



What's New....

GP 2015 & GP 2016

Microsoft Partner

Silver Enterprise Resource Planning
Silver Customer Relationship Management
Silver Independent Software Vendor (ISV)

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THE FIRST AMPLIFY CONFERENCE

What Was Amplify?

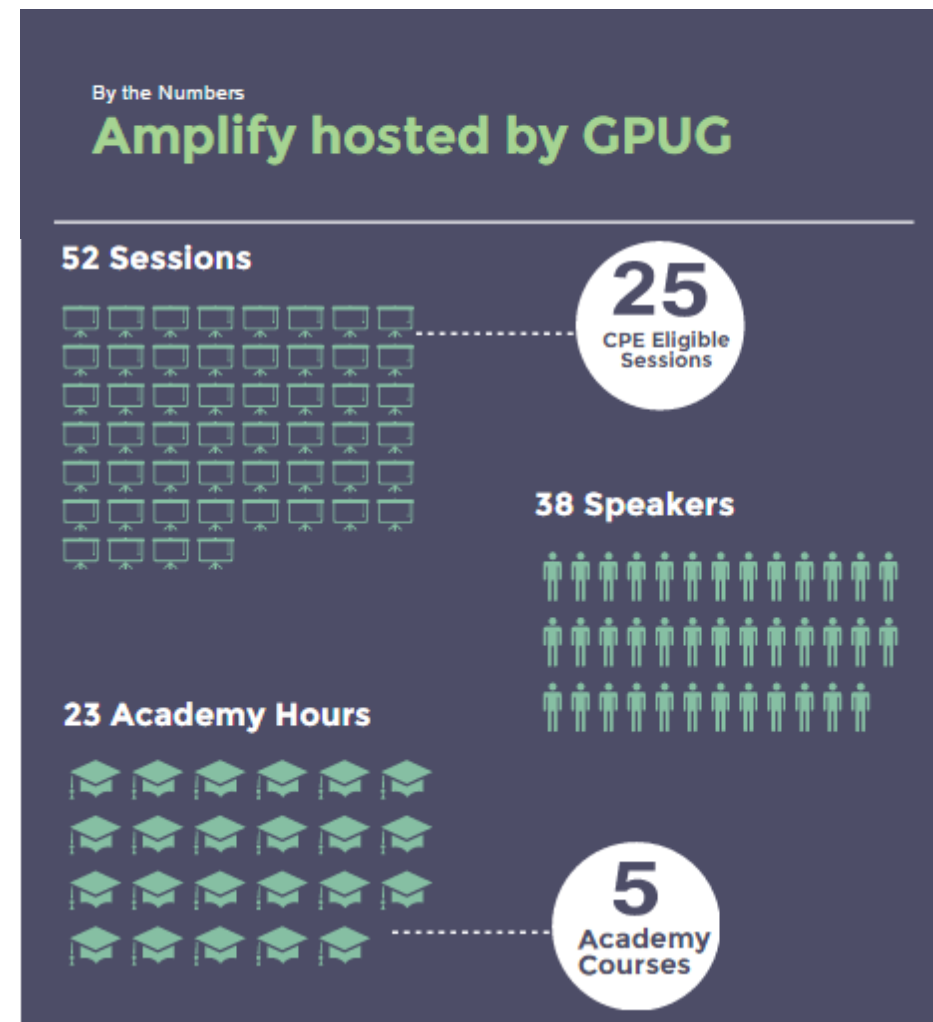
- GPUG event to fill Convergence learning gap
- 450 Attendees
- Anaheim May 22nd to 25th
- Location Marriott at the Convention Center



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...AND JUST NEXT DOOR A LITTLE EXCITEMENT!



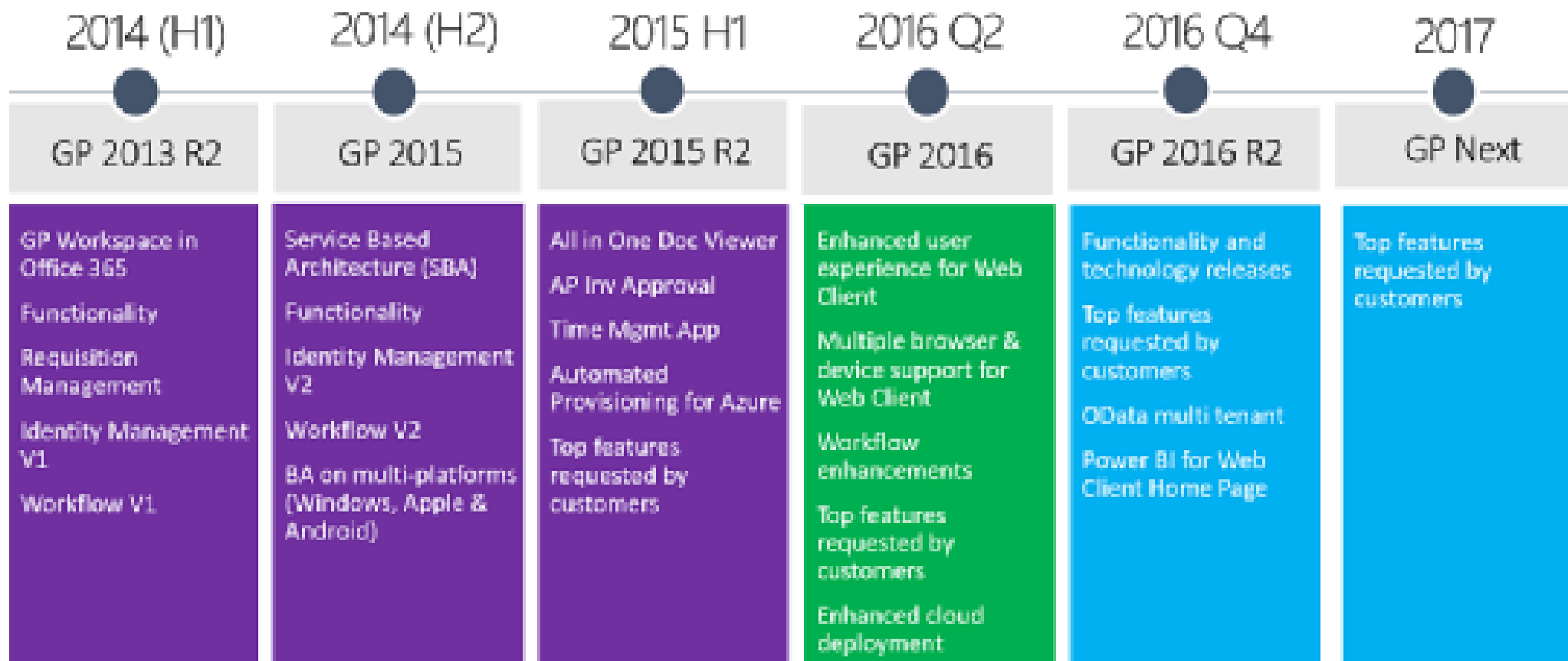
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IT'S A DYNAMIC FUTURE

Microsoft Dynamics GP Roadmap



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PRODUCT HIGHLIGHTS

DYNAMICS GP 2015 RTM & R2

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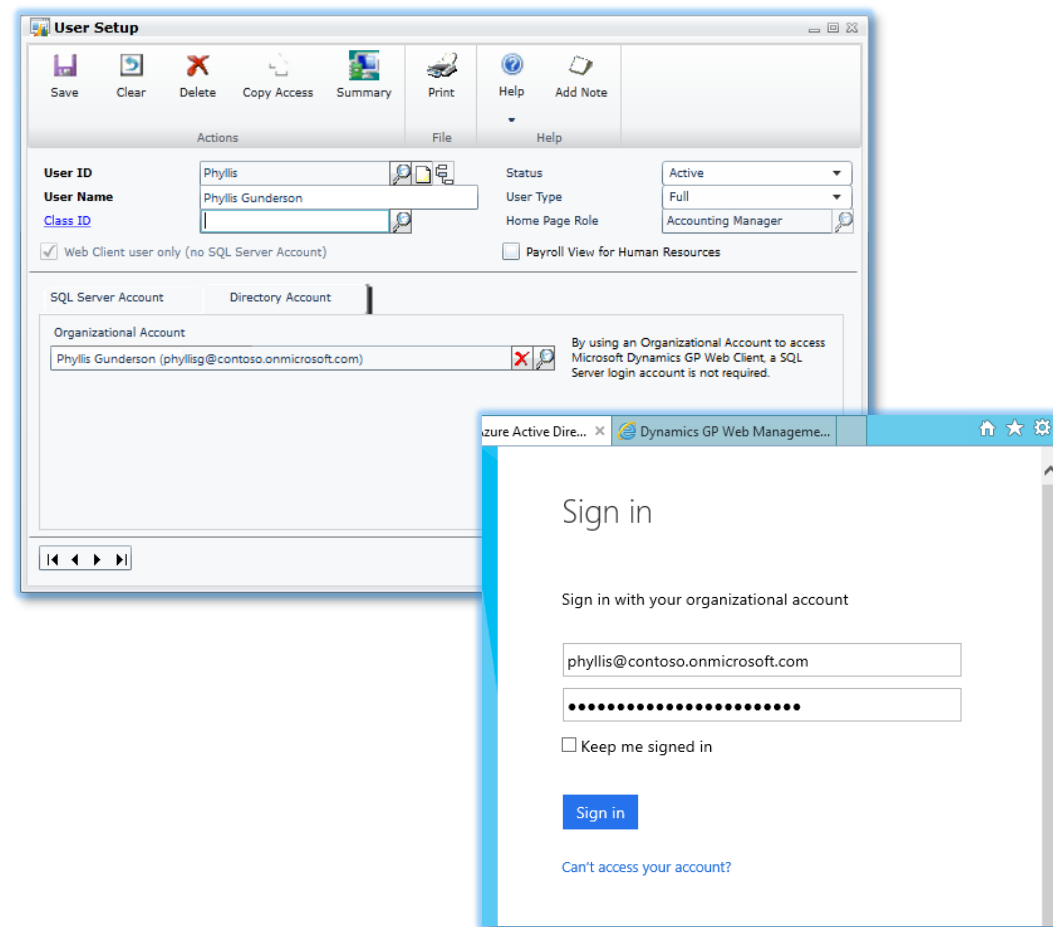
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Azure Identity Management for Web Client

Azure Active Directory

- Same account that is used for Office 365
- Seamless Integration with other Microsoft cloud solutions
- Runtime process runs as a service account

Note: Canadian Azure opened May 10th with Dynamics CRM Online Sept. 2016



Copy Home Page & Area Page

- Copy Home Page Setting & Content to Other Users
- Copy Area Page Settings to Other Users

The image shows two overlapping windows from the GP 2015 RTM software. The 'User Setup' window on the left is for configuring a user named 'Brian'. It includes fields for 'User ID' (Brian), 'User Name' (Brian Meier), and 'Class ID'. There are checkboxes for 'Web Client user only (no SQL Server Account)' and 'SQL Server Account' (with sub-fields for Password and Confirm Password). Under 'Advanced SQL Server options', there are checkboxes for 'Enforce Password Policy', 'Enforce Password Expiration', and 'Change Password Next Login'. The 'Copy User Settings' window on the right is for copying settings from one user to another. It has 'OK', 'Cancel', and 'Help' buttons. The 'Security Access' section has a description and fields for 'Copy From' (User ID and User Name). The 'Home Page & Area Pages' section has a description and checkboxes for 'Home Page Role', 'Home Page Content', and 'Area Pages'. It also has fields for 'Copy From' (User ID and User Name) and 'Copy To' (User ID: Brian, User Name: Brian Meier).

Refreshable Excel Reports

- Enable tighter integration with Smartlist Designers and Excel

SmartList - TWO16 (sa)

New Modify Search Refresh Columns Favorites Print Excel Word Stop Publish SmartList File Tools Help

Options File Tools Help

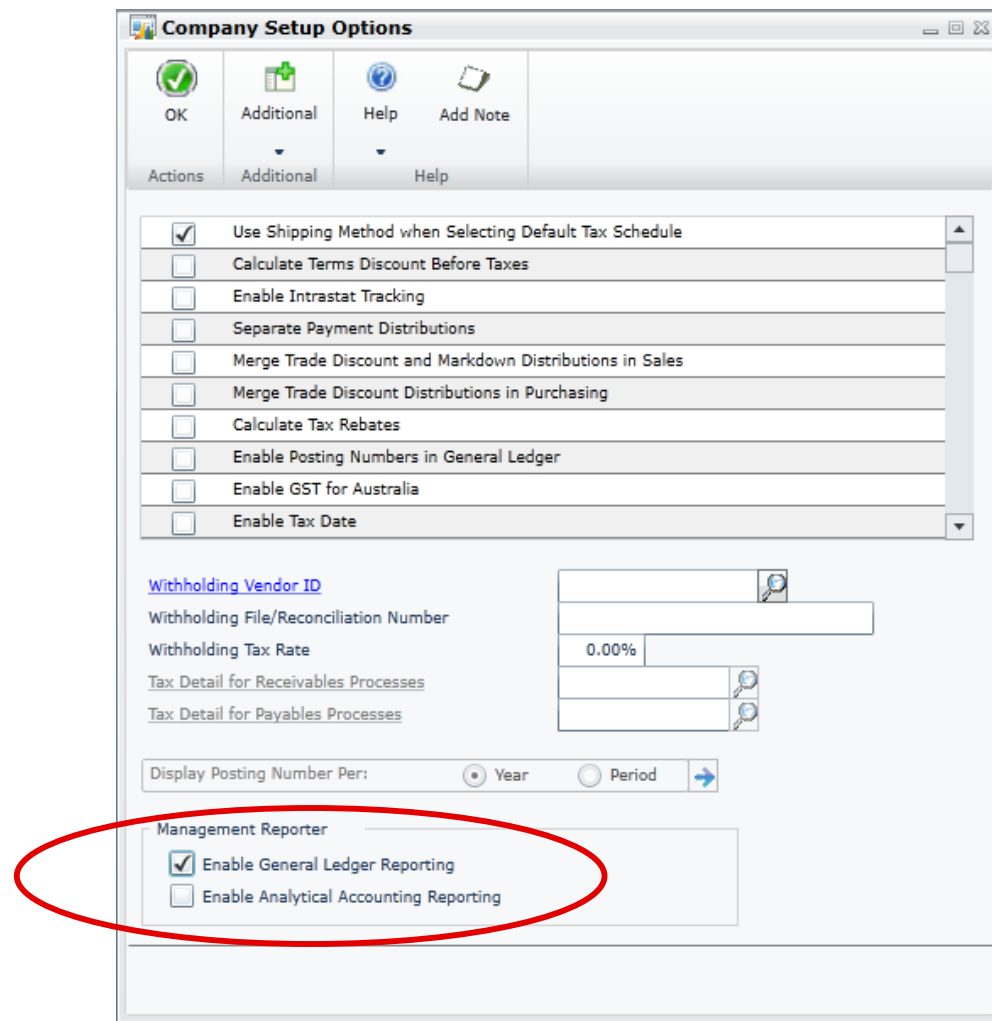
My Inventory - *

Item Number	Item Description	Item Type
1-A3261A	Multi-Core Processor	Sales Inventory
1-A3483A	SIMM EDO 72	Sales Inventory
100XLG	Green Phone	Sales Inventory
128 SDRAM	128 meg SDRAM	Sales Inventory
1GPROC	1 Ghz Processor	Sales Inventory
2-A3284A	Dual Core Server	Sales Inventory
24X IDE	24x CD-ROM	Sales Inventory
256 SDRAM	256 meg SDRAM	Sales Inventory
2GPROC	2 Ghz Processor	Sales Inventory
3-A2440A	Operating System	Sales Inventory
3-A2969A	1 TB SCSI Raid	Sales Inventory
3-A2990A	HSC 2 Expansion Slot	Sales Inventory
3-A2998A	Rackmount UPS	Sales Inventory
3-A3294A	ECC Memory	Sales Inventory
3-A3416A	Internal CD-ROM Drive	Sales Inventory
3-A3542A	DDS Drive	Sales Inventory
3-B3813A	Keyboard	Sales Inventory
3-B3897A	CD-ROM Media	Sales Inventory
3-C2786A	Cabinet	Sales Inventory
3-C2804A	Rackmount Kit	Sales Inventory
3-C2924A	SCSI Cable	Sales Inventory
3-D2094A	Printer	Sales Inventory
3-D2657A	Male Adapter	Sales Inventory
3-D2659A	Female Adapter	Sales Inventory

228 My Inventory Completed First 1000 records with no search criteria.

Management Reporter Integration

- Each company is setup to allow integration to MR
- Analytic Accounting can be integrated separately



Company Setup Options

OK Additional Help Add Note

Actions Additional Help

☒ Use Shipping Method when Selecting Default Tax Schedule

☐ Calculate Terms Discount Before Taxes

☐ Enable Intrastat Tracking

☐ Separate Payment Distributions

☐ Merge Trade Discount and Markdown Distributions in Sales

☐ Merge Trade Discount Distributions in Purchasing

☐ Calculate Tax Rebates

☐ Enable Posting Numbers in General Ledger

☐ Enable GST for Australia

☐ Enable Tax Date

[Withholding Vendor ID](#)

Withholding File/Reconciliation Number

Withholding Tax Rate 0.00%

[Tax Detail for Receivables Processes](#)

[Tax Detail for Payables Processes](#)

Display Posting Number Per: ☒ Year ☐ Period

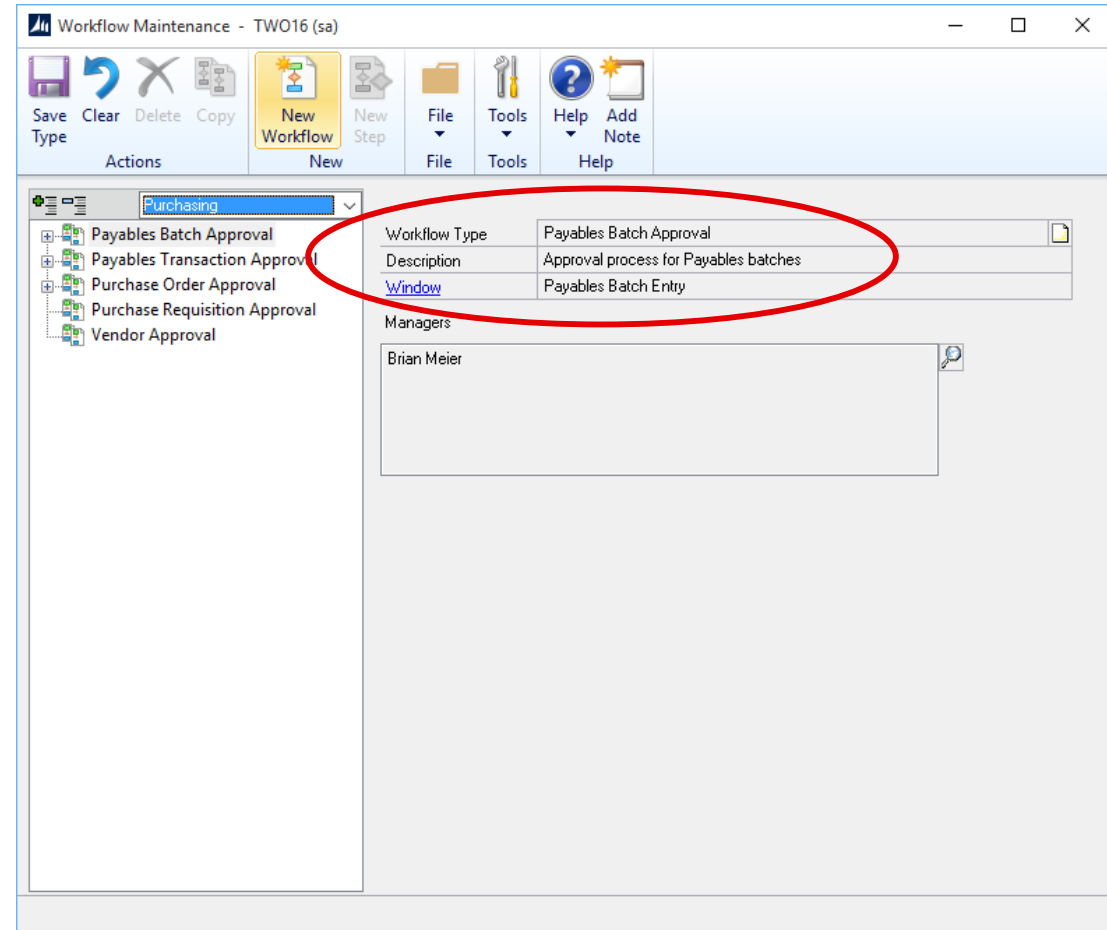
Management Reporter

☒ Enable General Ledger Reporting

☐ Enable Analytical Accounting Reporting

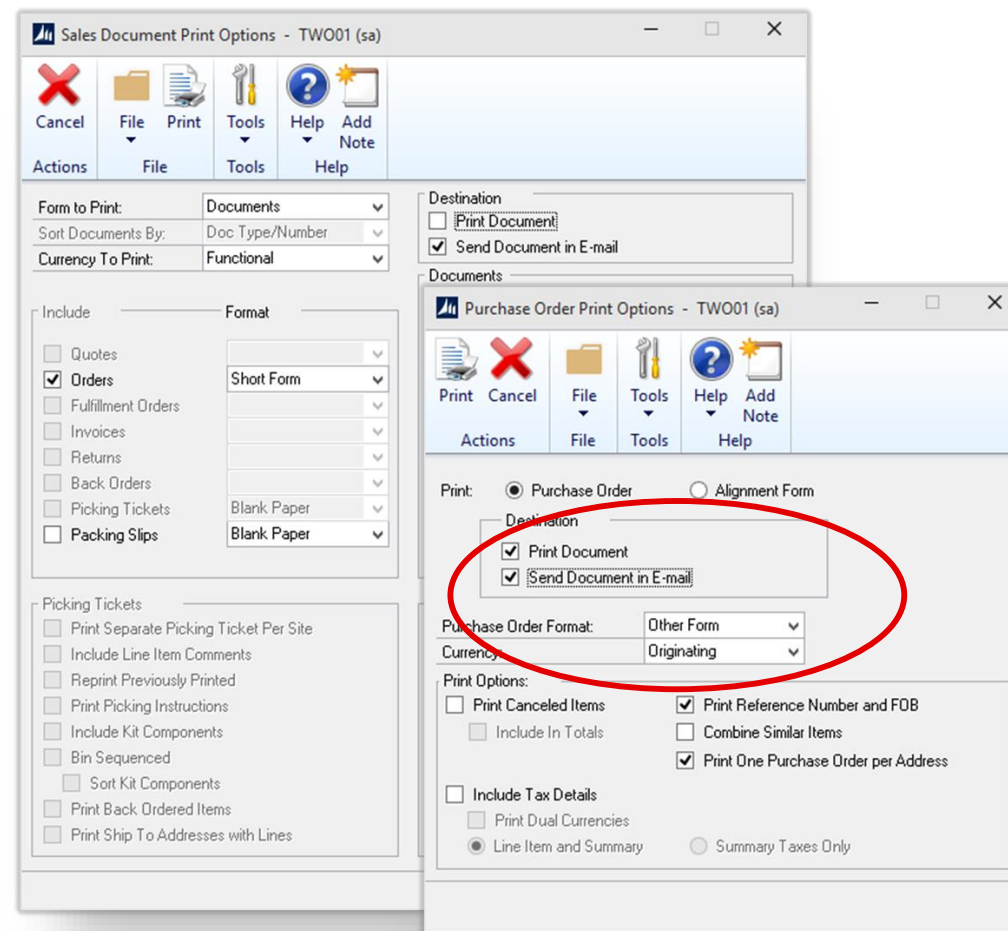
Additional Workflows

- Batch Approvals
 - GL
 - Receivables
 - Payables
- Vendor Approval



Enable Email on Report Options

- Support all Sales Order Processing document formats
 - Blank
 - Short
 - Long
 - Other
- Support all Purchase Order Processing document formats
 - Blank
 - Other



Document Attachments for Workflow Email

- Send Document attachment files with workflow task notification emails
 - Scan payables invoice and attach it to the transactions
 - Submit through workflow
 - Workflow notification email will have scanned invoice attached along with pertinent details of payables invoice for the approver

The screenshot displays the 'Workflow Maintenance' window. On the left, a tree view shows the 'Purchasing' workflow with steps like 'Payables Batch Approval', 'Payables Transaction Approval', 'AP Invoice', and 'Invoice Approval'. The 'Invoice Approval' step is highlighted. The right pane shows the configuration for this step. The 'Step Name' is 'Invoice Approval', the 'Description' is 'Invoice Approval', and the 'Step Type' is 'Approval'. The 'Condition' section has two options: 'Action is always required for this step' (selected) and 'Action is required only when the following condition is met:'. The 'Assignment' section shows 'Assign to: Jodi Christiansen', 'Time limit: 8 Hours', and 'Apply Workflow Calendar' checked. The 'Send Message' checkbox is checked with the message 'WF ASSIGN PMDOC APPROVAL*'. The 'Include Document Attachment documents' checkbox is checked and circled in red. The 'Completion policy' section has three options: 'Only one response needed' (selected), 'Majority must approve', and 'All must approve'.

PRODUCT HIGHLIGHTS

DYNAMICS GP 2016

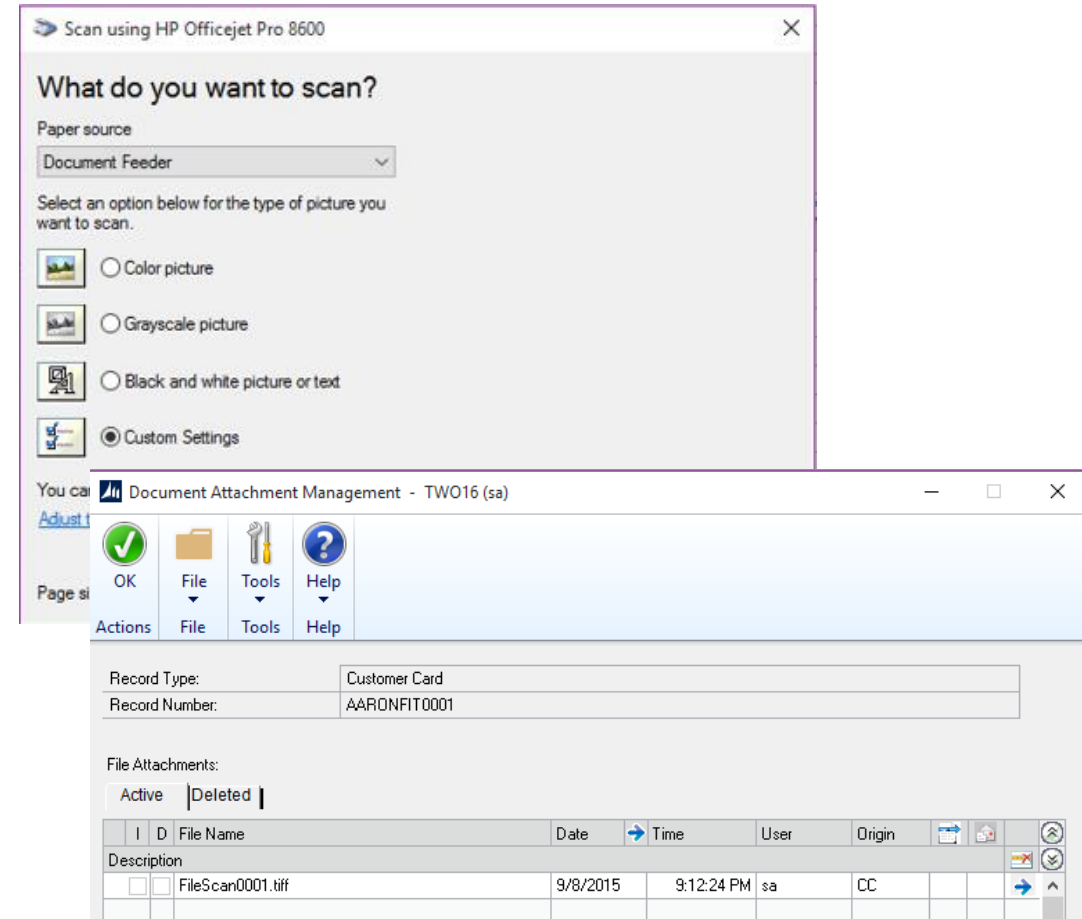
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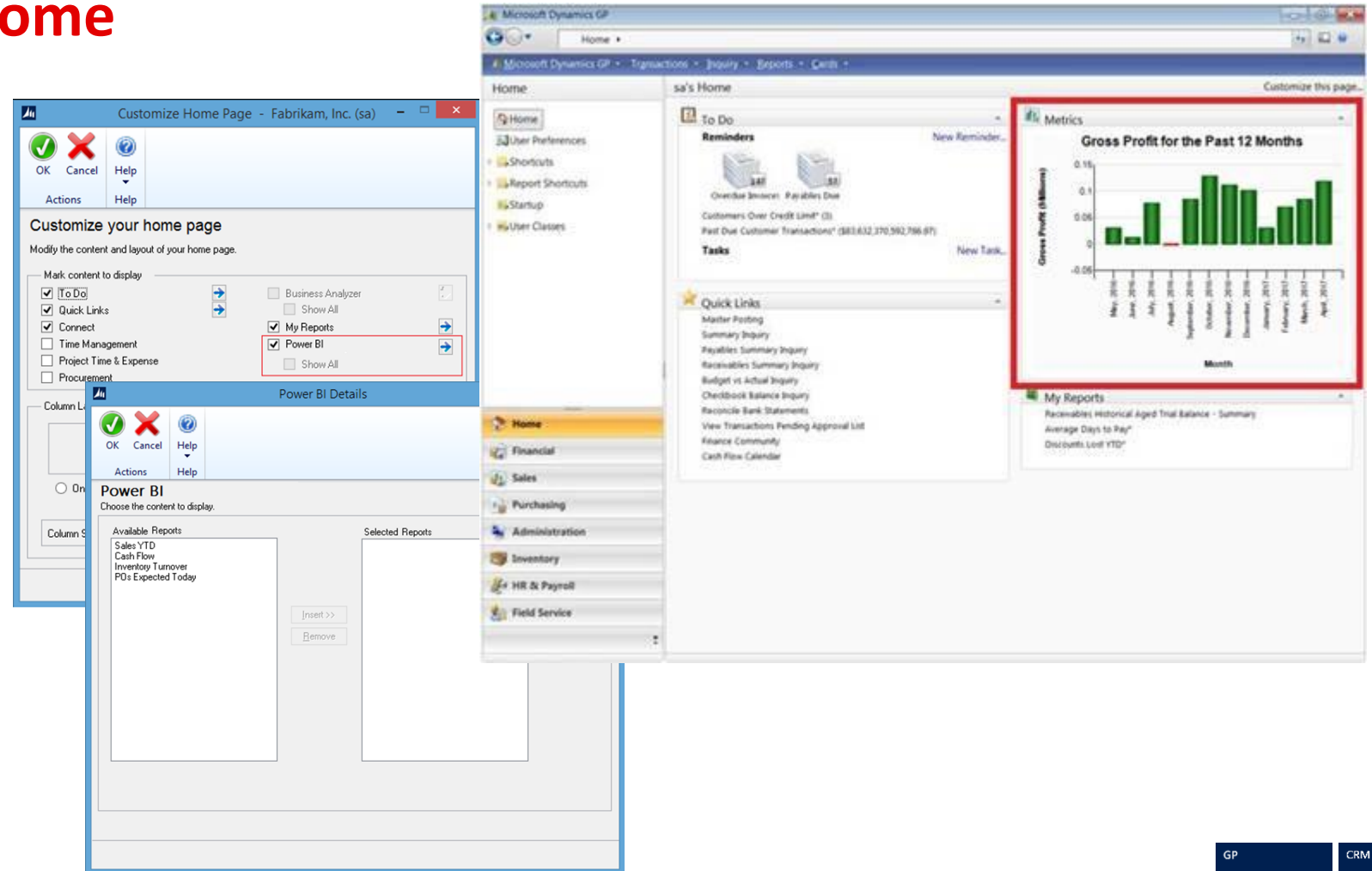
Ability to scan multiple pages

- When using the Scan functionality in Document Attachment, multiple pages can now be scanned
- Document feeder option
- Formatted as .tiff files



Power BI Reports on Home Page

- New area on Home Page to display Power BI
- Can utilize OData (Open Data protocol)



Workflow Condition Management Enhancement

- Two new options for what happens when step conditions are not met:
 - Continue to next step
 - Reject

Workflow Maintenance - TWO (sa)

Save Step Clear Delete Step Copy New Workflow New Step File Tools Help Add Note

Purchasing

- Payables Batch Approval
- Payables Transaction Approval
- Purchase Order Approval
- Purchase Requisition Approval
- PO Req Approval
- Manager Approval
- Vendor Approval

Step Name: Manager Approval
Description: Manager Approval
Step Type: Approval

Order:

- ☒ This step is a first step
- ☐ This step follows the selected step:

Condition:

- ☐ Action is always required for this step
- ☒ Action is required only when the following condition is met:

where Account Index Master.Account Number String begins with '___1300'

If the condition is not met: Reject the workflow

Assignment:

Assign to: Workflow manager
Time limit: 8 Hours
☒ Apply Workflow Calendar

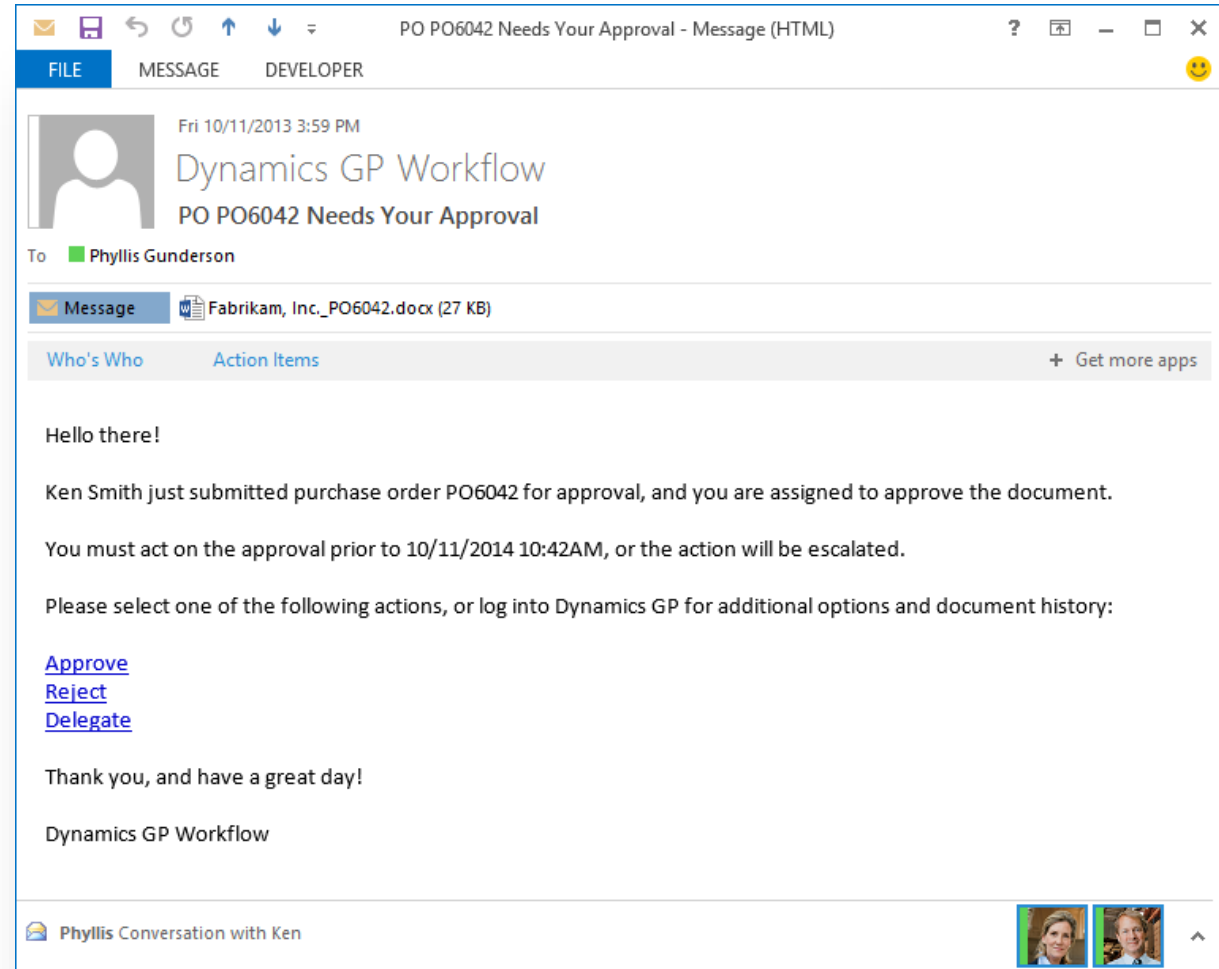
☒ Send Message: WF ASSIGN POREQ APPROVAL
☒ Include Document Attachment documents

Completion policy:

- ☒ Only one response needed
- ☐ Majority must approve
- ☐ All must approve

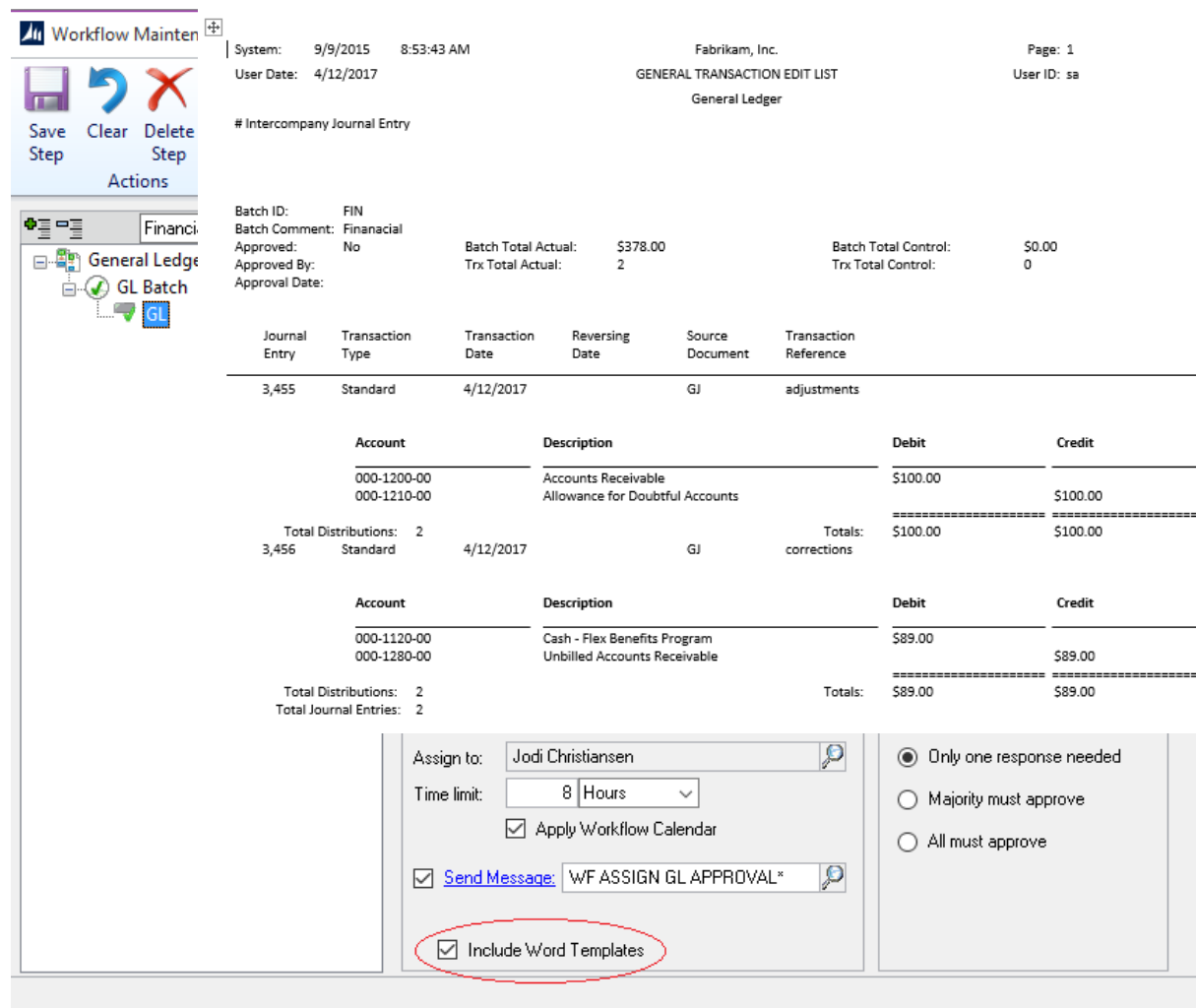
Workflow Reassignment Notifications

- Email notification be sent to the new approver for:
 - Delegation
 - Escalation
 - Alternate Approval



Word Templates for Batch Approval Workflow emails

- Workflow Batch Approvals now have a default Word template for the edit list for:
 - General Ledger Batches
 - Payable Batches
 - Receivables Batches
- Can be emailed to approver for complete information before approving



The screenshot shows the 'Workflow Maintenance' window for 'Fabrikam, Inc.' with the 'GENERAL TRANSACTION EDIT LIST' selected. The 'Intercompany Journal Entry' workflow is being configured. The 'Batch ID' is 'FIN' and the 'Batch Comment' is 'Financial'. The 'Batch Total Actual' is \$378.00 and the 'Batch Total Control' is \$0.00. The 'Journal Entry' is '3,455' and the 'Transaction Type' is 'Standard'. The 'Transaction Date' is '4/12/2017' and the 'Reversing Date' is blank. The 'Source Document' is 'GJ' and the 'Transaction Reference' is 'adjustments'. The 'Account' is '000-1200-00' and the 'Description' is 'Accounts Receivable'. The 'Debit' is \$100.00 and the 'Credit' is \$100.00. The 'Total Distributions' is 2 and the 'Total Journal Entries' is 2. The 'Send Message' checkbox is checked and the message is 'WF ASSIGN GL APPROVAL*'. The 'Include Word Templates' checkbox is also checked and circled in red. The 'Assign to' field is 'Jodi Christiansen' and the 'Time limit' is '8 Hours'. The 'Apply Workflow Calendar' checkbox is checked. The 'Only one response needed' radio button is selected.

Journal Entry	Transaction Type	Transaction Date	Reversing Date	Source Document	Transaction Reference
3,455	Standard	4/12/2017		GJ	adjustments

Account	Description	Debit	Credit
000-1200-00	Accounts Receivable	\$100.00	
000-1210-00	Allowance for Doubtful Accounts		\$100.00
Total Distributions: 2		\$100.00	\$100.00

Account	Description	Debit	Credit
000-1120-00	Cash - Flex Benefits Program	\$89.00	
000-1280-00	Unbilled Accounts Receivable		\$89.00
Total Distributions: 2		\$89.00	\$89.00

Assign to: Jodi Christiansen
Time limit: 8 Hours
☒ Apply Workflow Calendar
☒ Send Message: WF ASSIGN GL APPROVAL*
☒ Include Word Templates

Only one response needed
Majority must approve
All must approve

Web Client GP HTML 5

- Any Browser
- Device Specific
- Enhance UI



GP 2016 Summary

System-wide Changes

- Web Client enhancements
- Ability to scan multiple pages
- Word templates for batch approval workflow
- Workflow condition management
- Workflow reassignment notifications
- Configurable OData Service points added
- OData Service deployment enhancements

Business Intelligence Enhancements

- Import and export SmartLists from SmartList Designer
- Exported to Excel, formatted as numbers
- Power BI reports can be added to home pages
- Create SmartList from the Favorite using SmartList Designer

Financial Enhancements

- Budget import exception report
- Scotia Bank EFT format added as a default EFT file format
- Analytical Accounting user access settings
- Payables batch credit card payment option
- Edit attachments that flow to transactions
- Deposit cash receipts batches automatically

GP 2016 Summary

Distribution Enhancements

- All-in-one document view for sales and inventory transactions
- Prepay purchase order total

GP 2016 Summary

Project Accounting Enhancements

- Project expenses – document attachments
- Project Accounting fields in Purchase Requisition Entry
- Add Unit Cost field in PTE Employee Expense window
- Project Time Entry reports added

- How long will my solution be supported?
- How do I know when a new release is available and what's in the release?
- When should I be upgrading?

- How long will my solution be supported?
 - MS typically drops support with 5 year horizons
- How do I know when a new release is available and what's in the release?
 - Joe's blog, Customer Source, email me (rick@joesoftware.com)
- When should I be upgrading?
 - If using payroll, need to have version that has regular tax table upgrade i.e. min. GP 2013
 - Best to always be on supported version i.e. min. GP 2013
 - Always consider as part of annual financial planning



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