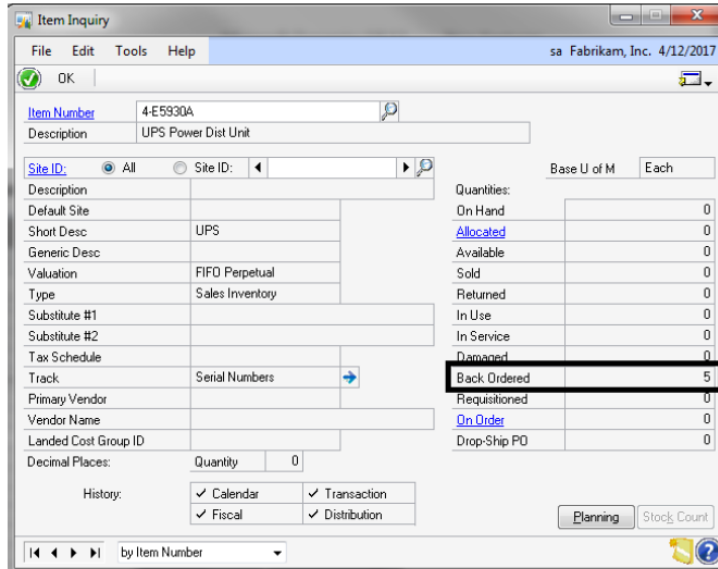


### Back Ordered Quantity Updated

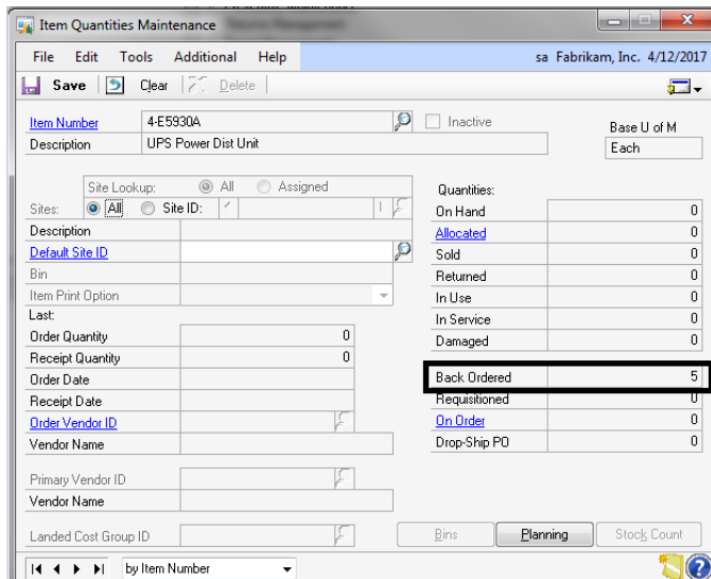
- In Dynamics GP 2013, when Field Service Transactions have a back ordered quantity, the Back Ordered field will update in the Item Inquiry and Item Quantities Maintenance window.

#### Item Inquiry:



Quantities:	
On Hand	0
Allocated	0
Available	0
Sold	0
Returned	0
In Use	0
In Service	0
Damaged	0
<b>Back Ordered</b>	<b>5</b>
Requisitioned	0
On Order	0
Drop-Ship PO	0

#### Item Quantities Maintenance:



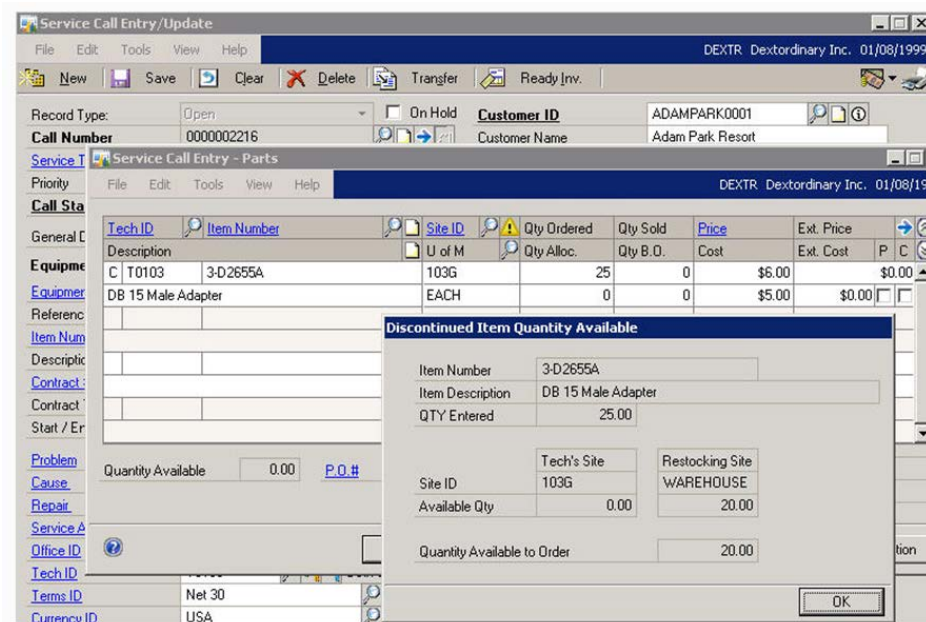
Quantities:	
On Hand	0
Allocated	0
Sold	0
Returned	0
In Use	0
In Service	0
Damaged	0
<b>Back Ordered</b>	<b>5</b>
Requisitioned	0
On Order	0
Drop-Ship PO	0

### Allocations Display in Item Allocation Inquiry

- On Microsoft Dynamics GP 2010 and previous versions, Field Service transactions did not display in the Item Allocation Inquiry window.
- In Microsoft GP 2013, when you enter Field Service Transactions, the allocated quantities from those transactions update the Item Allocation Inquiry window.

### Honor Discontinued Item Status in Field Service

- In Microsoft GP 2013, when a discontinued part is entered on a service call or depot work order, the system searches the requested warehouse and the restocking warehouses to determine quantity available. When the quantity available is less than the quantity entered a window will appear showing you the quantities available so that you are able to make a decision such as changing the quantity entered or substituting the item. The enhancement will honor the Sales Order Processing Setup option Allow Sale of Discontinued items. It will inform users of a discontinued item and reveal the available quantity.
- The Discontinued Item Quantity Available window will not open when the part line is created automatically through PM Generation, ECO Generation, or when the item is a component of a kit.



The screenshot shows the 'Service Call Entry/Update' window for 'DEXTR: Dextordinary Inc. 01/08/1999'. The 'Call Number' is 0000002216 and the 'Customer Name' is Adam Park Resort. A 'Discontinued Item Quantity Available' dialog box is open, displaying the following information:

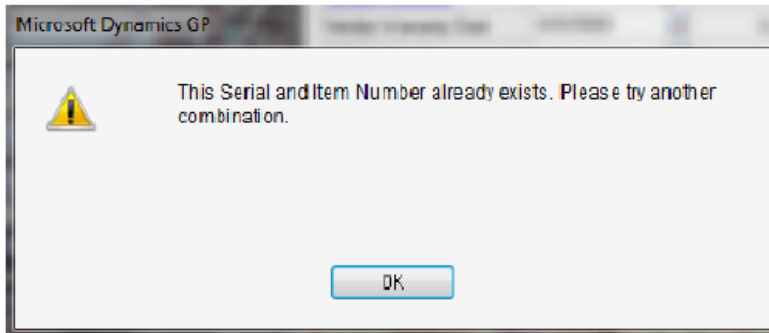
Item Number	Item Description	QTY Entered	Tech's Site	Restocking Site	Available Qty	Quantity Available to Order
3-D2655A	DB 15 Male Adapter	25.00	103G	WAREHOUSE	0.00	20.00

The background window shows a table of equipment items:

Equipme	Description	U of M	Qty Ordered	Qty Sold	Price	Ext. Price
C   T0103	3-D2655A	103G	25	0	\$6.00	\$0.00
Equipmer	DB 15 Male Adapter	EACH	0	0	\$5.00	\$0.00

### Equipment Supersession Posts

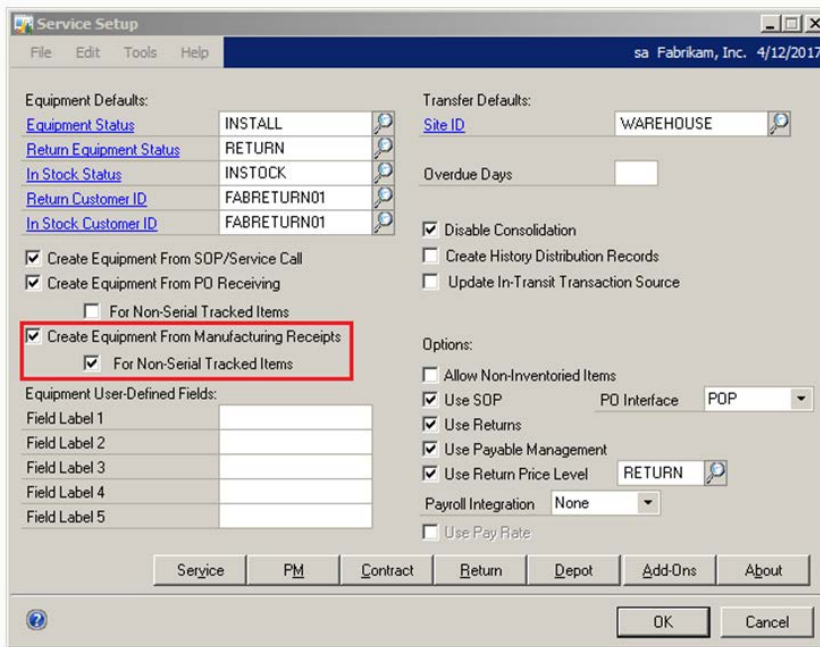
- On Microsoft Dynamics GP2010 and previous versions, no message appears to warn you the equipment may already exist.
- In Microsoft GP 2013, you may post a supersession and the system verifies the serial number/item number/customer combination.



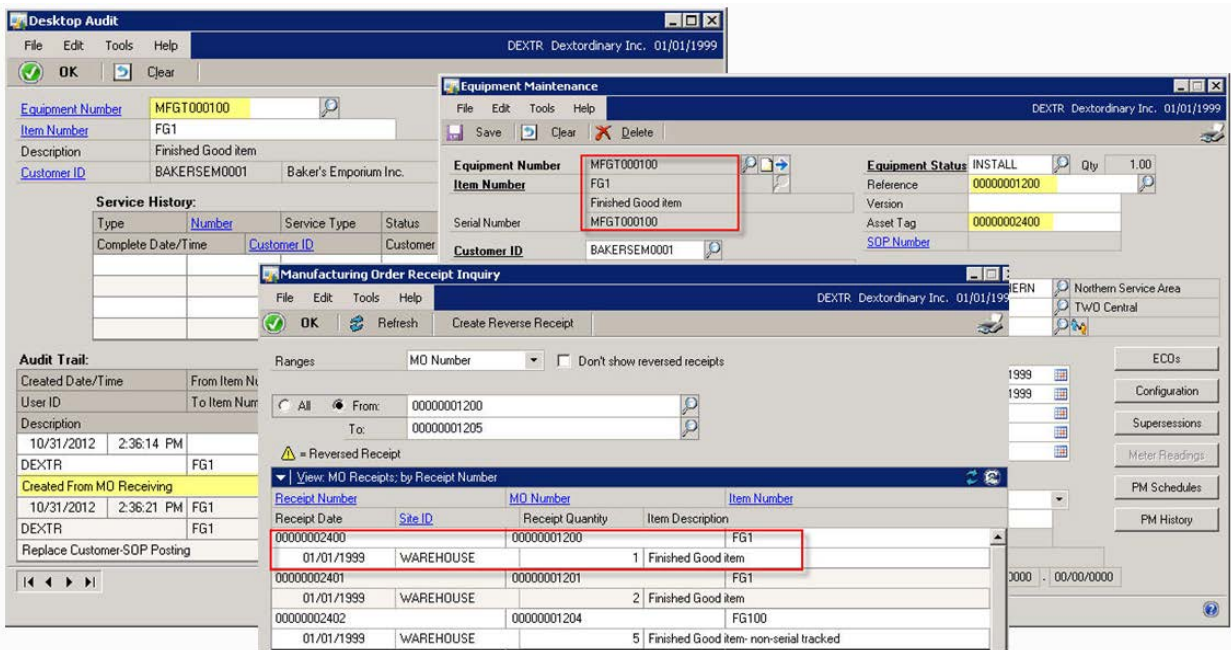
### Create Equipment from Manufacturing

- You may also create an equipment record from a Quick Manufacturing Order (MO) with the option marked in Service Setup.
- If your item is not a serial item and you receive more quantities than the quantity on the MO, the equipment record will reflect the quantity on the MO and not the quantity received.
- In Microsoft GP 2013, a checkbox appears in Service Setup to allow you to automatically create equipment records when you receive an item through a Manufacturing Order.

- **Why this feature is cool!** You can now automatically create equipment records from Manufacturing Order Receiving's and from Manufacturing Quick Orders. You can also decide whether you want to create equipment records from non-serialized items on manufacturing orders as well. A checkbox appears in Service Setup to allow you to automatically create equipment records when you receive an item through a Manufacturing Order.



The screenshot shows the 'Service Setup' dialog box for 'sa Fabrikam, Inc.' dated 4/12/2017. The 'Equipment Defaults' section includes dropdowns for Equipment Status (INSTALL), Return Equipment Status (RETURN), In Stock Status (INSTOCK), Return Customer ID (FABRETURN01), and In Stock Customer ID (FABRETURN01). The 'Transfer Defaults' section includes Site ID (WAREHOUSE) and Overdue Days. Checkboxes for 'Create Equipment From SOP/Service Call' and 'Create Equipment From PO Receiving' are checked. A red box highlights the 'Create Equipment From Manufacturing Receipts' checkbox, which is also checked, with a sub-checkbox 'For Non-Serial Tracked Items' also checked. The 'Options' section includes 'Use SOP' (checked), 'Use Returns' (checked), 'Use Payable Management' (checked), and 'Use Return Price Level' (RETURN). Buttons at the bottom include Service, PM, Contract, Return, Depot, Add-Ons, About, OK, and Cancel.



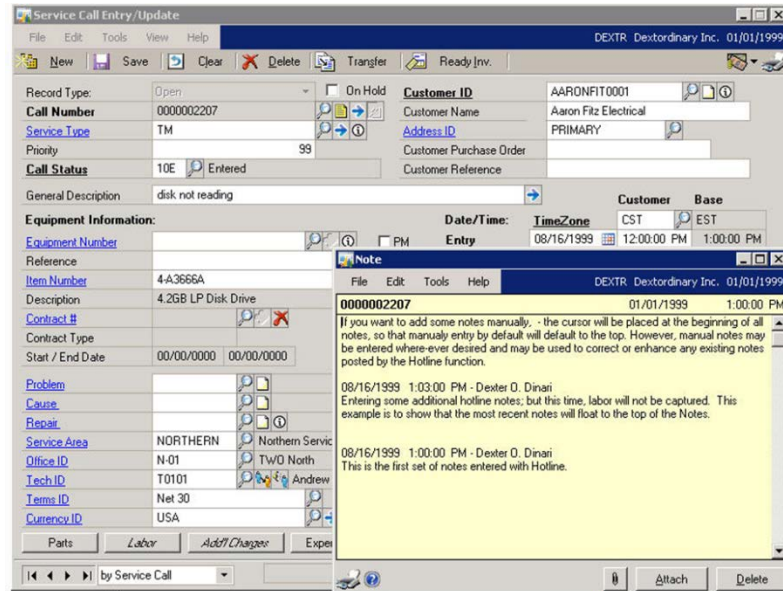
The screenshot shows two overlapping windows: 'Desktop Audit' and 'Manufacturing Order Receipt Inquiry'. The 'Desktop Audit' window shows details for Equipment Number MFGT000100, Item Number FG1, and Customer ID BAKERSEM0001. The 'Manufacturing Order Receipt Inquiry' window shows a table of receipts with a red box highlighting a specific receipt.

Receipt Number	Site ID	Receipt Quantity	Item Description	Item Number
00000002400	WAREHOUSE	00000001200	Finished Good item	FG1
01/01/1999	WAREHOUSE	1	Finished Good item	FG1
00000002401	WAREHOUSE	00000001201	Finished Good item	FG1
01/01/1999	WAREHOUSE	2	Finished Good item	FG100
00000002402	WAREHOUSE	00000001204	Finished Good item	FG100
01/01/1999	WAREHOUSE	5	Finished Good item- non-serial tracked	

## Service Call Management

### Hotline Notes Top Down

- In Microsoft Dynamics GP 2010 and previous versions, the hotline notes append to the bottom and you would need to scroll to the bottom to view the latest note.
- In Microsoft GP 2013, this will display the hotline notes from the top down on a service call.



Service Call Entry/Update

File Edit Tools View Help DEXTR Dextordinary Inc. 01/01/1999

New Save Clear Delete Transfer Ready Inv.

Record Type: Open On Hold Customer ID: AARONFIT0001  
 Call Number: 000002207 Customer Name: Aaron Fitz Electrical  
 Service Type: TM Address ID: PRIMARY  
 Priority: SS Customer Purchase Order:  
 Call Status: 10E Entered Customer Reference:

General Description: disk not reading Customer Base:

Equipment Information: Date/Time: TimeZone: CST EST  
 Entry: 08/16/1999 12:00:00 PM 1:00:00 PM

Reference: 4-A3666A  
 Item Number: 4.2GB LP Disk Drive  
 Description: 4.2GB LP Disk Drive  
 Contract #: Contract Type:  
 Start / End Date: 00/00/0000 00/00/0000

Problem: Cause: Repair: Service Area: NORTHERN Northern Service  
 Office ID: N-01 TWD North  
 Tech ID: T0101 Andrew  
 Terms ID: Net 30  
 Currency ID: USA

Parts Labor Add'l Charges Expenses

Note

File Edit Tools Help DEXTR Dextordinary Inc. 01/01/1999

000002207 01/01/1999 1:00:00 PM

If you want to add some notes manually, - the cursor will be placed at the beginning of all notes, so that manually entry by default will default to the top. However, manual notes may be entered where-ever desired and may be used to correct or enhance any existing notes posted by the Hotline function.

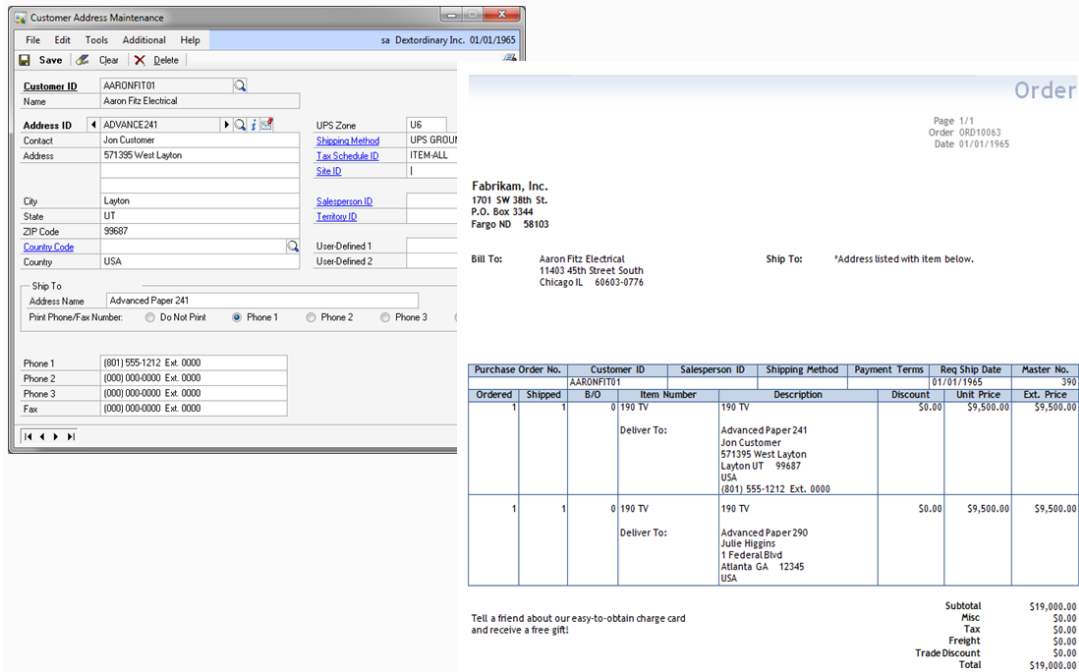
08/16/1999 1:03:00 PM - Dexter O. Dinari  
 Entering some additional hotline notes; but this time, labor will not be captured. This example is to show that the most recent notes will float to the top of the Notes.

08/15/1999 1:00:00 PM - Dexter O. Dinari  
 This is the first set of notes entered with Hotline.

by Service Call Attach Delete

**Ship To Address from Service Call Line**

- In Microsoft Dynamics GP 2010 and previous versions, the ship to address on the SOP invoice defaults from the Address ID on the service call header. You must manually change each line on the invoice to match the address on the service call line.
- In Microsoft GP 2013, the address you select in the Shipping Address Override window on the Service Call line, determines the address for the ship to address for a purchase order or Inventory Transfer.



The screenshot shows the 'Customer Address Maintenance' window on the left and an 'Order' form on the right.

**Customer Address Maintenance Window:**

- Customer ID: AARONFIT01
- Name: Aaron Fitz Electrical
- Address ID: ADVANCE241
- Contact: Jon Customer
- Address: 571395 West Layton
- City: Layton
- State: UT
- ZIP Code: 99687
- Country: USA
- Shipping Method: UPS GROUP
- U.S. Zone: U6
- Item ALL: ITEM-ALL
- Site ID: I
- Salesperson ID: [blank]
- Territory ID: [blank]
- User Defined 1: [blank]
- User Defined 2: [blank]
- Ship To Address Name: Advanced Paper 241
- Print Phone/Fax Number:  Phone 1  Phone 2  Phone 3
- Phone 1: (801) 555-1212 Ext. 0000
- Phone 2: (000) 000-0000 Ext. 0000
- Phone 3: (000) 000-0000 Ext. 0000
- Fax: (000) 000-0000 Ext. 0000

**Order Form:**

Order: 08010063  
Date: 01/01/1965

**Fabrikam, Inc.**  
1701 SW 38th St.  
P.O. Box 3344  
 Fargo ND 58103

Bill To: Aaron Fitz Electrical  
11403 45th Street South  
Chicago IL 60603-0776

Ship To: \*Address listed with item below.

Purchase Order No.	Customer ID	Salesperson ID	Shipping Method	Payment Terms	Req Ship Date	Master No.	
Ordered	Shipped	B/O	Item Number	Description	Discount	Unit Price	Ext. Price
1	1	0	190 TV	Advanced Paper 241 Jon Customer 571395 West Layton Layton UT 99687 USA (801) 555-1212 Ext. 0000	\$0.00	\$9,500.00	\$9,500.00
1	1	0	190 TV	Advanced Paper 290 Julie Higgins 1 Federal Blvd Atlanta GA 12345 USA	\$0.00	\$9,500.00	\$9,500.00

Tell a friend about our easy-to-obtain charge card and receive a free gift!

Subtotal: \$19,000.00  
 Misc: \$0.00  
 Tax: \$0.00  
 Freight: \$0.00  
 Trade Discount: \$0.00  
 Total: \$19,000.00



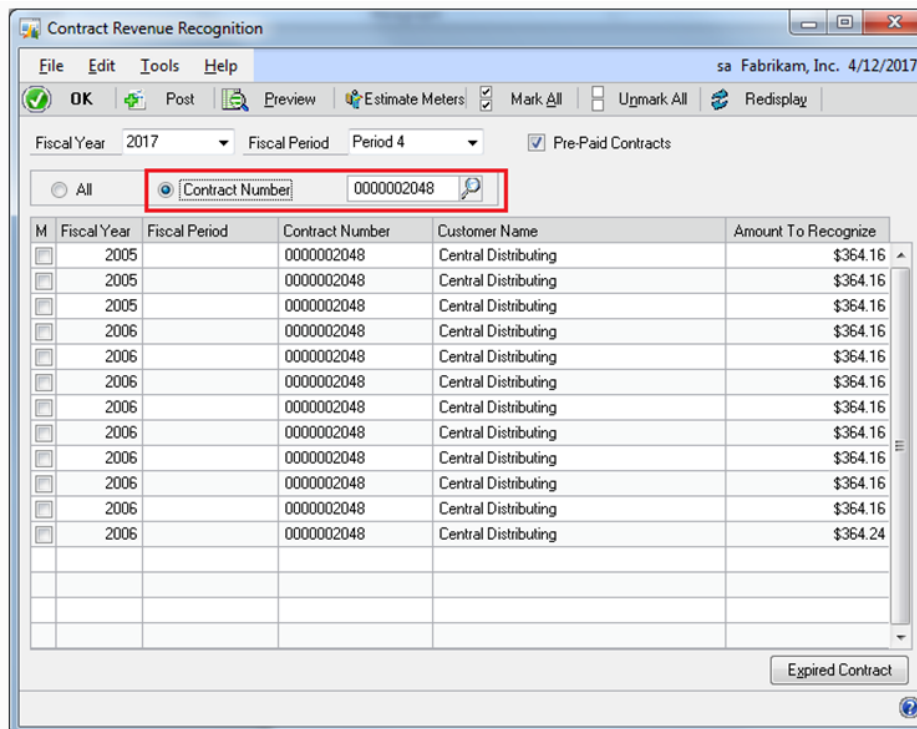
## **Contract Administration**

### **Contract Line Move with Open Service Call**

- In Microsoft Dynamics GP 2010 and previous versions, you may not move a contract line to another contract if the equipment is on a service call.
  - You receive the following message when you edit a contract line and change the percentages. "Do you want to update the percentages on all related Service Calls?"
  - If you click Yes, the percentage fields on the service call will update to the contract line percentages. This will then affect the prices on the lines of the service call.
  - If you click No, the service call percentages will not update.
- In Microsoft GP 2013, this will allow you to move a contract line from one document to another for a contract line that is on a service call.

### **Search by Contract in Revenue Recognition**

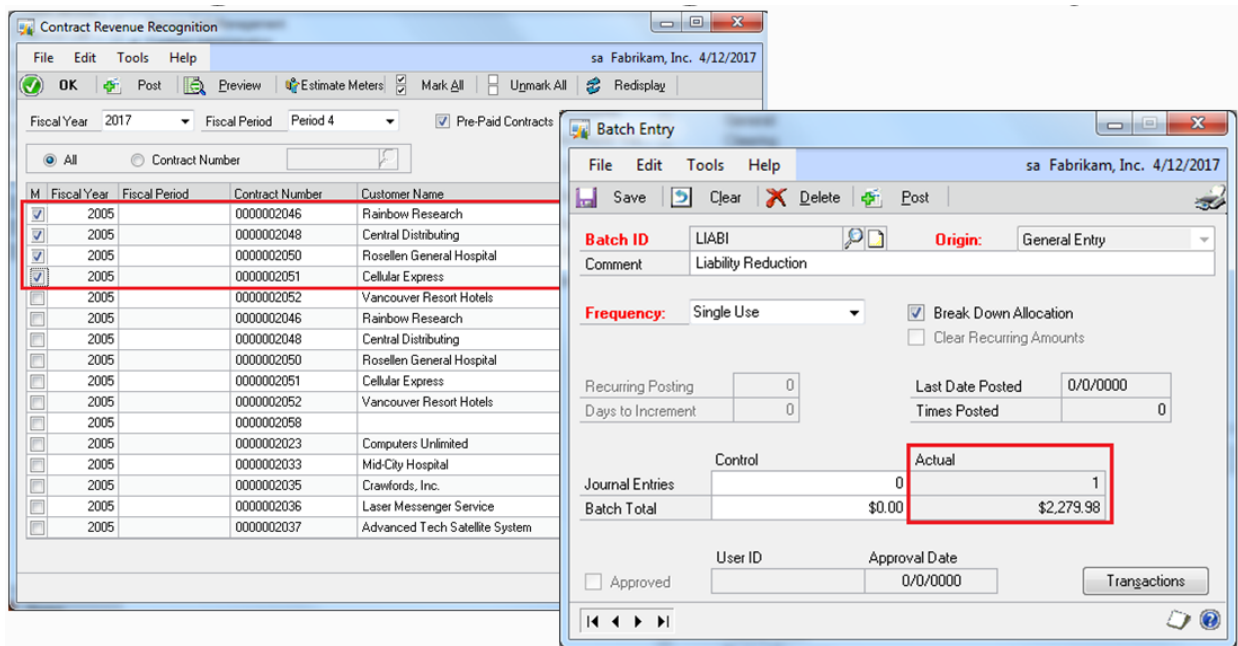
- In Microsoft Dynamics GP 2010 and previous versions, you do not have the ability to search based on contract number.
- In Microsoft GP 2013, this will allow you to select a single contract and display only the un-posted revenue associated with the contract for the year and period selected.
- ***Why this feature is cool!*** In Dynamics GP 2013, a new filter by Contract Number field is added to the Contract Revenue Recognition window. You can select a single contract number and view only the un-posted revenue entries for that contract for all periods up to and including the fiscal year and period selected. You can then post the revenue for the single contract.



M	Fiscal Year	Fiscal Period	Contract Number	Customer Name	Amount To Recognize
<input type="checkbox"/>	2005		000002048	Central Distributing	\$364.16
<input type="checkbox"/>	2005		000002048	Central Distributing	\$364.16
<input type="checkbox"/>	2005		000002048	Central Distributing	\$364.16
<input type="checkbox"/>	2006		000002048	Central Distributing	\$364.16
<input type="checkbox"/>	2006		000002048	Central Distributing	\$364.16
<input type="checkbox"/>	2006		000002048	Central Distributing	\$364.16
<input type="checkbox"/>	2006		000002048	Central Distributing	\$364.16
<input type="checkbox"/>	2006		000002048	Central Distributing	\$364.16
<input type="checkbox"/>	2006		000002048	Central Distributing	\$364.16
<input type="checkbox"/>	2006		000002048	Central Distributing	\$364.16
<input type="checkbox"/>	2006		000002048	Central Distributing	\$364.16
<input type="checkbox"/>	2006		000002048	Central Distributing	\$364.24
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					

### Consolidate Revenue Recognition

- On Microsoft Dynamics GP 2010 and previous versions, a journal entry is created for each unique contract line by the fiscal year and fiscal period.
- In Microsoft GP 2013, this will consolidate the journal entries into one GL entry in the LIABA batch based on grouping the fiscal year and fiscal period.
- **Why this feature is cool!** The contract revenue recognition process creates a General Ledger batch named LIABI which contains the account information from all marked contracts to be posted. Prior to this change, a journal entry was created for each unique contract number. Now, this batch will contain one journal entry consolidating the account information by fiscal period and year, and you will still be able to see the account detail for each contract line within the single transaction.



The screenshot displays two overlapping windows from Microsoft Dynamics GP 2013. The background window is 'Contract Revenue Recognition', showing a list of contracts for fiscal year 2017, period 4. The foreground window is 'Batch Entry', showing the details for a batch named 'LIABI' with a comment of 'Liability Reduction'. The batch is set to 'Single Use' frequency and 'Break Down Allocation' is checked. A summary table at the bottom of the Batch Entry window shows the consolidation of journal entries.

	Control	Actual
Journal Entries	0	1
Batch Total	\$0.00	\$2,279.98

### Returns Management RMA Line Level Lock

- On Microsoft Dynamics GP 2010 and previous versions, only one user can edit the RMA at one time. If another user tries to access the RMA, they receive the message "This document is being edited by other user."
- In Microsoft GP 2013, this allows multiple users to edit the same RMA.

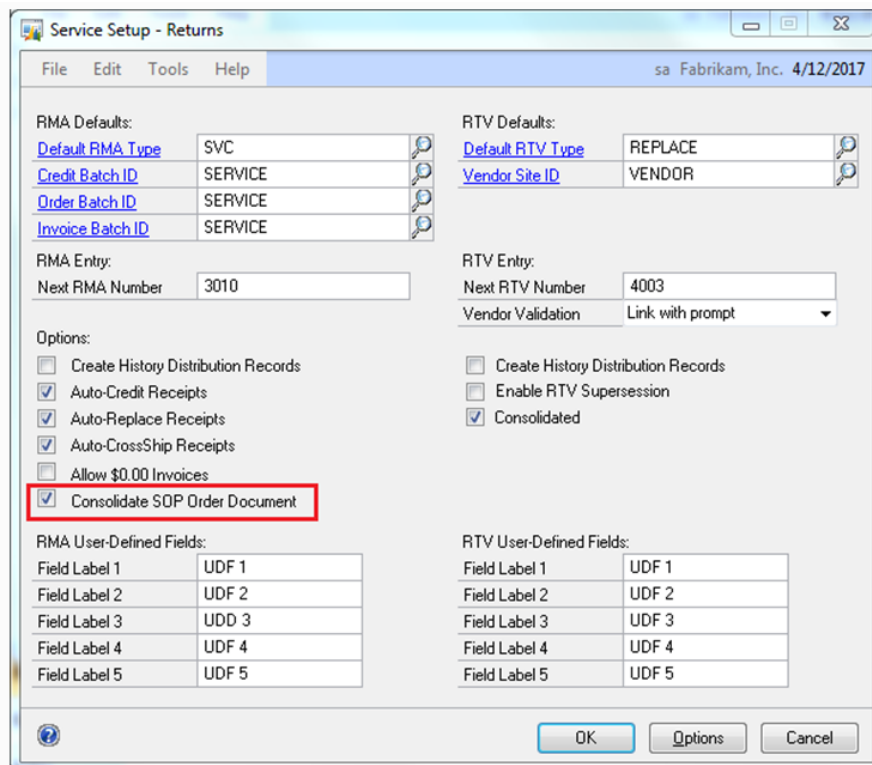


### RMA Return Quantity

- In Microsoft Dynamics GP 2010 and previous versions, all quantities are returned as on hand when you received an RMA.
- In Microsoft GP 2013, this allows you to specify a return quantity type on an RMA when you receive the quantity. You may select a default return quantity type based on the RMA Type.
- You may use the RMA Line Process Return window to change the Qty. Type for items marked as customer owned, however, it does not actually affect inventory in any way.
- The Inventory Reconcile utility will check Qty. Types and not affect allocations other than when the Qty. Type is On Hand.
- When you upgrade from Microsoft Dynamics GP 2010 and previous versions, the default Qty. Type will be On Hand.

### RMA SOP Consolidate

- On Microsoft Dynamics GP 2010 and previous versions, the cross-ship process creates a separate sales order for each line on the RMA.
- In Microsoft GP 2013, when you enter a Cross-Ship RMA with multiple lines, you will be able to consolidate those lines from the RMA to one sales order when you cross-ship them.
- **Why this feature is cool!** Now with Dynamics GP 2013, you can optionally consolidate multiple cross shipped lines on an RMA onto a single SOP order document. As long as the SOP order is open, any additional lines cross shipped for that same RMA will be added to the same sales order.



Service Setup - Returns  
sa Fabrikam, Inc. 4/12/2017

File Edit Tools Help

RMA Defaults:

Default RMA Type	SVC
Credit Batch ID	SERVICE
Order Batch ID	SERVICE
Invoice Batch ID	SERVICE

RMA Entry:

Next RMA Number: 3010

Options:

Create History Distribution Records

Auto-Credit Receipts

Auto-Replace Receipts

Auto-CrossShip Receipts

Allow \$0.00 Invoices

Consolidate SOP Order Document

RMA User-Defined Fields:

Field Label 1	UDF 1
Field Label 2	UDF 2
Field Label 3	UDF 3
Field Label 4	UDF 4
Field Label 5	UDF 5

RTV Defaults:

Default RTV Type	REPLACE
Vendor Site ID	VENDOR

RTV Entry:

Next RTV Number: 4003

Vendor Validation: Link with prompt

RTV User-Defined Fields:

Field Label 1	UDF 1
Field Label 2	UDF 2
Field Label 3	UDF 3
Field Label 4	UDF 4
Field Label 5	UDF 5

Options:

Create History Distribution Records

Enable RTV Supersession

Consolidated

Buttons: OK Options Cancel

**RMA Entry/Update** sa Fabrikam, Inc. 4/12/2017

File Edit Tools View Help

New Save Clear Delete Copy Ready Close Void

RMA Number: RMA00000003010  
 RMA Type: CROSS (Advanced Cross-Ship RMA)  
 RMA Status: 10 (Awaiting Receipt of RMA)  
 RMA Reason Code:  
 Customer ID: ADAMPARK0001 (Adam Park Resort)  
 Address ID: PRIMARY (Roberta Masouras)  
 Origin: None  
 Origin Document:  
 Office ID: N-01  
 Site ID: RETURNS  
 Bill To Customer ID: ADAMPARK0001  
 Bill To Address ID: BILLING  
 Currency ID: Z-US\$  
 Customer PD:

**Line Items by Order Entered**

R	C	Type	Return Item Number	U of M	Quantity	Qty Received	Return Price	Extended Price
		CROSS	4-A3666A	Each	1	0	\$0.00	\$0.00
		CROSS	3-A2440A	Each	3	0	\$0.00	\$0.00
					0.00	0.00	\$0.00	\$0.00

by Status

**Sales Transaction Entry** sa Fabrikam, Inc. 4/12/2017

File Edit Tools View Options Additional Help

Save Actions

Type/Type ID: Order (RMAORD)  
 Document No.: RMA002002  
 Customer ID: ADAMPARK0001 (Adam Park Resort)  
 Ship To Address: PRIMARY (Suite 9876)  
 Date: 4/12/2017  
 Batch ID: RMA CROSS  
 Default Site ID: WAREHOUSE  
 Customer PD Number:  
 Currency ID: Z-US\$

**Line Items by Order Entered**

Item Number	D	U of M	Qty Ordered	Unit Price	Extended Price
3-A2440A		Each	3	\$200.00	\$600.00
4-A3666A		Each	1	\$2,500.00	\$2,500.00
			0.00	\$0.00	\$0.00

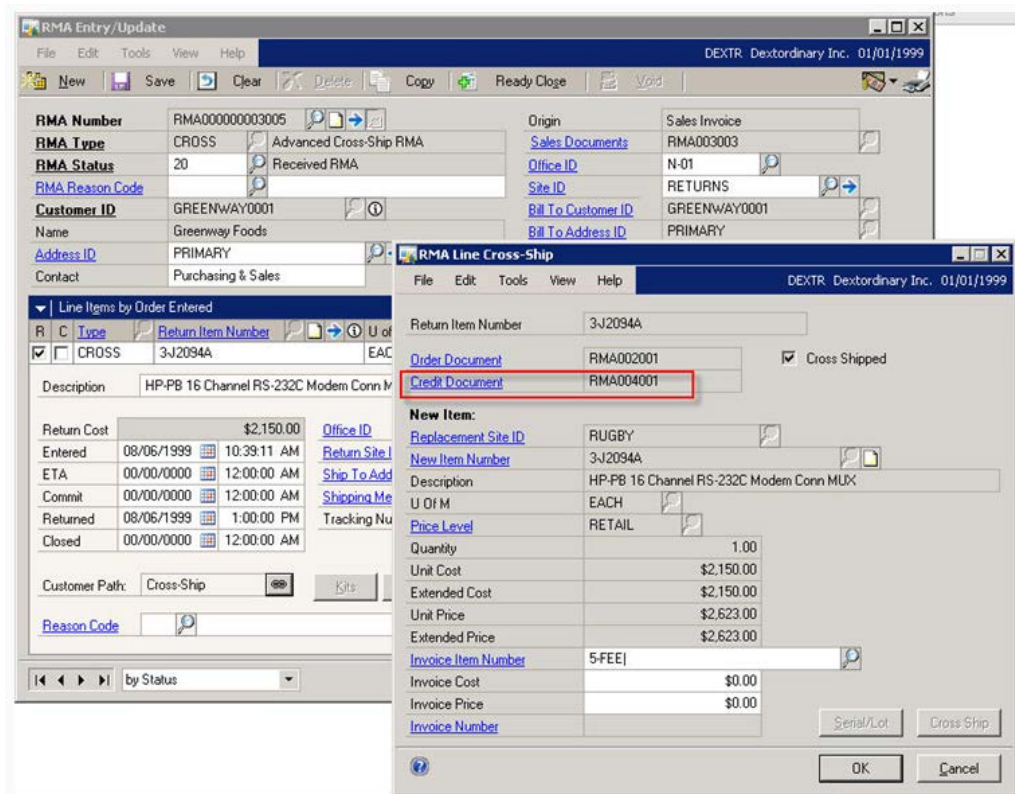
Amount Received: \$0.00  
 Terms Discount Taken: \$0.00  
 On Account: \$3,317.00  
 Comment ID:

Subtotal: \$3,100.00  
 Trade Discount: \$0.00  
 Freight: \$0.00  
 Miscellaneous: \$0.00  
 Tax: \$217.00  
 Total: \$3,317.00

by Document No. Document Status

### Item Description from RMA

- In Microsoft GP 2013, when a SOP document is created from an RMA it will display the item description from the RMA return item.
- **Why this feature is cool!** In prior versions of Microsoft Dynamics GP, the SOP document that was generated from an RMA had an item description that was a concatenation of the return item, RMA number and RMA type. Most customers would have to edit each line. Now the item description will contain the actual returned item's description. This will happen for any SOP Return document generated from RMAs. Also, a SOP invoice generated from RMA closing for any final charges will now use the invoice item's description.



The screenshot displays two overlapping windows from Microsoft Dynamics GP 2013. The background window is titled "RMA Entry/Update" and shows the main RMA details for RMA00000003005. The foreground window is titled "RMA Line Cross-Ship" and shows details for a specific RMA line (3J2094A).

**RMA Entry/Update Details:**

- RMA Number: RMA00000003005
- RMA Type: CROSS (Advanced Cross-Ship RMA)
- RMA Status: 20 (Received RMA)
- RMA Reason Code: [Empty]
- Customer ID: GREENWAY0001 (Greenway Foods)
- Address ID: PRIMARY (Purchasing & Sales)
- Origin: Sales Invoice
- Sales Documents: RMA003003
- Office ID: N-01
- Site ID: RETURNS
- Bill To Customer ID: GREENWAY0001
- Bill To Address ID: PRIMARY

**RMA Line Cross-Ship Details:**

- Return Item Number: 3J2094A
- Order Document: RMA002001
- Credit Document: RMA004001 (highlighted with a red box)
- Cross Shipped:
- New Item:
  - Replacement Site ID: RUGBY
  - New Item Number: 3J2094A
  - Description: HP-PB 16 Channel RS-232C Modem Conn MUX
  - U of M: EACH
  - Price Level: RETAIL
  - Quantity: 1.00
  - Unit Cost: \$2,150.00
  - Extended Cost: \$2,150.00
  - Unit Price: \$2,623.00
  - Extended Price: \$2,623.00
  - Invoice Item Number: 5-FEE
  - Invoice Cost: \$0.00
  - Invoice Price: \$0.00
  - Invoice Number: [Empty]

The "Line Items by Order Entered" table in the background window shows the following data:

R	C	Type	Return Item Number	U of M
<input checked="" type="checkbox"/>	<input type="checkbox"/>	CROSS	3J2094A	EAC

The description for this line is "HP-PB 16 Channel RS-232C Modem Conn MUX".

**Sales Transaction Inquiry Zoom** | File Edit Tools View Options Help | DEXTR, Dextrordinary Inc. 01/01/1999

OK

Type/Type ID: Return R MARTN Date: 08/06/1999  
 Document No. RMA004001 Batch ID: RMA CREDIT  
 Customer ID: GREENWAY0001 Default Site ID: RUGBY  
 Customer Name: Greenway Foods Customer PO Number:  
 Ship To Address: PRIMARY 61309 N 19th Avenue Currency ID: USA

**Line Items by Order Entered**

Item Number	D	U of M	Quantity Returned	Unit Price	Extended Price
3-J2094A	<input checked="" type="checkbox"/>	EACH	1	\$2,623.00	\$2,623.00

Description: HP-PB 16 Channel RS-232C Modem Conn MUX

Site ID: RETURNS  
 Price Level: RETURN  
 Ship To Address ID: PRIMARY  
 Shipping Method: UPS GROUND

Markdown	\$0.00	Qty to Invoice	0
Unit Cost	\$2,150.00	Qty Fulfilled	1
Req Ship Date	08/06/1999	Qty Canceled	0
Date Shipped	08/06/1999	Qty to Order	0

Amount Received: \$0.00  
 Discount Returned: \$0.00  
 On Account: \$2,806.61  
 Comment ID:

Subtotal: \$2,623.00  
 Trade Discount: \$0.00  
 Freight: \$0.00  
 Miscellaneous: \$0.00  
 Tax: \$183.61  
**\$2,806.61**

Document Status

**Sales Transaction Inquiry Zoom** | File Edit Tools View Options Help | DEXTR, Dextrordinary Inc. 01/01/1999

OK

Type/Type ID: Invoice R MAINV Date: 01/01/1999  
 Document No. RMA003004 Batch ID: RMA INVOICE  
 Customer ID: GREENWAY0001 Default Site ID: RUGBY  
 Customer Name: Greenway Foods Customer PO Number:  
 Ship To Address: PRIMARY 61309 N 19th Avenue Currency ID: USA

**Line Items by Order Entered**

Item Number	D	U of M	Invoice Quantity	Unit Price	Extended Price
5-RMA-FEE	<input checked="" type="checkbox"/>	EACH	1	\$21.50	\$21.50

Description: Return Material Fees

Site ID: RETURNS  
 Price Level: RETAIL  
 Ship To Address ID: PRIMARY  
 Shipping Method: UPS GROUND

Markdown	\$0.00	Billed Quantity	1
Unit Cost	\$0.00	Qty Fulfilled	1
Req Ship Date	01/01/1999	Qty Canceled	0
Date Shipped	01/01/1999	Qty to Back Order	0

Amount Received: \$0.00  
 Terms Discount Taken: \$0.00  
 On Account: \$23.01  
 Comment ID:

Subtotal: \$21.50  
 Trade Discount: \$0.00  
 Freight: \$0.00  
 Miscellaneous: \$0.00  
 Tax: \$1.51  
**\$23.01**

Document Status