dynamics GP 18.9, cancel all applicable remaining lines through Edit Purchase Order Status and process the change so the header status also becomes Canceled. Workflow then completes automatically, keeping purchasing status and workflow aligned.

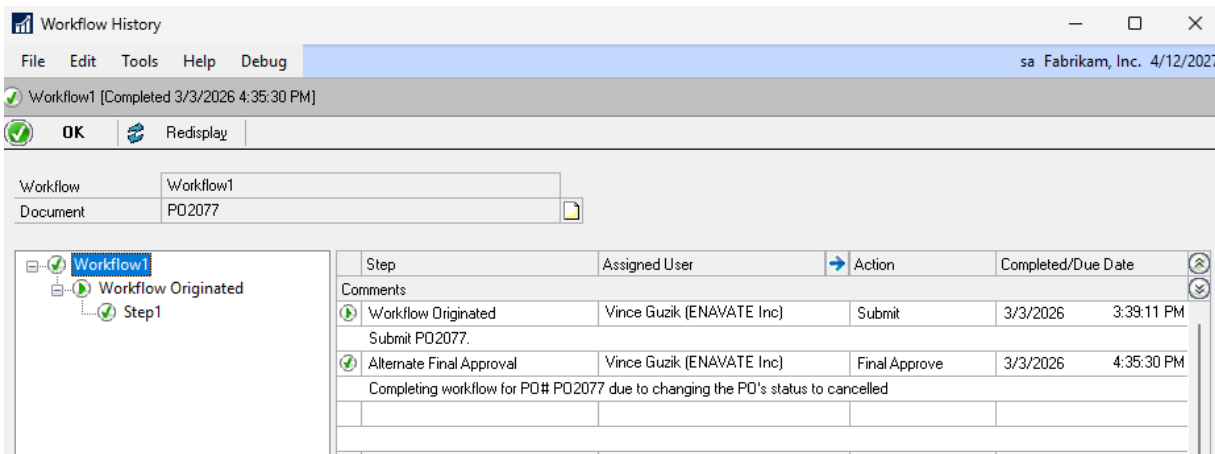
How to use

Step	Action	Expected Result
1	Create a purchase order and submit it to workflow before it is approved or fully processed.	Workflow requires approval or user action.
2	Open Edit Purchase Order Status and cancel all applicable remaining purchase order lines.	The remaining lines are canceled.
3	Process the change so that the purchase order header status also becomes Canceled.	The purchase order workflow is automatically completed.
4	Review workflow history and the workflow navigation lists.	There is no active approval item; history reflects completion associated with the canceled purchase order.

Expected Workflow Behavior

The workflow state becomes Completed, and the completion is reflected automatically in the Workflow History window. Remaining assigned workflow tasks or actions that no longer apply can clear as part of completion, removing the canceled PO from active approval queues. No separate completion action in the workflow navigation lists is needed. This reduces cleanup for purchasing users and approvers.

Note: Automatic completion requires all applicable remaining lines and the purchase order header to be canceled. Canceling only some lines while the header remains uncanceled does not complete workflow. If the PO is reopened or edited later, existing workflow behavior still applies, and it may be recalled depending on the action and workflow state.

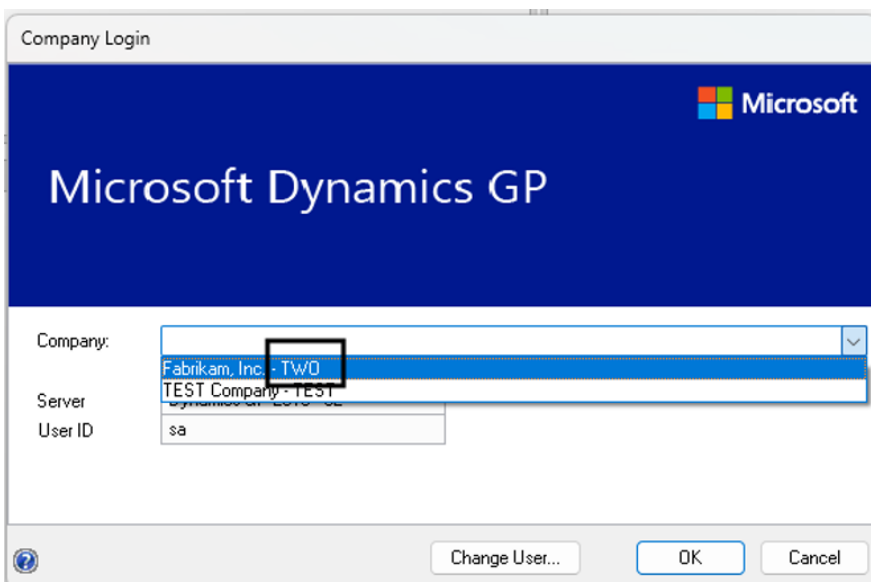


Workflow History shows Completed and records that the workflow was completed because the purchase order status changed to canceled.

INTERID & Company name now visible when logging in

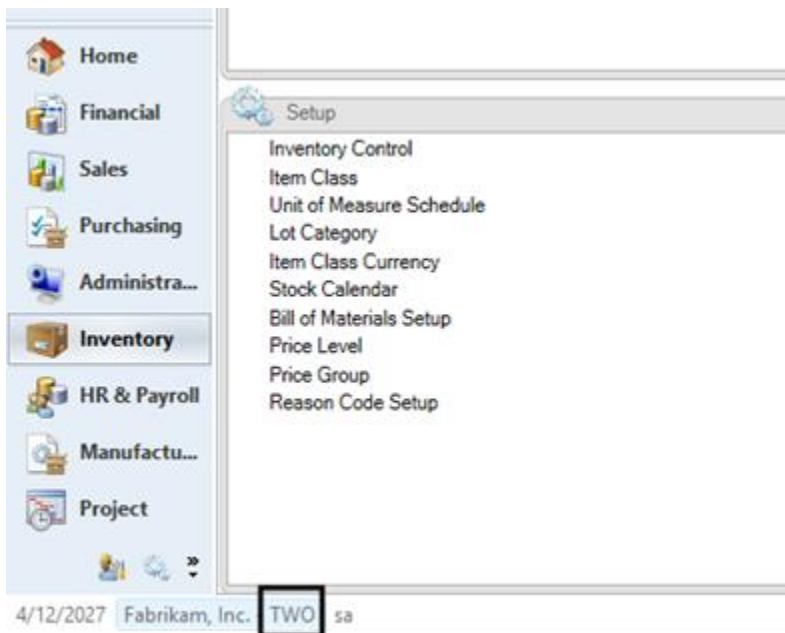
INTERID is the company database identifier. Displaying it alongside the company name helps users distinguish companies with similar names and confirm the intended company before and after login. This is especially useful when working with many companies or switching companies frequently.

The company selection list will display both the company name and the INTERID. This gives users another identifier to confirm they are selecting the intended company before continuing into Microsoft Dynamics GP.



Company selection: review the company name and INTERID before signing in.

After logging in, the INTERID will also display along with the company name on the bottom bar, making it easier to quickly confirm which company is currently active while users work in the application.



After login: the bottom status bar identifies the active company by name and INTERID.

To use this enhancement, open Microsoft Dynamics GP and review the company name and INTERID in the company selection dropdown. Select the intended company and complete sign-in. Once logged in, verify the company name and INTERID on the bottom status bar before beginning work.

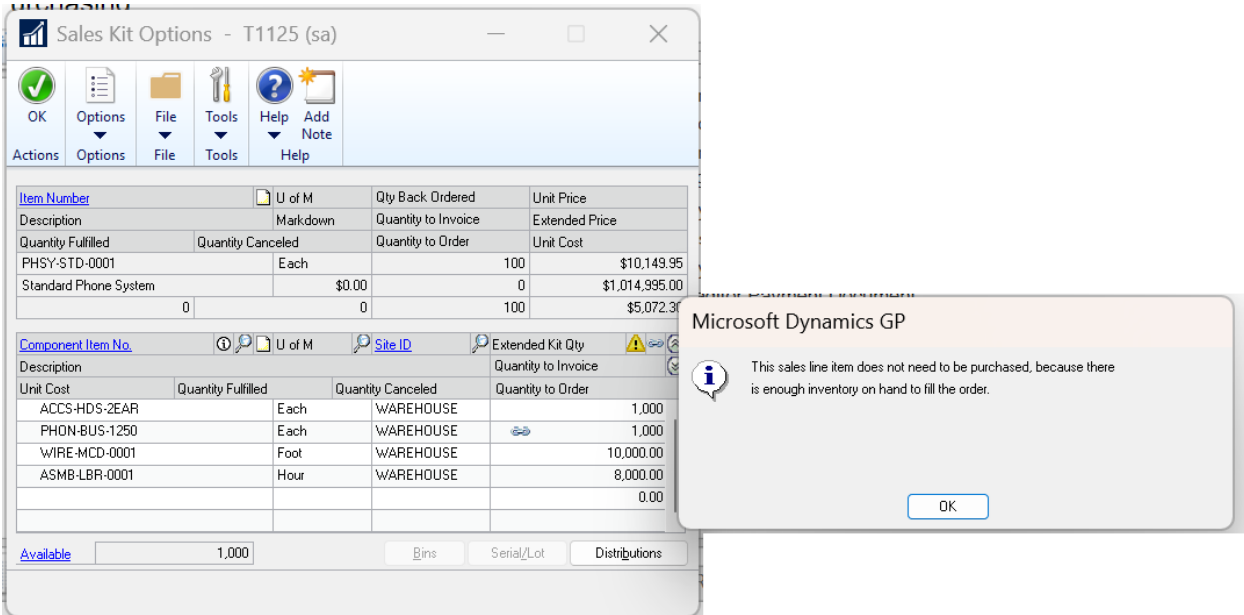
This is an informational display enhancement. INTERID does not replace the company name or change company setup, security, company access, posting, or transaction processing.

View/Break existing SOP/POP link for Kit components

This customer-requested enhancement lets users view or break an existing Sales Order Processing (SOP) and Purchase Order Processing (POP) link for a kit component even when additional inventory becomes available after the link was created. It keeps the existing purchase commitment accessible as sales order, backorder, and inventory quantities change.

What changed

Previously, a kit component could be linked to a purchase order because there was not enough quantity available when the sales order or backorder was created. If more stock later became available through another purchase order receipt, a SOP return, an inventory adjustment, or another inventory transaction, GP could prevent users from opening the existing PO commitment link. The message reflected the current quantity available but did not account for the link already in place.



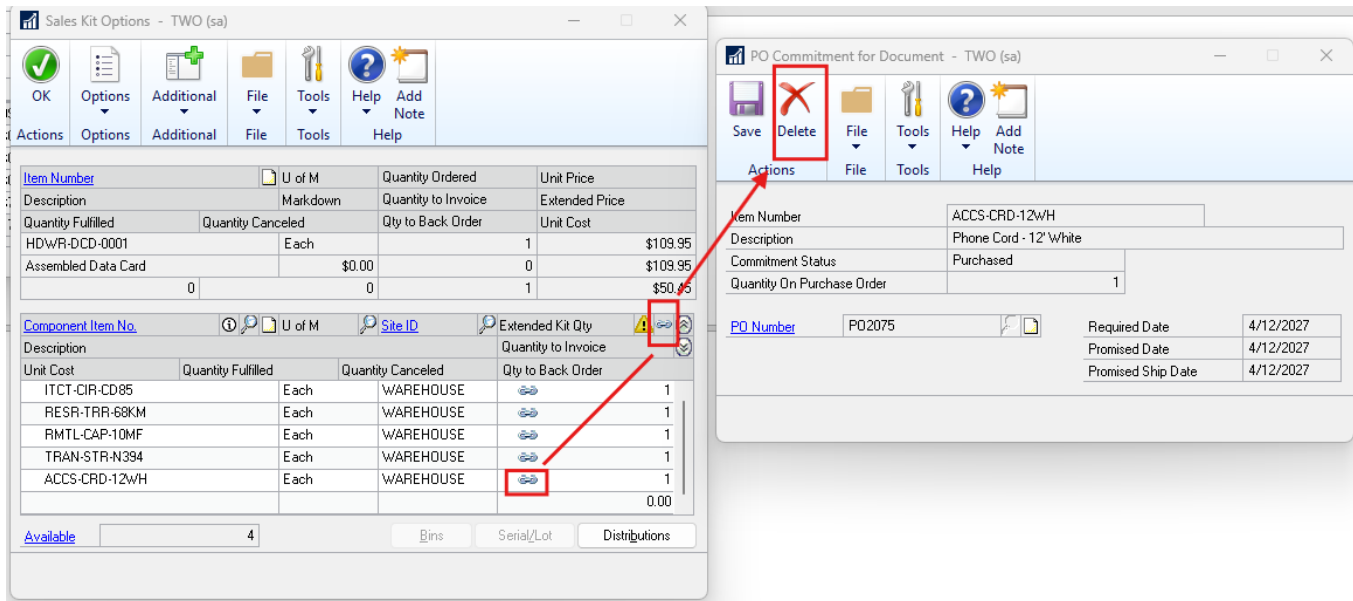
Kit component example 1: Before the update, Sales Kit Options could show “This sales line item does not need to be purchased, because there is enough inventory on hand to fill the order.”

With this update, users can still open the existing kit component link after more quantity becomes available. They can review the commitment and, if needed, break the link rather than being blocked by the current inventory availability.

Example scenario and use

Enter a sales order for a kit item when a component does not have enough quantity available. Link that component to a purchase order, then transfer the sales order to a backorder.

Later, receive or adjust more quantity for that component into inventory. The existing SOP/POP link remains accessible. Review the purchase order connection and confirm the commitment or break the link if the additional stock means the purchase commitment is no longer needed. The source examples below show the sales order, kit details, component quantities, and PO commitment and assignment windows.



Benefits

Sales teams gain visibility into kit component fulfillment. Purchasing teams can review commitments tied to sales demand, and inventory teams can receive or adjust component quantities without blocking access to an existing link. Users can review or clean up links when a purchase commitment is no longer needed.

Email Notifications for Workflow Approvers

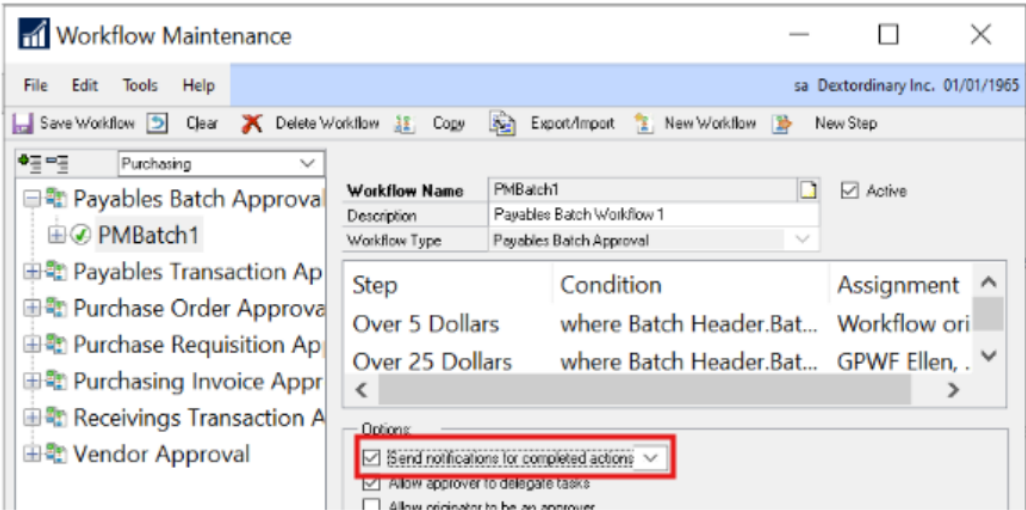
When multiple users are assigned to a workflow task and only one approval is required, another user's action can make the task unavailable to the remaining assignees. Completed-action email notifications give assigned users visibility into what happened, beyond the original task-assignment notice.

Changes to notifications

Assigned users can receive emails when a task is approved, rejected, or another selected action is completed. When configured, these messages notify the remaining assigned users, so they understand why a task is no longer awaiting their action. The completed actions that generate notifications are selected in the workflow email settings.

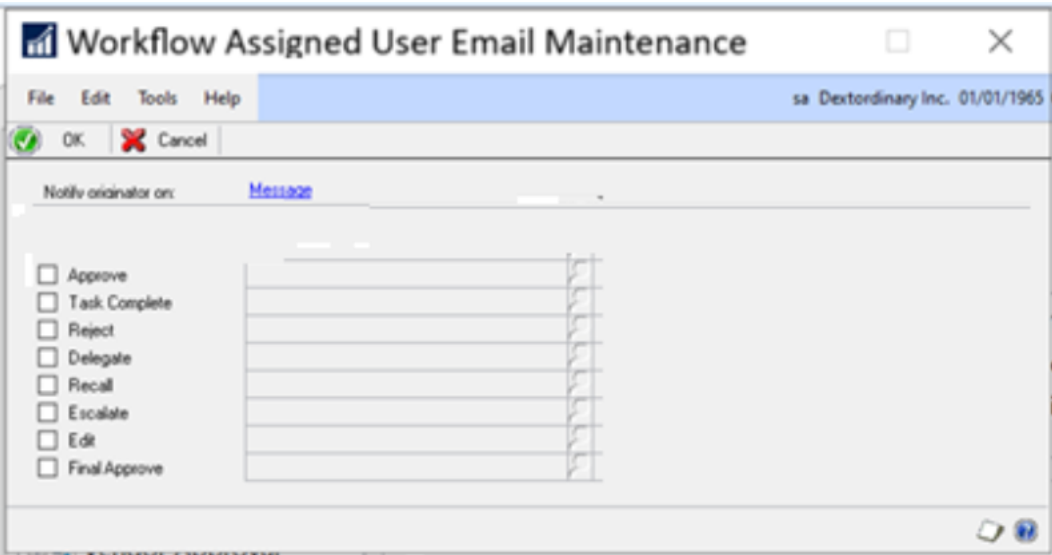
Setup by Window

In Workflow Maintenance, select Send notifications for completed actions for the workflow. This option enables completed-action notifications for assigned users.



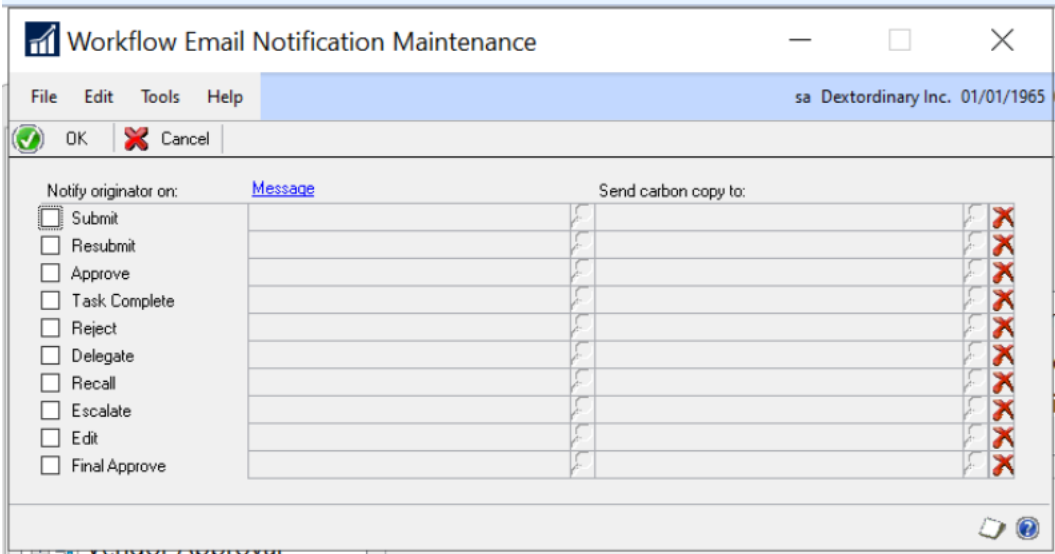
Workflow notification example 1: Workflow Maintenance includes the Send notifications for completed actions option.

In Workflow Assigned User Email Maintenance, choose which completed actions notify assigned users and configure the associated messages. The illustrated choices are Approve, Task Complete, Reject, Delegate, Recall, Escalate, Edit, and Final Approve.



Workflow notification example 2: Workflow Assigned User Email Maintenance selects actions and messages for assigned-user notifications.

Workflow Email Notification Maintenance is a separate window for configuring messages to the workflow originator. Its Notify originator on settings are distinct from the assigned-user completed-action settings; use the appropriate window for the intended recipients.



Workflow notification example 3: Workflow Email Notification Maintenance configures workflow-originator messages separately from assigned-user notifications.

Example: one approval required

Barb, Vika, and Vince are assigned to a workflow that requires only one approval. Barb approves the task. With the appropriate completed-action notification settings, the system can email Barb, Vika, and Vince indicating that Barb approved it. Vika and Vince can then understand why the task is no longer awaiting their approval.

Important notes

Workflows can require approval from one assigned approver or from all assigned approvers. If all approvals are required, a notification that one user has finished does not replace the remaining required approvals. Emails depend on the configured notification options and selected actions. They complement task-assignment notices and do not change approval requirements.

Benefits

Completed-action notifications make the action taken visible to assigned users, reduce follow-up about inactive tasks, and help avoid duplicate effort. Approvers can distinguish a task already handled by another assignee from work that still requires their action.

Include/Exclude voided transactions in PM/RM Transaction Inquiry

The new Void Filter in Payables Transaction Inquiry and Receivables Transaction Inquiry lets users include all transactions, exclude voided transactions, or show only voided transactions when researching a customer or vendor. Previously, void activity could not easily be isolated within the same inquiry. The filter helps users determine whether transactions were voided, compare open and historical activity, or focus on active, non-voided transactions.

Changes to Windows

A Void Filter dropdown is available in both inquiry windows. For customer transactions, select Inquiry > Sales > Transactions by Customer. For vendor transactions, select Inquiry > Purchasing > Transactions by Vendor.

Void Filter choices

- All Transactions displays both voided and non-voided transactions.
- Not Voided displays only transactions that have not been voided.
- Voided displays only voided transactions.

Functionality

The Void Filter works with the existing Work, Open, and Historical selections. In both illustrated windows, the historical transaction checkbox is labeled History. Select the appropriate transaction status, then use the Void Filter to further refine the results. Changing the filter retains the same inquiry context while changing which transactions are included.

- Open the customer or vendor inquiry using the navigation path above, then select the customer or vendor to research.
- Choose the appropriate Work, Open, or History selections and select All Transactions, Not Voided, or Voided in the Void Filter dropdown.
- Review the results, which refresh based on the selected value. Change the Void Filter within the same inquiry to compare voided and non-voided activity without changing the customer or vendor context.

Receivables Transaction Inquiry - Customer - TWO (sa)

OK Redisplay View All-in-One View File Print Tools Help Add Note

Customer ID: AARONFIT0001
Name: Aaron Fitz Electrical

Documents: by Document Number All From: To:

Sort by: Type Ascending

Include: ☒ Work ☒ Open ☒ History Void Filter: Voided

Origin	Type	Document Number	Check Number	Amount
Doc. Date	Due Date	Discount Amount	Writeoff Amount	Amount Remaining
OPEN*	SLS	SLS20000		\$2,461.00

by Customer ID

Customer inquiry: Inquiry > Sales > Transactions by Customer. The Void Filter controls whether voided transactions are included.

Payables Transaction Inquiry - Vendor - TWO (sa)

OK Redisplay View All-in-One View File Print Tools Help Add Note

Vendor ID: ACETRAVE0001
Name: A Travel Company

Documents: by Document Number All From: To:

Sort by: Document Number Ascending

Include: ☒ Work ☒ Open ☒ History Void Filter: Voided

Origin	IC	Document Number	Type	Doc. Date	Original Amount	Amount
Voucher/Payment Number	Due Date	Disc. Date	Transaction Description	Currency ID		
HIST *	☐	11006	INV	1/28/2024	\$1,054.39	\$1,054.39

by Vendor ID

Vendor inquiry: Inquiry > Purchasing > Transactions by Vendor. Use the same Void Filter choices to research vendor transactions.

Summary of changes

Changes to Microsoft Dynamics GP Tables

SmartList Track User additions:

Table or Field	Description
ASIEXP81	added columns: • LSTEDTDT datetime - Last datetime the SmartList was modified • LSTUSRED char(15) – Last userid to modify the SmartList
SY04300 SY_Security_Log_SETP	Added columns: • TRKSLADD tinyint – Enables SmartList Tracking - Add (New) • TRKSLDELETE tinyint – Enable SmartList Tracking – Delete • TRKSLMODIFY tinyint – Enable SmartList Tracking – Modify
Additional info	Description
SY05000 – Activity Tracking Dynamics database	Stores Activity Tracking history when SmartList activity tracking is enabled. • INDEX1 - Value 6 identifies SmartList activity. • INQYTYPE - Value 24 = Create SmartList activity. • INQYTYPE - Value 25 = Modify SmartList activity. • INQYTYPE - Value 26 = Delete SmartList activity.

Payables Void Reason code feature additions:

PMVoidReason	New table - VoidReason-char (31) - DEX_ROW_ID
PM40100 – PM_SETP	added columns: - EnableVoidReasonCode tinyint - RequireVoidReasonCode tinyint
PM10900 - PM_Void_Payment_WORK	added column VoidReason (char 31)
PM10901 - PM_Void_Transaction_WORK	added column VoidReason (char 31) added column
PM30200 - PM_Paid_Transaction_HIST	added column VoidReason (char 31) added columns

Email Notifications for Workflow Approvers additions:

WF40400 - Workflow_Email_Notifications	added value to WF_Notification_Type column - Originator = 1 (Previously there) - Approver = 2 (new)
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Quality fixes for 18.9

- Fixed the Project Accounting workflow issue associated with the “Account Index errors exist for PTE Timesheet” message.
- Fixed an issue with One check per Invoice when unmarking or marking an invoice in the Edit payment batch window.
- Fixed an issue that caused Workflow Auto Post to add records when it was not enabled.
- Fixed an issue with updating the Australian-specific modules to 18.8.
- Fixed the Tax Date filter on the Payables SmartList.
- Fixed a missing workflow label.