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

Microsoft Dynamics GP 18.4

Application and System Features for Microsoft Dynamics GP

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Microsoft Dynamics GP Features

This course/module was created for Partners and Customers.

It will take approximately 120 minutes to train The Features in Microsoft Dynamics GP.

The features for Microsoft Dynamics GP are built around:
Ease of Use - Customer Requests - Extend Functionality

After this course/module you will be able to:

Understand the Microsoft Dynamics GP Features around 3 key areas:

Update Account Description using Mass Modify

Add Email to 1096 Form

Mask Social Security Number on W2

Add Autopost for Workflow Batches

Update Project or Contract ID

Default Inquiry Sort Options

Summary or Transaction post Receivables Cash Receipts to Bank Reconciliation

Scroll through Account Segments

Save Filter Settings for All in One Viewer

Payroll Transaction Entry Defaults

Delete Carbon Copy on Workflow Notification

Add GoTo option for SOP Inquiry

Workflow Approvers - Count

Paste from Excel for Payroll Transactions

Default 1099 as Single Feed

Display Employee name from Check in SafePay file

Microsoft Dynamics GP Lifecycle

🕐 The time to complete this lesson, including exercises, is 30 minutes.

🎯 After this lesson you will be able to:

- Understand the Lifecycle and what is Modern Lifecycle

Lifecyle for Microsoft Dynamics GP

Understand the Lifecycle Policies for Dynamics GP:

Software lifecycle policy - Dynamics GP | Microsoft Docs

The exciting future of Microsoft Dynamics GP - Lifecycle Update

What Does Modern Lifecycle mean for Dynamics GP?
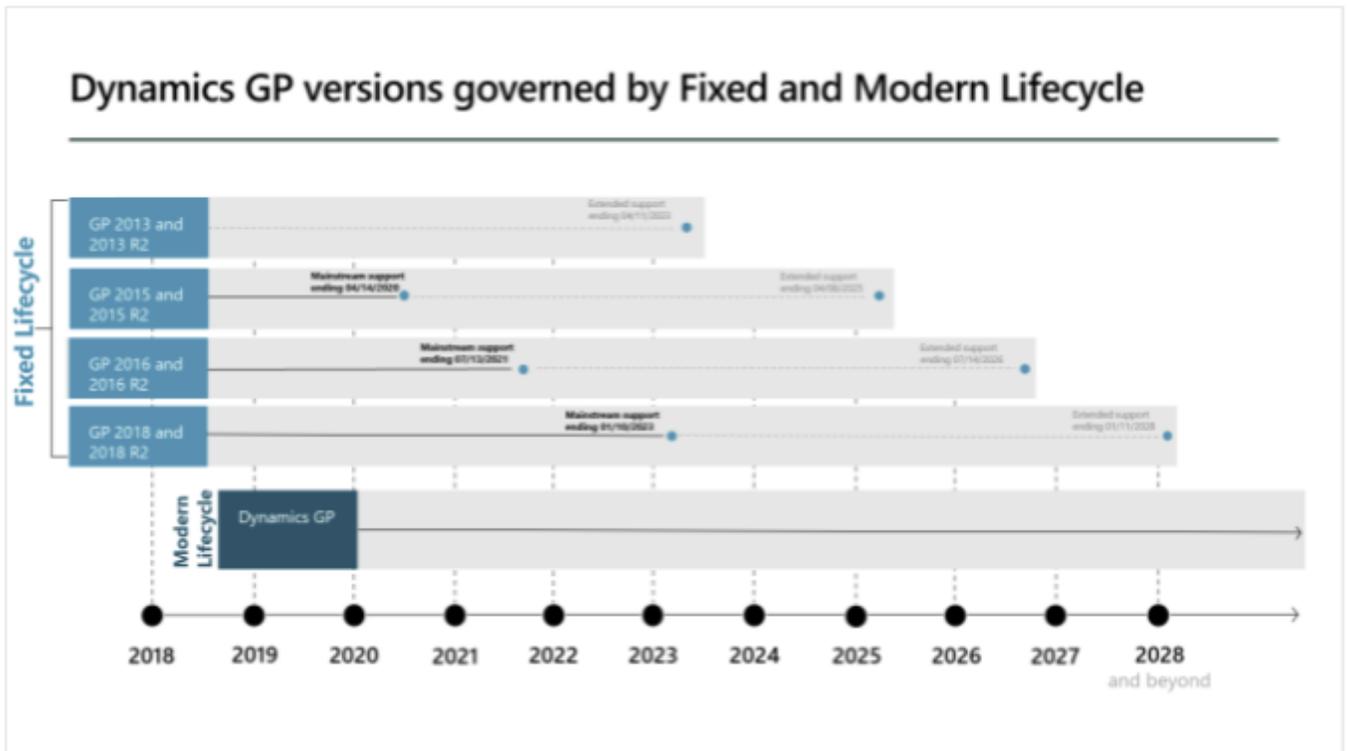
Financials Features

	The time to complete this lesson, including exercises, is 30 minutes.

	After this lesson you will be able to: • Familiarize yourself with the features related to Financial Modules.

Update account descriptions using Mass Modify

We have added a new option to the Mass Modify Chart of Accounts window which will allow you to update the existing account descriptions to match the segment descriptions that make up that account. Microsoft Dynamics GP will take the description for each segment from the Segment Setup window, and build a string to update your new account description. This modification can be processed on a single account or a range of accounts.

For example, if you have 3 segments and your account looks as follows 000-1100-00. The first segment represents your division, the second segment represents your accounts, and third segment represents your departments.

The current description of the account in the Account Maintenance window is Cash Account for Sales, but I want to update it to more specifically describe which division, account and department it is used for based on its segment's descriptions.

You can see each segment's description by going to the Microsoft Dynamics GP menu, point to Tools, point to Setup, point to Financial, and click on Segment.

	Note: It would be recommended to try this in a TEST company first to verify the desired result of the mass modify update as this process cannot be reversed once completed. You would have to restore from a backup.

Account Segment Setup - T18R5 (sa)

Save   Clear   Delete   File   Print   Tools   Help   Add
                                                                  Note
          Actions   File   Tools   Help

Segment ID   Division

Number   ◀ 000
Description   Two, Inc|

Account Segment Setup - T18R5 (sa)

Save   Clear   Delete   File   Print   Tools   Help   Add
                                                                  Note
          Actions   File   Tools   Help

Segment ID   Account

Number   ◀ 1100
Description   Cash|

Account Segment Setup - T18R5 (sa)

Save   Clear   Delete   File   Print   Tools   Help   Add
                                                                  Note
          Actions   File   Tools   Help

Segment ID   Department

Number   ◀ 00
Description   Sales|

> **(i)** **Note:** If you make a change to the description, you do not have to roll it down from this window, you can use the new Mass Modify feature to do this for you and update the account description with all segment descriptions at once.

In the chart below you will see each segment and its respective description for the example account. This will be used to create my new account description.

	Segment 1	**Segment 2**	**Segment 3**
Segment ID	Division	Account	Department
Segment Number	000	1100	00
Segment Descriptions	Two, Inc	Cash	Sales

I can now run the Mass modify Chart of Accounts tool to update my account descriptions by going to the Cards menu, point to Financial, and click on Mass Modify.

In this window you will see a new drop down for Update Account Description.
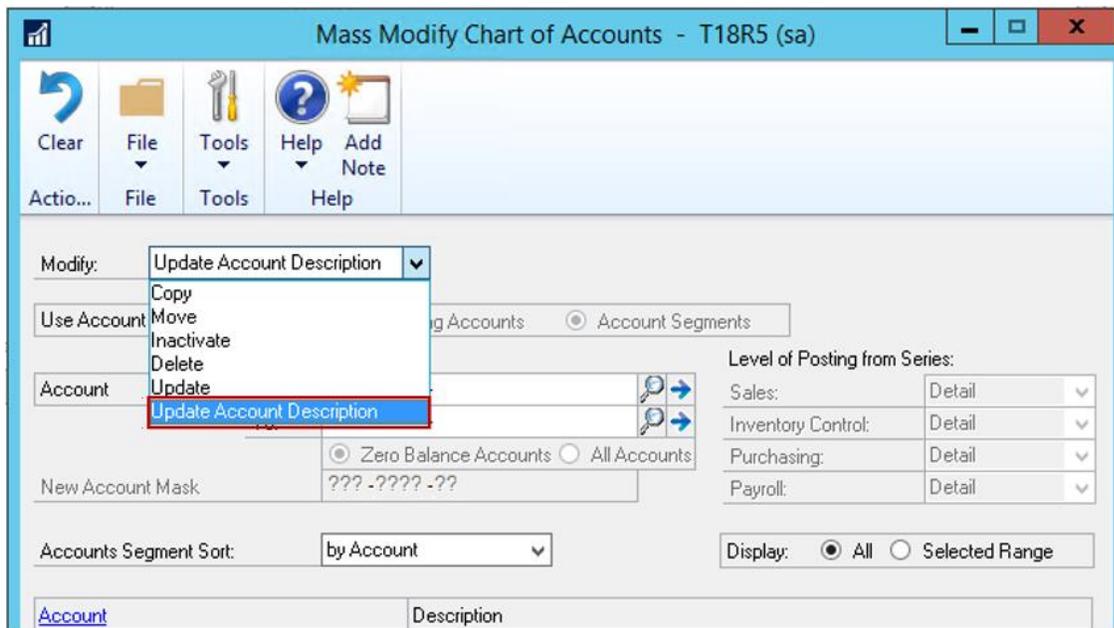
After selecting this new option, you can either choose to update all accounts or enter a To and From range. In this example we only want to update the account description on account 000-1100-00.
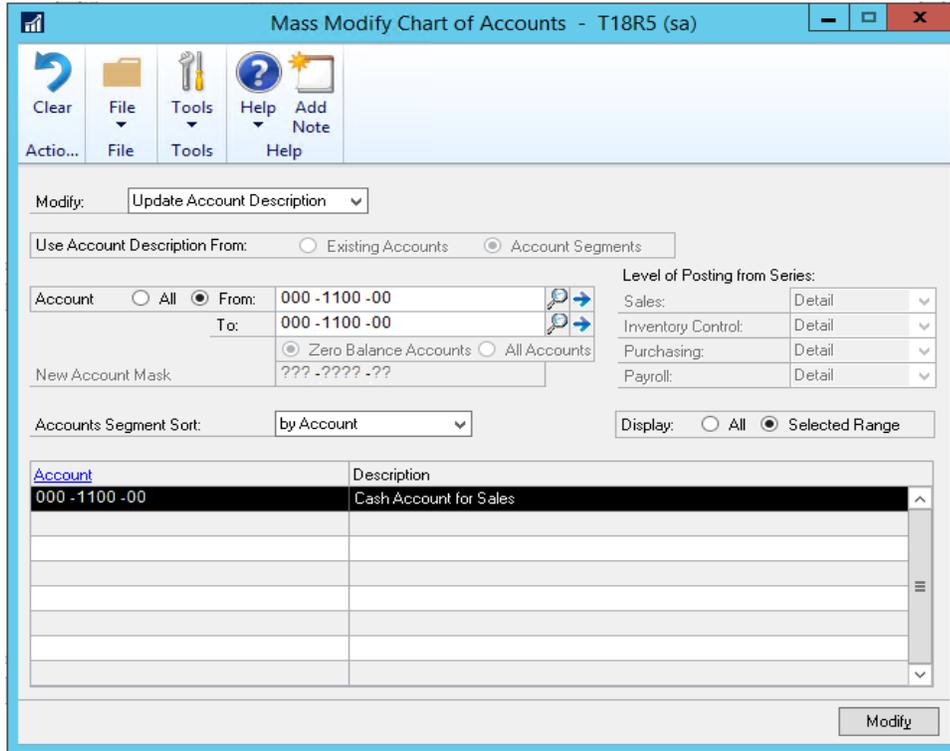
After clicking the Modify button the new account description will now match the 3 segment descriptions and appear as follows: Two, Inc-Cash-Sales
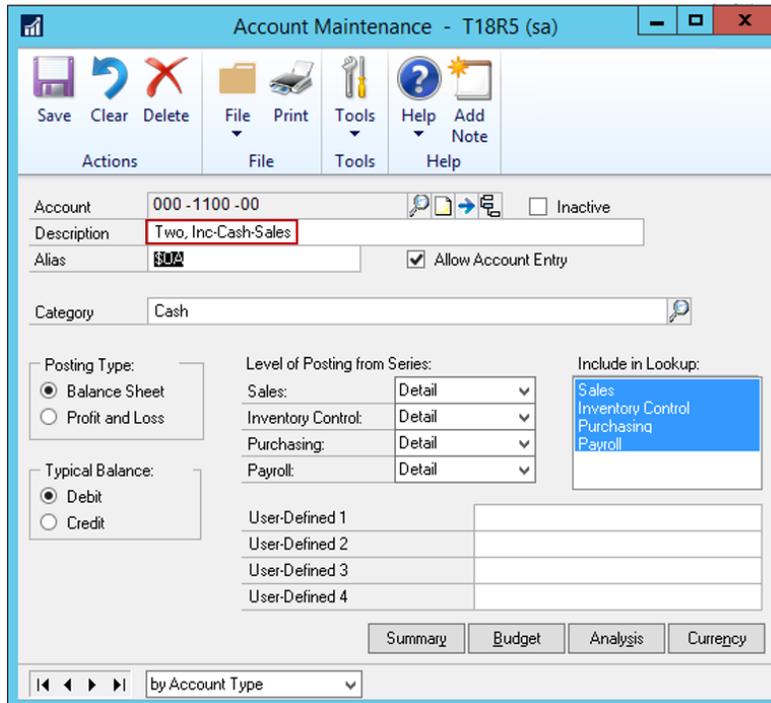
Note: It is very important to test this feature prior to running the process. Especially in the case where your combined segment descriptions will be longer than 50 characters, as the data will be truncated evenly per segment to fit within the 50 character combined limit.

There is a warning to you prior to running this process to alert you of this mass modify change.
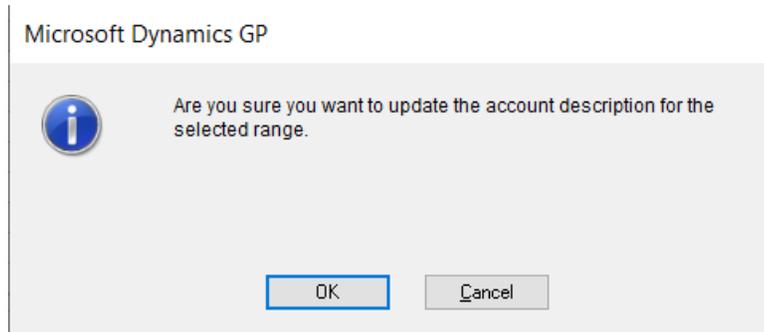
In my example above, I have 3 segments so if my segment descriptions combined were greater than 50, this process would truncate each segment at 16 characters after compensating for segment separators (dashes).

(50 minus 2 separators = 48 divided by 3 segments) = 16 per segment

1234567890123456-1234567890123456-1234567890123456

Summary Post Accounts Receivables Cash Receipt through Bank Reconciliation

Many customers really appreciate the 'Automatically post cash receipt deposits' option which automatically deposits receivables cash receipts into Bank Reconciliation when posting a receivables batch with cash payments saving you extra time in Bank Reconciliation.

In past versions of Dynamics GP, this option deposited receivables cash payment into Bank Reconciliation as a summary deposit for batches or as individual deposits per payment. It just depended upon which version of Dynamics GP you were on. We have had many requests from customers to give users the ability to select how customer cash receipts should be deposited to Bank Reconciliation for receivables batches.

With Microsoft Dynamics GP 18.4, you can select how you want to deposit customer payments for each receivables batch individually.

In the Receivables Batch Entry window, a new field called 'Post Deposit' has been added. You can then select if you want customer cash receipts deposited to Bank Reconciliation as the following:

'Summary' (one deposit includes all cash receipts for that batch)

or

'Transaction' (multiple deposits will be created, one for each cash receipt in the batch). With this new feature, one receivables batch can post in Summary, while a different one can post at the Transaction level. So, for example, you can select to deposit customer wire payments as one summary deposit for one batch, while depositing individual payment transaction in another batch for customer check payments.
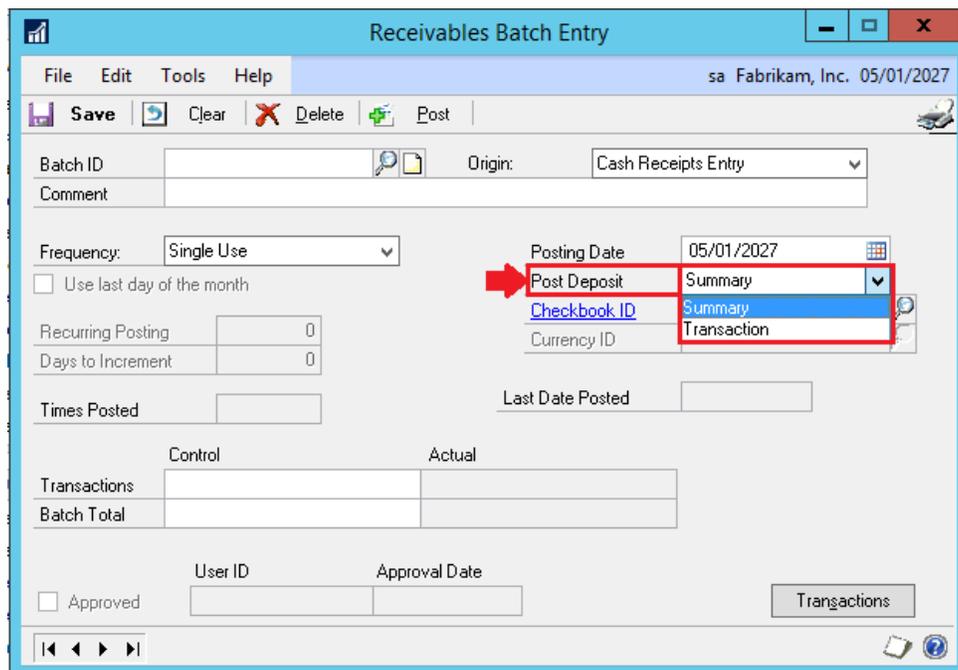
The first Bank Deposit Posting Journal was from a receivables batch which had 'Summary' option selected for the Post Deposit field. As you can see, one bank reconciliation deposit was created, which contains multiple customer payments. The second Bank Deposit Posting Journal was from a receivables batch with 'Transaction' selected. Here, each cash payment is its own deposit transaction in Bank Reconciliation.

In order to see the 'Post Deposit' field in the Receivables Batch Entry window, this option must be marked in the Company Setup Options window. To mark this, go to Microsoft Dynamics GP on the menu bar and select Tools. Then select Setup and Company, then Company again. Once the Company Setup window opens, click the Options button. Now scroll down until you see the option, 'Automatically post cash receipt deposits'. You will want to mark this to enable the 'Post Deposit' field.
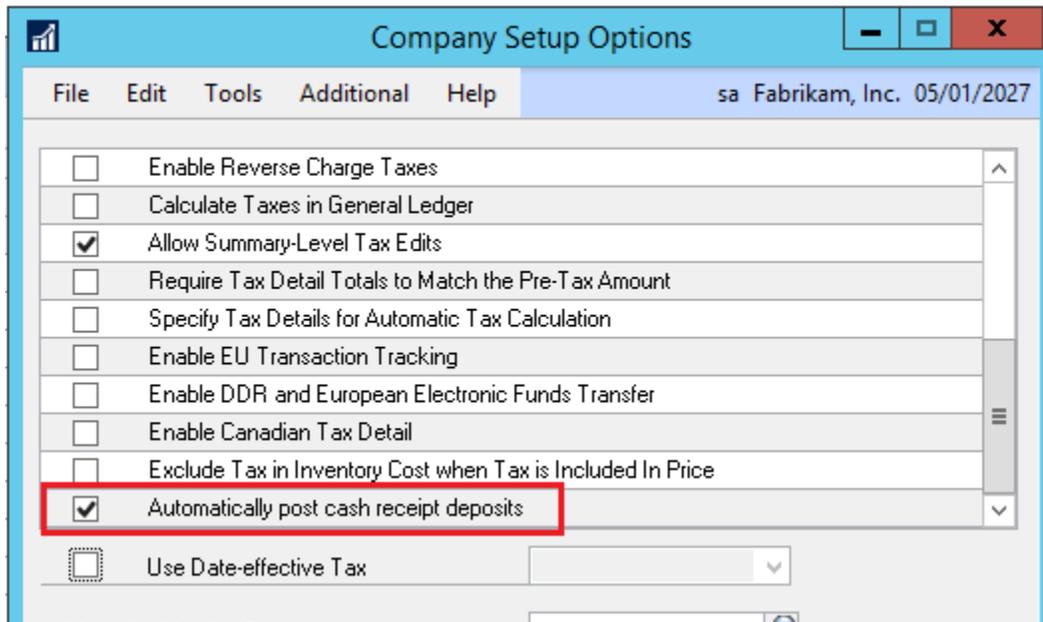
Note: If you are posting a Sales Order Processing batch which contains customer cash payments, those payments will automatically be deposited to Bank Reconciliation as a 'Summary' deposit. There is no 'Post Deposit' field for Sales Order Processing batches.

Scroll through Account Segments

In the Account Segment Setup window, there are now scrolling buttons on the number field. Go to the Financial Series Setup and select Segment. The scrolling buttons on the Number field allows users the ability to quickly scroll within the segment numbers which have currently been setup once a Segment ID has been selected.

If the user changes the value in the Description field of an existing number and then selects the scrolling buttons, the user will be prompted with a message that a change has been made and asks if the user wants to save this change.

Once the user reaches the last segment number, clicking the right scrolling button again will do nothing but chime at the user. The left scrolling button does the same if you select it on the first segment number.
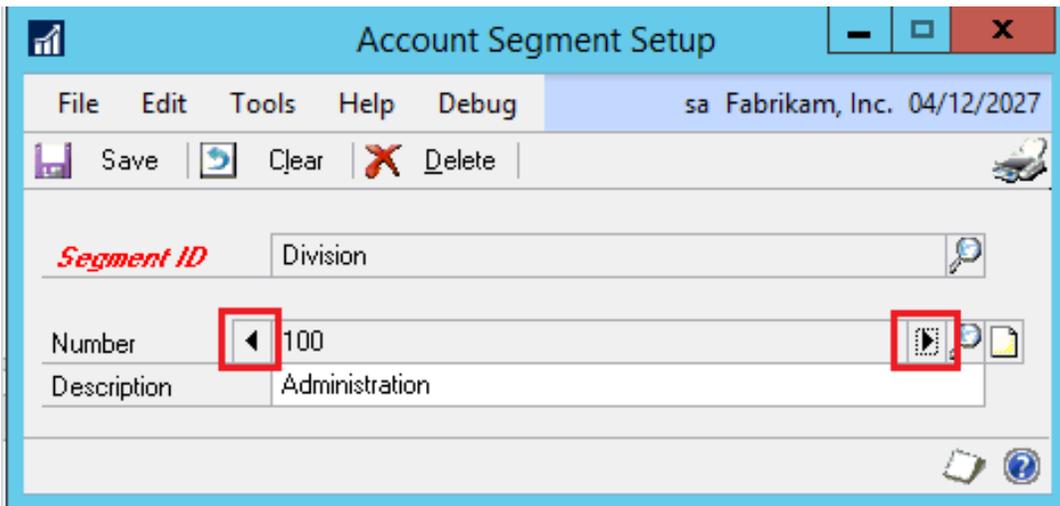
Payables 1099 Default to Single Feed

Today, when customers print 1099 forms, they most often print a single sheet form. Now, when printing 1099's, the form type will default to 'Single Feed' instead of 'Continuous', saving the user time and hassle from printing the incorrect 1099 form layout. This default setting can be found by going into Purchasing Routines and selecting Print 1099.
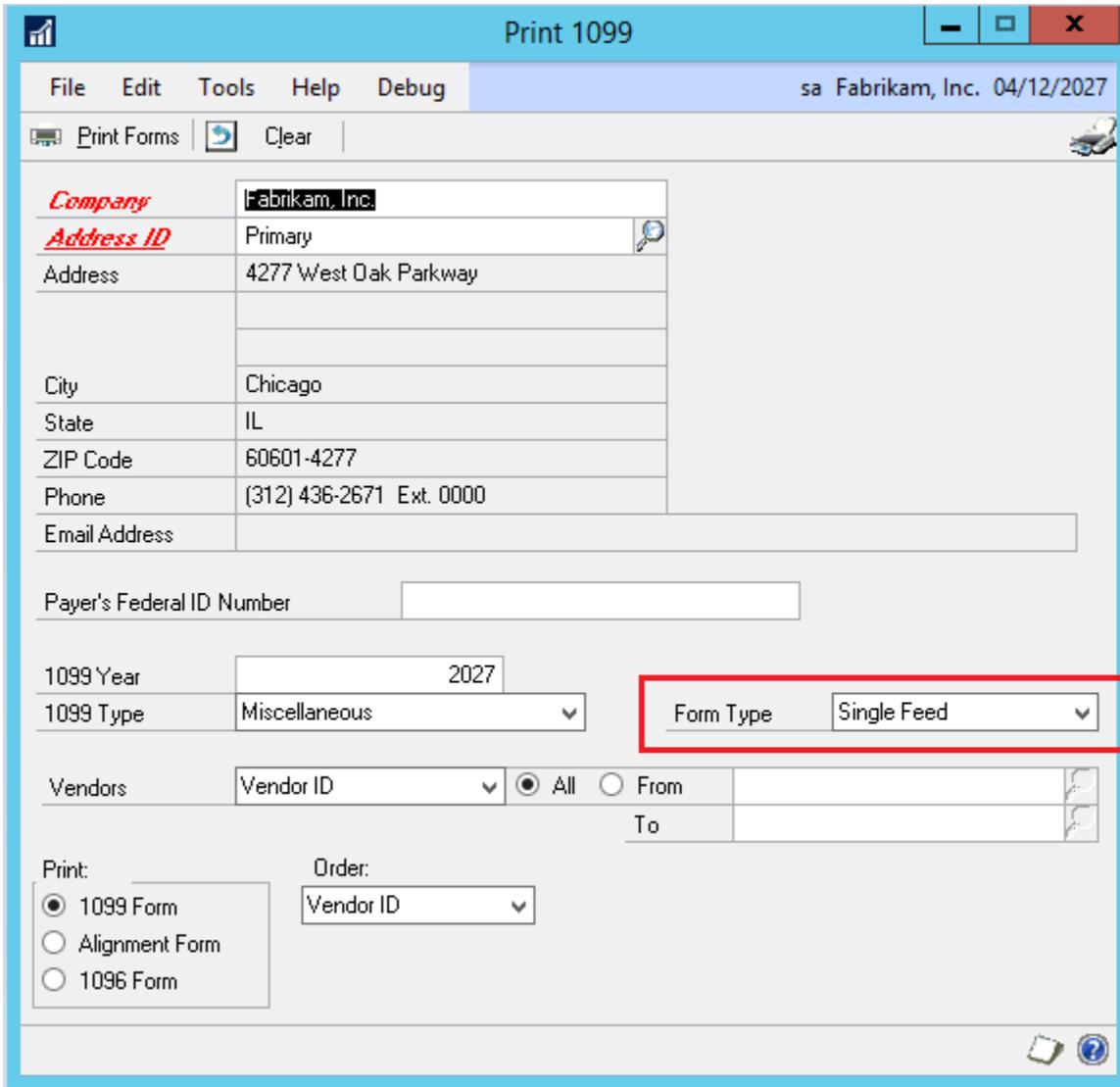
Payables 1096 form print email address

The Payables 1096 Form will print your company's email address for the Address ID which is selected in the Print 1099 window. Also, that email address will be displayed on the Print 1099 window. You can locate the 1096 Form by going to Purchasing Routines and selecting Print 1099.

On the IRS instructions it is recommended to include this address information.

If you have not yet entered an email address for your company's Address ID in the Company Setup, these fields will be blank and you will need to enter it if you want it to display and print.

To enter your company's email address, go to Microsoft Dynamics GP from the menu bar and clicking Tools, select Setup, Company and Company again.

Once the Company Setup window opens, make sure the correct Address ID is selected on the window and click the Internet Address icon next to it. After the Internet Information window opens, enter in the correct email address into the 'To' field making sure you have the correct Address ID as well as 'Company' option selected in the Select Information for field.

If you need to setup email addresses for multiple company Address ID's, can click the 'Address' button at the bottom of the Company Setup window to open the Company Address Setup window where you can select a different Address ID.
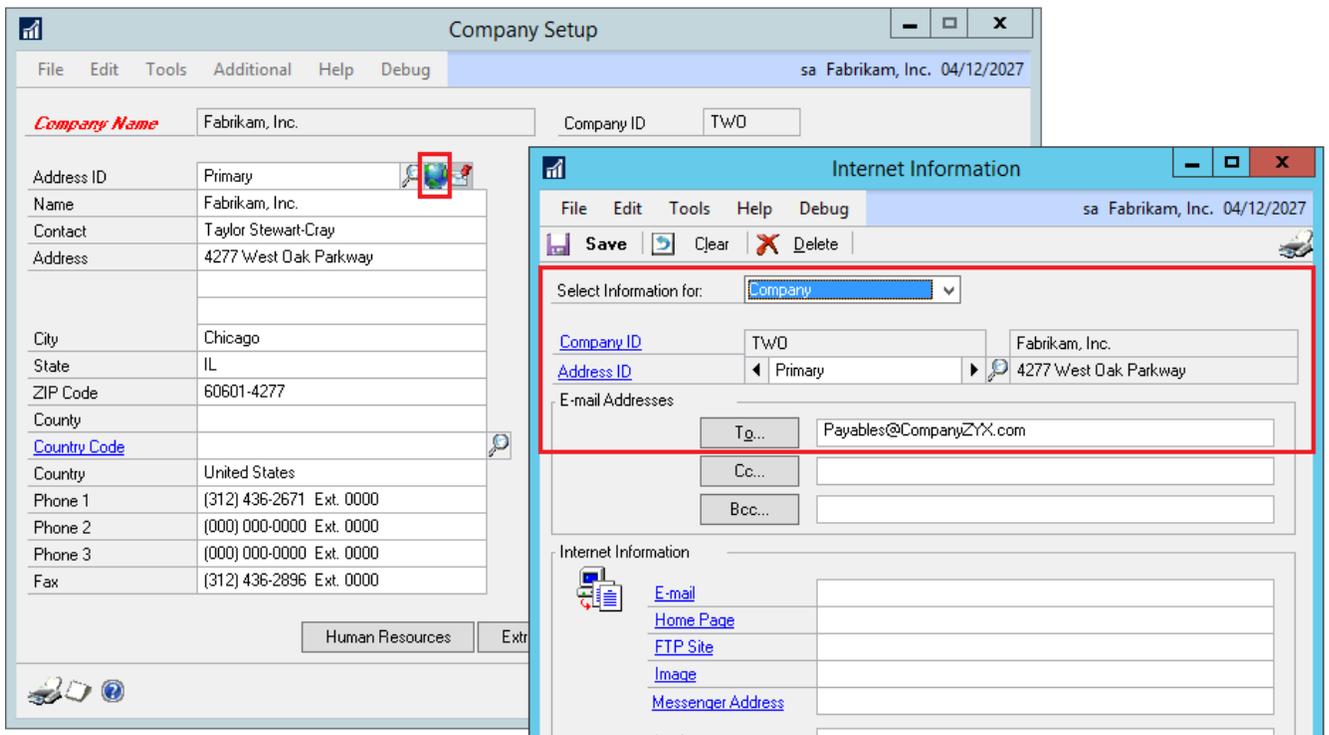
Default Inquiry sort Options (AP, AR, BR)

We all know how much users love the sorting option for Ascending/Descending in some of the inquiry windows. When users go into the Inquiry windows with these sorting options, the first thing they most often do is change the sort type to be Document Number or Document Date and select descending, as they want to display the most recent documents. Now, these sort option settings can be saved as default, saving the user a lot of time when trying to locate transactions.

In addition to the sort options being saved, the inquiry windows Include Type (Work/Open/History) and window size can also be saved for default. To set the default inquiry window preferences, the user needs to select the desired sort options, include type, and desired window size. Once these have been selected, the user will click the View button on the inquiry window and select the Save Windows Preferences option.
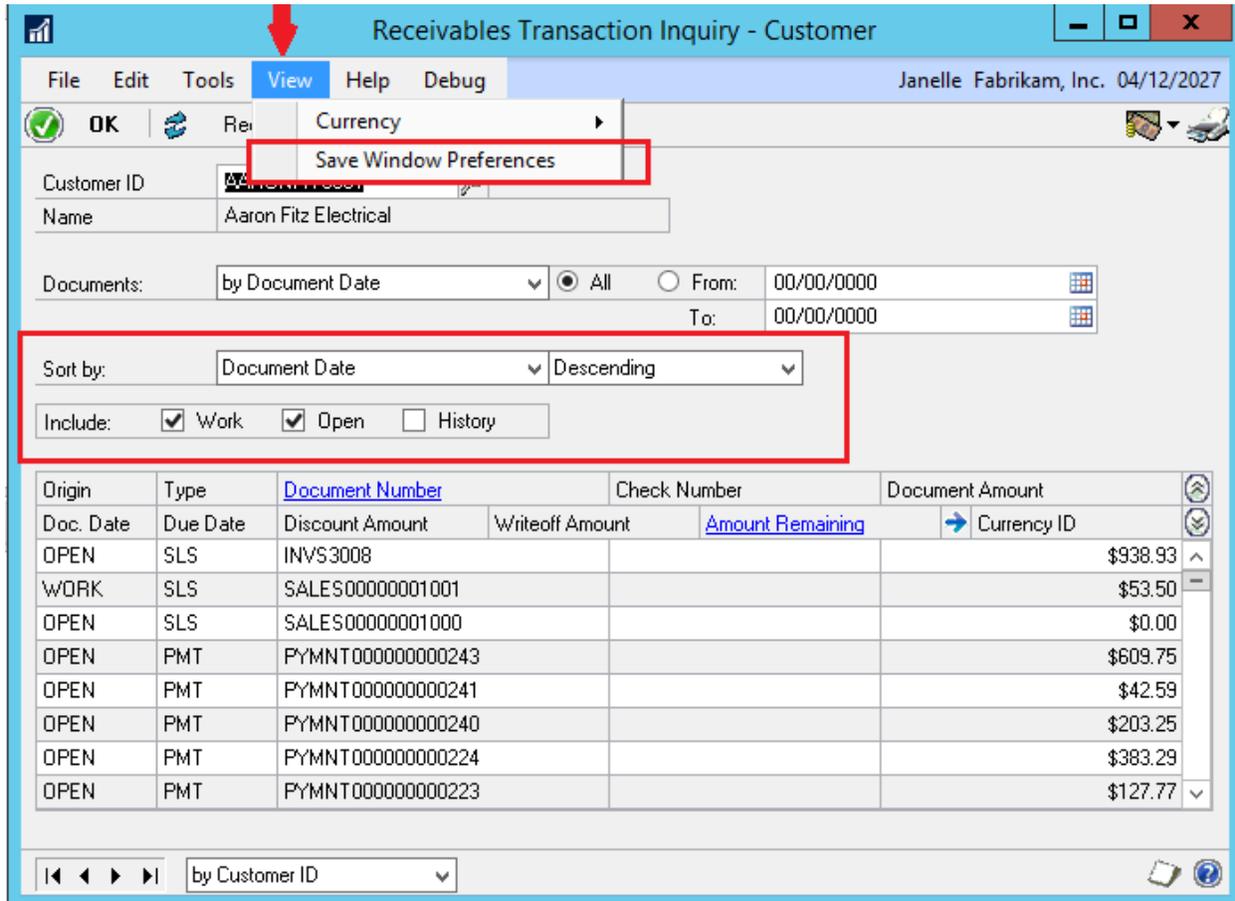
These saved default settings are per individual user, individual inquiry window and are system wide, so the saved setting will default for any company that user logs into. If the user wants a different default view,

they simply set their desired window preferences (sort option, include type and window size), click the View button and select the Save Windows Preferences option again to save the new desired preference. The next time the user opens that window, their new default setting will display.

Sort options have also been added to the Checkbook Register Inquiry and Checkbook Balance Inquiry window.
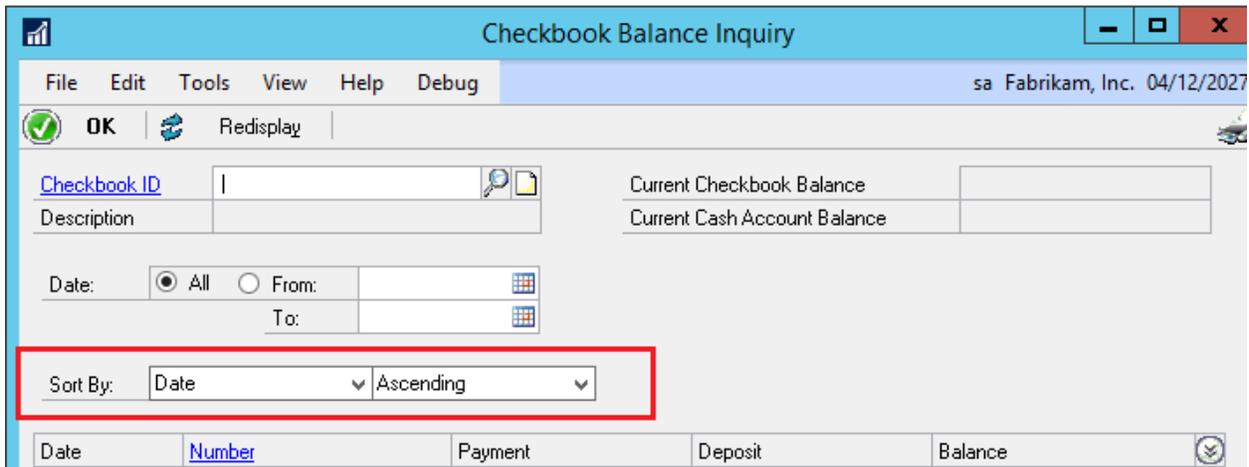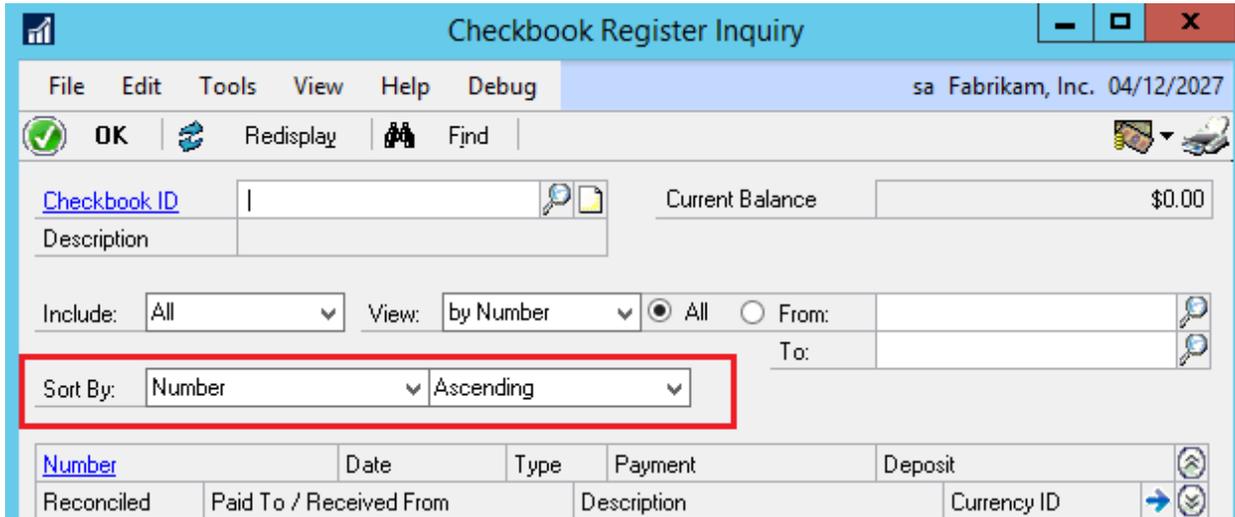
These Default Inquiry options can be found in the following inquiry windows:

Receivables Transaction Inquiry - Customer (Inquiry > Sales > Transaction by Customer)

Receivables Transaction Inquiry - Document (Inquiry > Sales > Transaction by Document)

Payables Transaction Inquiry - Vendor (Inquiry > Purchasing > Transaction by Vendor)

Payables Transaction Inquiry - Document (Inquiry > Purchasing > Transaction by Document)

Checkbook Register Inquiry (Inquiry > Financial > Checkbook Register)

Checkbook Balance Inquiry (Inquiry > Financial > Checkbook Balance)

Sales Order Processing Item Inquiry (Inquiry > Sales > Sales Items)

Note: This feature is not controlled nor saved in the Dex.ini on a local machine. It is stored in a Dynamics / System table listed below,

Table Changes:

New Table Physical Name	New Table Technical Name
SY01407	syWindowDefaults

Distribution Features

🕐	The time to complete this lesson, including exercises, is 15 minutes.

🎯	After this lesson you will be able to: • Mass Modify Project Information

Update Project and Contract Numbers

We have added a new window call the Project Code Modifier which will enable you to modify Project Numbers, Project IDs, Contract Numbers, Contract IDs, and Cost Categories. With this new feature you can change fields listed above for existing Contracts, Projects, and Cost Categories in Microsoft Dynamics GP to a new value.

ⓘ	**Note:** This feature does not combine existing records into one record, it modifies existing records to have a new number or id that does not already exist in the system.

To access this window, go to the Microsoft Dynamics GP menu, point to Tools, point to Utilities, point to Project, and click on Project Code Modifier. In this window you can use the Code Type drop down to select the code that you would like to modify, then use the Old Code lookup to select and existing code and enter the New Code value that you want to change it to.
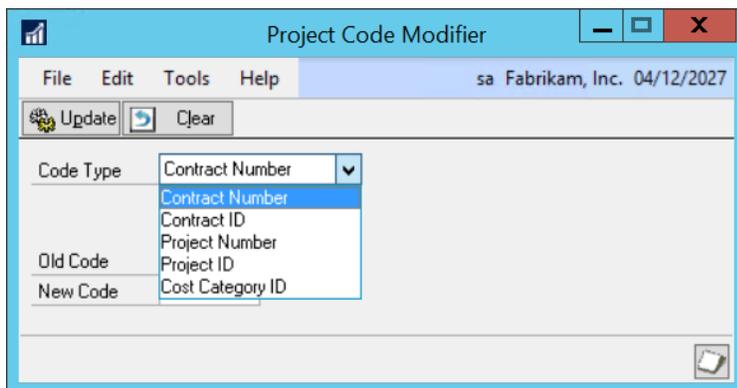
A new Code Modification report will print when the process completes that will document which SQL tables were updated during the process for your reference.

> **Note:** It would be recommended to do this first in a TEST company to verify all information changes as you would expect as this change cannot be reversed if any errors arise.

> **Note:** If you have customizations or 3rd party products, you want to be very careful with this feature to make sure all data for those other product tables are updated as expected. As long as they used the exact same column names as the Microsoft Dynamics GP tables that are being updated, this should work without issue. If you are unsure of compatibility or which areas and tables to check for your customization or 3rd party product please reach out to them for clarification.

Save Filter Settings for All-In-One

In the All-in-One View windows, column filter settings are automatically saved so now when a user closes and logs back into Microsoft Dynamics GP the last column filters, they had set will default. These filters are saved for the Sales, Purchasing and Inventory All-in-One View windows.

Once the All-in-One View window opens, click the filter icon on any of the columns to open the Filter window. Now, select and/or enter your filter parameters for that specific column. Columns may have different filter setting to choose from based on the type of column data. Once you close that window and exit out of Microsoft Dynamics GP these filter settings automatically save so the next time that user logs in, they do not have to reselect filters.

This is saved in the CO00201 table in the company database.
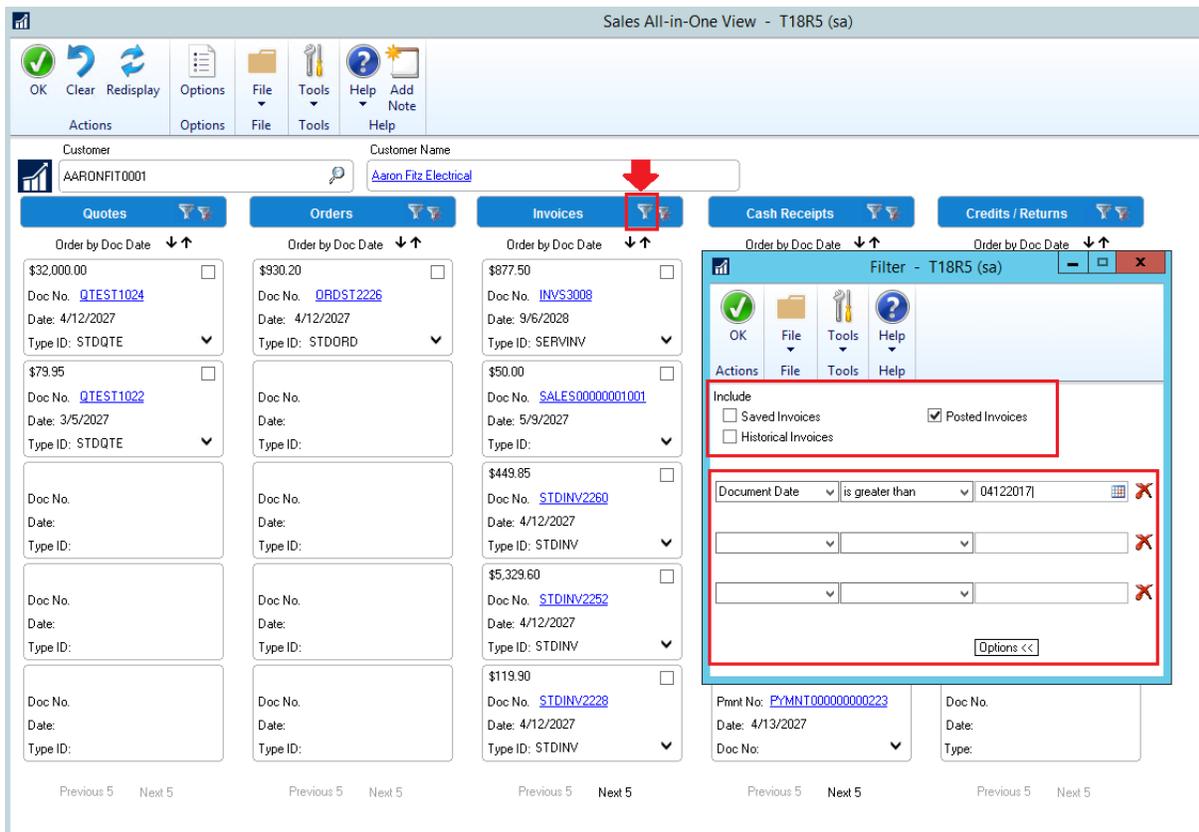
The filter setting is based on each individual user login and each individual master record (Customer, Vendor and Item). For example, if USER1 has set Sales All-in-One View filters for customer AARONFIT0001, those same saved filters will not automatically be assign to customer ADAMPARK0001. To get the same saved filters for ADAMPARK0001, USER1 would need to set them up for that customer. If USER2 now goes into the Sales All-in-One view for AARONFIT0001, that user would need to select their own filters for that customer.

Use GOTO from SOP Inquiry to SOP Trx Entry

A' Go To' option has been added to the Sales Order Processing Document Inquiry and the Sales Document Range Inquiry windows to view a document in either the Sales Transaction Inquiry Zoom or Sales Transaction Entry window. To get to these windows, go under Sales Inquiry and select either Sales Document or Sales Range Inquiry.
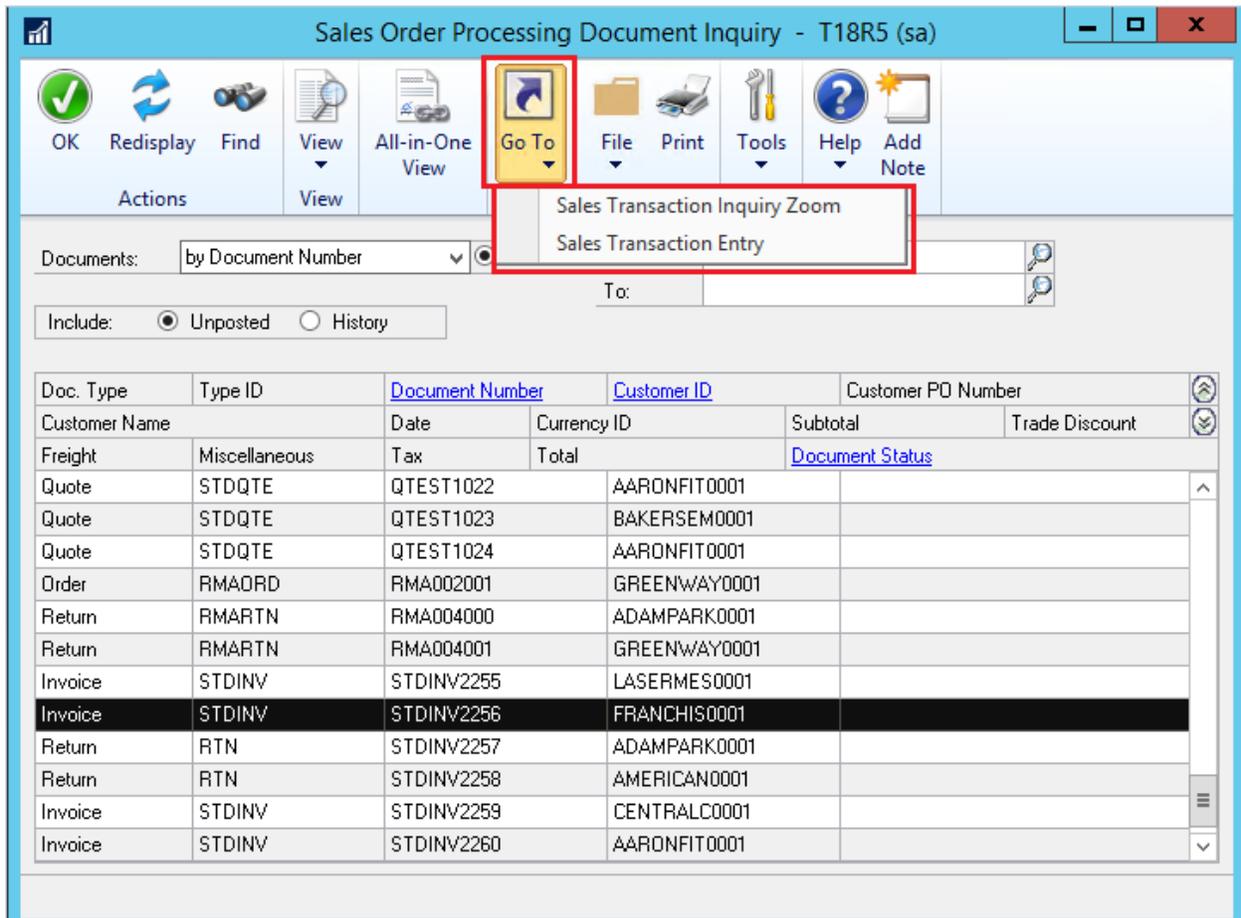
Once the Sales Order Processing Document Inquiry or Sales Document Range Inquiry windows are open, the user must first select a document. Then click the 'Go To' button and select what window they want to 'Go To' to view the document. The Sales Transaction Inquiry Zoom window is available for history documents only, but both 'Go To' window options are available for unposted documents

Note: If the user is currently working on an unsaved or unposted transaction in the Sales Transaction Entry window, when the Sales Transaction Entry 'Go To' is selected, they will be prompted to either save, delete or cancel before the selected document can be viewed.

Note: When a user does not have security to either the Sales Transaction Entry or Sales Transaction Inquiry Zoom window, they will receive the message, 'You don't have security privileges to open this window. Contact your administrator for assistance.'

Human Resource & Payroll

The time to complete this lesson, including exercises, is 30 minutes.

After this lesson you will be able to:

- Mask SSN on the W2
- Copy and paste payroll transactions from Excel

SafePay - employee name from check

When generating the SafePay file, the Payee Name field will pull the employees name printed on the actual payroll check rather than pulling the employees name from the employee master record fields. This change will make the file more accurate between the actual payroll check and the information provided to the bank, ultimately helping to minimize the risk of fraudulent activity.

Masking Employee Social Security Number on W2

For employee copies of the W-2, we have a new option to partially mask the SSN when W-2s are printed. A new checkbox labeled as Partial Mask SSN will be available in the Print W-2 Forms window. This option will also partially make the 1095-C reports for ACA that are printed when it is selected.

The masking will use following format which will only keep the last 4 digits: XXX-XX-1234

To access this new option, go to the Microsoft Dynamics GP menu, point to Tools, point to Routines, point to Payroll, and click on Print W-2s.

This option is only available when you choose to print the form
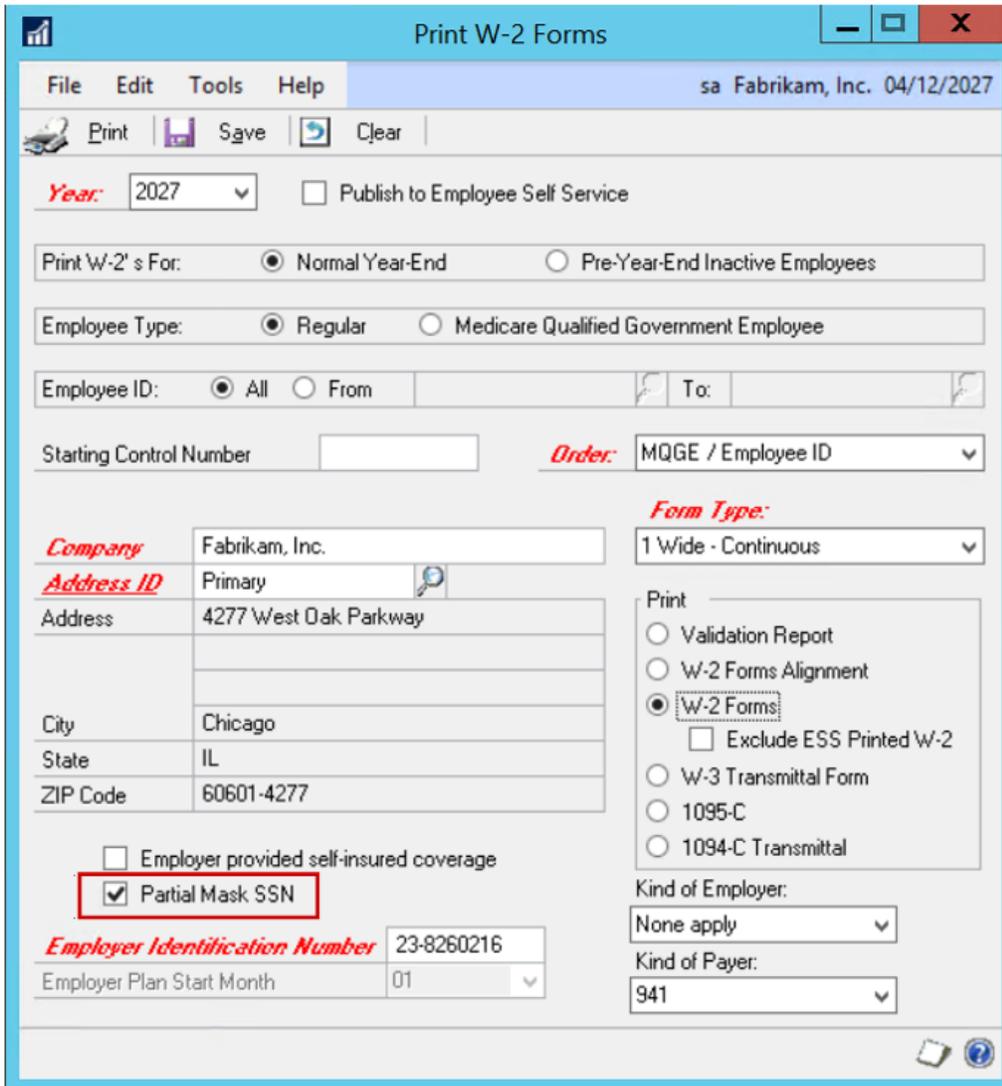
In my example below I have printed the W-2 One-Wide Forms with box, and you will notice that the SSN has been partially masked.

The partial masking will function on all 5 of our W-2 Form Types, as well as the 1095-C for ACA.

> **Note:** All W-2s printed from the Employee Self Service Module, will automatically be partially masked, this cannot be toggled.

Copy and Paste Payroll Transactions from Excel

In Microsoft Dynamics GP you can now copy and paste payroll transactions from Excel straight into the Payroll Transaction Entry window similar to our General Ledger and Payables Transactions Copy and Paste features.

This is a great feature which makes it easier for those who may have an external time keeping system that can export data to Excel in the required format for pasting or for those who might currently be using Integration Manager to enter a larger payroll transaction.

Overview

A new Paste button will be visible in the default (core) Payroll Transaction Entry window. To view this window go to the Transactions menu, point to Payroll, and click on Transaction Entry.
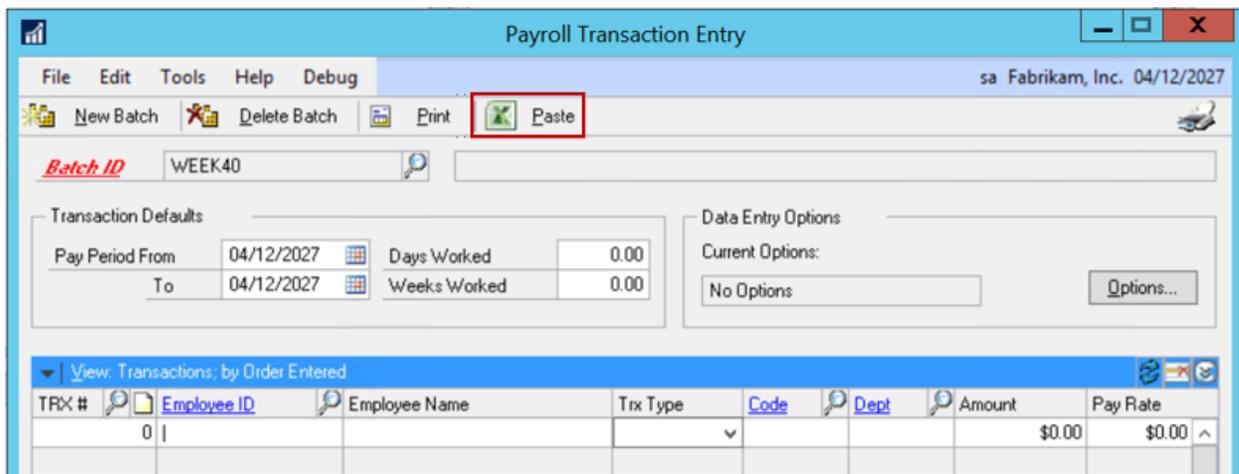
After copying the data from the Excel spreadsheet, click the Paste Button in the Payroll Transaction Entry window you will begin to see the Validation start to occur in the lower left the window. If there are no Validation errors, then this status will switch to Processing.

If any Validation errors or warnings occur, the UPR Transaction Paste Validation Report will print and display the errors that it has identified, and no data will Pasted. The validation report will not print if there are no errors or warnings.

Warning messages such as 'WARNING - The pay rate amount cannot be edited.' will appear on the Payroll Transactions Paste Validation Report but will not prevent the data from pasting. Default pay rates would be used in this situation instead of the rates on the Excel spreadsheet.   See the Requirements section for more information on defaults.

Requirements

User Security must be set to the Microsoft Dynamics GP version of the Payroll Transaction Entry window.
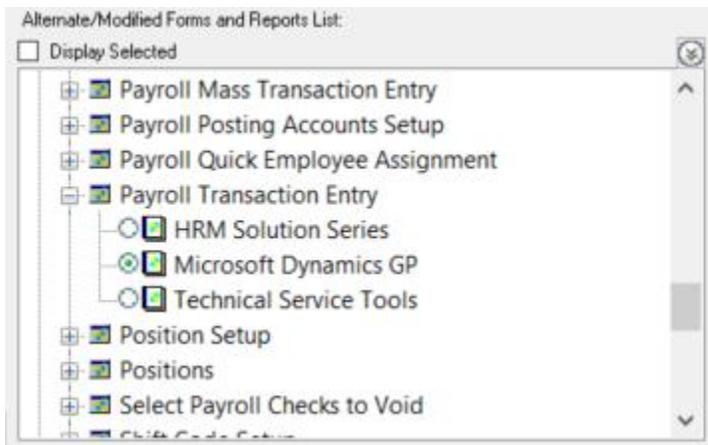
A Batch ID must be entered in the Payroll Transaction Entry window before you can paste information.

The Batch ID selected must not have existing transactions in it. It must have 0 transaction lines entered on it in order for the Paste button to become available. You cannot paste more data into a Batch ID that has existing transaction lines.
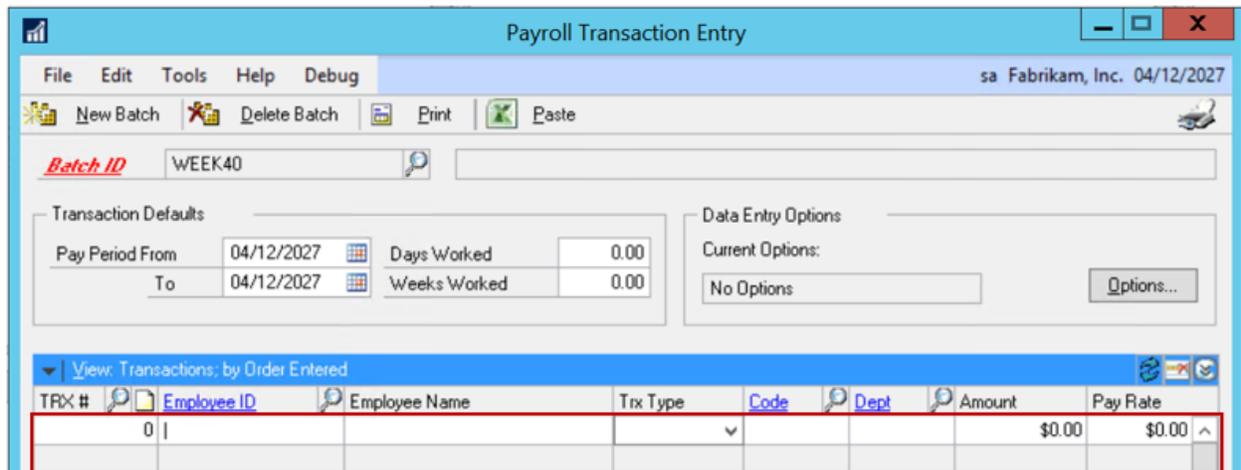
The Excel file that you are pasting from must be formatted properly. Please see the formatting section below for more information.

When copying data from Excel, do not copy the column headers, only select and copy the specific rows and columns that you desire to paste.

	A	B	C	D	E	F	G	H	I	J
1	Employee	Trx Type	Code	Amount	Pay Rate	Department	Position	Date From	Date To	
2	ACKE0001	Pay Code	HOUR	40	45.25	SPTS	CSP	04/12/2027	04/12/2027	
3	ACKE0001	Pay Code	SALY	4		SPTS	CSP	04/12/2027	04/12/2027	
4	BARR0001	Pay Code	HOUR	40	33.47	SPTS	CSP	04/12/2027	04/12/2027	
5	BARB0001	Pay Code	HOUR	80	20	SPTS	CSP	04/12/2027	04/12/2027	
6	ACKE0001	Pay Code	HOUR	80	15	SPTS	CSP	04/12/2027	04/12/2027	
7	ACKE0001	Pay Code	SALY	4		SPTS	CSP	04/12/2027	04/12/2027	

In order to paste in pay rates, the option for Display Pay Rate on Trx must be marked in Payroll Setup. To view this window go to the Microsoft Dynamics GP menu, point to Tools, point to Setup, Point to Payroll, and click on Payroll. Then click the Options button.   If the Display Pay Rate on Trx option is not marked default pay rates will be used and a warning will appear on the UPR Transaction Paste Validation Report.
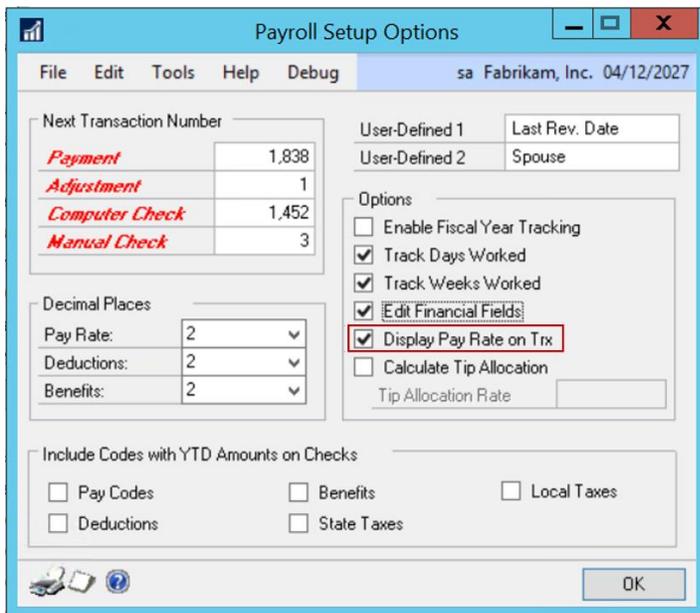
Additional Notes:

This feature is not compatible with Web Client at this time.

This feature will not integrate data for Analytical Accounting.

Baseline testing showed best results with 1000 or less transaction lines. 2000 transaction lines processed within about 8 minutes and will vary depending on the environment. For those with larger numbers, it is best practice to break up the data and paste it into separate batches for best results.

This feature will update Human Resource Attendance information if you are using it for tracking.

Defaults

The Amount, Pay Rate, Department, and Position fields will default from the Employee's setup records if left blank.

Date From and Date To will default with the values in the Payroll Transaction Entry window if left blank.

Benefit and Deduction Trx Types will use the Amount field for the dollar amount or percentage that you paste. Pasting a blank amount will use the default value from the Employee's setup for that code.

Salary pay codes will always use a Payroll Salary Adjustment Type of Reduced Hours and will reduce the employee's salary by the number of hours entered in the Amount column of the Excel spreadsheet.

Columns that are not available in the Excel Format to be copied will use the defaults for the employee from the user interface. For example, State and Local Tax will default from the Employee Tax Maintenance window and cannot be pasted just like they would when manually keying a new transaction line.

Excel Format

Please use the following chart as a reference for your Excel Spreadsheet. The columns must be in this order.

Column	Description	Required	Accepted Values
A	Employee ID	Yes	15 Character Max; Must exist in company;
B	Trx Type	Yes	Pay Code, Deduction, or Benefit;
C	Code	Yes	6 Character Max; Must be assigned to employee;
D	Amount	No	Number must be between 0 and 9999.99; Cannot be negative;
E	Pay Rate	No	Number must be between 0 and 999999999.99; Decimal Places must follow Payroll Setup. Must be blank for Salary, Benefits and Deductions;
F	Department	No	6 Character Max; Must exist in company;
G	Position	No	6 Character Max; Must exist in company;
H	Date From	No	MM/DD/YYYY Date format;
I	Date To	No	MM/DD/YYYY Date format;

A sample table with data is available the exercise below.

Exercise

This exercise will give you an example of entering multiple transaction types for 4 employees in a batch using data from the sample company Fabrikam. Before you begin, please ensure that the setting Display Pay Rate on Trx is marked in Payroll Setup as instructed in the Requirements section above.

We have 4 employees in this batch with the following scenarios:

BARB0001 has an hourly pay code HOUR and works an amount of 40 hours with a Pay Rate of $20 per hour. BARB0001 normally works in department INST and position TEC, but this week they worked in department SPTS and position CSP so we need to fill these in so they do not default to the values listed on their employee setup. We can leave the date from and date to blank because we want to use the defaults from the Payroll Transaction Entry window.

ACKE0001 is a salary employee who only worked 4 days this week instead of 5 so we need to reduce their SALY pay code hours by an amount of 8 hours on 05/14/2027 in their default department and position so it is left blank.

BUCH0001 made an employee purchase which needs to be deducted for the amount of $50 using deduction code EPU on 05/12/2027.

CHEN0001 took an amount 8 hours of holiday pay which is tracked using the HOLI pay code on 05/12/2027 under their default department and position.

Employee ID	Trx Type	Code	Amount	Pay Rate	Department	Position	Date From	Date To
BARB0001	Pay Code	HOUR	40.00	20.00	SPTS	CSP		
ACKE0001	Pay Code	SALY	8				05/14/2027	05/14/2027
BUCH0001	Deduction	EPU	50.00				05/12/2027	05/12/2027
CHEN0001	Pay Code	HOLI	8				05/12/2027	05/12/2027

Now that a table is created with the data that we want to paste into Microsoft Dynamics GP, we can create a new batch and paste our data into the Payroll Transaction Entry window.

To open the Payroll Transaction Entry window, go to the Transactions menu, point to Payroll, and click on Transaction Entry.

Create a new Batch ID by typing EXERCISE in the Batch ID field and press the Tab Key on your keyboard.

When prompted, click Add to create this new batch.

Click Save in the Payroll Batch Entry window to save this new batch.

Back in the Payroll Transaction Entry Window Enter a Pay Period From Date of 05/12/2027 and To Date of 05/16/2027. You can also enter the Days and Weeks Worked.

Your window should now look like the following:

Notice that the Paste Button is now available on the Menu Bar.
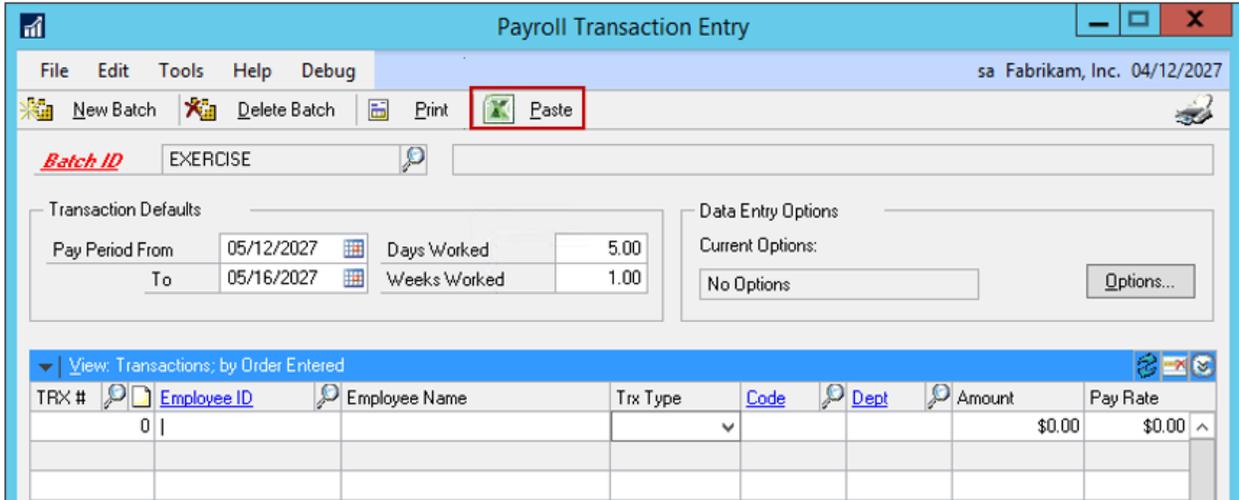
Select and copy the transaction lines from your Excel spreadsheet making sure that you DO NOT include the column headers.

This group of transactions was picked to show you the variety of transaction types you can copy and paste, hourly, salary, deductions and holiday as examples.

Click the Paste button in the Payroll Transaction Entry window.

If any errors or warnings occur, you will be prompted to print the UPR Transaction Paste Validation Report.

For instance, you may have received a warning that CHEN0001 using 8 HOLI hours will use more than the employee has available right now. Warnings will not prevent the data from Pasting, but errors will.

You will now see the 4 transaction lines have been pasted successfully.

Saving Payroll Batch default in Transaction Entry

In previous versions of Microsoft Dynamics GP the Payroll Transaction Entry window would reset the Transaction Defaults for Pay Period From and To back to the user date and 0 days and weeks worked when the window was closed. This new feature will save your Transaction Defaults in the Payroll Transaction Entry window on a per batch basis. This allows you to close the window and come back at a later time to continue entering transaction into the batch, and the window will remember what Transaction Default selections you used the last time you worked on the same batch.

To access this new feature, go to the Transactions menu, point to Payroll, and click on Transaction Entry. Then select a Batch ID. Any changes made to the Transaction Defaults section of the window will be saved specific to your Batch ID when you close the window.

The next time you open the Payroll Transaction Entry Window and select the same Batch ID, your Transaction Defaults will appear based on your previous selections.

> **Note:** The Transaction Defaults saved on Reoccurring Batches will maintain their same values and will not automatically increment the From and To Dates.

Table Changes

Table Physical Names	Table Technical Name	New field
UPR10301	UPR_TRX_Batch_HDR	TRXBEGDT
UPR10301	UPR_TRX_Batch_HDR	TRXENDDT
UPR10301	UPR_TRX_Batch_HDR	Days_Worked
UPR10301	UPR_TRX_Batch_HDR	Weeks_Worked

System & Workflow

🕐	The time to complete this lesson, including exercises, is 30 minutes.

🎯	After this lesson you will be able to: • Delete Carbon Copy in workflow and Auto Post Workflow end to end.

Auto Post Workflow for complete end to end process

We have now added an option to automatically post Approved Workflows for the Payables Batches, General Ledger Batches, and Receivables Management Batches. When this new option is marked, and a transaction is Final Approved, it will be automatically posted. No posting reports will generate during this process, but the posting journals will still be accessible to print after the fact from the respective modules Posting Journal Reports.

The new option will be available in the Workflow Maintenance window. To access this window, go to the Microsoft Dynamics GP menu, point to Tools, point to Setup, point to Company, point to Workflow and click on Workflow Maintenance. You will notice a new option to mark titled Automatically post when workflow complete.
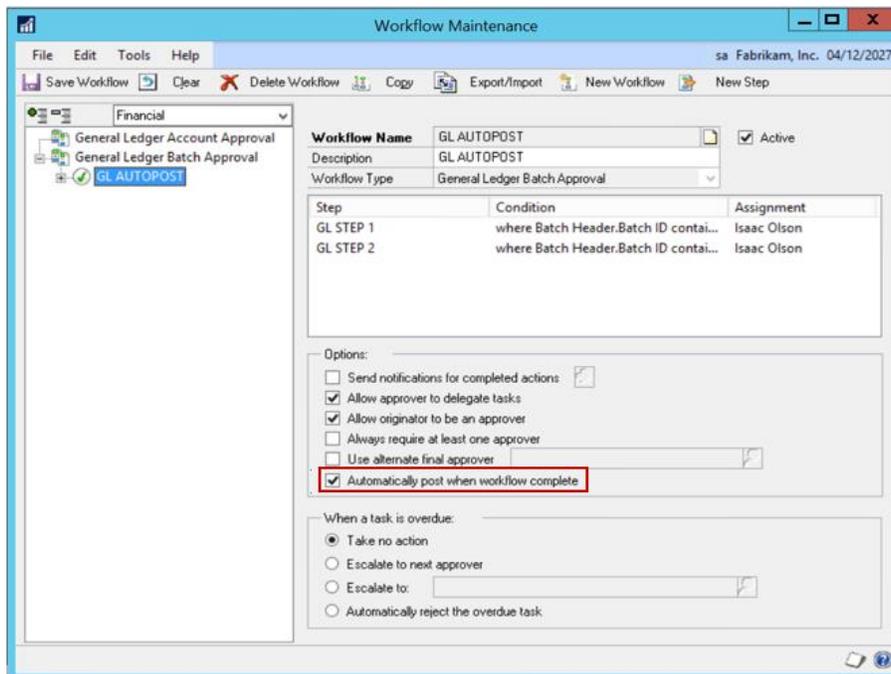
This option will be available for the following Workflow Types.

    General Ledger Batch Approval

    Receivables Batch Approval

    Payables Batch Approval

> **Note:** Automatic posting will only process when approving the Workflow through the user interface at release. Additional functionality to automatically post the batch when approving through Workflow Email links will be coming in a future update. You can still enable this option and approve workflows via email links without error, they just will not automatically post just like previous versions.

When a workflow approval is automatically posted the Workflow History will display a message stating: Batch XXXX was posted by the workflow process.

If the Batch is being edited by another user at the time of approval, you will receive a message in workflow history stating: The batch can't be posted because it is being edited or it is marked to post.

If an error occurs during the automatic posting, the batch will go into Batch Recovery just like it does when you attempt to manually post an already approved batch. Workflow History will display a message stating: Batch XXXX failed to complete posting in the workflow process. Use the Batch Recovery window to complete the posing process.
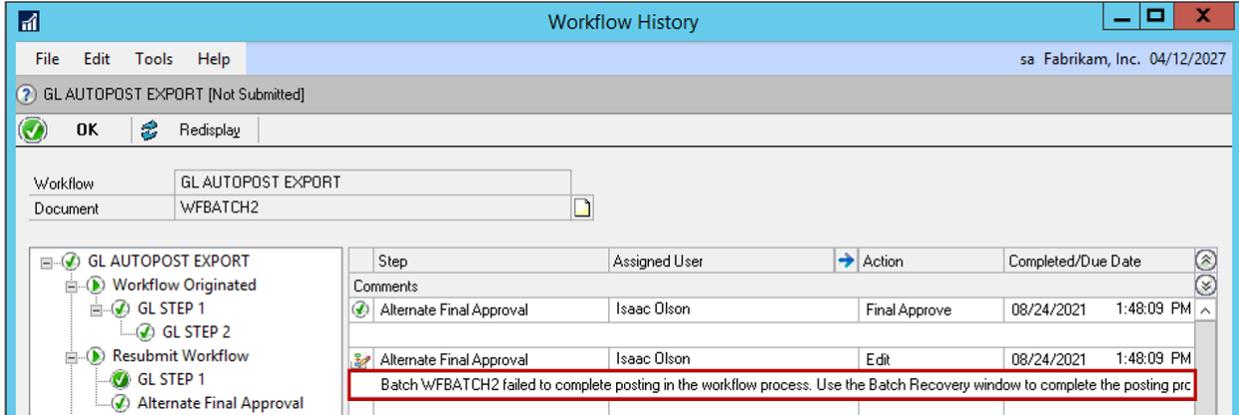
In the case of an error, the batch must be recovered, the errors on the batch must be fixed, and the batch must be resubmitted through the Workflow with the new changes to be approved.

> **Note:** Payables batches with a type of Computer Checks will not automatically post as these types of batches require check printing or the production of EFT files which cannot be automated through Workflow. The workflow history will display a message stating: Payables Computer Check batches will not post as part of the Workflow auto post batch process.

Table Changes

Table Physical Names	Table Technical Name	New field
WFI10002	Workflow_Instance	WF_PostAfterFinalApprova
WF100002	Workflow_Master	WF_PostAfterFinalApprova

Workflow Maintenance Remove Carbon Copy

Along with the option to send emails to the originator/submitter of a workflow in Microsoft Dynamics GP, you could also add 'carbon copy' users as well, to receive those emails, such as when a workflow was submitted, approved, rejected, delegated or final approved among others.

In the Workflow Email Notification Maintenance window, click Administration, choose Setup, then click Company, select Workflow and Workflow Maintenance, click the lookup arrow next to 'Send notifications for completed actions') we can also add and remove 'carbon copy' user accounts to receive the emails, along with the originator/submitter of the workflow.

This is nice to have this availability if someone leaves your organization and needs to be removed from the notification list.

Here's an example of adding 'carbon copy' users to receive the Completion emails for Workflow:
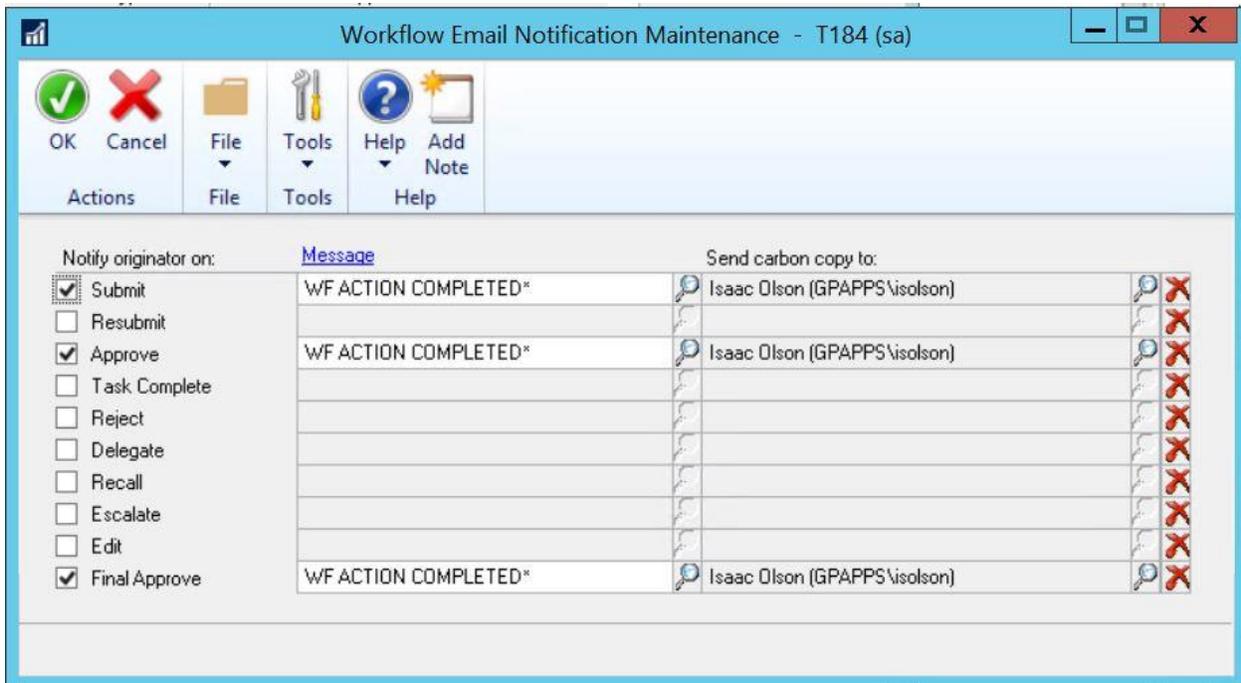
Here's the same window after removing a 'carbon copy' user account from receiving the emails.
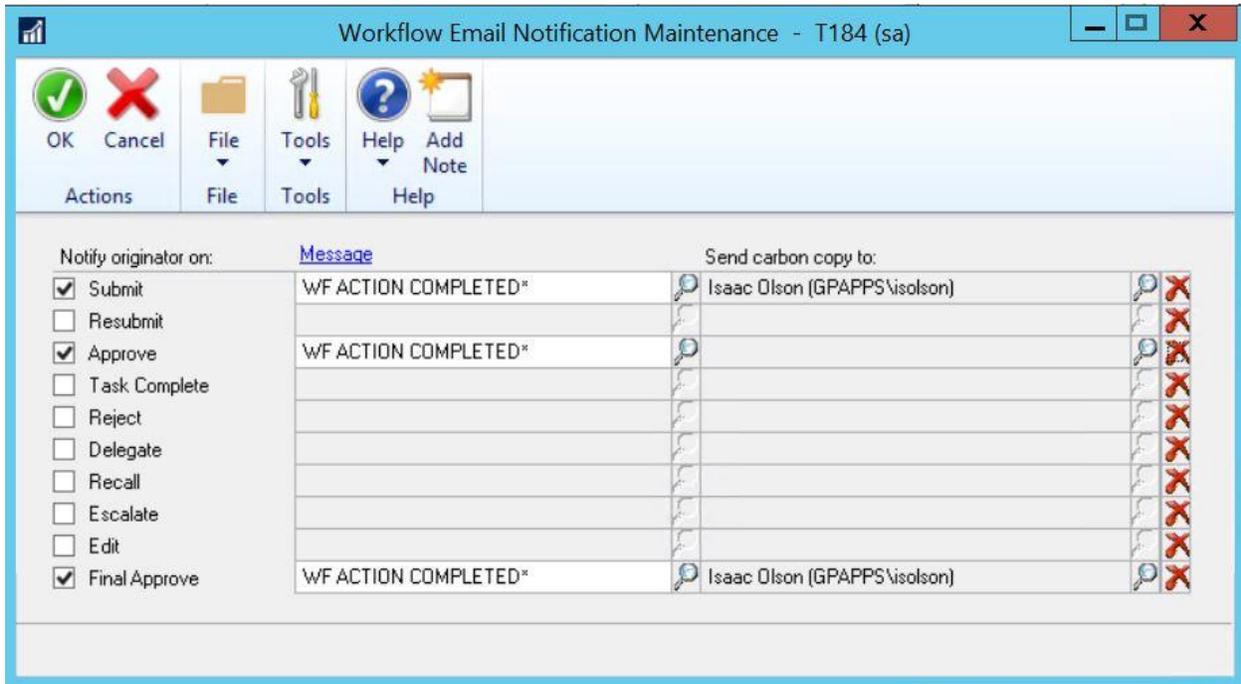
> **Note:** This information is stored in an existing table the WF40400, prior to this feature you could not remove the carbon copy person and it would need to be removed from the table noted above.

Workflow Approver Count

Previously, in the Workflow Step setup for Microsoft Dynamics GP, for the 'Completion Policy' options, we only had three options:

--Only one response needed

--Majority must approve

--All must approve

Now, we have a fourth option available: 'Number of approvers' where we can specify the exact number of the total specified approvers we require to approve the workflow at that step, before it moves past that step with a 'completed' status for that step.

In this example, if we have four approvers setup on this workflow step, by using the 'Number of approvers' option and setting it to '2', only two of the approvers would need to take action on the workflow for this step, before the workflow would move forward in the process.

This enables the requirement to have more than one approver, but not have to have more than 50% approver response nor all approvers respond.

The number field next to 'Number of approvers' defaults with 1.

When an assigned to individual responds to the workflow step, the system will look at the number required and the number that have already responded. If it equals or is greater than the completion policy number assigned, the step will be 'completed' and the workflow process will continue.

Note: If the number entered is more than the number of approvers, the workflow step will stay in limbo because the number of approvers isn't met. At this point, the workflow manager could reject it, the originator could recall it, or that type of action would need to be taken to the workflow.

Note: Any open workflows that exist prior to the upgrade, will continue to use the assigned completion policy option, regardless of this new option being added.

Intelligent Cloud Insights Removed

The Business Central Intelligent Cloud for On-Premises Customers has been removed from the Microsoft Dynamics GP Home Page.

Example of this page from a prior version:

After you update to 18.4