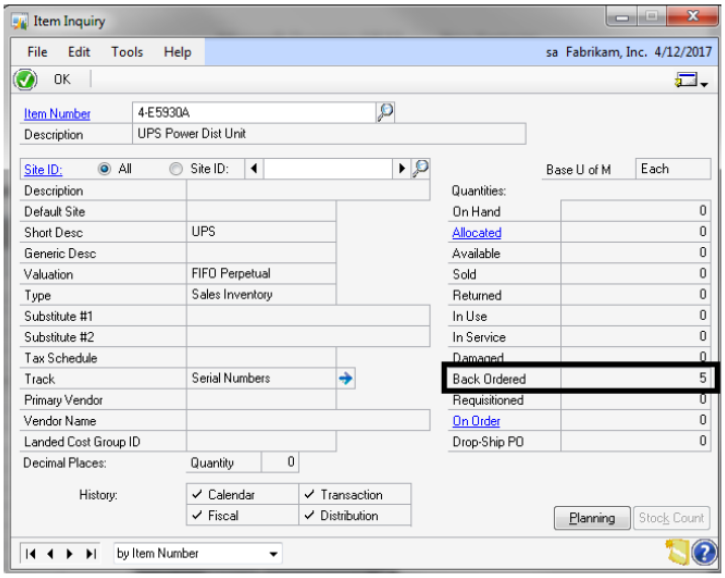
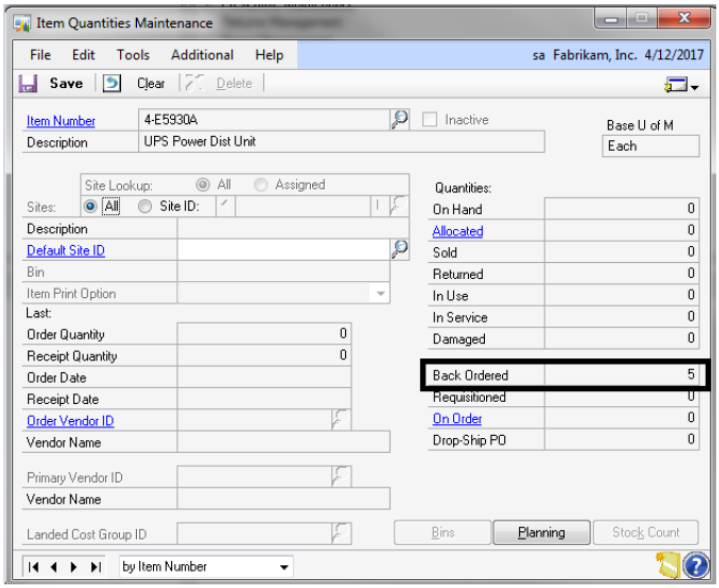
Back Ordered Quantity Updated

- 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:



Item Quantities Maintenance:

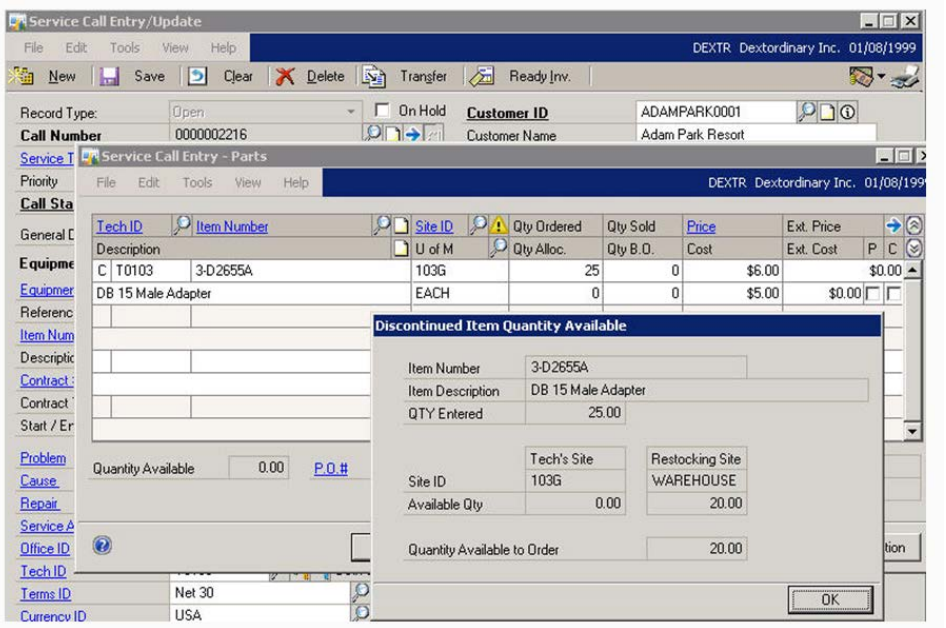


Allocations Display in Item Allocation Inquiry

- 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.

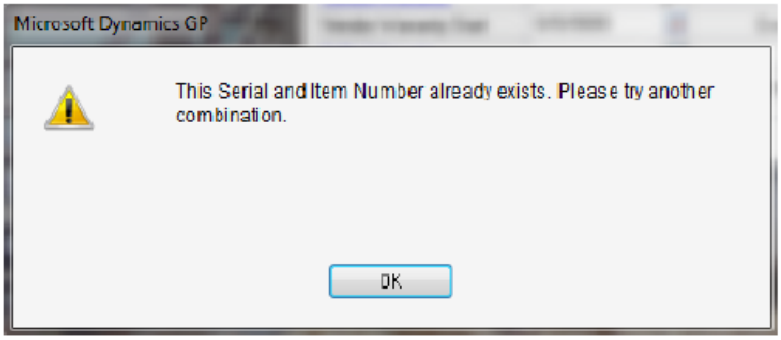
Honor Discontinued Item Status in Field Service

- 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.



Equipment Supersession Posts

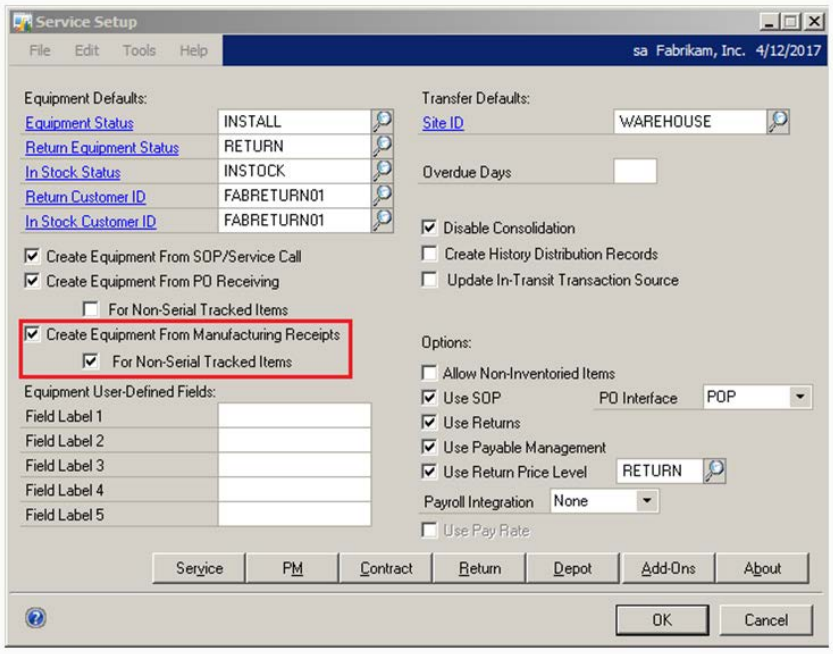
- On Microsoft Dynamics GP2010 and previous versions, no message appears to warn you the equipment may already exist.
- In Microsoft GP 2013, you may post a supersession and the system verifies the serial number/item number/customer combination.

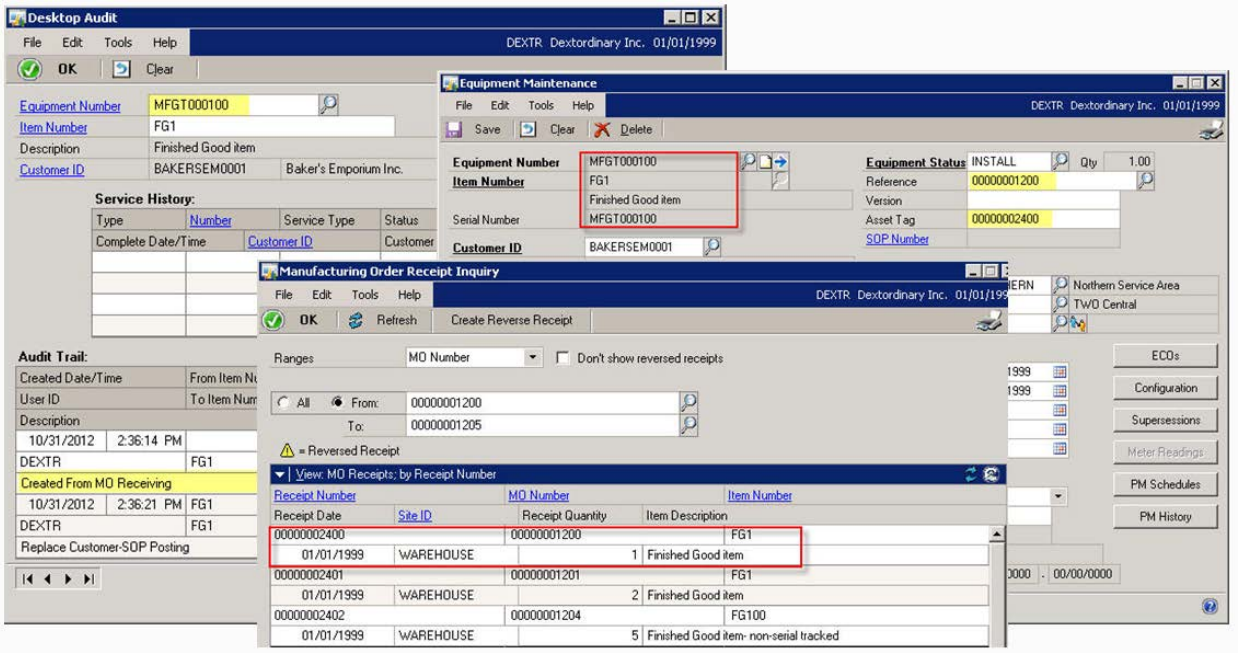


Create Equipment from Manufacturing

- 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 Oder 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.

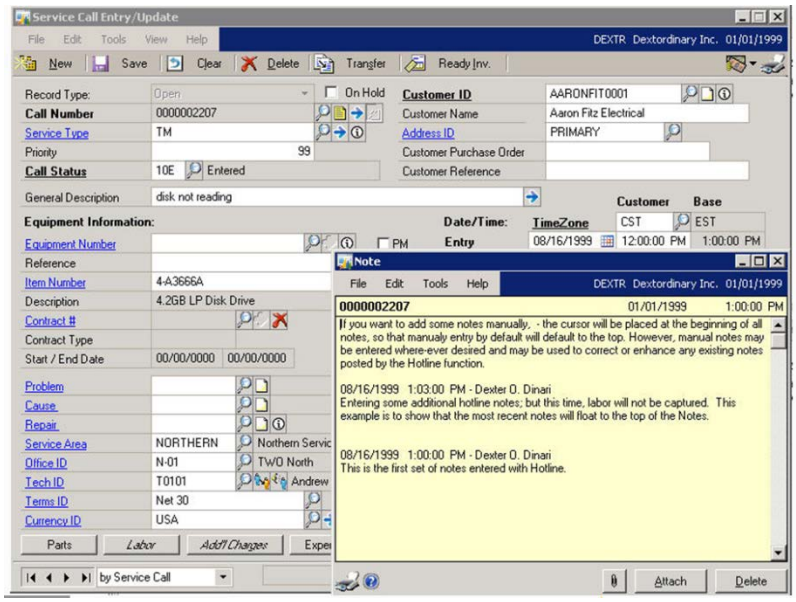




Service Call Management

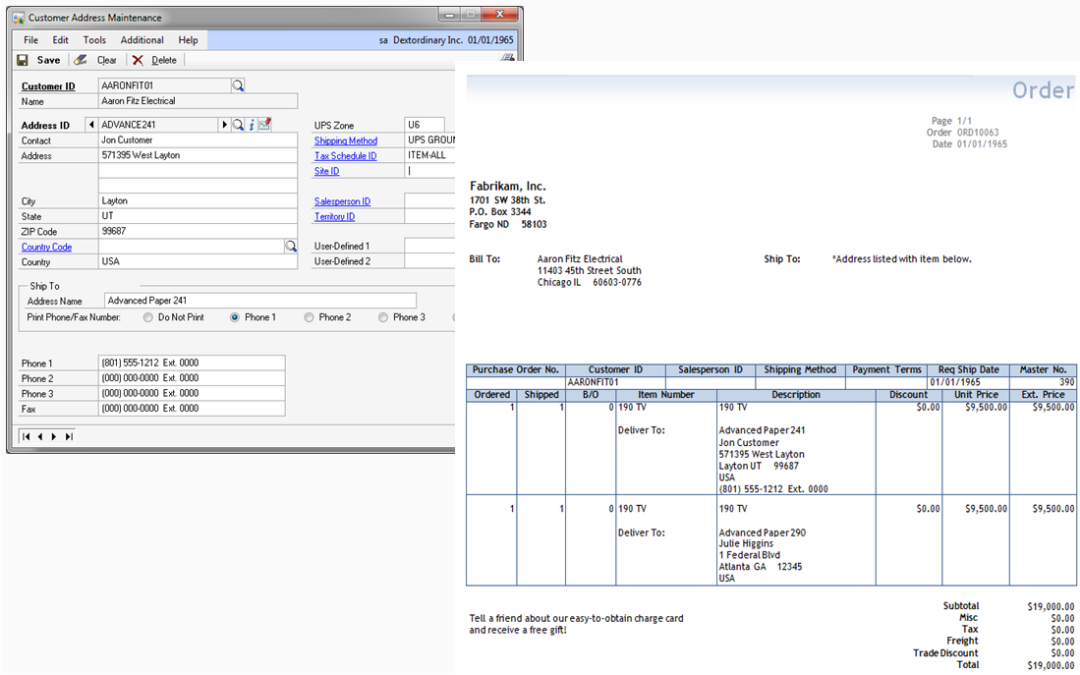
Hotline Notes Top Down

- 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.



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.



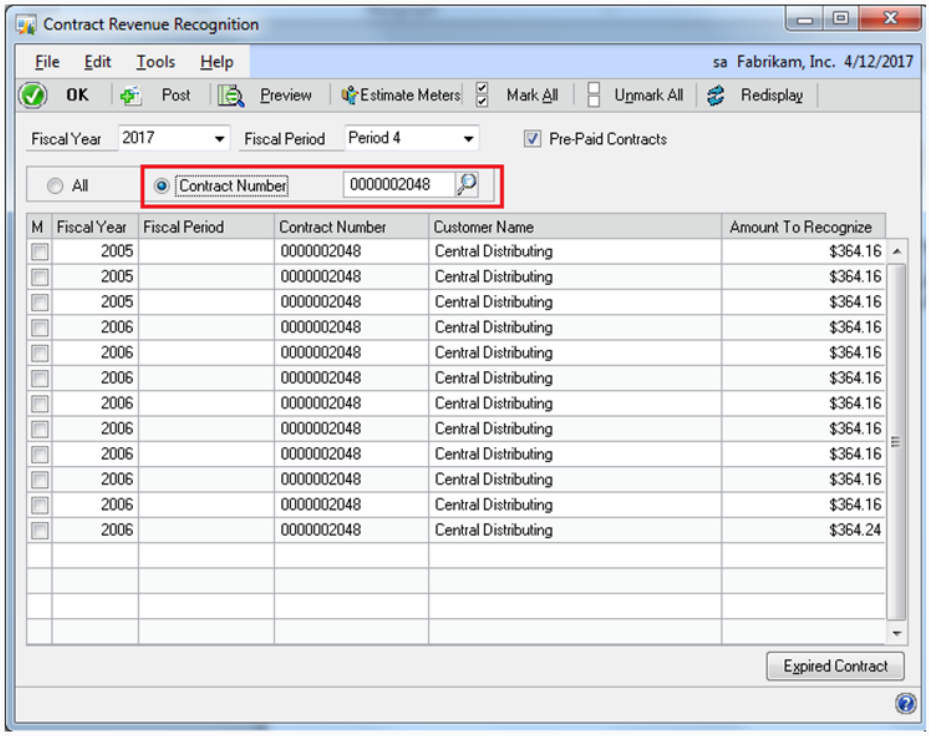
Contract Administration

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.

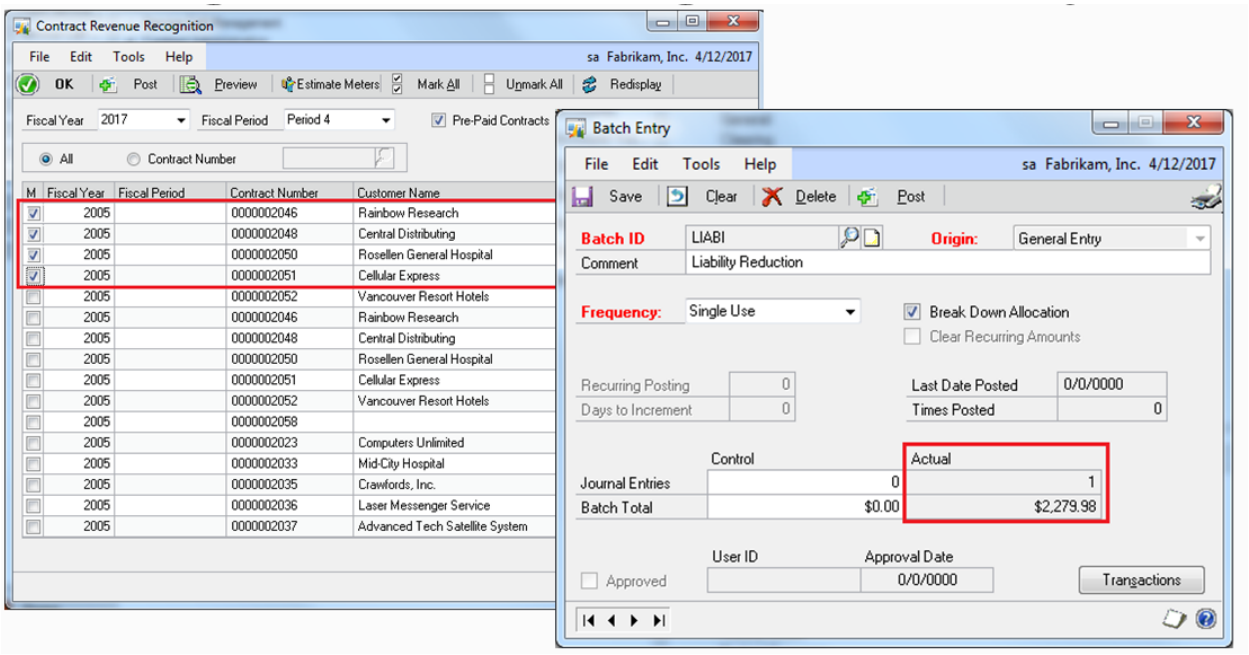
Search by Contract in Revenue Recognition

- 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.



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.



Returns Management

RMA Line Level Lock

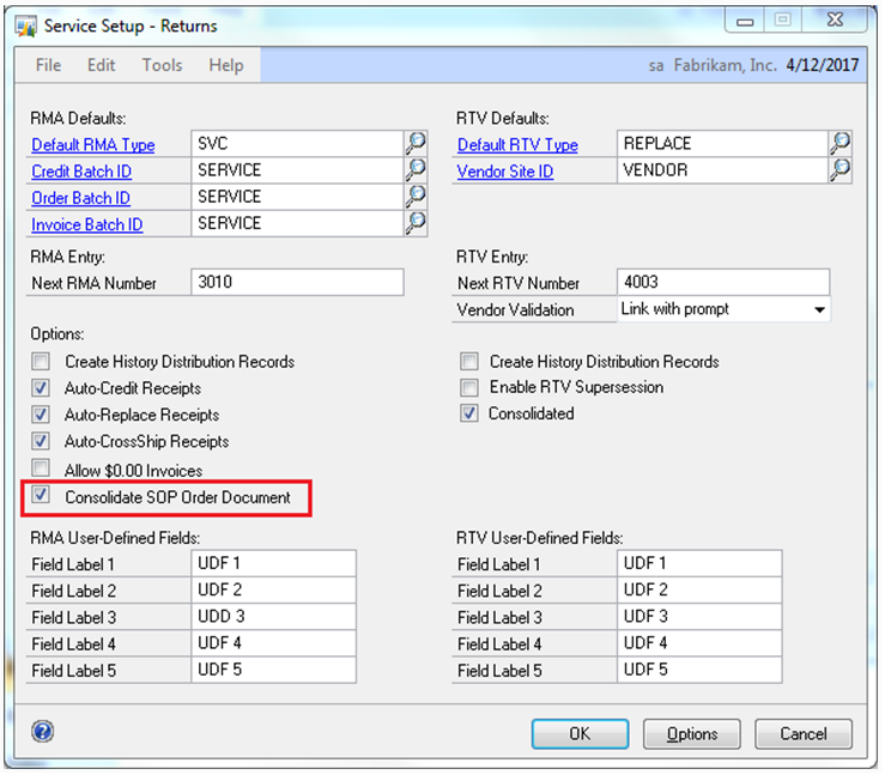
- On Microsoft Dynamics GP 2010 and previous versions, only one user can edit the RMA at one time. If another user tries to access the RMA, they receive the message “This document is being edited by other user.”
- In Microsoft GP 2013, this allows multiple users to edit the same RMA.

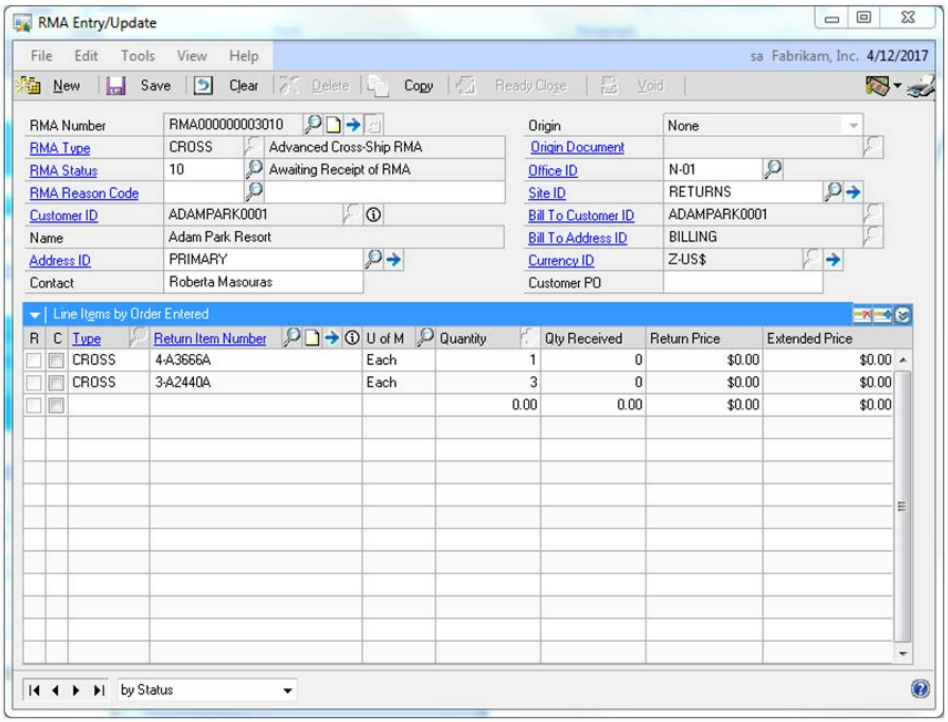
RMA Return Quantity

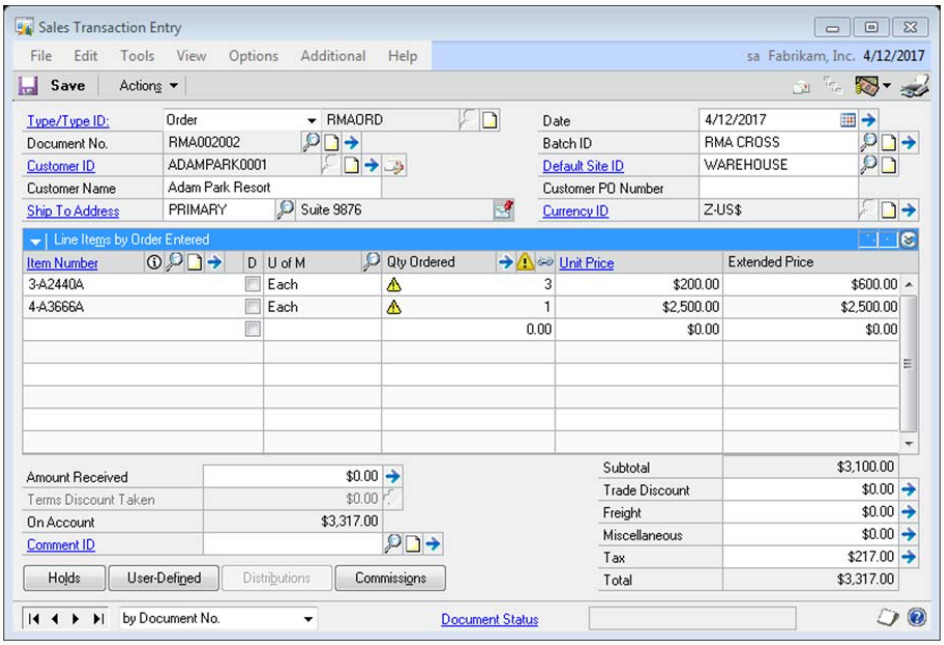
- In Microsoft Dynamics GP 2010 and previous versions, all quantities are returned as on hand when you received an RMA.
- In Microsoft GP 2013, this allows you to specify a return quantity type on an RMA when you receive the quantity. You may select a default return quantity type based on the RMA Type.
- 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.

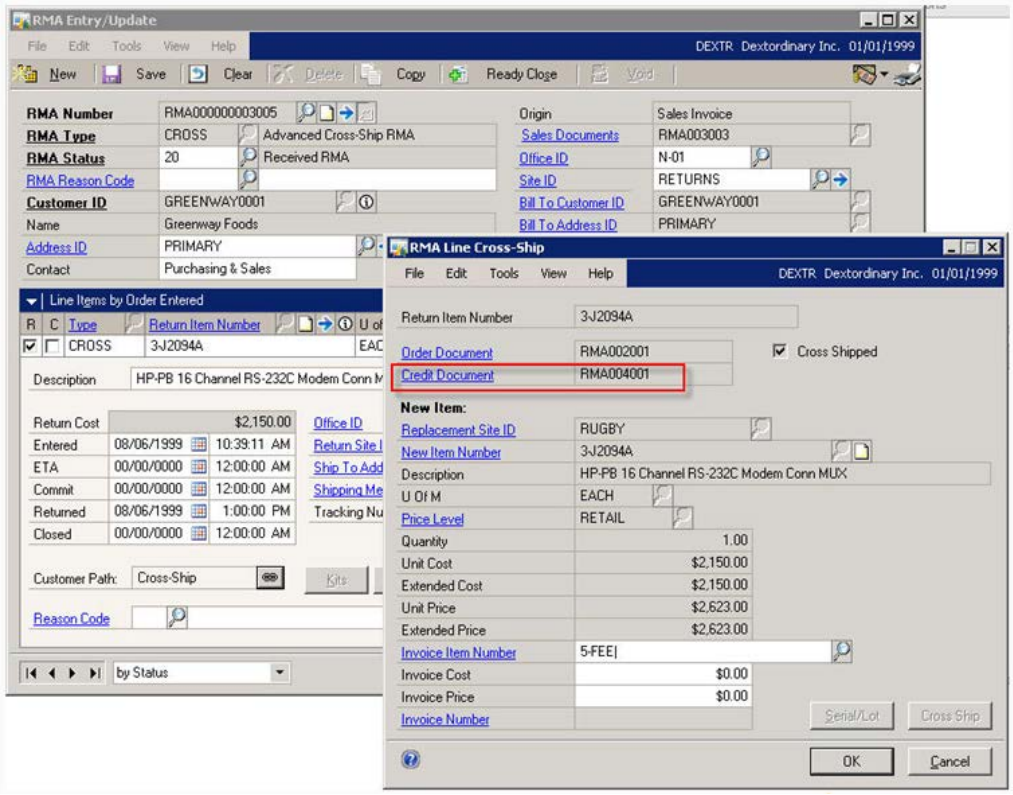


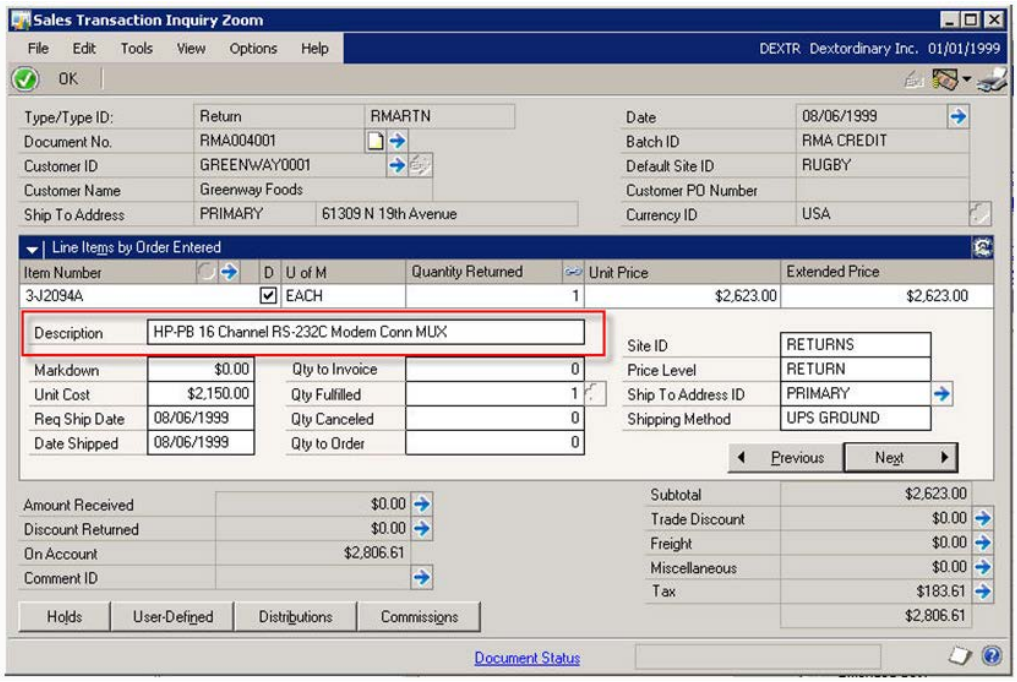

RMA Entry/Update
File Edit Tools View Help
sa Fabrikam, Inc. 4/12/2017
New Save Clear Delete Copy Ready Close Void
RMA Number RMA000000003010
RMA Type CROSS Advanced Cross-Ship RMA
RMA Status 10 Awaiting Receipt of RMA
RMA Reason Code
Customer ID ADAMPARK0001
Name Adam Park Resort
Address ID PRIMARY
Contact 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 PO
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

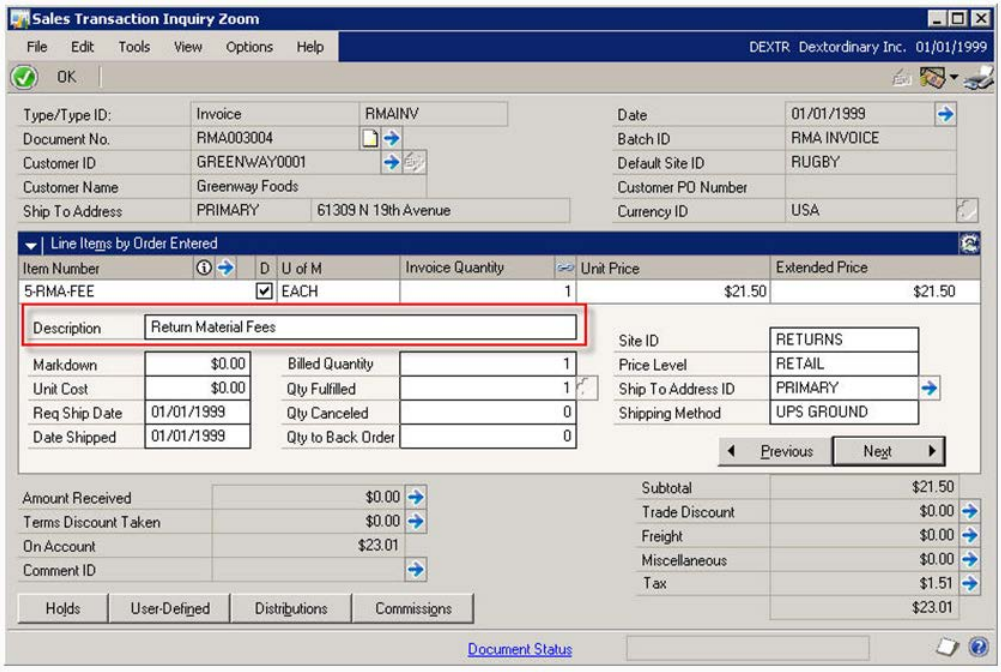

Sales Transaction Entry
File Edit Tools View Options Additional Help
sa Fabrikam, Inc. 4/12/2017
Save Actions
Type/Type ID: Order RMAORD
Document No. RMA002002
Customer ID ADAMPARK0001
Customer Name Adam Park Resort
Ship To Address PRIMARY Suite 9876
Date 4/12/2017
Batch ID RMA CROSS
Default Site ID WAREHOUSE
Customer PO 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
Holds User-Defined Distributions Commissions
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.




Sales Transaction Inquiry Zoom
File Edit Tools View Options Help
DEXTR Dextordinary Inc. 01/01/1999
OK
Type/Type ID: Return RMARTN
Document No. RMA004001
Customer ID GREENWAY0001
Customer Name Greenway Foods
Ship To Address PRIMARY 61309 N 19th Avenue
Date 08/06/1999
Batch ID RMA CREDIT
Default Site ID RUGBY
Customer PO Number
Currency ID USA
Line Items by Order Entered
Item Number D U of M Quantity Returned Unit Price Extended Price
3-J2094A EACH 1 $2,623.00 $2,623.00
Description HP-PB 16 Channel RS-232C Modem Conn MUX
Markdown $0.00
Unit Cost $2,150.00
Req Ship Date 08/06/1999
Date Shipped 08/06/1999
Qty to Invoice 0
Qty Fulfilled 1
Qty Canceled 0
Qty to Order 0
Site ID RETURNS
Price Level RETURN
Ship To Address ID PRIMARY
Shipping Method UPS GROUND
Previous Next
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
Holds User-Defined Distributions Commissions
Document Status


Sales Transaction Inquiry Zoom
File Edit Tools View Options Help
DEXTR Dextordinary Inc. 01/01/1999
OK
Type/Type ID: Invoice RMAINV
Document No. RMA003004
Customer ID GREENWAY0001
Customer Name Greenway Foods
Ship To Address PRIMARY 61309 N 19th Avenue
Date 01/01/1999
Batch ID RMA INVOICE
Default Site ID RUGBY
Customer PO Number
Currency ID USA
Line Items by Order Entered
Item Number D U of M Invoice Quantity Unit Price Extended Price
5-RMA-FEE EACH 1 $21.50 $21.50
Description Return Material Fees
Markdown $0.00
Unit Cost $0.00
Req Ship Date 01/01/1999
Date Shipped 01/01/1999
Billed Quantity 1
Qty Fulfilled 1
Qty Canceled 0
Qty to Back Order 0
Site ID RETURNS
Price Level RETAIL
Ship To Address ID PRIMARY
Shipping Method UPS GROUND
Previous Next
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
Holds User-Defined Distributions Commissions
Document Status