

GP2018 R2 FEATURES FOR EXISTING CUSTOMERS



HOW AND WHY TO TAKE ADVANTAGE OF AN UPGRADE?



Abra Lynne Gilman
Senior Consultant
Collins Computing
March 2019

GOT SNOW?!



“DO I HAVE TO UPGRADE?”

- You pay enhancement, you might as well take advantage of all the new features and technology!
- Year-end updates don't go back more than 3 releases.
- GP 2015 will have a year end update this year, but the end date for primary support is April 14, 2020.



Microsoft Dynamics GP Roadmap

2016 H1

2016 H2

2017

2018

2019

2020 +

GP 2016

Enhanced user experience for Web Client

Multiple browser & device support for Web Client

Workflow 3.0

PowerBI: Odata 1.0

Top feature requests

GP 2016 R2

Power BI: OData 2.0
Home Page Refresh

Web Client Evolution

Top Features Requested by Customers

GP 2018

Workflow 4.0

Doc Attach

Fin/HR Optimization

Power Suite

Top feature requests

GP 2018 R2

Intelligent Edge

Financial Enhancements

Purchasing Usability

Sales Optimization

Top features requests

GP 'Next'

Ongoing Development

Intelligent Edge Enhancements

Top features requested by customers & community

GP 'Next'

Ongoing Development

Intelligent Edge Enhancements

Top features requested by customers & community

New Connect (Ideas) Site!

Vote for
other's
suggestions!

"Print to Screen" Size Change



Suggested 13 days ago by [Shawn Dorward, MVP](#) – **New**

23

Category: System

Why oh WHY do I have to resize the print preview window every time I run a report to the screen? This seems like a simple fix and would save 1000's of click and drags... maybe even every day! :)

[ADD A COMMENT](#)



<https://experience.dynamics.com/ideas/list/?forum=771cc5ac-c117-e811-8105-386>

MAINSTREAM / EXTENDED SUPPORT

Microsoft Dynamics GP 2018: Mainstream Support for Microsoft Dynamics GP 2018 will end on 1/10/2023 which means that at that point in time, you will no longer receive tax and year end updates. Microsoft Dynamics GP 2018 will then move into Extended Support until 1/11/2028. Microsoft Dynamics GP 2016:

Support provided	Mainstream Support phase	Extended Support phase
Paid support (per-incident, per hour, and others)	X	X
Security update support	X	X
Non-security hotfix support	X	Requires extended hotfix agreement, purchased within 90 days of mainstream support ending.
No-charge incident support	X	
Warranty claims	X	
Design changes and feature requests	X	
Product-specific information that is available by using the online Microsoft Knowledge Base	X	X
Product-specific information that is available by using the Support site at Microsoft Help and Support to find answers to technical questions	X	X

PREVIOUS VERSION SUPPORT

- | | |
|------------------------------------|--|
| Microsoft Dynamics GP 2016: | Mainstream Support 7/13/2021 (Last Tax Update)
Extended Support until 7/14/2026. |
| Microsoft Dynamics GP 2015: | Mainstream Support 4/14/2020 (Last Tax Update)
Extended Support until 4/8/2025. |
| Microsoft Dynamics GP 2013: | Mainstream Support ended 4/10/2018
Extended Support until 4/11/2023. |
| Microsoft Dynamics GP 2010: | Mainstream Support ended 10/13/2015
Extended support lifecycle 10/13/2020. |

WHAT GP VERSION ARE YOU CURRENTLY ON?

- GP 2018
- GP 2016 (or R2)
- GP 2015 (or R2)
- GP 2013 (SP2, R2)
- PRIOR RELEASE?

WHEN DO YOU PLAN ON UPGRADING?

- This month
- Before Fall
- This Year
- Next Year
- After it warms up!

Version to Version GP 2018 R2

There is no direct upgrade from Microsoft Dynamics GP 2013 to Microsoft Dynamics GP 2018R2. (You will have to do at LEAST two hops).

- GP 2015, I need to be on 14.00.1159 to get directly to 2018R2 (and then you would have to install Feb 2019 Hotfix).
- GP 2016, I need to be on 16.00.0741 to get to latest 2018R2.

Management Reporter 2012 CU16 is compatible with Microsoft Dynamics GP 2018 (With a patch for SQL 2017)



GP 2018 Blogs

[Microsoft Dynamics GP 2018 System Requirements](#)

[Microsoft Dynamics GP 2018 Web Components](#)

[Microsoft Dynamics GP 2018 Upgrade Hot Topic](#) ●

[Microsoft Dynamics GP 2018 Product Download](#)

[Microsoft Dynamics GP 2018 What's New](#)

[Microsoft Dynamics GP 2018 Detailed Documentation](#)

[Microsoft Dynamics GP 2018 Quality Fixes](#)

[Microsoft Dynamics GP 2018 New Features VIDEO!!](#)

[Microsoft Dynamics GP 2018 Upgrade Blog Series](#)

<https://docs.microsoft.com/en-us/dynamics-gp/index>

Keep up with
the latest
issues.



GP 2018R2 System Requirements

Operating System - 32 Bit or 64 Bit

MS Windows 10 Professional Edition or Enterprise Edition

MS Windows 8 & 8.1 Professional/Ultimate/Enterprise Edition

Database Requirements

Microsoft SQL Server 2017-Enterprise, Standard or Express

Microsoft SQL Server 2016-Enterprise, Standard or Express

Microsoft SQL Server **2014**-Enterprise, Standard or Express

Operating System

Microsoft Windows Server 2016 Essentials or Standard Edition

Microsoft Windows Server 2012 Essentials or Standard Edition

Microsoft Windows Server 2012 R2 Essentials or Standard Edition

Microsoft Office 365, 2013 32/64 Bit or 2016 32/64 Bit

https://mbs.microsoft.com/customersource/northamerica/GP/learning/documentation/system-requirements/MDGP2018_System_Requirements



Gather your specs/Review the facts

GP About Box

MR About Box

Third Party About Box

Dynamics.set

Reports.dic (Forms.dic, other reports dictionaries)

SQL Version, Windows Server Version, Server Review and Plans

PartnerSource/CustomerSource Review (Third Parties, Key Access)

Add-Ons folder

GP folder/other executables

MICR/Ext/SLB



GP About Box – Version, SP, User Count, SQL Server, DB Sizes

Microsoft

Microsoft Dynamics GP 2015

Session Information	
	Current: Total Registered
Users	17 117
Site	
Language-Country	English-US
Server	Dynamics GP 2015
Session ID	191
Size	22576MB

Version Information	
Microsoft Dynamics GP	14.00.0817 (R2)
Dexterity	14.00.0085.000
SmartList	14.00.0782
Database	SQL Server
System	Windows 8
ODBC Driver Manager	03.80.0000
ODBC Driver	11.00.3000
Microsoft SQL Server 2012 (SP3-GDR) (KB4019092) - 11	

[Software License Terms](#)

[Third Party Notices](#)

© 2012 Microsoft Corporation. All rights reserved.
Portions copyright 1992-2002 FairCom Corporation. All rights reserved.

sa Can-Personal 9/22/2017

Microsoft Dynamics GP 10.0

Version Information	
Microsoft Dynamics GP Professional	10.00.1779
Dexterity	10.0.332.0
SmartList	10.00.1620
Database	SQL Server
System	Windows Server 2003
ODBC Driver Manager	03.52.0000
ODBC Driver	03.86.3959
Microsoft SQL Server 2005 - 9.00.3042.00 (Intel X86)	

D. Applegate All Rights Reserved
rights reserved.



Financial Reporting MR/FRx

About Management Reporter

Management Reporter 2012 for Microsoft Dynamics® ERP
© 2013 Microsoft Corporation. All rights reserved.

Version 2.12.13002.1

About FRx Report Designer

Microsoft®
FRx®

FRx® Report Designer

Release: 6.7.12008

© 2009 Microsoft Corporation. All rights reserved.

About Management Reporter

Management Reporter 2012 for Microsoft Dynamics® ERP
© 2013 Microsoft Corporation. All rights reserved.

Version 2.12.14001.45



SQL Database Details

SELECT @@VERSION

Microsoft SQL Server 2012 (SP3-GDR) (KB4019092) - 11.0.6251.0 (X64)

Jul 7 2017 07:14:24

Copyright (c) Microsoft Corporation

Enterprise Edition: Core-based Licensing (64-bit) on Windows NT 6.3 <X64> (Build 9600:) (Hypervisor)

Backup	
Last Database Backup	9/20/2017 4:00:11 PM
Last Database Log Backup	None

Database	
Name	DYNAMICS
Status	Normal
Owner	DYNSA
Date Created	10/15/2015 10:48:26 AM
Size	10485.38 MB
Space Available	34.91 MB
Number of Users	36

Maintenance	
Collation	SQL_Latin1_General_CP1_CI_AS



Dynamics.set files (Many or One?)

15
0
Microsoft Dynamics GP
105
IntegrationManager
949
FieldService
1042
Interfund Management
1493
SmartList
1632
Cash Flow Management
1878
Excel-Based Budgeting
2277
Purchase Order Enhancements
2416
Control Account Management
2547
Enhanced Commitment Management
2992
Copier Series
3104
Advanced Security
3278
Report Scheduler
6499
Dynamics Online Services
7800
SOP Invoice Comment Splitter
Windows
:C:\Data\G22945\Great Plains 10.0\Dynamics.dic
GP :L:\Great Plains 10.0\Default\Forms.dic
:L:\Great Plains 10.0\Default\Reports.dic

24
0
Microsoft Dynamics GP
309
Fixed Assets
949
FieldService
1042
Interfund Management
1045
Revenue Expense Deferrals
1428
Electronic Reconcile
1493
SmartList
1632
Cash Flow Management
1878
Excel-Based Budgeting
2277
Purchase Order Enhancements
2416
Control Account Management
2547
Enhanced Commitment Management
2992
CopierSeries
3096
VAT Daybook
3104
Advanced Security
3107
Extender
3180
Analytical Accounting
3278

:C:\Program Files (x86)\Microsoft Dynamics\GP2015\Dynamics.dic
:C:\Program Files (x86)\Microsoft Dynamics\GP2015\Data\FORMS.DIC
//GPServer\dyngp-shared\REPORTS.DIC
:C:\Program Files (x86)\Microsoft Dynamics\GP2015\SrvcAdv.DIC
:C:\Program Files (x86)\Microsoft
Dynamics\GP2015\Data\FRMS949.DIC
:C:\Program Files (x86)\Microsoft
Dynamics\GP2015\Data\RPTS949.DIC



Customized Reports

- GP2015-Dynamics-Reports.package
- GP2015-Multi-Entity-Management.package

Name	Type	Product
1099 Dividend	Modified Report	Microsoft Dynamics GP
BM Bill of Materials	Modified Report	Microsoft Dynamics GP
BOM Detail Report	Modified Report	Manufacturing
BOM Report	Modified Report	Manufacturing
BOM Report (Text)	Modified Report	Manufacturing
BOM Report with Standard Costs	Modified Report	Manufacturing
BOM Summary Report	Modified Report	Manufacturing
CurrencyClass	Class Module	Microsoft Dynamics GP
CustomerUserDefLFunctions	Module	Microsoft Dynamics GP
DatabaseClass	Class Module	Microsoft Dynamics GP
GL Journal Inquiry	Modified Report	Microsoft Dynamics GP
Graphical_BOM_Edit	Modified Form	Manufacturing
IncotermsClass	Class Module	Microsoft Dynamics GP
InvoiceClass	Class Module	Microsoft Dynamics GP
Invoicing Detail Sales History Report	Modified Report	Microsoft Dynamics GP
Item List By User Category	Modified Report	Microsoft Dynamics GP
IV_Item_Inquiry	Modified Form	Microsoft Dynamics GP
IV_Item_Maintenance	Modified Form	Microsoft Dynamics GP
Microsoft ActiveX Data Objects 2.8 Library	Reference	Microsoft Dynamics GP
Microsoft ActiveX Data Objects 2.8 Library	Reference	Manufacturing
MOP_Receipt_Entry	Modified Form	Manufacturing
NotesTextClass	Class Module	Microsoft Dynamics GP

Picklist Summary Report	Modified Report with VBA	Manufacturing
PM Blank Document	Modified Report	Microsoft Dynamics GP
PM_Apply_To_Maintenance	Modified Form	Microsoft Dynamics GP
PM_Transaction_Entry	Modified Form	Microsoft Dynamics GP
PM_Transaction_Entry_Distribution	Modified Form with VBA	Microsoft Dynamics GP
PM_Transaction_Inquiry	Modified Form	Microsoft Dynamics GP
PM_Vendor_Maintenance	Modified Form with VBA	Microsoft Dynamics GP
PM_VendorAnalysis	Modified Form	Microsoft Dynamics GP
POP History Purchase Order Blank Form	Modified Report	Microsoft Dynamics GP
POP Purchase Order Blank Form	Modified Report with VBA	Microsoft Dynamics GP
POP Purchase Order Rollup Blank Form	Modified Report with VBA	Microsoft Dynamics GP
POP_Inquiry_Receivings_Entry	Modified Form	Microsoft Dynamics GP
POP_Invoice_Entry	Modified Form	Microsoft Dynamics GP
POP_Print_Options	Modified Form	Microsoft Dynamics GP
POP_Print_Options	Form with VBA	Microsoft Dynamics GP
POP_Receivings_Entry	Modified Form	Microsoft Dynamics GP
PurchaseOrderClass	Class Module	Microsoft Dynamics GP
RM Blank Document	Modified Report	Microsoft Dynamics GP
RM Customer Sales Summary	Modified Report	Microsoft Dynamics GP
RM Statement On Blank Paper	Modified Report	Microsoft Dynamics GP
RM_Customer_Inquiry	Modified Form with VBA	Microsoft Dynamics GP
RM_Customer_Maintenance	Modified Form with VBA	Microsoft Dynamics GP
Shipping Methods Report With Notes	Modified Report	Microsoft Dynamics GP
SOP Blank History Invoice Form	Modified Report with VBA	Microsoft Dynamics GP
SOP Blank History Order Form	Modified Report with VBA	Microsoft Dynamics GP
SOP Blank History Quote Form	Modified Report with VBA	Microsoft Dynamics GP
SOP Blank Invoice Form	Modified Report with VBA	Microsoft Dynamics GP
SOP Blank Order Form	Modified Report with VBA	Microsoft Dynamics GP
SOP Blank Packing Slip Form	Modified Report	Microsoft Dynamics GP
SOP Blank Quote Form	Modified Report with VBA	Microsoft Dynamics GP
SOP Short Order Form	Modified Report with VBA	Microsoft Dynamics GP
SOP_Batch_Entry	Modified Form	Microsoft Dynamics GP

GP Dropdown > Tools > Customize > Customization Maintenance



WILL DO

CUSTOMER'S FAVORITE MICROSOFT DYNAMICS GP 2018 R2 TIPS!



Yes, I LOVE showing off new GP Features!

POST THRU: TRANSACTION LEVEL POSTING

Posting Setup - TWO (Abra)

OK Save File Print Tools Help Add Note

Series: Sales Origin: Sales Transaction Entry

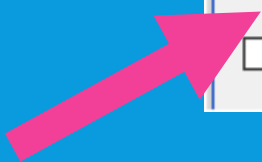
Post to General Ledger
 Post Through General Ledger Files

Allow Transaction Posting
 Post Through General Ledger Files
 Include Multicurrency Info

Create a Journal Entry Per:
 Transaction
 Batch Use Account Settings

Posting Date From: Batch Transaction
If Existing Batch: Append Create New

Super Helpful
for SOP
Transactions!



NO MORE HANGING BATCHES

Batch Entry - TWO (Abra)

Display Batches: All Marked

Batch ID	Origin
<input type="checkbox"/> CLEARING BATCH	Clearing Entry
<input type="checkbox"/> CMXFR00000001	General Entry
<input type="checkbox"/> GL BATCH	General Entry
<input type="checkbox"/> IVADJ00000023	General Entry
<input type="checkbox"/> PMCHK	General Entry
<input type="checkbox"/> PMPAY	General Entry
<input type="checkbox"/> POIVC00000053	General Entry
<input type="checkbox"/> RECVG00000075	General Entry
<input type="checkbox"/> RECVG00000076	General Entry
<input type="checkbox"/> RMCSH00000011	General Entry

Sales Transaction Entry - TWO (Abra)

Batch ID: SLSTE00000245
Comment: Transactions from Service
Frequency: Single Use

Recurring Posting: 0
Days to Increment: 0

Journal Entries: 0
Batch Total: \$0.00

Date: 8/5/2028
Batch ID:
Default Site ID: WAREHOUSE
Customer PO Number: 34564
Currency ID: Z-US\$

Item Number	D	U of M	Invoice Quantity	Unit Price	Extended Price
5-CONTRACTS	<input type="checkbox"/>	Each	1	\$3,400.00	\$3,400.00
5-CONTRACTS	<input type="checkbox"/>	Each	1	\$0.00	\$0.00
5-CONTRACTS	<input type="checkbox"/>	Each	1	\$400.00	\$400.00

2018 R2

DEFAULT AP CHECKBOOK ON PAYMENTS!

Payables Management Setup - TWO (Abra)

OK Cancel File Print Tools Help Add Note

Aging Periods: Due Date Document Date

Current Period	From:	To:
1 - 30 Days	0	30
31 - 60 Days	31	60
61 and Over	61	999
		0
		0
		0

Apply By: Document Date Due Date

Defaults:

Default Summary View: Amounts Since Last Close

Checkbook ID: UPTOWN TRUST

Check Form: Stub on Top

Sort Checks: Payment Number

List Documents on Remittance: All Documents

Show previously Applied Documents on Remittance

Options:

- Override Voucher Number at Transaction Entry
- Track Discounts Available in GL
- Print Historical Aged Trial Balance
- Delete Unposted Printed Documents
- Print Tax Details on Documents
- Print Dual Currencies
- Age Unapplied Credit Amounts
- Exclude Expired Discounts from Payments
- Warn if Vendor has Existing Purchase Order

Allow Duplicate Invoices Per Vendor:

Yes

No

Recurring Transactions Only

Password:

Remove Vendor Hold	ACCESS
Exceed Maximum Invoice Amount	ACCESS
Exceed Maximum Writeoff Amount	ACCESS

Options Classes 1099 Setup

Purchasing > Setup > Payables

IT DEFAULTS ON AP PAYMENT BATCHES!



The screenshot shows two overlapping software windows from the Abra system. The top window is titled "Build Payment Batch - TWO (Abra)" and contains a toolbar with icons for Build Batch, Clear, Options, Additional, File, Print, Tools, Help, and Add Note. Below the toolbar are fields for Batch ID (GPUG), Batch Total (\$0.00), Payment Option ID, and Vendor ID selection options (All, From, To). There are also "Restrictions" and "One Payment Per" dropdown menus.

The bottom window is titled "Payables Batch Entry - TWO (Abra)" and contains a toolbar with icons for Save, Clear, Delete, Post, Additional, File, Print, Tools, Help, and Add Note. Below the toolbar are fields for Batch ID (GPUG), Origin (Computer Check), Comment, Payment Method (radio buttons for Check, EFT, Credit Card), Frequency (Single Use), Posting Date (4/12/2027), Check Date (4/12/2027), Checkbook ID (UPTOWN TRUST), and Currency ID (Z-US\$). There are also fields for Recurring Posting, Days to Increment, Last Date Posted, and Times Posted.

DUPLICATE CHECK NUMBERS

Prevent or enable the use of duplicate check #s –
NOT JUST PAYABLES!
If the field is cleared, then Dynamics GP will prevent
users from using a duplicate check
number in:

Bank Transaction Entry,
Miscellaneous Checks, and
Payroll Manual Check-Adjustment Entry

If check number has been used, user will
receive error: "This check # has been used".

The user will have to enter an unused check
number to successfully post the transaction.

Checkbook Maintenance - T18R2 (sa)

Save Clear Delete File Print Tools Help Add Note

Actions File Tools Help

Checkbook ID FIRST BANK Inactive
Description FIRST BANK

Currency ID Z-US\$ Current Checkbook Balance \$0.00
Payment Rate Type ID Cash Account Balance \$1,525,703.96
Deposit Rate Type ID

Cash Account 000 -1100 -00 Cash - Operating Account

Next Check Number 00000000000000000001 Last Reconciled Balance \$0.00
Next Deposit Number 00000000000000000001 Last Reconciled Date 0/0/0000

Company Address ID
Bank Account 123456789
Bank ID
User-Defined 1
User-Defined 2

Payables Options
Max Check Amount \$0.00
Password
 Duplicate Check Numbers
 Override Check Number

EFT Bank Direct Deposit

Checkbook ID

DEFAULT RECURRING BATCHES: LAST DAY

Monthly/Bi-Monthly



Payables Batch Entry - TWO (Abra)

Save Clear Delete Post Additional File Print Tools Help Add Note

Batch ID: GPUG RECUR Origin: Payables Trx Entry

Comment:

Frequency: Monthly Use last day of the month

Posting Date: 4/30/2027

Check Date: 0/0/0000

Checkbook ID: UPTOWN TRUST

Currency ID:

Recurring Posting: 0

Days to Increment: 0

Last Date Posted:

Times Posted:

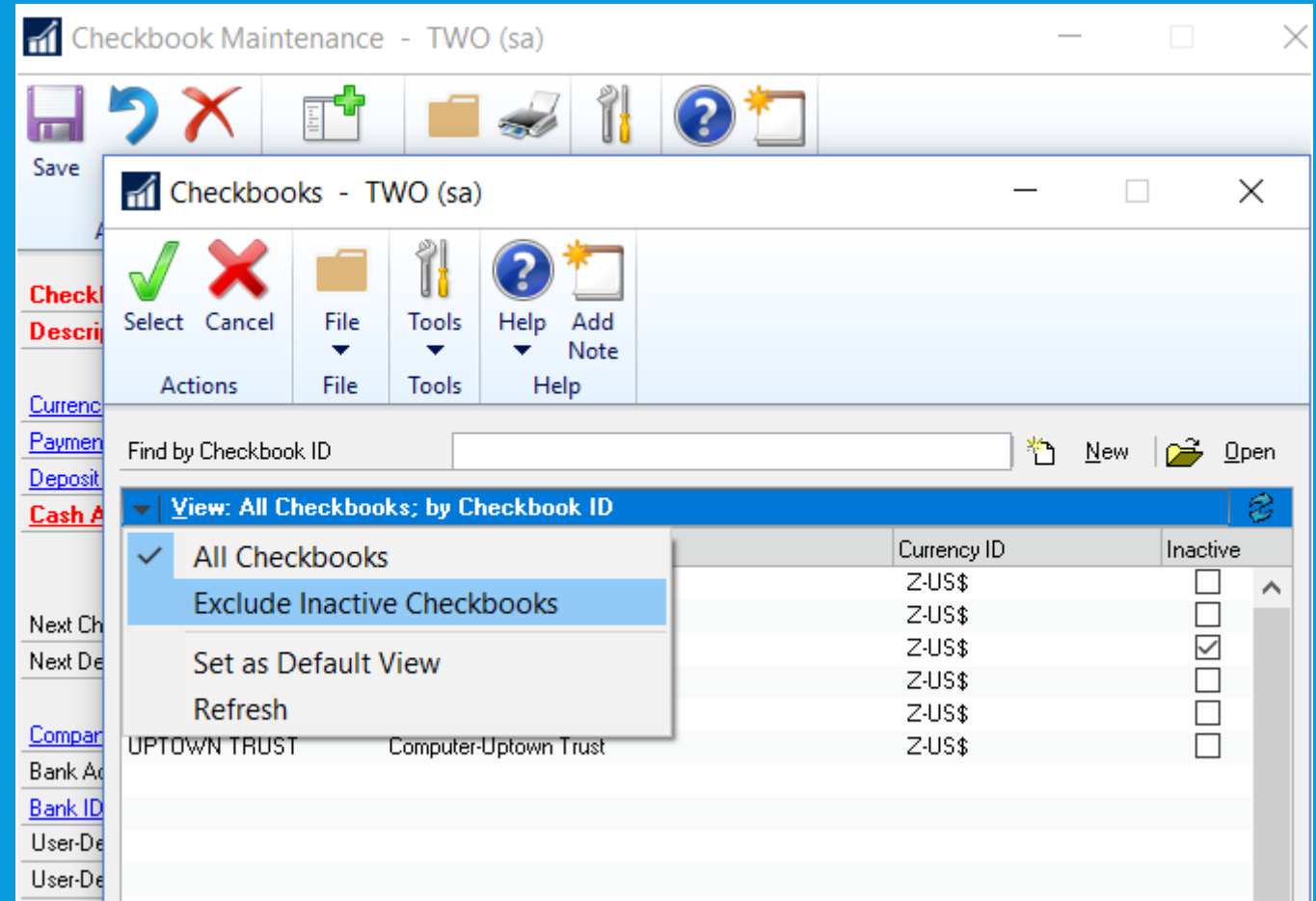
DON'T DISPLAY INACTIVE CHECKBOOKS IN LOOKUPS

PREVIOUS versions have many OTHER fields to exclude.

Now in GP 2018 R2, Choose to exclude inactive checkbooks in the Lookup window by choosing the black drop-down arrow next to View, and then choose Exclude Inactive Checkbooks.

To save as the default view, simply choose Set as Default View in the same list.

This is accessed from any window in Dynamics GP that has a Checkbook ID field with a magnifying glass next to it.



NEW SORT OPTIONS IN SOP ITEM INQUIRY

Ascending and Descending – WOO HOO!
The sort options include Item Number, Document Number, Document Type, Document Date, & Cust ID.

Item Number will be the default sort when the window is opened.

In 2018 other windows (AP/AR had this added)!



Sales Order Processing Item Inquiry - TWO (sa)

OK Redisplay Find View All-in-One View File Print Tools Help Add Note

Items: by Item Number All From:

Include: by Document Number
by Document Type
by Item Number
by Document Date

Display: Unposted History

Sort By: by Item Number Ascending

Item Number	U of M	Quantity	Extended Price
Doc. Type Document Number	Date	Customer ID	Customer Name
1-A3261A	Each	1	\$32,000.00
1-A3261A	Each	1	\$32,000.00
1-A3261A	Each	1	\$32,000.00
1-A3261A	Each	1	\$32,000.00
100XLG	Each	2	\$119.90
100XLG	Each	2	\$119.90
128 SDRAM	Each	2	\$270.40
128 SDRAM	Each	4	\$540.80
128 SDRAM	Each	2	\$270.40
128 SDRAM	Each	1	\$135.20

BULK UPDATE INACTIVATE/REACTIVATE FROM NAVIGATION LISTS!

GL Accounts Navigation List, Checkbooks Navigation List, Customers Navigation List, Salespeople Navigation List, Vendors Navigation List, Items Navigation List, and Employees Navigation List windows.

Additionally, vendors can be marked as Temporary in the Vendors Navigation List window and a different visual indicator

*Employees must be inactivated/reactivated one at a time. If more than one Employee ID is selected, the Inactivate & Reactivate options are grayed out. When a user clicks the Inactivate or Reactivate option, the Employee Maintenance window will automatically open.

The screenshot displays the Microsoft Dynamics GP interface. The top navigation bar includes 'Transactions', 'Inquiry', 'Reports', 'Cards', and 'Microsoft Dynamics GP'. The left sidebar shows a navigation tree with 'Customers' selected. The main window title is 'Customers (read only)'. The 'Actions' ribbon contains 'Apply Sales Documents', 'Aging', and 'Print Statements'. The 'Modify' ribbon contains 'Delete', 'Apply Hold', 'Remove Hold', 'Inactivate', and 'Reactivate'. A dialog box is open over the 'Inactivate' button, prompting the user to 'Click below to proceed.' with an 'Inactivate' button. Below the ribbon, a filter is applied: 'Where Phone Number contains 312'. A status bar at the bottom indicates: '9/28/2018; Inactivate action completed. 1 succeeded; 8 failed.' Below this, a table lists customer records.

	Customer Name	Customer ID	Phone Number	Contact
<input type="checkbox"/>				
<input checked="" type="checkbox"/>	Fabrikam Returns	FABRETURN01	(312) 436-267...	Returns Dept.

ADD VENDOR DOCUMENT NUMBER TO PURCHASING ALL-IN-ONE VIEW



The vendor's document number for payments, credit memos, and returns now shows in the Purchasing All-in-One Document View.

The all-in-one view is great for viewing related documents but most times the vendor document number is the one known, not the document number.

Purchasing Menu > Inquiry > Purchasing All-In-One View.

To view the doc number of an invoice, finance charge, or miscellaneous change, simply click the black arrow in the lower right hand corner of the document to expand the view.

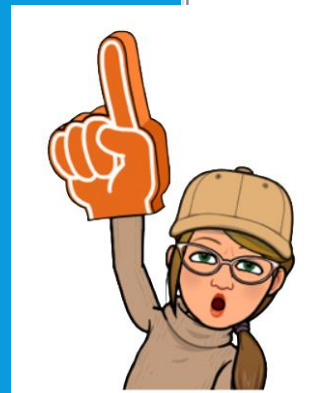
The screenshot displays the 'Purchasing All-in-One View' interface. The main window shows a grid of document cards for Purchase Orders, Invoices, Payments, and Credit Documents. Each card displays a document amount, voucher number, document date, and document number. The document numbers are circled in red. A secondary window on the right shows a detailed view of an invoice with its own document number circled in red. The interface includes a menu bar with options like OK, Clear, Redisplay, Options, File, Tools, Help, and Add Note. The title bar reads 'Purchasing All-in-One View - TWO (sa)' and 'Purchasing All-in-One View - GPDAT (sa)'.

Document Type	Amount	Voucher No.	Document Date	Document No.
Purchase Order	\$49.28	0000000000000029	09/29/1999	10051
Invoice	\$46.82	0000000000000003	10/05/1999	200005
Payment	\$35.00	0000000000000002	09/13/1999	CM0000000000000002
Credit Document	\$50.00	0000000000000099	08/15/1999	4124
Purchase Order	\$593.00	0000000000000047	08/15/1999	10051
Invoice	\$898.35	0000000000000098	08/15/1999	12902
Payment	\$22.59	0000000000000041	07/07/1999	1004
Credit Document	\$50.00	0000000000000099	08/15/1999	4124
Purchase Order	\$430.72	0000000000000016	8/20/2023	1002
Payment	\$28.46	0000000000000059	4/12/2027	20065

SMARTLIST FOR DEPOSITS WITH UNPOSTED SALES TRANSACTIONS

This SmartList is a new option under Sales Transactions so you can quickly see customers that have put a deposit on a sales transaction, but the sales transaction hasn't been posted. No more searching through the sales records to see the deposits, now you have a new SmartList to view the details.

This new default SmartList is filtered to look at Sales Order WORK transactions (SOP10100) with a Deposit Received amount (DEPRECVD field) greater than zero.



Sales Transactions - Deposits on Unposted Sales Transactions*

SOP Type	SOP Number	Document Date	Customer Number	Customer Name	Sales Document Status	D
Order	ORDST2231	4/12/2027	BAKERSEM0001	Baker's Emporium I...	New	

Sales Transaction Entry - TWO (sa)

Save Actions AA Attach Options View Additional Go To File Print E-mail Tools Help Add Note

Actions Options View Additional Go To File Tools Help

Type/Type ID: Order STDORD Date: 04/12/2027
Document No.: ORDST2231 Batch ID: EMAIL
Customer ID: BAKERSEM0001 Default Site ID: WAREHOUSE
Customer Name: Baker's Emporium Inc. Customer PO Number:
Ship To Address: PRIMARY 789 University Ave Currency ID: Z-US\$

Line Items by Order Entered

Item Number	D	U of M	Qty Ordered	Unit Price	Extended Price
1-A3261A	<input type="checkbox"/>	Each	1	\$32,000.00	\$32,000.00
	<input type="checkbox"/>		0.00	\$0.00	\$0.00

Amount Received	\$1,000.00	Subtotal	\$32,000.00
Terms Discount Taken	\$0.00	Trade Discount	\$0.00
On Account	\$33,240.00	Freight	\$0.00
Comment ID		Miscellaneous	\$0.00
		Tax	\$2,240.00
		Total	\$34,240.00

WARNING WHEN THE VENDOR IS ON HOLD

When entering a payables transaction for a vendor that is marked as on hold, you now get a visual indicator. (Similar to the customer hold status that was implemented in an earlier version).

Dynamics GP WILL give a warning message when a user attempts to enter a transaction when the vendor is on hold.

You can see the vendor hold status in the following pages:

- Vendor Inquiry
- Transactions by Vendor
- Purchasing All-in-One Viewer
- Payables Transaction Entry Zoom

In these windows, a red dot now displays next to the vendor name or ID if the vendor is on hold.

The screenshot displays the Microsoft Dynamics GP interface. The main window is titled "Vendor Inquiry - T8R2B (sa)". It shows a vendor record for "ASSOCIAT0001" (Associated Insurance Inc.) with a red dot next to the Vendor ID. The status is "Active". A secondary window, "Payables Transaction Entry - T8R2B (sa)", is open, showing a transaction entry form for an invoice. A warning dialog box is displayed in the foreground, titled "Microsoft Dynamics GP", with the message: "Vendor ASSOCIAT0001 is currently on hold. Do you want to continue?". The dialog box has "Yes" and "No" buttons.

SEND A PURCHASE ORDER USING THE "OTHER FORMAT" TEMPLATE

A new option to send a purchase order as an email using the format "Other format" has been added.

This means that users can choose if they want to email the Blank Paper or the Other form. This can be useful if you are using different purchase order formats depending on the type of vendor that the PO is being emailed to.

After selecting a purchase order format, you can click the Send button at the bottom of the window. The vendor's email address and the message ID entered on the purchase order transaction will be used and the email will be sent in the format selected.

*NOTE: Email functionality is dependent on Word Templates being enabled and properly configured in your company.

Purchase Order Send Email Options - T...

File Tools
File Tools

Purchase Order Format: Blank Paper
Blank Paper
Other Form

Print Options:

- Print Canceled Items
- Include In Totals
- Print Reference Number and FOB
- Combine Similar Items
- Print One Purchase Order per Address
- Include Tax Details
- Print Dual Currencies
- Line Item and Summary
- Summary Taxes Only

E Mail Send To

To... agilman@collinscomputing.com

Cc...

Bcc...

Send

EXCLUDE ITEMS ON THE HITB REPORT WITH ZERO QUANTITY OR VALUE

Additional options on Historical Inventory Trial Balance report to **exclude** items with zero quantity or zero value.

Inventory Menu > Reports > Activity

Exclude: Items With Zero Quantity
Items With Zero Value



Activity Report Options - GPDAT (sa)

Actions: Clear, My Reports, Email, File, Print, Tools, Help, Add Note

Report: Historical IV Trial Balance

Item Number: [Dropdown] Print: Detail [Dropdown]

GL Posting Date Document Date

All By Site From: [Search] To: [Search]

Items With Zero Quantity Items With Zero Value

Item Number: [Input]

System: 01/01/1965 4:15:00 AM
User Date: 01/15/2018

Sorted By: Item Number

Include Items With Zero Quantity: Yes
Include Items With Zero Value: Yes

HISTORICAL INVENTORY TRIAL BALANCE
Dextordinary Inc.
Inventory Control
Use: GL Posting Date

ALLOW PARTIAL PURCHASE ON A PO FROM A PURCHASE REQUISITION



When creating a PO if you enter a qty less than what was initially requested, the remaining quantity on the requisition will then be canceled.

I.E. if you have a qty of 50 of the item 128 SDRAM on a requisition, but you only want to purchase 35 items, you receive a warning that the remaining quantity ordered will be canceled.

When the purchase order is generated, the purchase requisition will move to history if all lines on the requisition have been fully or partially ordered with the remaining quantity on the partially ordered lines canceled.

If you drill back on the transaction in the Purchase Requisition Inquiry zoom, there will be a red icon as a visual indicator to show that the quantity was only partially ordered.

Purchase Orders Preview - TWO (sa)

Validate Generate Cancel File Print Tools Help Add Note

Actions File Tools Help

Vendor	PO	Item	Requisitions
Item	128 SDRAM	128 meg SDRAM	
Vendor Item	128 SDRAM	128 meg SDRAM	
Vendor ID	CRUGEREN0001	Cruger Engineering Company	
PO Number	New PO-2	Drop Ship	<input type="checkbox"/>

Qty To Purchase	U of M	Site ID	Unit Cost	Extended Cost
35	Each		\$152.10	\$5,323.50

Required Date	Quantity	Base U of M	Comment ID	Minimum Order	Economic Order	Maximum Order
4/12/2027	50	Each		0	0	0

Recent POs for this item

Vendor	PO Number	Req Date	Unit Cost
--------	-----------	----------	-----------

Microsoft Dynamics GP

The remaining quantity ordered will be canceled.

RETAIN SHIP-TO-ADDRESS NAME WITH CUSTOMER MODIFIER

The Ship-To-Address Name value is retained when a customer is modified with the Customer Combiner and Modifier Utility.

Sales Menu > Utilities > Customer Combiner and Modifier
Sales Menu > Cards > Customer Address

The image shows two overlapping software windows. The left window, titled "Customer Combiner and M...", has a menu bar with "Process", "Cancel", "File", "Tools", "Help", and "Add Note". It features radio buttons for "Customer Combiner" and "Customer Modifier" (which is selected). Below are fields for "Import File" and "Validate", and "Remove" and "Remove All" buttons. A "Customer Balance Type" section has radio buttons for "All", "Open Item", and "Balance Forward". A table with two columns, "Source Customer ID" and "Destination Customer ID", shows a mapping from "CENTRALD0001" to "CENTRALDIST01", both labeled "Central Distributing".

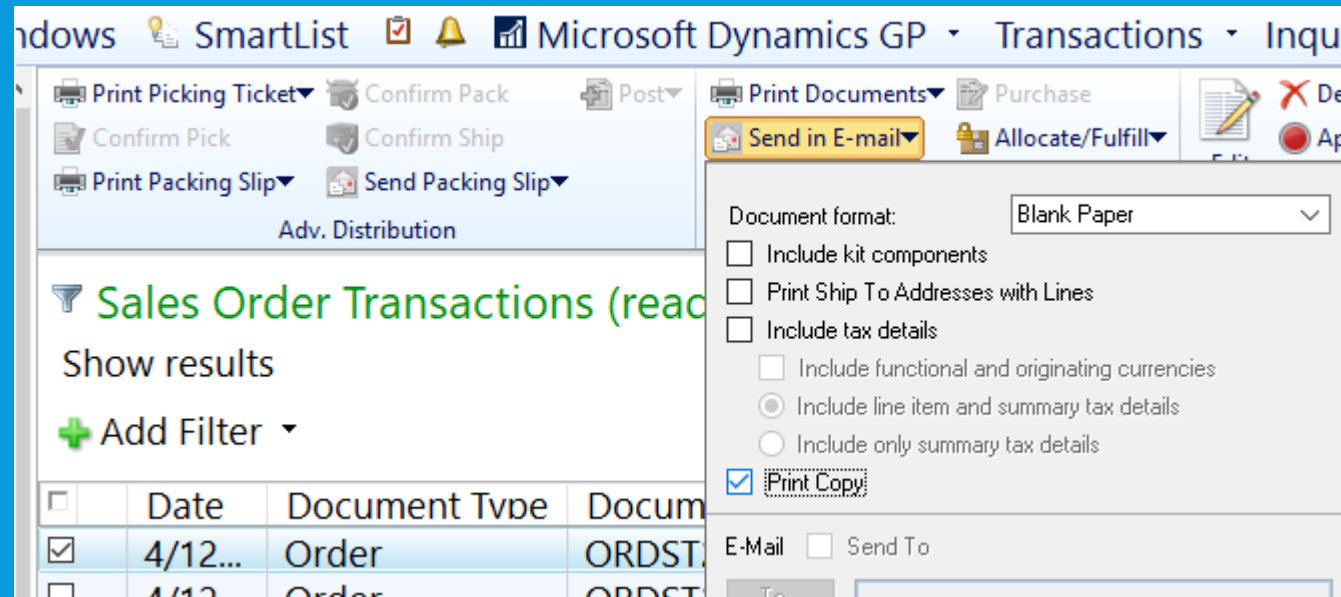
The right window, titled "Customer Address Maintenance - TWO (sa)", has a menu bar with "Save", "Clear", "Delete", "Additional", "File", "Print", "Tools", "Help", and "Add Note". It displays fields for "Customer ID" (CENTRALD0001), "Name" (Central Distributing), "Address ID" (WAREHOUSE), "Contact" (Jason Paul), and "Address" (727 25 St. N). Other fields include "City" (La Crosse), "State" (WI), "ZIP Code" (54601-9975), and "Country" (USA). On the right side, there are fields for "UPS Zone", "Shipping Method" (GROUND), "Tax Schedule ID" (USASTCITY-6*), "Site ID", "Salesperson ID", and "Territory ID". At the bottom, a "Ship To" section shows "Address Name" (Central Distributing) and "Print Phone/Fax Number" options: "Do Not Print" (selected), "Phone 1", "Phone 2", "Phone 3", and "Fax".

PRINT/EMAIL SALES DOCS SIMULTANEOUSLY

This feature allows you to print & email sales invoices all in one process.

Previously you would have been required to print the document or range of documents, and then once that process was completed, you would have to go back into the window, mark the documents again and email the documents.

In the Sales Document Print Options and Print Sales Document windows, new fields specify if you want to print or email the document. In the Sales Order Transactions Navigation List window, when you choose the action to send a transaction in email, you can now choose to print a copy.



*Note: Email functionality is dependent on Word Templates being enabled and properly configured in your company.

EMAIL CUSTOMER STATEMENTS



In the Customer Maintenance window, you can email statements with the click of a button. A new email button can be found on the Menu bar of the Customer Maintenance window.

When you click the email button, Dynamics GP will email a customer statement to the customer that you have selected in the window. The settings from your 'BLANK FORM' statement ID will be used for this functionality. If a Statement ID of 'BLANK FORM' does not already exist in your company, then Dynamics GP will create a new Statement ID with the name 'BLANK FORM'.

The screenshot shows two windows from Dynamics GP. The left window is titled 'Customer Maintenance - TWO (sa)'. It features a menu bar with 'Save', 'Clear', 'Delete', 'Write Letters', 'Attach', 'Print', 'All-in-One View', 'File', 'E-mail', 'Tools', 'Help', and 'Add Note'. The 'E-mail' button is highlighted, and a dropdown menu is open showing 'Customer Report' and 'Statement'. Below the menu bar, there are fields for 'Customer ID' (AARONFIT0001), 'Name' (Aaron Fitz Electrical), 'Short Name' (Aaron Fitz Elec), 'Statement Name' (Aaron Fitz Electrical), 'Address ID' (PRIMARY), 'Parent Customer ID', 'Class ID' (USA-ILMO-T1), and 'Priority' (9).

The right window is titled 'Screen Output - RM Email Statements Report'. It has a menu bar with 'File', 'Edit', 'Tools', 'Find', and 'Help'. Below the menu bar, there are buttons for 'Print', 'Send To', 'Modify', and a 'Completed' status indicator. The main content area contains the text: 'The following statements have been successfully created and e'. Below this text is a table with the following data:

Customer ID	Customer Name
AARONFIT0001	Aaron Fitz Electrical
to: agilman@collinscomputing.com; abra.gilman@bendbroadband.com	

*Note: Email functionality is dependent on Word Templates being enabled and properly configured in your company.

HUMAN RESOURCES & PAYROLL ENHANCEMENTS

Payroll check register FICA totals

The report has employee and employer FICA amounts and a total for both. The following FICA totals have been added to the Payroll Check Register report: FICA Medicare = Employee FICA Medicare total + Employer FICA Medicare total FICA Social Security = Employee Social Security total + Employer Social Security total

In earlier versions of Dynamics GP, the Employee Medicare and Employer Medicare values were totaled separately. Additionally, the Employee Social Security and Employer Social Security values were totaled separately.

Changes to Payroll Check Register Report

Two new calculated fields added to the Payroll Check Register report to accommodate the ability to view these totals: FICA Med Total Owed, FICA Soc Total Owed.

The Payroll Check Register report can be printed after checks are 'calculated' (pre-posting report), and/or during the Payroll Computer Check posting process.



START & END DATES FOR PAY CODES

You can assign a start date and/or an end date to pay Codes. These will be applicable for Payroll Trx Entry & Build check windows!

This new feature will allow users to setup new pay codes without having to worry about when to start using them, or when to deactivate those they no longer wish to use.

This will be very useful to you when you are activating a new hire and terminating an existing salary employee.

*Note: In earlier versions of Dynamics GP, it was not possible to restrict whether a pay code is included in a pay run via start and/or end dates. Instead, users would generally 'inactivate' a pay code (most often a salary type pay code) to ensure it's not included in a pay run.

Employee Pay Code Maintenance

File Edit Tools Help DEXTR Dextrordinary Inc. 01/15/2000

Save Clear Delete

Employee ID: A Inactive
Name: Askland, Linda M. Data Entry Default
Pay Code: HOUR2
Description: 4/01/2018- 8/1/2018 Pay Type: Hourly

Start Date: 04/01/2018
End Date: 08/01/2018

Based on Pay Code:
Pay Factor: 0.00
Pay Rate: \$200.00000
Unit of Pay: Hourly
Pay Period: Weekly
Pay per Period: \$0.00
Shift Code:

SUTA State: ND
Workers' Comp Code: NDFK
Maximum per Period: \$0.00
Advance Amount: \$0.00

Subject To Taxes:
 Federal State FUTA
 FICA Soc Sec Local SUTA
 FICA Medicare

Report As Wages:
W-2 Box: 0
W-2 Label:

Flat Tax Rates:
Federal: 0.00%
State: 0.00%

Accrue:
 Vacation
 Sick Time

Summary History

by Employee ID

SHARED MAX FOR BENEFITS & DEDUCTIONS

It is now possible to assign a shared calendar year maximum for groups of benefits and/or groups of deductions.

This will be a huge benefit to your organization for employees who may contribute to two 401K plans.

A new window has been added to accommodate the new deduction and benefit shared maximum functionality, the Ded/Ben Shared Limit window.

The screenshot shows a software window titled "Ded/Ben Shared Limit Setup - T18R2 (sa)". The window has a menu bar with "Save", "Clear", "Delete", "File", "Tools", "Help", and "Add Note". Below the menu bar, there are fields for "Group Code" (401KMx), "Description" (401K max), "Type" (Deduction), and "Calendar Year Max" (\$27,500.00). At the bottom, there are two lists: "Codes:" and "Selected:". The "Codes:" list contains 401K, CHD, EPU, INS1, INS2, MED, and UW. The "Selected:" list contains 401K and CHD. Between the lists are buttons for "Insert All >>", "Insert >", "< Remove", and "<< Remove All".

Group Code	401KMx
Description	401K max
Type	Deduction
Calendar Year Max	\$27,500.00

Codes:

- 401K
- CHD
- EPU
- INS1
- INS2
- MED
- UW

Selected:

- 401K
- CHD

WORKFLOW: SALES TRANSACTION APPROVAL



Create approvals for SOP docs for things like:

Customer credit limits

All transaction types in Sales Transaction Entry

The default WF ASSIGN SOP APPROVAL* email message for the Sales Transaction Approval workflow will have the option to add many customer and transaction related fields like Customer credit limit information so that you can write in the email if the customer credit limit has been exceeded.

The workflow history for the Sales Transactions Approval workflow is also displayed on inquiry windows and navigation lists.

SYSTEM ENHANCEMENTS

Password maximum length

User Passwords were increase from 15 to 21 characters!
Just like other Microsoft products, example Microsoft SQL Server.

Password expiration notification

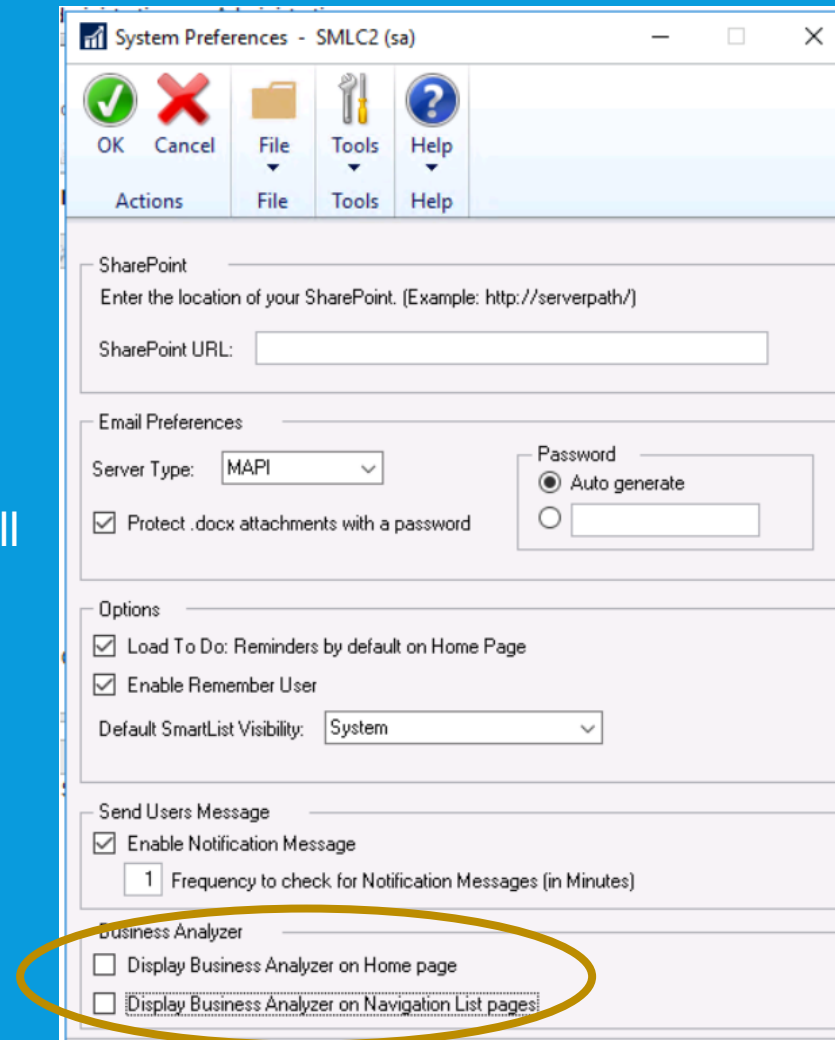
Gives users a notification 7 days in advance of their login password expiring. This allows users to proactively update their passwords before the expiration date specified in the password policy configured by the system administrator.



HIDE BUSINESS ANALYZER IN NAVIGATION LISTS FOR ALL USERS/LISTS

ALSO - SmartList Designer favorites display in navigation lists

SmartList Favorites created via SmartList Designer will appear in the SmartList Favorites nav lists.



Turn off Business Analyzer for the Home Page and/or navigation lists at the system level in the System Preferences window.

These are global settings. Individual users can still choose to turn on Business Analyzer using customization options.

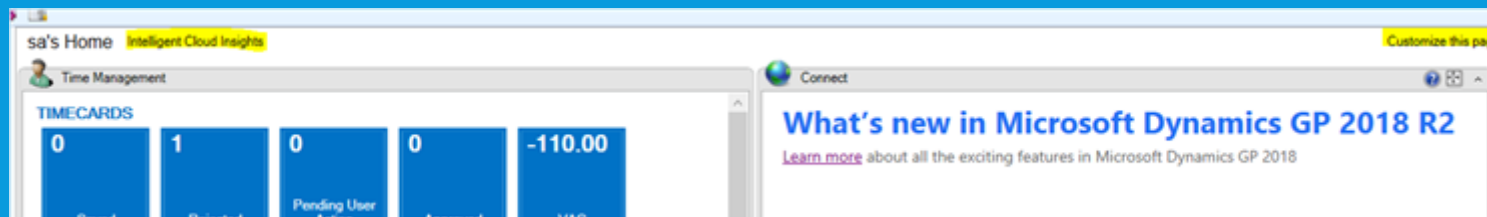
INTELLIGENT CLOUD



Intelligent Edge-Intelligent Cloud Insights

With the release of Dynamics GP 2018 R2, you will notice a new tab on your home page: Intelligent Cloud Insights. Essentially, you can connect your Dynamics GP to a Dynamics 365 Business Central cloud tenant that you can synchronize data to. This enables cloud scenarios for your Dynamics GP that will then show in the Intelligent Cloud Insights tab with insights from machine learning and other cloud scenarios.

When you upgrade to GP 2018 R2 with an existing install, the users' Home Page tab will default as usual, but you will see a new tab called Intelligent Cloud Insights. If you do a new install of Dynamics GP 2018 R2, the Home Page will default to the Intelligent Cloud Insights tab. For more information, see [Frequently Asked Questions about Connecting to the Intelligent Cloud](#) in the docs for Dynamics 365 Business Central.



Bonus Tip – Changing Column Display

Did you know you can change the info showing in the Edit Payment Window? Hit the COLUMNS Button!

The screenshot shows the 'Edit Payment Batch - TWO18 (sa)' window. The interface includes a menu bar with 'OK', 'Redisplay', 'File', 'Print', 'Tools', 'Help', and 'Add Note'. Below the menu bar, there are several data fields for 'Batch ID' (COMPUTER CHECKS), 'Currency ID' (Z-US\$), 'Batch Total' (\$9,274.45), and 'Apply Date' (4/12/2027). To the right, there are fields for 'Checkbook ID' (UPTOWN TRUST) and 'Checkbook Currency ID' (Z-US\$), along with 'Balance before Payments' (\$64,598.55) and 'Balance after Payments' (\$55,324.10).

The 'Vendors' table is displayed with the following columns: Vendor ID and Total Amount Paid. The 'Columns' button is visible in the top right corner of the table header.

Vendor ID	Total Amount Paid
<input checked="" type="checkbox"/> BEAUMONT0001	\$9,274.45
<input type="checkbox"/> ACETRAVE0001	\$0.00
<input type="checkbox"/> ADVANCED0001	\$0.00
<input type="checkbox"/> ALLENSON0001	\$0.00
<input type="checkbox"/> AMERICAN0001	\$0.00
<input type="checkbox"/> ASSOCIAT0001	\$0.00
<input type="checkbox"/> ATTRACTI00001	\$0.00
<input type="checkbox"/> BERGERON0001	\$0.00
<input type="checkbox"/> BURNETTT0001	\$0.00
<input type="checkbox"/> BUSINESS MAG	\$0.00
<input type="checkbox"/> BUSINESS0001	\$0.00
<input type="checkbox"/> CAPITALP0001	\$0.00

The 'Select the documents you would like to pay for vendor:' table is also displayed with the following columns: Document No, Due Date, Amount, Amount Paid, Original Amount, and Transaction Desc. The 'Columns' button is visible in the top right corner of the table header.

Document No	Due Date	Amount	Amount Paid	Original Amount	Transaction Desc
<input checked="" type="checkbox"/> 13000000	2/19/2024	\$0.00	\$6,828.57	\$6,828.57	
<input checked="" type="checkbox"/> 3002	1/18/2024	\$0.00	\$445.88	\$445.88	BEGINNING BA
<input checked="" type="checkbox"/> 3001	12/12/2023	\$0.00	\$2,000.00	\$2,000.00	BEGINNING BA

At the bottom of the window, there is a legend: Indicates that a credit document is applied. At the bottom right, there are two buttons: 'Edit Vendor Payments' and 'Print Payments'.

MICROSOFT DYNAMICS GP 2018(NOT R2) DON'T FORGET ABOUT THESE!



Microsoft Dynamics GP 2018

MORE WORKFLOW

MORE DOCUMENT ATTACHMENT OPTIONS

SORTING ADDED!! ASCENDING AND DESCENDING!!

Receivables Transaction Inquiry - by Customer

Receivables Transaction Inquiry - by Document

Payables Transaction Inquiry - by Vendor

Payables Transaction Inquiry - by Transaction

System password valid for duration of the user session!!

Rename of Payables windows to say **Payments instead of Checks**

SmartList Favorites – **unique password protection**

Additional Sorting in Bank Reconciliation Window

Update help icons to link to tagged online support documents





THANKS FOR ATTENDING

QUESTIONS?

agilman@collinscomputing.com