

#### **Ship-to Addresses with a different company name**

- When you enter a Sales Order whose line items are shipped to two or more locations, this feature allows you to print the addresses for both locations on the one document. You can also assign a name to your address, which can be printed on the document.
- On earlier versions of Microsoft Dynamics GP, a customization would be required to print additional customer name and address information on documents.

#### **Print Ship to Addresses with Lines option**

- There is a new option to select when you print Sales Order documents of **Print Ship to Addresses with Lines**.
- In conjunction with the ability to now print multiple ship to addresses on one Sales document, if you are drop shipping your items, you can also configure the system to consolidate purchase order information so that only 1 PO is created even though multiple customer sites are being shipped to.
- On earlier versions of Microsoft Dynamics GP, you would need to click the Organize button in the Purchase Orders Preview window and manually combine nodes to create a single PO.

#### **Combine Different Ship-To Addresses into one PO option**

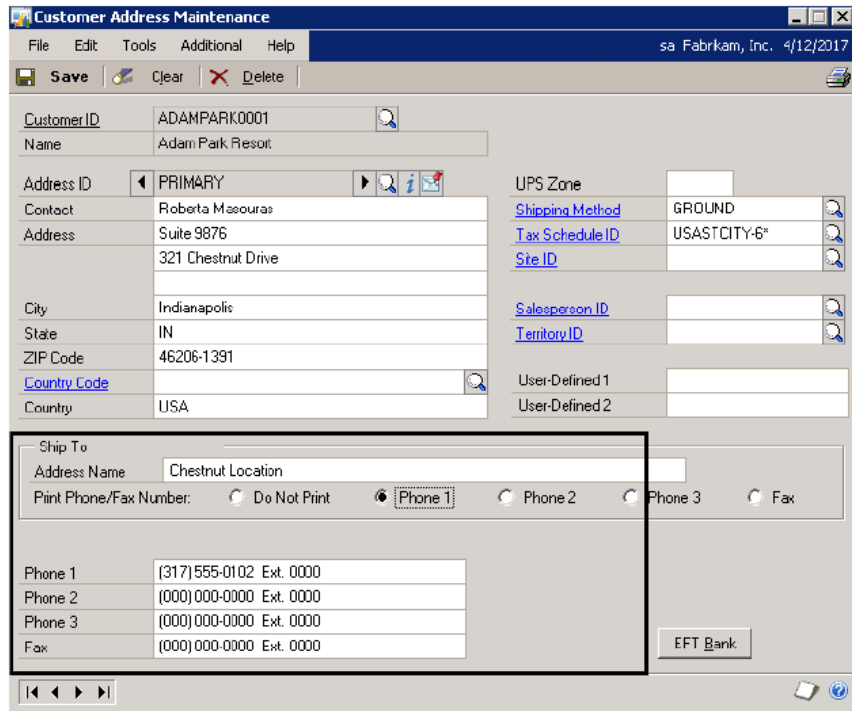
- This is a new option you can select in **Sales Order Processing Setup Options** to create one purchase order from one sales order with multiple lines that contains different ship-to addresses. This is useful when you have a sales order for one company and you are drop shipping to multiple locations. When used in conjunction with the **Combine Similar Items into a Single PO Line** option, orders with similar items and the same Ship-to address are combined into one line.

#### **Combine Different Ship-To Addresses from Different Sales Orders into one PO option**

- This is a new option you can select in **Sales Order Processing Setup Options**, which will create one purchase order from multiple sales orders when drop shipping to multiple shipping addresses. This is useful when you have several sales orders and you are drop shipping the same item to multiple locations, and only one purchase order is necessary to purchase the correct quantity of the items. When used in conjunction with the **Combine Similar Items into a Single PO Line** option, the similar items with the same shipping address are summed onto one line on the PO.
- **Note:** The **Combine Different Ship-To Addresses from Different Sales Order into one PO** option can only be marked if **Combine Different Ship-To Addresses into one PO** is also marked.
- **Note:** Use the Sales Document Range Inquiry window to create one purchase order from multiple sales documents. (Sales >> Inquiry >> Sales Range Inquiry > Purchase button)

### 1. Customer Address Maintenance window

Several fields are added to the **Customer Address Maintenance** window. Use the **Address Name** field to enter the receiver's name that you want printed on documents.



**Customer Address Maintenance**

File Edit Tools Additional Help sa Fabrkam, Inc. 4/12/2017

Save Clear Delete

Customer ID: ADAMPARK0001

Name: Adam Park Resort

Address ID: PRIMARY

Contact: Roberta Masouras

Address: Suite 9876  
321 Chestnut Drive

City: Indianapolis

State: IN

ZIP Code: 46206-1391

Country Code: USA

Country: USA

UPS Zone: [ ]

Shipping Method: GROUND

Tax Schedule ID: USASTCITY-6\*

Site ID: [ ]

Salesperson ID: [ ]

Territory ID: [ ]

User-Defined 1: [ ]

User-Defined 2: [ ]

**Ship To**

Address Name: Chestnut Location

Print Phone/Fax Number:  Do Not Print  Phone 1  Phone 2  Phone 3  Fax

Phone 1: (317) 555-0102 Ext. 0000

Phone 2: (000) 000-0000 Ext. 0000

Phone 3: (000) 000-0000 Ext. 0000

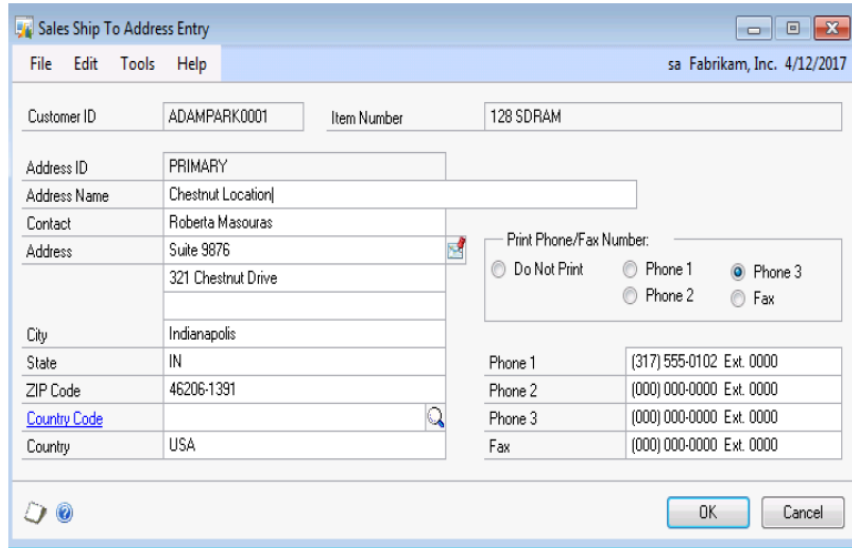
Fax: (000) 000-0000 Ext. 0000

EFT Bank

- Data converted to Microsoft Dynamics GP 2013 from a previous version or new addresses entered will have the **Address Name** populated with the **Customer Name** information. Use this window to update that information if desired.
- Data converted to Microsoft Dynamics GP 2013 from a previous version will default with **Do Not Print** selected for the **Print Phone/Fax Number**.
- Changes can be made to the Address Name, phone and fax number selections at the time of transaction entry since the information in **Customer Address Maintenance** is for default purposes.

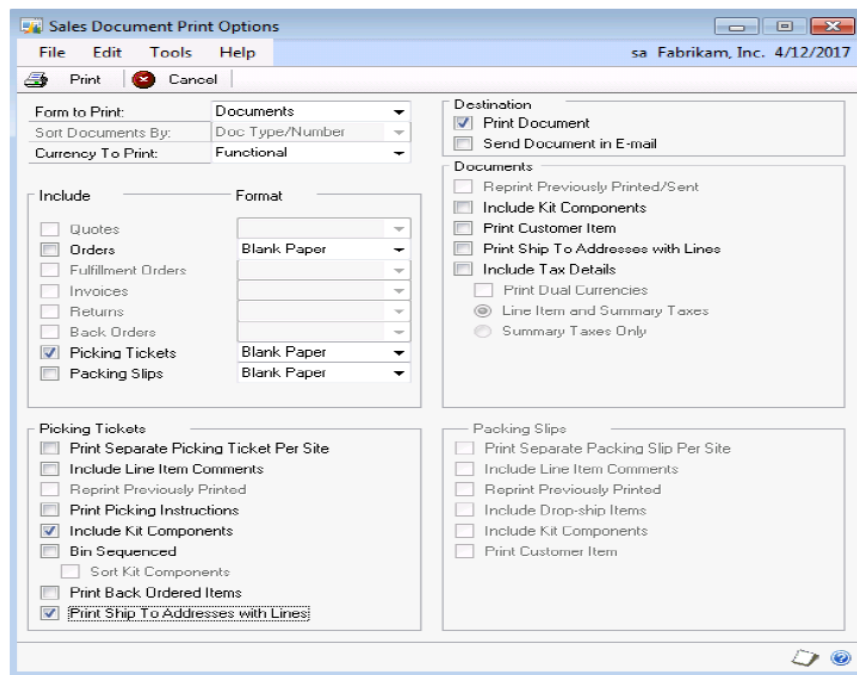
## 2. Sales Ship To Address Entry window

Use the **Sales Ship To Address Entry** window to make changes to the address on the fly during transaction entry. These changes are reflected on the printed document.



## 3. Sales Document Print Options window

Additional options are added to the **Sales Document Print Options** window. Mark **Print Ship To Addresses with Lines** under the Documents or Picking Tickets areas to have the ship-to address information associated with each line item on the document printed within the body of the document.



#### 4. Print Sales Documents window

The same options described above are available in the **Print Sales Documents** window so that you can print ship-to addresses with line items when you print multiple documents.

#### 5. List - Print Picking Ticket window

The same options described above are available in the **Print Picking Ticket** window accessed from the Sales List so that you can print ship-to addresses with line items when you print documents via the List view.

#### 6. List - Print Documents window

The same options described above are available in the **Print Documents** window accessed from the Sales List so that you can print ship-to addresses with line items when you print documents via the List view.

#### 7. Sales Ship To Address Inquiry window

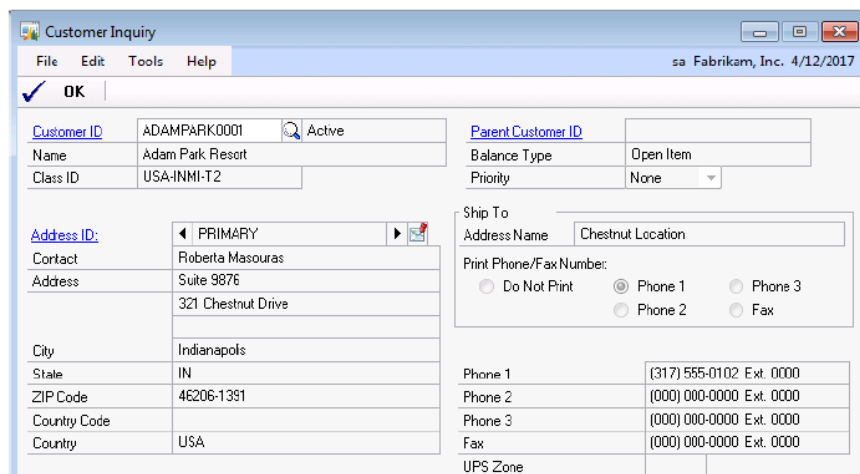
The **Sales Ship To Address Inquiry** window is updated to show the **Ship To Address Name** and **Print Phone/Fax Number** selections. Since this is an inquiry window, no changes are allowed to the data.

#### 8. Sales Ship To Address Inquiry window

The **Sales Ship To Address Inquiry** window is updated to show the **Ship To Address Name** and **Print Phone/Fax Number** selections. Since this is an inquiry window, no changes are allowed to the data.

#### 9. Customer Inquiry window

The Customer Inquiry window is updated to show the **Ship To Address Name** and **Print Phone/Fax Number** selections. Since this is an inquiry window, no changes are allowed to the data.



Customer Information		Parent Customer Information	
Customer ID	ADAMP&RK0001 Active	Parent Customer ID	
Name	Adam Park Resort	Balance Type	Open Item
Class ID	USA-INMI-T2	Priority	None

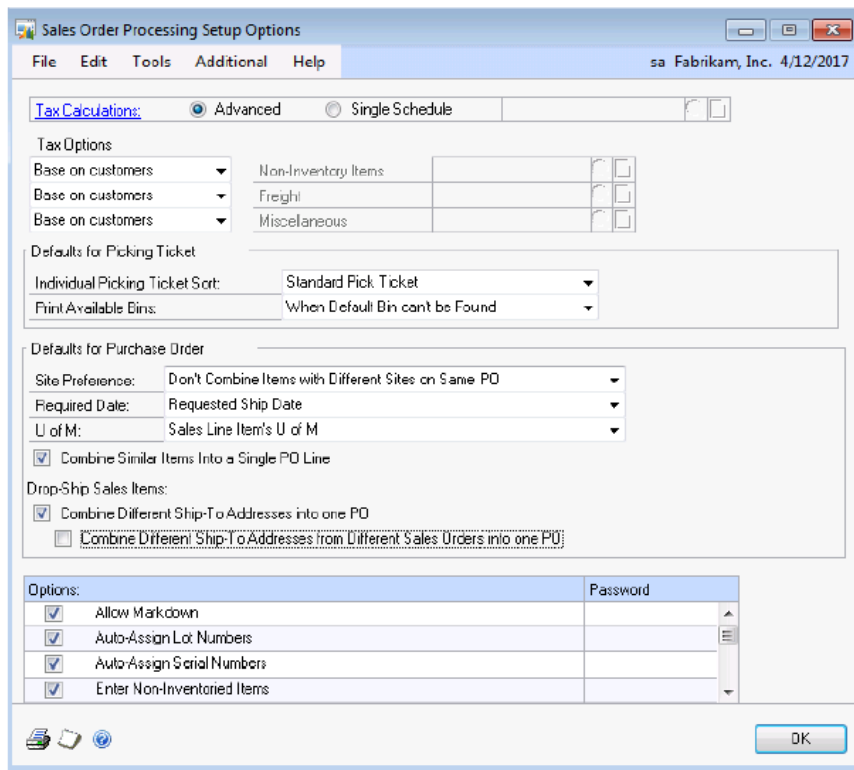
Address Information		Ship To Information	
Address ID	PRIMARY	Address Name	Chestnut Location
Contact	Roberta Masouras	Print Phone/Fax Number:	<input type="radio"/> Do Not Print <input checked="" type="radio"/> Phone 1 <input type="radio"/> Phone 3 <input type="radio"/> Phone 2 <input type="radio"/> Fax
Address	Suite 9876 321 Chestnut Drive	Phone 1	(317) 555-0102 Ext. 0000
City	Indianapolis	Phone 2	(000) 000-0000 Ext. 0000
State	IN	Phone 3	(000) 000-0000 Ext. 0000
ZIP Code	46206-1391	Fax	(000) 000-0000 Ext. 0000
Country Code		UPS Zone	
Country	USA		

## 10. Sales Order Processing Setup Options window

The new options in this window relate to drop-ship items. When you mark **Combine Different Ship-To**

**Addresses into one PO**, then one purchase order is created even though the items on your sales order document are being shipped to multiple locations.

- When you also mark **Combine Different Ship-To Addresses from Different Sales Orders into one PO** then one purchase order is created even though the items on multiple sales order documents are being shipped to multiple locations.



Sales Order Processing Setup Options

File Edit Tools Additional Help sa Fabrikam, Inc. 4/12/2017

Tax Calculations:  Advanced  Single Schedule

Tax Options

Base on customers	Non-Inventory Items		
Base on customers	Freight		
Base on customers	Miscellaneous		

Defaults for Picking Ticket

Individual Picking Ticket Sort: Standard Pick Ticket

Print Available Bins: When Default Bin can't be Found

Defaults for Purchase Order

Site Preference: Don't Combine Items with Different Sites on Same PO

Required Date: Requested Ship Date

U of M: Sales Line Item's U of M

Combine Similar Items Into a Single PO Line

Drop-Ship Sales Items:

Combine Different Ship-To Addresses into one PO

Combine Different Ship-To Addresses from Different Sales Orders into one PO

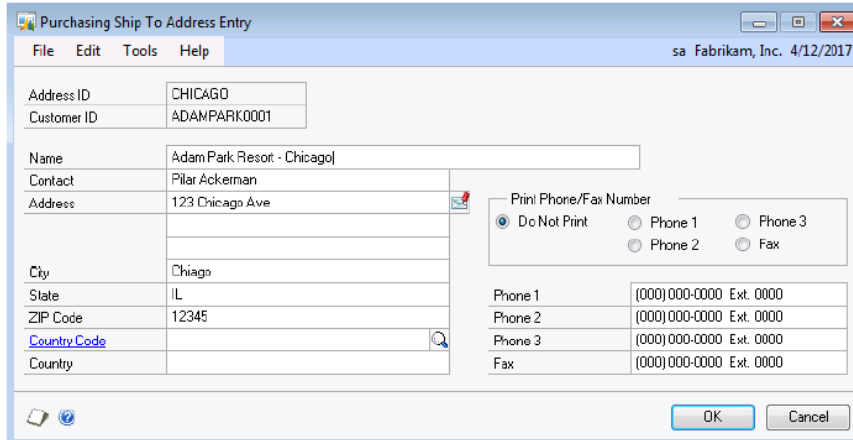
Options:	Password
<input checked="" type="checkbox"/> Allow Markdown	
<input checked="" type="checkbox"/> Auto-Assign Lot Numbers	
<input checked="" type="checkbox"/> Auto-Assign Serial Numbers	
<input checked="" type="checkbox"/> Enter Non-Inventory Items	

DK

- If neither of these new options is selected, then existing Microsoft Dynamics GP 2010 functionality is used.

### 11. Purchasing Ship to Address Entry window

You can review and update the address name and phone/fax information being used on the purchase order using the Purchasing Ship To Address Entry window.



- This window is not editable when there is a SOP commitment. If an address change is needed, the change would need to be done in SOP.

### 12. Purchasing Ship To Address Inquiry window

The **Purchasing Ship To Address Inquiry** window is updated to show the **Ship To Address Name** and **Print Phone/Fax Number** selections. Since this is an inquiry window, no changes are allowed to the data.

#### How the Copy functionality is affected

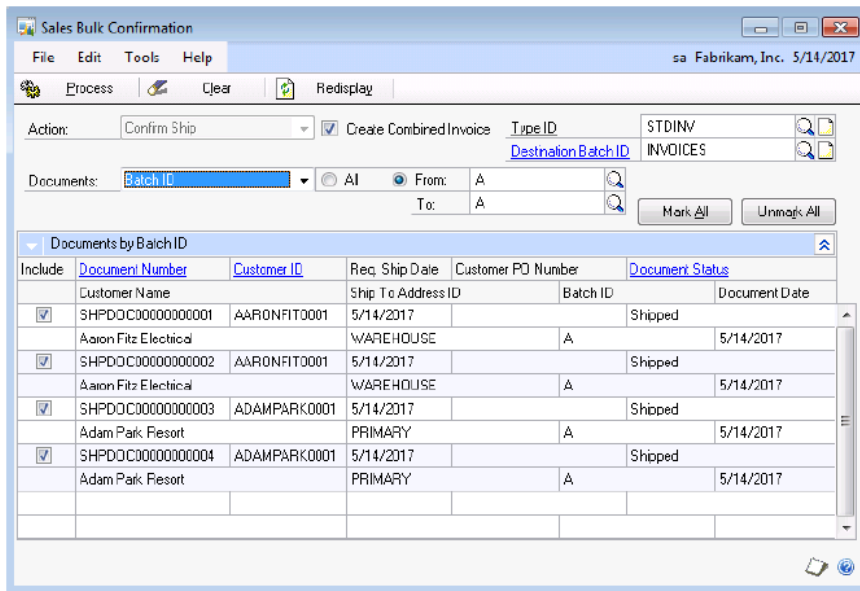
- You will see different results depending on whether or not the **Copy Ship-to Address, Ship Method, and Tax ID from Source Line** is marked when you use the Copy functionality in Sales Order Processing and Purchase Order Processing.
- You can only mark the **Copy Ship-to Address, Ship Method and Tax ID from Source Line** option if the document you are copying from is for the same customer you are copying to. You can also only mark it if the same Document Type is used for both documents.

### Combined Invoice

- Combined Invoice functionality allows you to combine multiple fulfillment orders for the same customer into a single invoice document. You must be registered for Advanced Distribution to use this functionality, as it requires the use of the Fulfillment Order type.
- For a fulfillment order to be combined, it must be in a Shipped (5) status. In addition, the same customer ID, bill to address ID, currency ID (including exchange table ID, exchange rate, and rate type ID), payment terms, and commission applies to information must exist on all potentially combined orders.
- On previous versions, there was not an automatic way to merge two or more documents into one invoice. It would need to be entered manually by removing the line items from one document, and adding them to the second one.

### Changes to Sales Bulk Confirmation window

- Three new fields have been added to **Sales Bulk Confirmation**.



Include	Document Number	Customer ID	Req. Ship Date	Customer PO Number	Batch ID	Document Status	Document Date
<input checked="" type="checkbox"/>	SHPDCC000000000001	AARONFIT0001	5/14/2017			Shipped	5/14/2017
	Aaron Fitz Electrical		WAREHOUSE		A		
<input checked="" type="checkbox"/>	SHPDCC000000000002	AARONFIT0001	5/14/2017			Shipped	5/14/2017
	Aaron Fitz Electrical		WAREHOUSE		A		
<input checked="" type="checkbox"/>	SHPDCC000000000003	ADAMPARK0001	5/14/2017			Shipped	5/14/2017
	Adam Park Resort		PRIMARY		A		
<input checked="" type="checkbox"/>	SHPDCC000000000004	ADAMPARK0001	5/14/2017			Shipped	5/14/2017
	Adam Park Resort		PRIMARY		A		

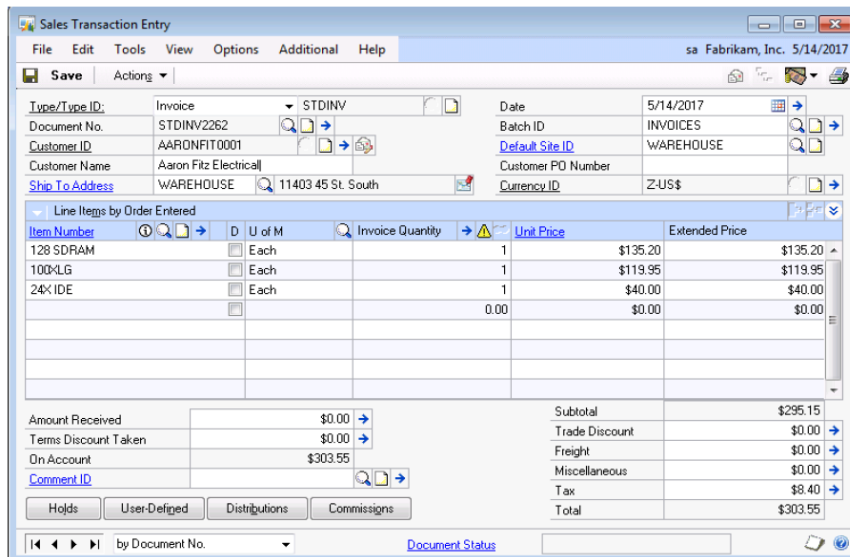
- Confirm Ship must be chosen as the Action to have access to the Create Combined Invoice field.

### New: Sales Bulk Confirmation - Combined Invoice report

- When you click **Process**, the **Sales Bulk Confirmation - Combined Invoice Report** is generated. This report details the fulfillment orders that were combined and provides the Document Number of the new invoice transaction that was created.
- Combined invoice functionality allows you to combine multiple fulfillment orders with the status 5 (Shipped) into a single invoice using the Sales Bulk Confirmation window.
- There is no limit to the number of fulfillment orders that can be combined.
- A new master number is assigned to the combined invoice as well as to the fulfillment orders to link the new invoice to the multiple fulfillment orders.
- Orders for customers related in a National Accounts relationship will not be combined. The same customer needs to be used.

### Reviewing the document

- Once the single invoice has been created from the multiple fulfillment orders, you can view it in Sales Transaction Entry. All line items that were fulfilled on the two fulfillment orders are included on the one invoice.



Sales Transaction Entry

File Edit Tools View Options Additional Help sa Fabrikam, Inc. 5/14/2017

Save Actions

Type/Type ID: Invoice STDINV Date: 5/14/2017

Document No. STDINV2262 Batch ID: INVOICES

Customer ID: AARONFIT0001 Default Site ID: WAREHOUSE

Customer Name: Aaron Fitz Electrical Customer PO Number:

Ship To Address: WAREHOUSE 11403 45 St. South Currency ID: Z-US\$

Line Items by Order Entered

Item Number	D	U of M	Invoice Quantity	Unit Price	Extended Price
128 SDRAM	<input type="checkbox"/>	Each	1	\$135.20	\$135.20
100xLG	<input type="checkbox"/>	Each	1	\$119.95	\$119.95
24x IDE	<input type="checkbox"/>	Each	1	\$40.00	\$40.00
			0.00	\$0.00	\$0.00

Amount Received: \$0.00 Subtotal: \$295.15

Terms Discount Taken: \$0.00 Trade Discount: \$0.00

On Account: \$303.55 Freight: \$0.00

Comment ID:

Miscellaneous: \$0.00

Tax: \$8.40

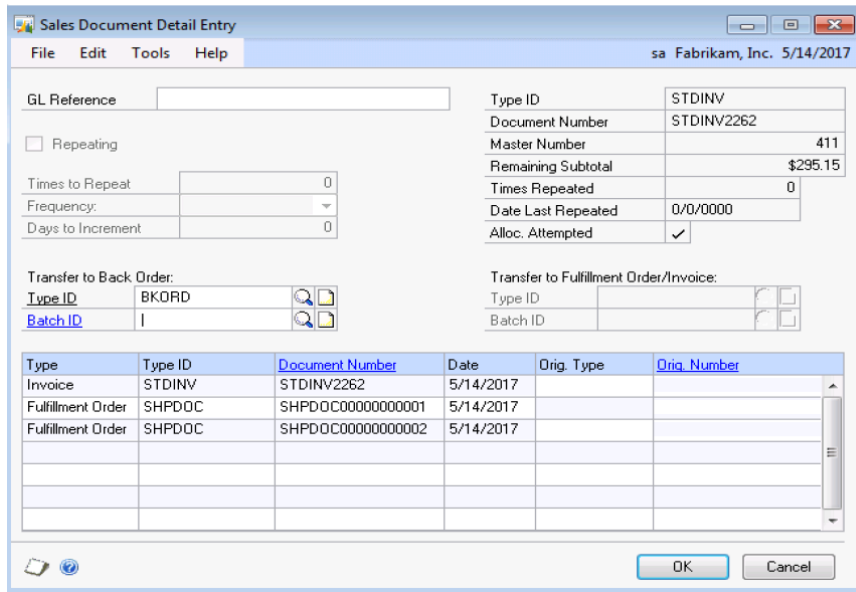
Total: \$303.55

Holds User-Defined Distributions Commissions

by Document No. Document Status



- When you click the expansion arrow on **Document No** to open **Sales Document Detail Entry**, you can see the fulfillment orders that created this invoice. A new Master Number has been assigned to the invoice and both fulfillment orders.

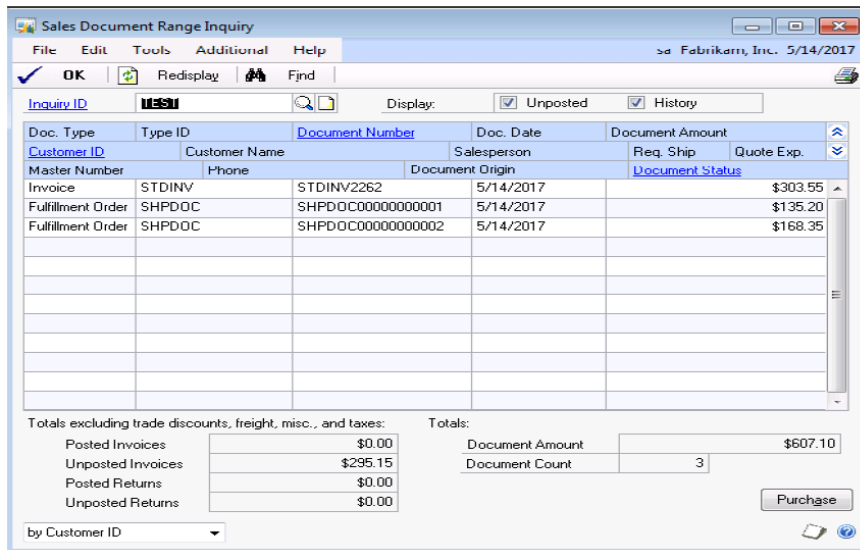


The screenshot shows the 'Sales Document Detail Entry' window for 'sa Fabrikam, Inc.' on 5/14/2017. The window is divided into several sections:

- GL Reference:** A text field for entering a GL reference.
- Repeating:** A checkbox and fields for 'Times to Repeat' (0), 'Frequency' (dropdown), and 'Days to Increment' (0).
- Transfer to Back Order:** Fields for 'Type ID' (BKORD) and 'Batch ID' (I).
- Transfer to Fulfillment Order/Invoice:** Fields for 'Type ID' and 'Batch ID'.
- Document Information:** A table with fields for Type ID, Document Number, Date, Orig. Type, and Orig. Number.
 

Type	Type ID	Document Number	Date	Orig. Type	Orig. Number
Invoice	STDINV	STDINV2262	5/14/2017		
Fulfillment Order	SHPDOC	SHPDOC000000000001	5/14/2017		
Fulfillment Order	SHPDOC	SHPDOC000000000002	5/14/2017		
- Summary:** Fields for 'Type ID' (STDINV), 'Document Number' (STDINV2262), 'Master Number' (411), 'Remaining Subtotal' (\$295.15), 'Times Repeated' (0), 'Date Last Repeated' (0/0/0000), and 'Alloc. Attempted' (checked).

- You can also use inquiry windows to review the new documents. For example, the **Sales Document Range Inquiry** will show you all three documents when you select the master number as the restriction.



The screenshot shows the 'Sales Document Range Inquiry' window for 'sa Fabrikam, Inc.' on 5/14/2017. The window displays a table of documents and a summary section.

**Document Table:**

Doc. Type	Type ID	Document Number	Doc. Date	Document Amount
Invoice	STDINV	STDINV2262	5/14/2017	\$303.55
Fulfillment Order	SHPDOC	SHPDOC000000000001	5/14/2017	\$135.20
Fulfillment Order	SHPDOC	SHPDOC000000000002	5/14/2017	\$168.35

**Totals:**

Totals excluding trade discounts, freight, misc., and taxes:		Totals:	
Posted Invoices	\$0.00	Document Amount	\$607.10
Unposted Invoices	\$295.15	Document Count	3
Posted Returns	\$0.00		
Unposted Returns	\$0.00		

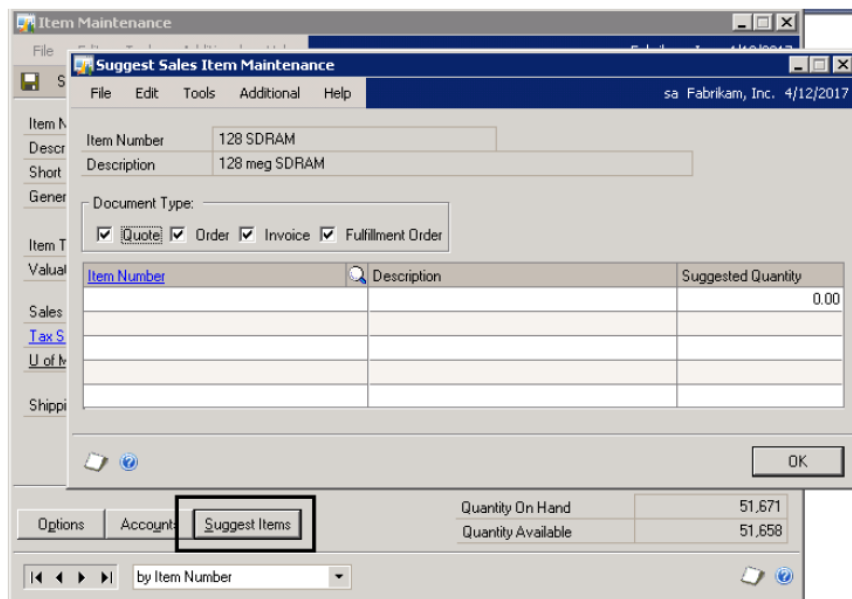
The window also includes a search bar with '12345' entered, a 'Display' section with 'Unposted' and 'History' checked, and a 'Purchase' button at the bottom right.

### Link Items for Suggested Sales

- Associate items that you typically sell together so that during Sales Transaction Entry you are prompted to include the second item on the document.
- A new Suggested Sales Item Maintenance window has been added so you can link complimentary items to a main item that you would typically sell together. This way when you sell the main item you will be prompted during Sales Transaction Entry to add the suggested items to the document as well.
- **Why this is cool!:** This cross selling or upsell functionality has the potential to increase sales and profitability.
- On previous versions, you would have to know what items you would typically sell together, and manually add them as necessary.

### New: Suggest Sales Item Maintenance window

- You access the Suggest Sales Item Maintenance window from the **Suggest Items** button in **Item Maintenance**. Here you enter the items that you want suggested with the item selected in **Item Maintenance**. You also enter the quantity that is typically sold of the item. For example if your main item is a dining room table, you may suggest 4 chairs and 1 centerpiece to be sold as companion items.



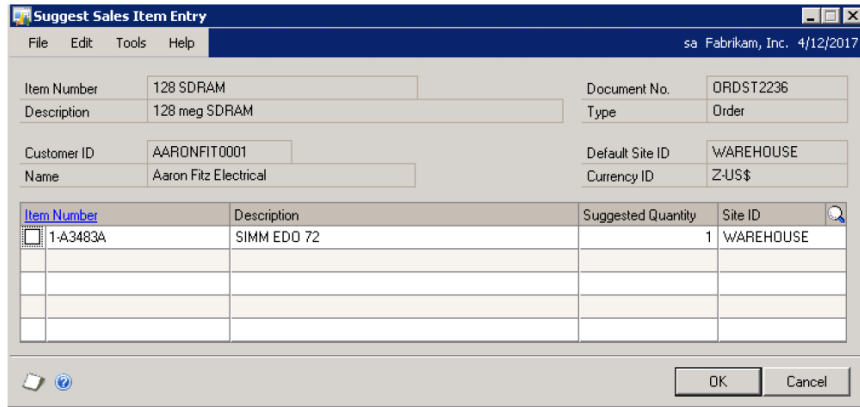
The screenshot displays the 'Suggest Sales Item Maintenance' window. The main form contains the following fields and options:

- Item Number:** 128 SDRAM
- Description:** 128 meg SDRAM
- Document Type:**  Quote,  Order,  Invoice,  Fulfillment Order
- Table:** A table with columns 'Item Number', 'Description', and 'Suggested Quantity'. The first row shows a suggested quantity of 0.00.
- Buttons:** 'Options', 'Account', 'Suggest Items' (highlighted with a red box), and 'OK'.
- Quantity On Hand:** 51,671
- Quantity Available:** 51,658

- If you have security access to Item Maintenance, you will also have access to Suggested Sales.
- The suggested items are stored in 2 new tables: Suggest Sales Item Setup Header (IV00400) and Suggest Sales Item Setup Line (IV00401).

**New: Suggest Sales Item Entry window**

- The Suggest Sales Item Entry window opens automatically when you tab off the line item of an inventory item that you have set up for suggested sales.



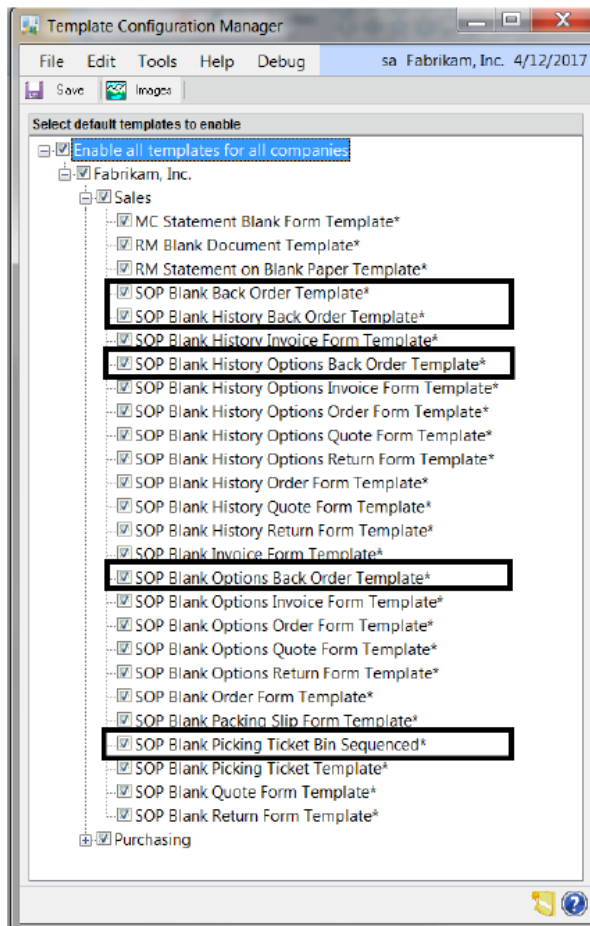
Item Number	Description	Suggested Quantity	Site ID
1-A3483A	SIMM EDO 72	1	WAREHOUSE

**New Word Templates**

- Five additional templates have been added, specifically to support backorders and picking tickets: SOP Blank Order Template, SOP Blank History Back Order Template, SOP Blank History Options Back Order Template, SOP Blank Options Back Order Template, and SOP Blank Picking Ticket Bin Sequenced.
- In Microsoft Dynamics GP 2010 and previous versions, you do not have the ability utilize Backorder and Picking Ticket templates without using the Template Generator (as of SP2 in Microsoft Dynamics GP 2010).

### Changes to the following areas of GP allow for the addition of these templates

- There are changes to Template Configuration Manager. The new templates appear in the Sales series.



- The functionality of how to modify and use templates is the same as the other, existing Sales Order Processing documents.

### Email Indicator

- An email indicator has been added in the Navigation Lists to specify which records have been sent via e-mail.
- In Microsoft Dynamics GP 2010, the ability to email Word Templates was added. However, there was no indication whether or not the e-mail had been sent.
- **Why this is cool!** Visually see whether or not an e-mail has been sent for a document with the new e-mail indicator icon.

**Changes to windows with addition of e-mail indicators**









- An icon is now displayed in the Navigation List when you successfully e-mail a Word template document.



- Changes to the Navigation lists will be noticed once a template has been emailed successfully.

<input type="checkbox"/>	4/12/2...	Quote	QTEST1024	Aaron Fitz Electrical	\$34,240.00
<input type="checkbox"/>	4/12/2...	Order	ORDST2230	Baker's Emporium L...	\$135.20
<input type="checkbox"/>	4/12/2...	Order	ORDST2231	Baker's Emporium L...	\$34,240.00
<input type="checkbox"/>	4/12/2...	Order	ORDST2232	Rosellen General H...	\$34,240.00
<input type="checkbox"/>	4/12/2...	Invoice	STDINV2261	Astor Suites	\$1,904.60
<input checked="" type="checkbox"/>	4/12/2...	Invoice	STDINV2262	Aaron Fitz Electrical	\$0.00
<input type="checkbox"/>	4/12/2...	Invoice	STDINV2263	Aaron Fitz Electrical	\$0.00

- Visual indicators appear in the list based of their priority ranking. The priority ranking is as follows:

Icon	Priority	Description
	Highest	The item has an error.
		The item is part of a workflow.
		The item is on hold.
		The item is inactive.
		The item has been voided.
		A record-level note is attached to the item.
		A general-purpose icon indicating an action should be performed for the item.
	Lowest	A general-purpose icon indicating additional information is available for the item.

- The new e-mail icon will be ranked after the void and before the record-level note.
- If a document has been mailed and then voided, you would only see the Void icon in the list.