GP2018 R2 FEATURES FOR EXISTING CUSTOMERS

COLLINS COMPUTING

HOW AND WHY TO TAKE ADVANTAGE OF AN UPGRADE?

Abra Lynne Gilman
Senior Consultant
Collins Computing
March 2019

GOT SNOW?!


BEND HIGH
LAVA BEARS
SPRING SPORTS
SIGN-UPS NOW
230


Two feet of snow and still snowing

"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	GP 2016 R2	GP 2018	GP 2018 R2	GP 'Next'	GP 'Next'
Enhanced user experience for Web Client Multiple browser & device support for Web Client Workflow 3.0 PowerBI: Odata 1.0 Top feature requests	Power BI: OData 2.0 Home Page Refresh Web Client Evolution Top Features Requested by Customers	Workflow 4.0 Doc Attach Fin/HR Optimization Power Suite Top feature requests	Intelligent Edge Financial Enhancements Purchasing Usability Sales Optimization Top features requests	Ongoing Development Intelligent Edge Enhancements Top features requested by customers & community	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

23

Suggested 13 days ago by Shawn Dorward, MVP – New

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

Keep up with the latest issues.

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

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 Editio

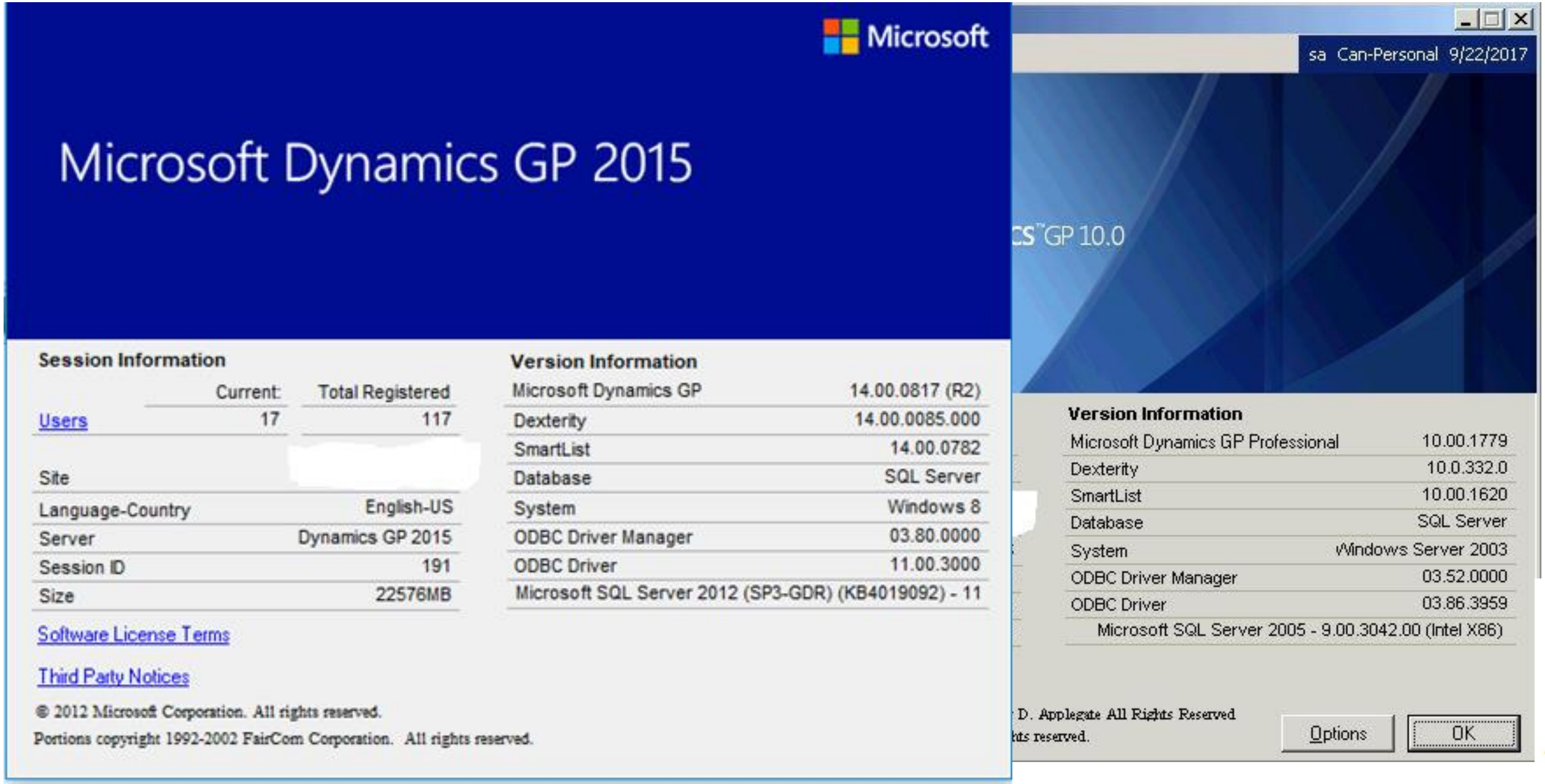
Microsoft Office 365, 2013 32/64 Bit or 2016 32/64 Bit

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

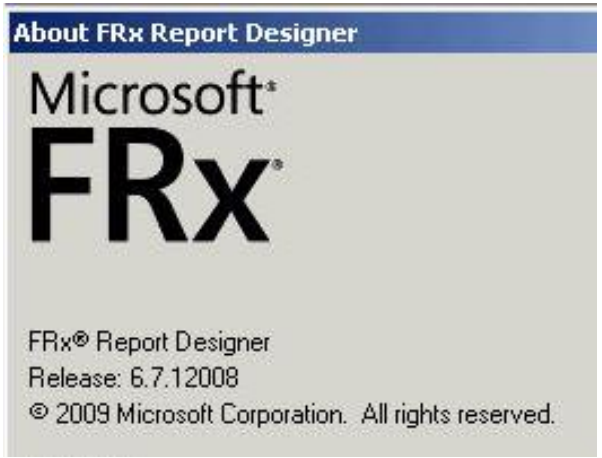
Gather your specs/Review the facts

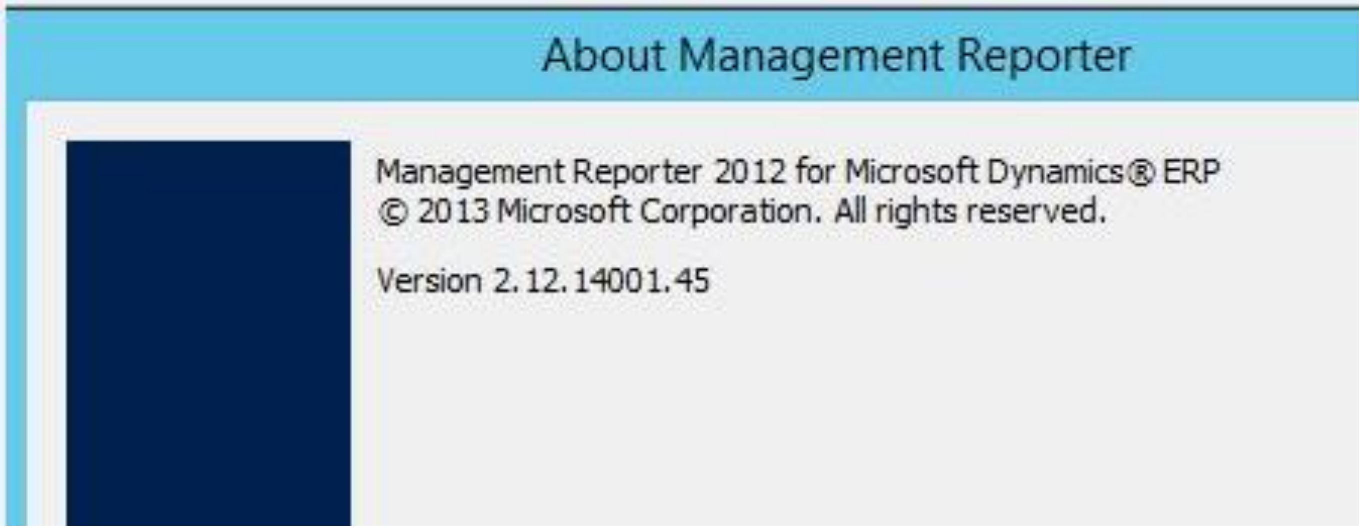
GP About Box
MR About Box
Third Party About Box
Dynamics.set
Reports.dic (Forms.dic, other reports dictionaries)
SQL Version, Windows Server Version, Server Review and Plans
PartnerSource/CustomerSource Review (Third Parties, Key Access)
Add-Ons folder
GP folder/other executables
MICR/Ext/SLB

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



Financial Reporting MR/FRx





SQL Database Details

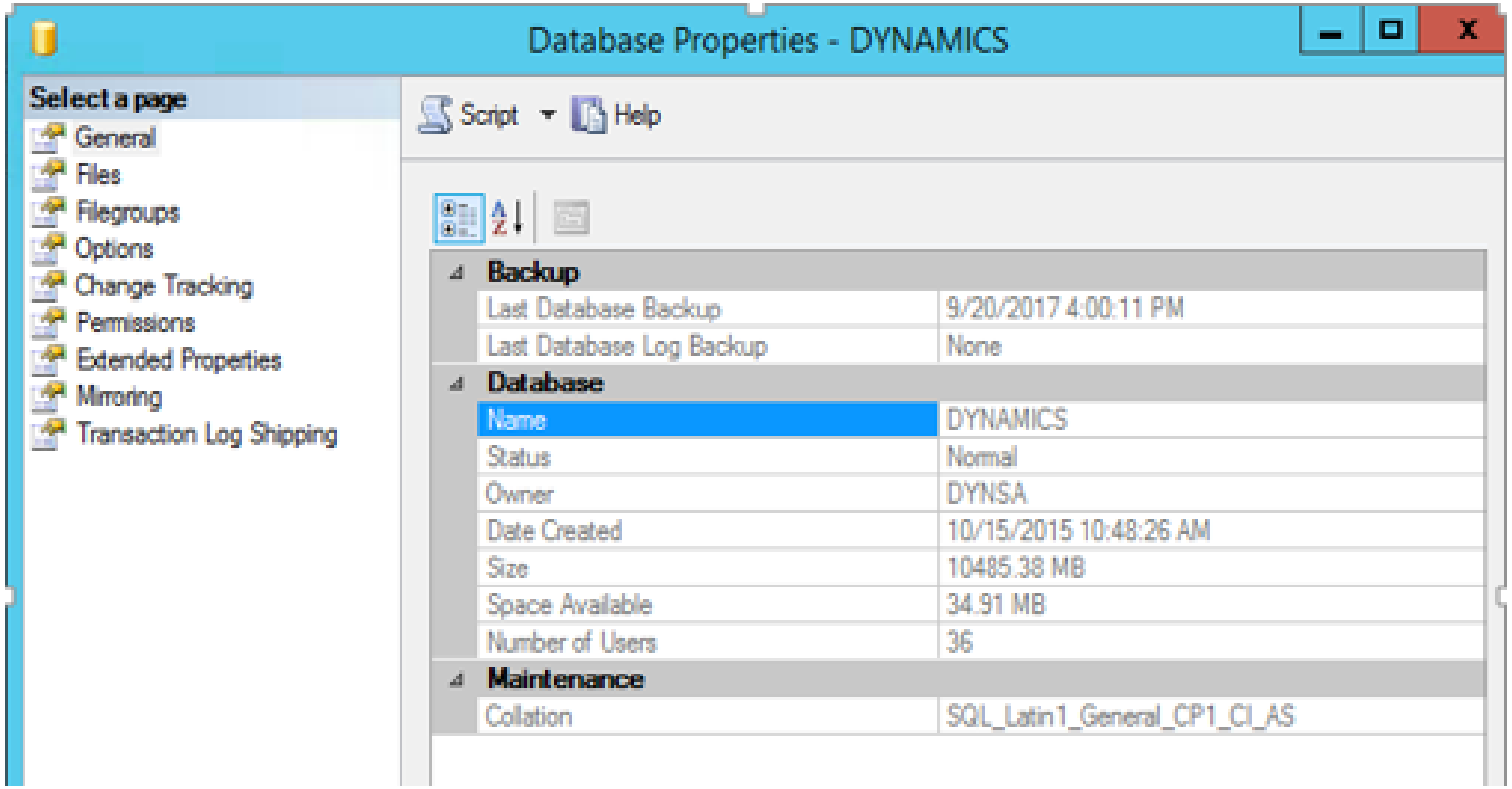
SELECT @@VERSION

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)



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
: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

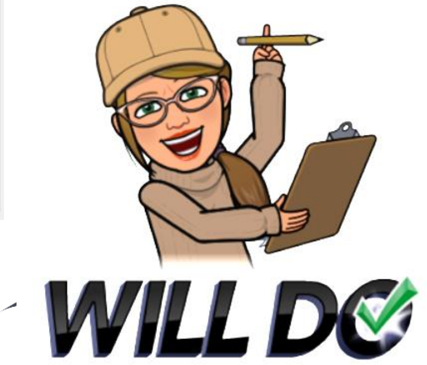
Customization Maintenance

Export Import

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
CustomerUserDef1Functions	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

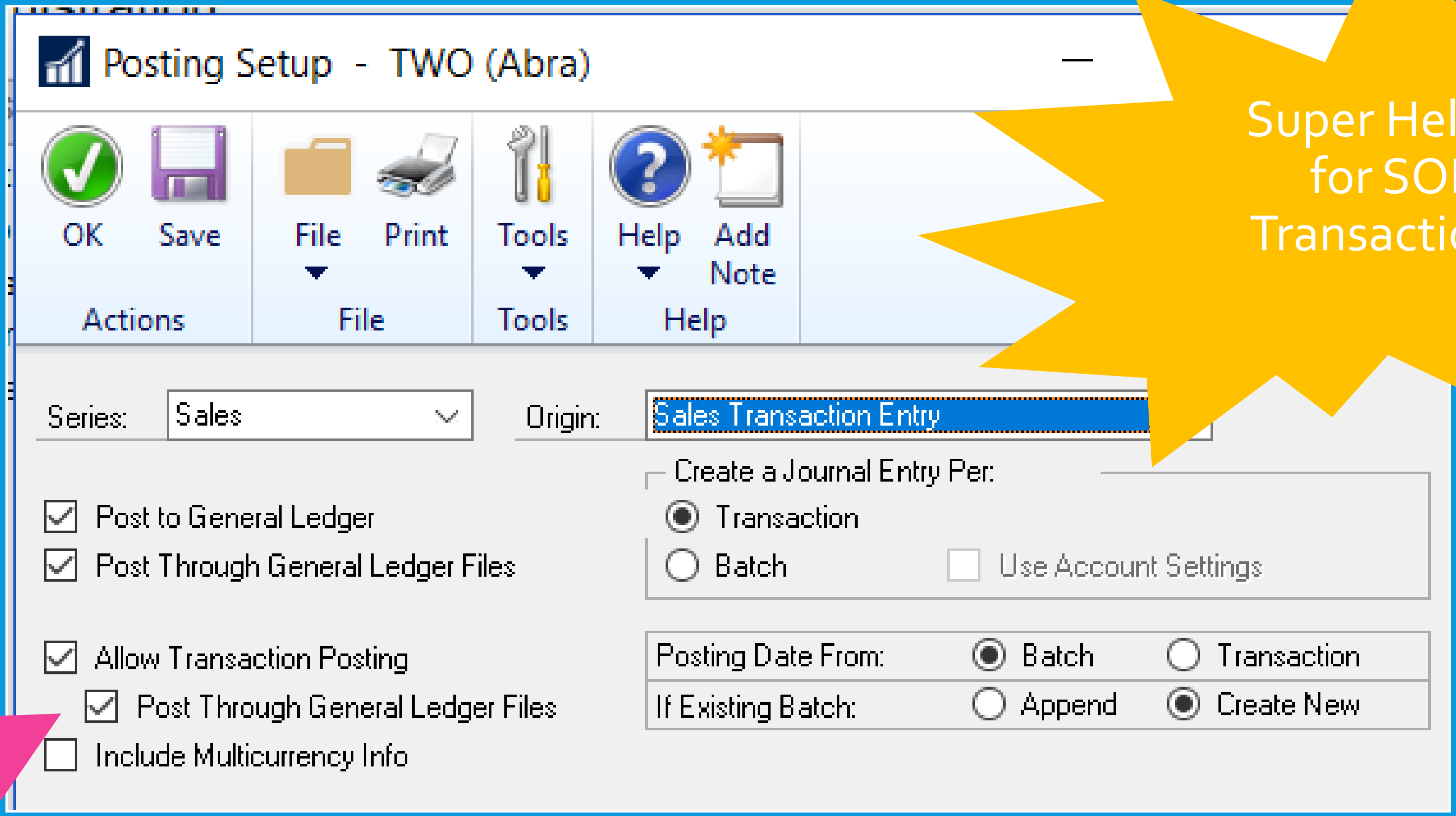
GP Dropdown > Tools > Customize > Customization Maintenance



CUSTOMER'S FAVORITE MICROSOFT DYNAMICS GP 2018 R2 TIPS!

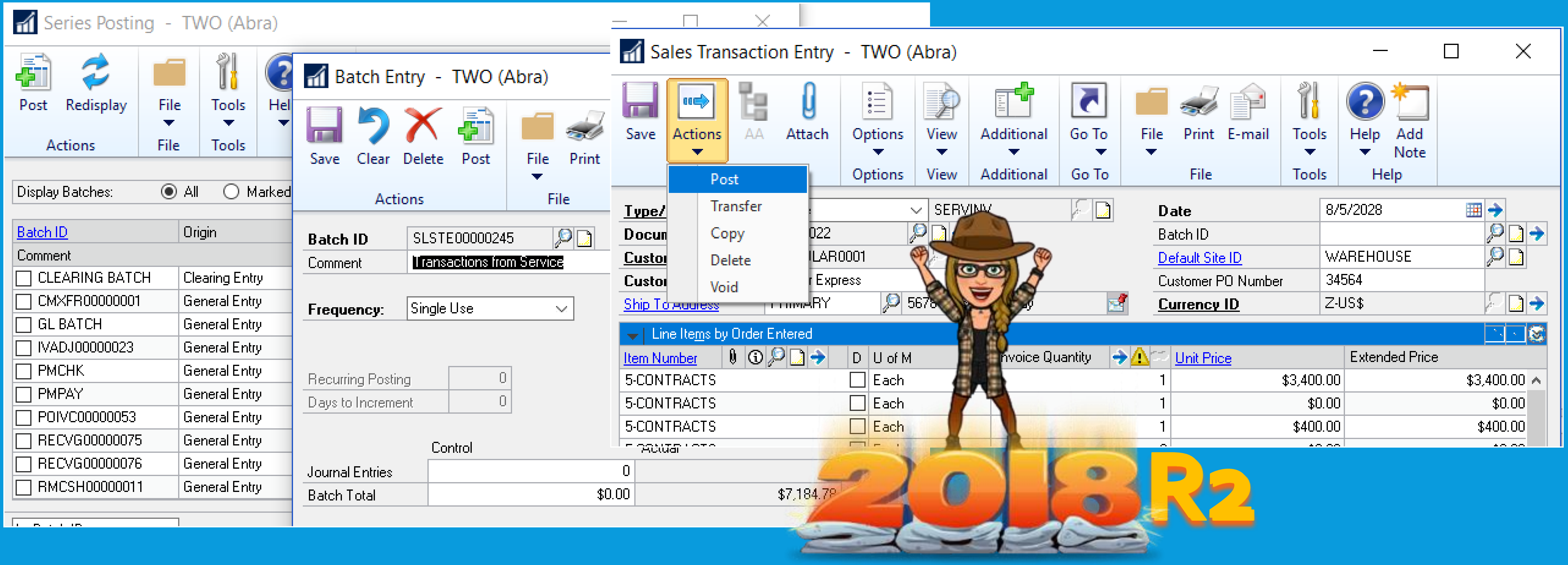
Yes, I LOVE showing off new GP Features!

POST THRU: TRANSACTION LEVEL POSTING

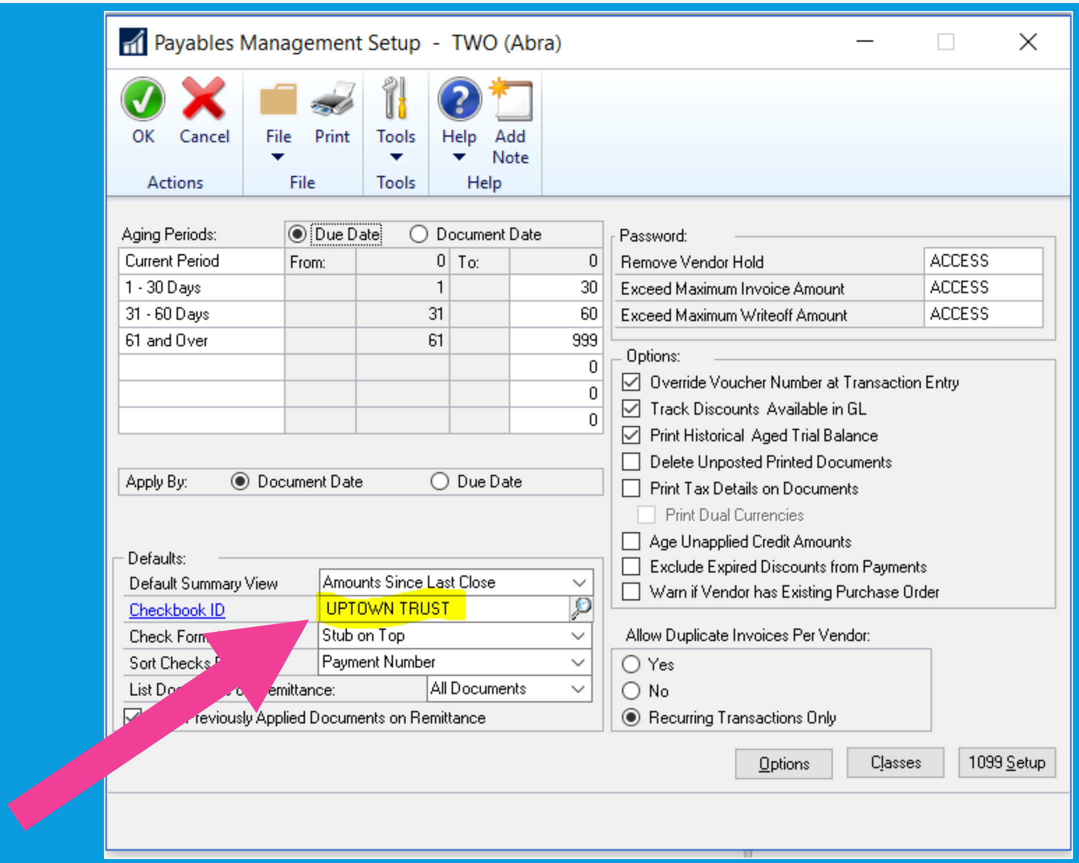


Super Helpful for SOP Transactions!

NO MORE HANGING BATCHES

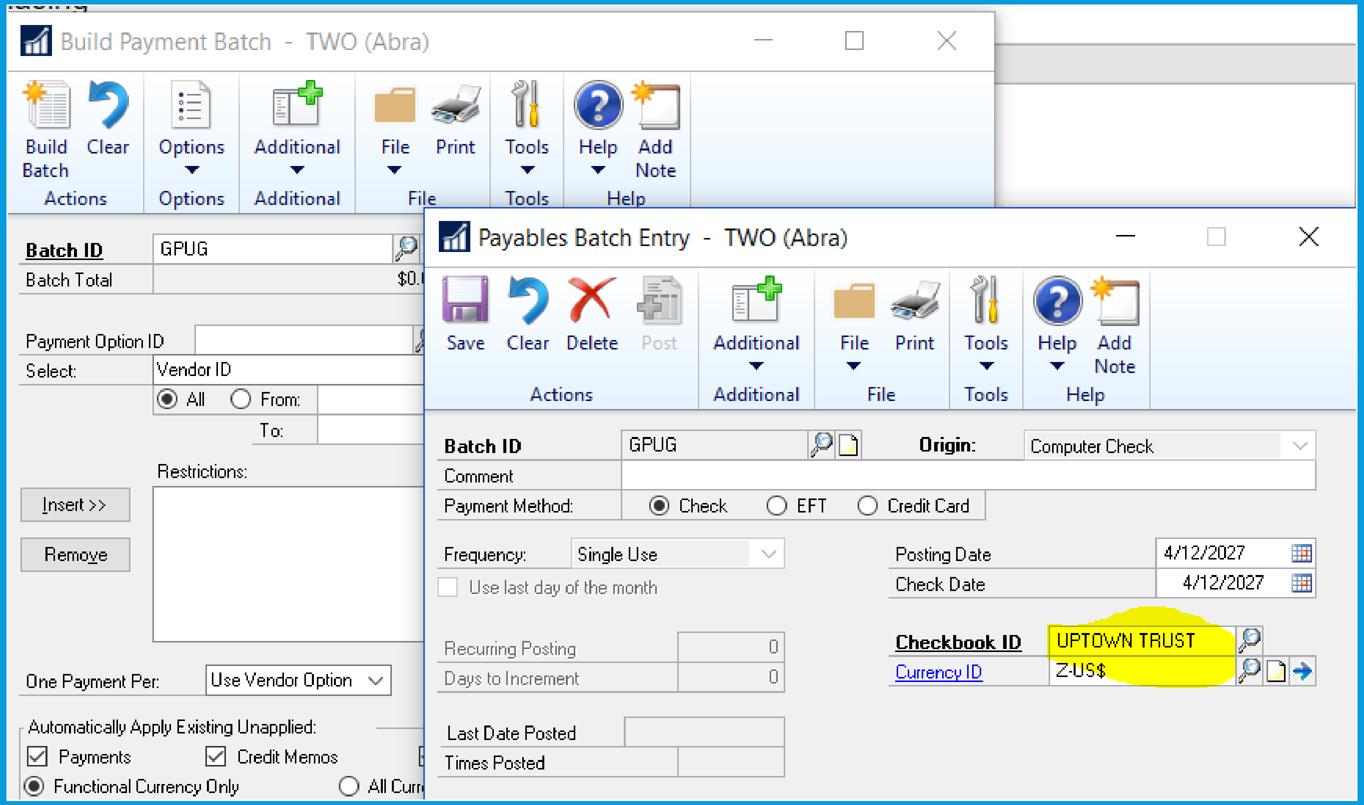


DEFAULT AP CHECKBOOK ON PAYMENTS!



Purchasing > Setup > Payables

IT DEFAULTS ON AP PAYMENT BATCHES!



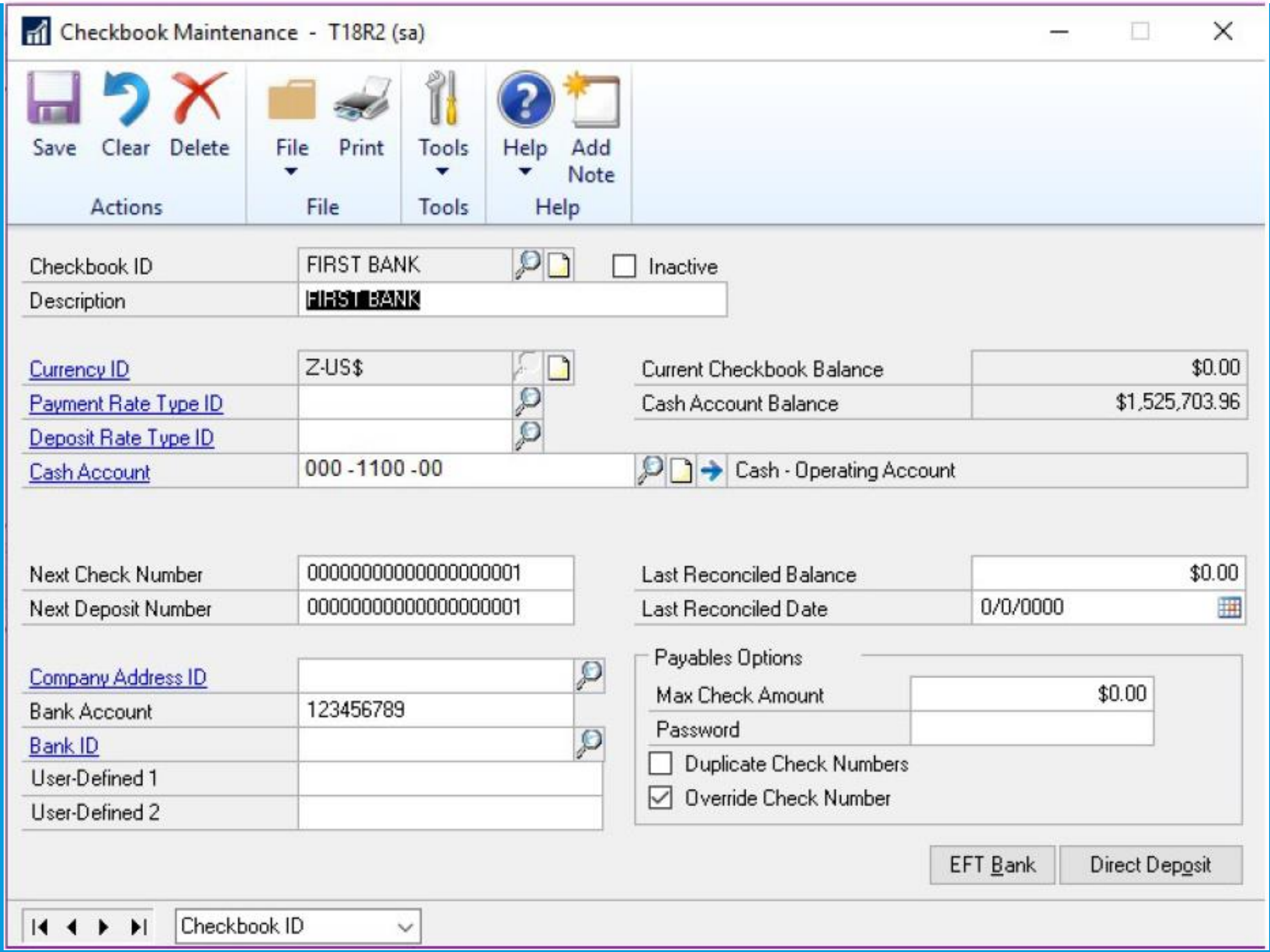
DUPLICATE CHECK NUMBERS

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:

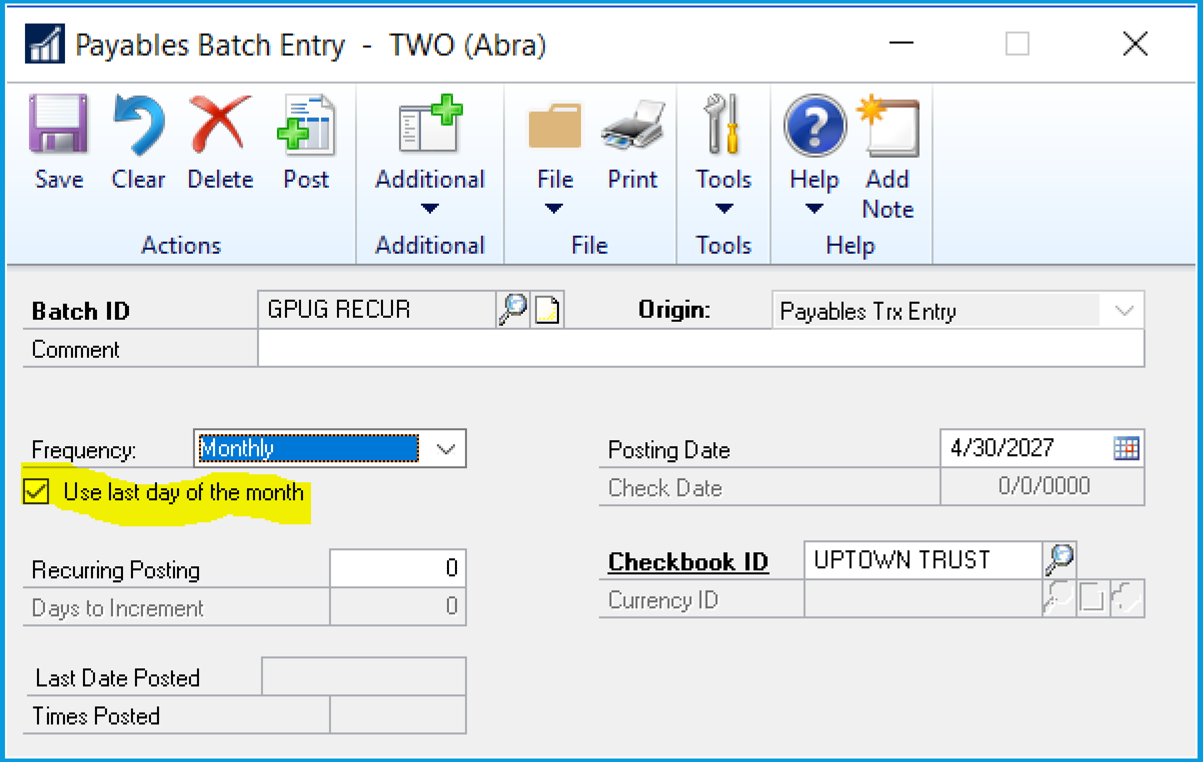
Bank Transaction Entry,
Miscellaneous Checks, and
Payroll Manual Check-Adjustment Entry

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.



DEFAULT RECURRING BATCHES: LAST DAY



Monthly/Bi-Monthly

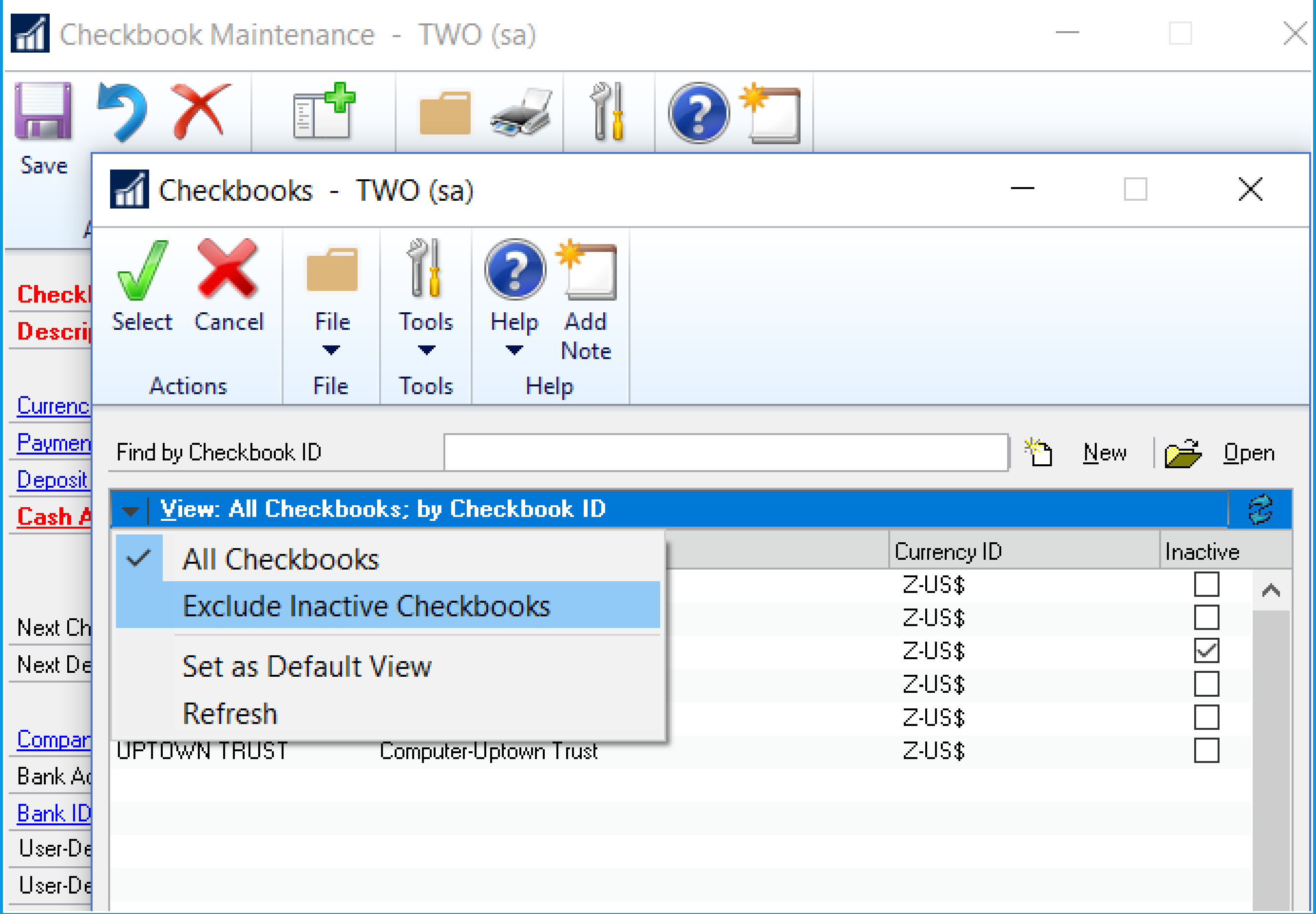
DON'T DISPLAY INACTIVE CHECKBOOKS IN LOOKUPS

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.

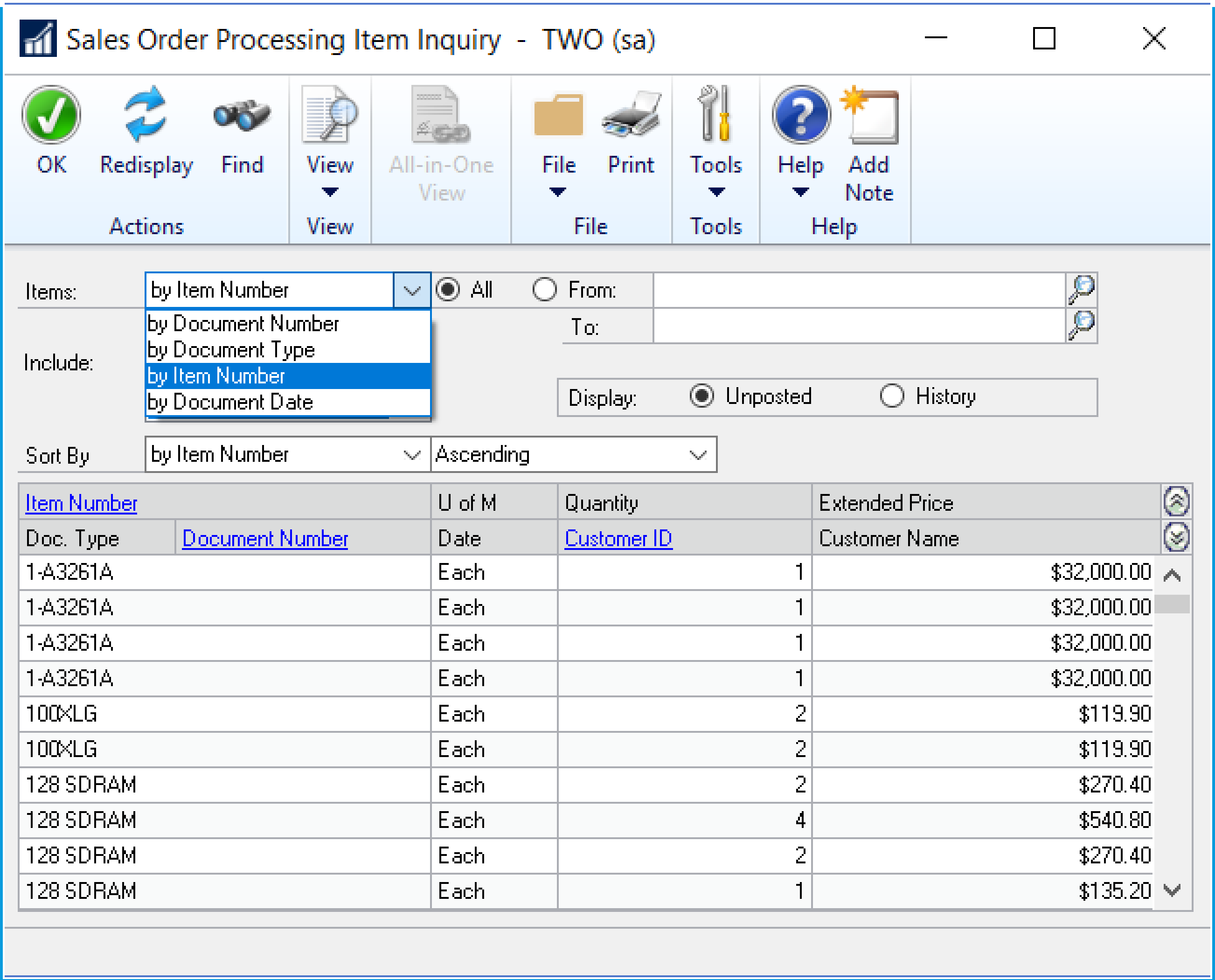


NEW SORT OPTIONS IN SOP ITEM INQUIRY

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)!

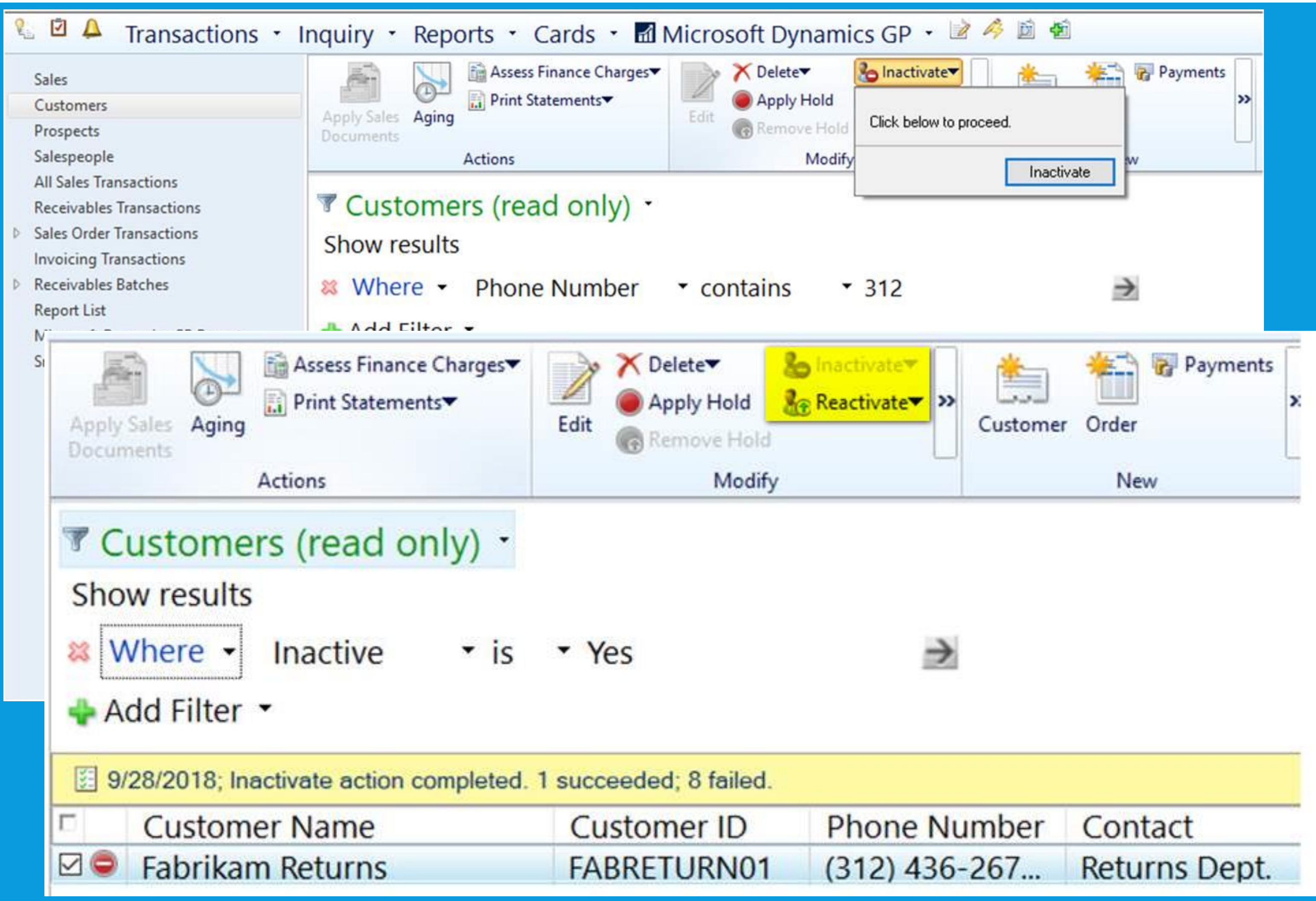


BULK UPDATE INACTIVATE/REACTIVATE FROM NAVIGATION LISTS!

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.



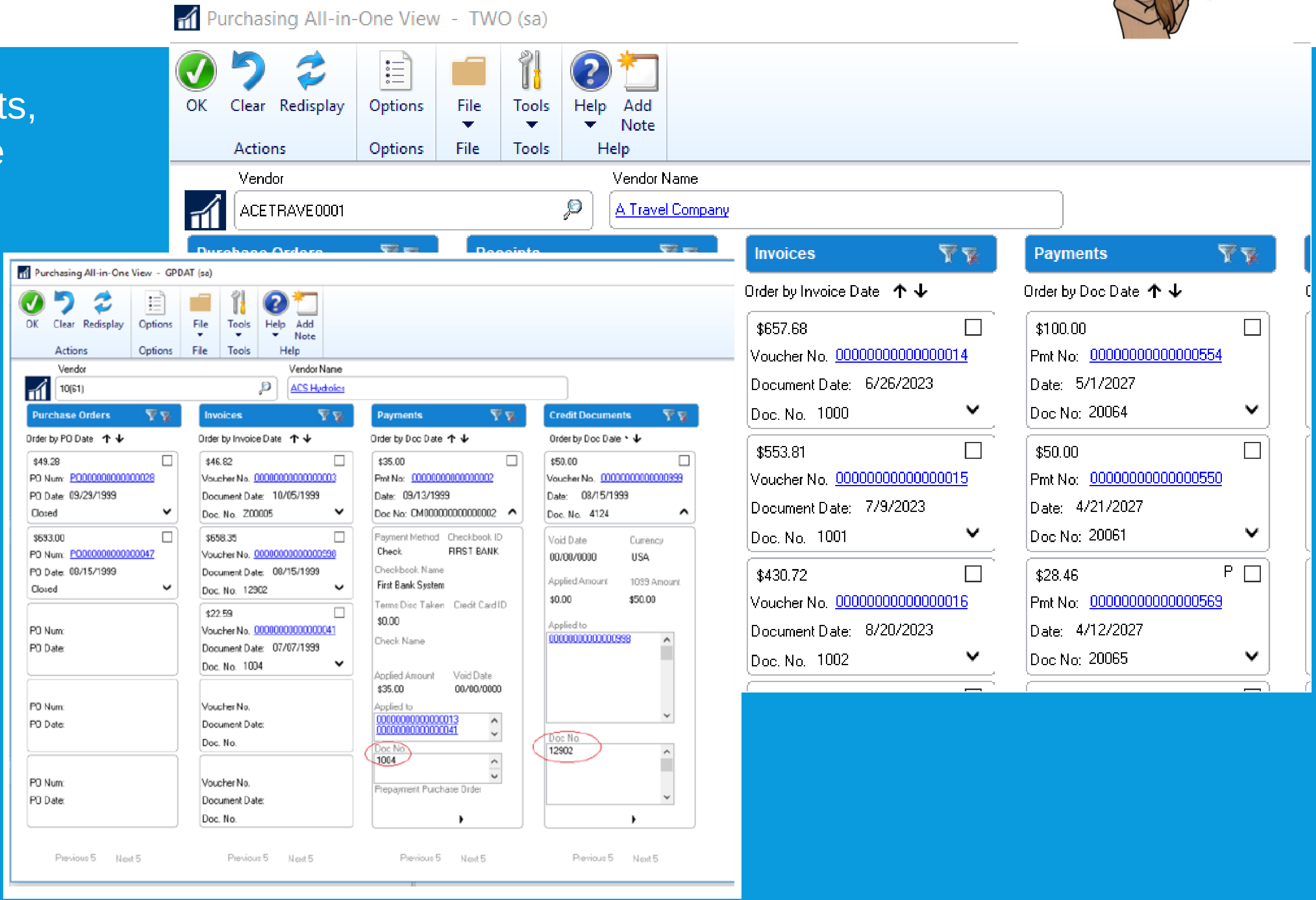
ADD VENDOR DOCUMENT NUMBER TO PURCHASING ALL-IN-ONE VIEW

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.

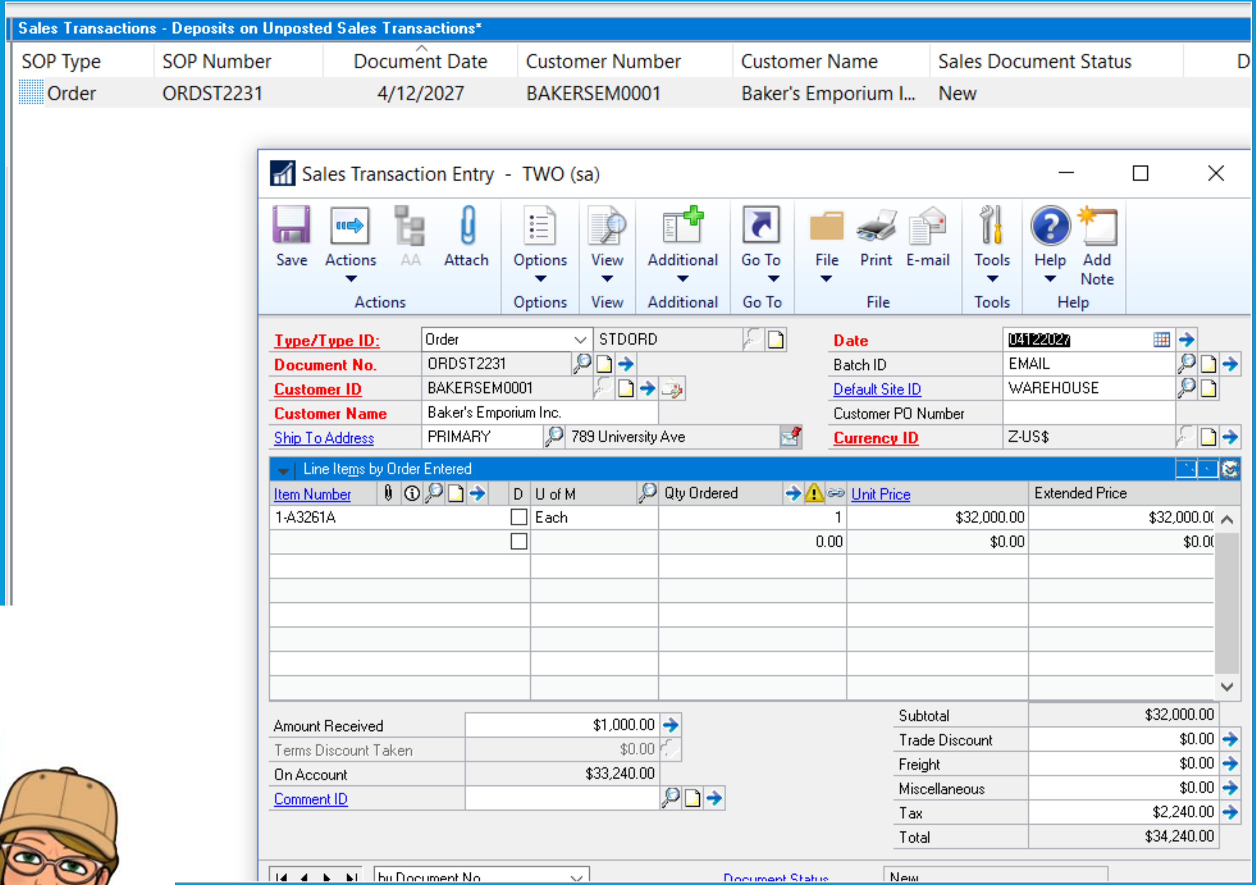
To view the doc number of an invoice, finance charge, or miscellaneous change, simply click the black arrow in the lower right hand corner of the document to expand the view.



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.



WARNING WHEN THE VENDOR IS ON HOLD

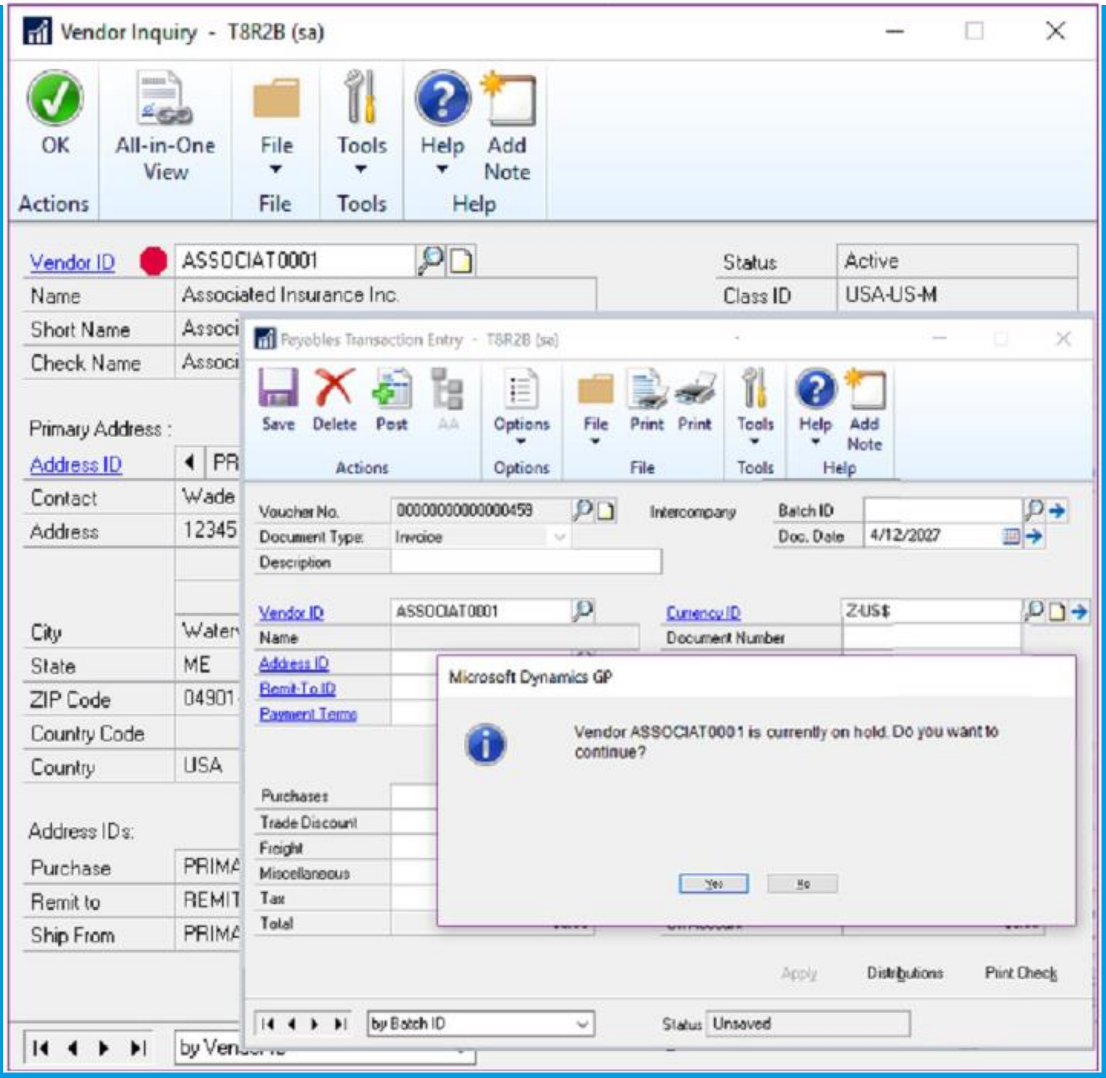
When entering a payables transaction for a vendor that is marked as on hold, you now get a visual indicator. (Similar to the customer hold status that was implemented in an earlier version).

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.



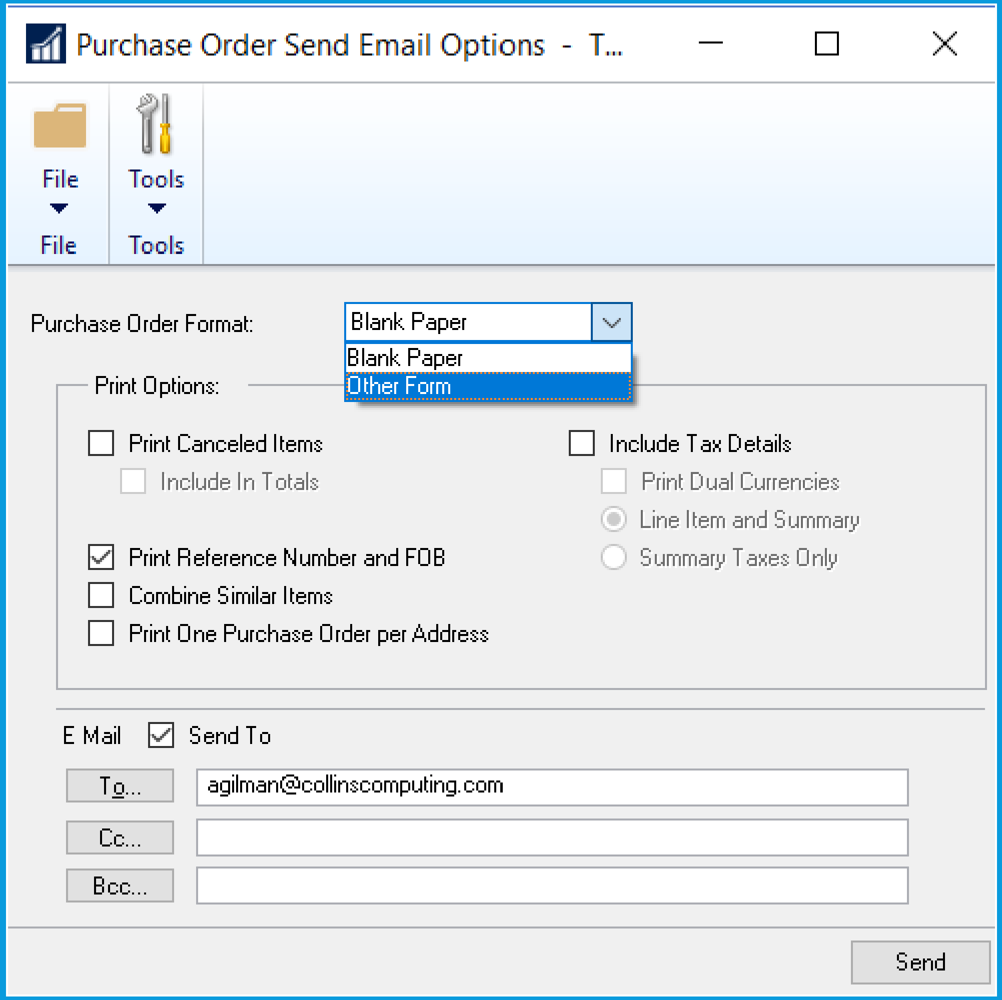
SEND A PURCHASE ORDER USING THE "OTHER FORMAT" TEMPLATE

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.

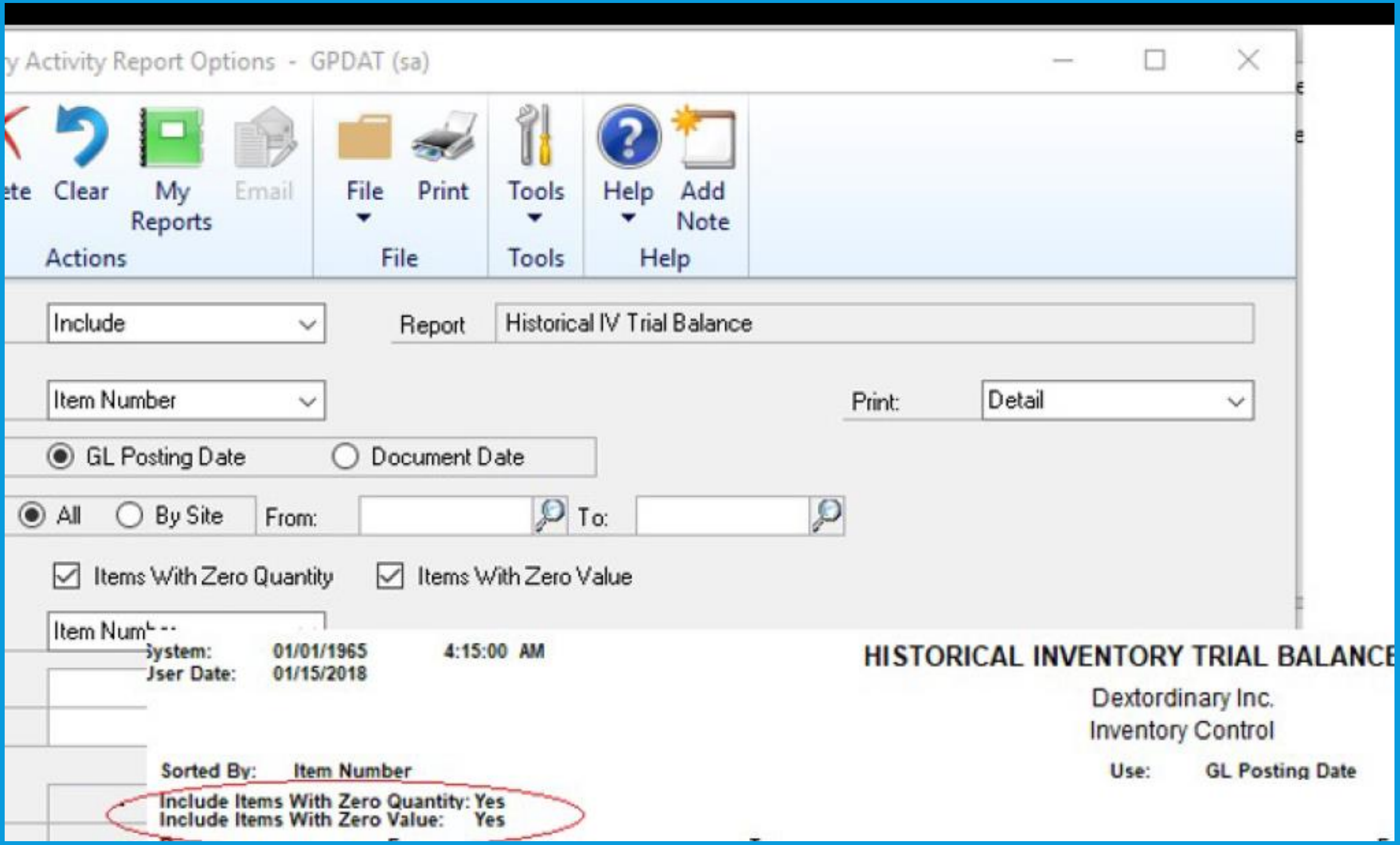


EXCLUDE ITEMS ON THE HITB REPORT WITH ZERO QUANTITY OR VALUE

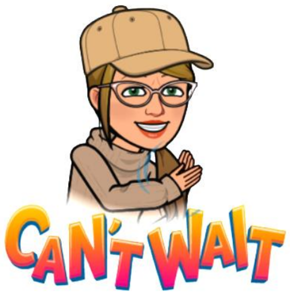
Additional options on Historical Inventory Trial Balance report to **exclude** items with zero quantity or zero value.

Inventory Menu > Reports > Activity

Exclude: Items With Zero Quantity
Items With Zero Value



ALLOW PARTIAL PURCHASE ON A PO FROM A PURCHASE REQUISITION

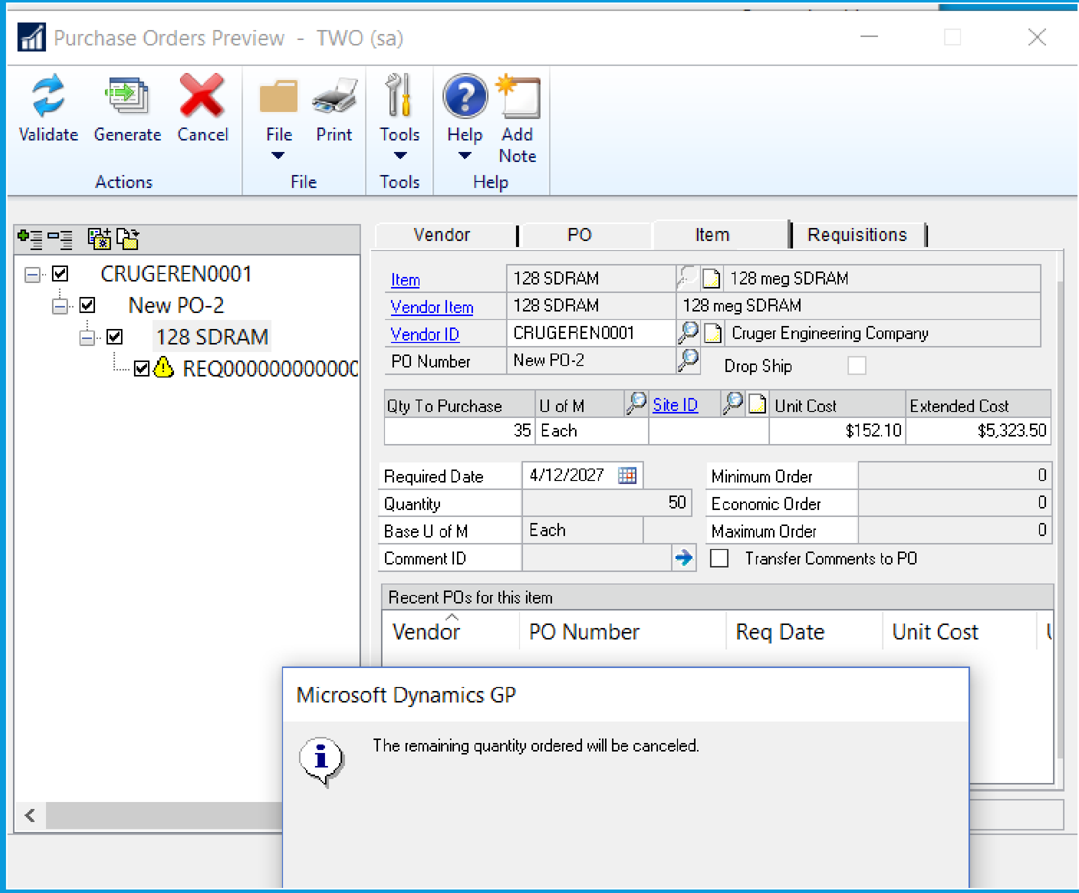


When creating a PO if you enter a qty less than what was initially requested, the remaining quantity on the requisition will then be canceled.

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.

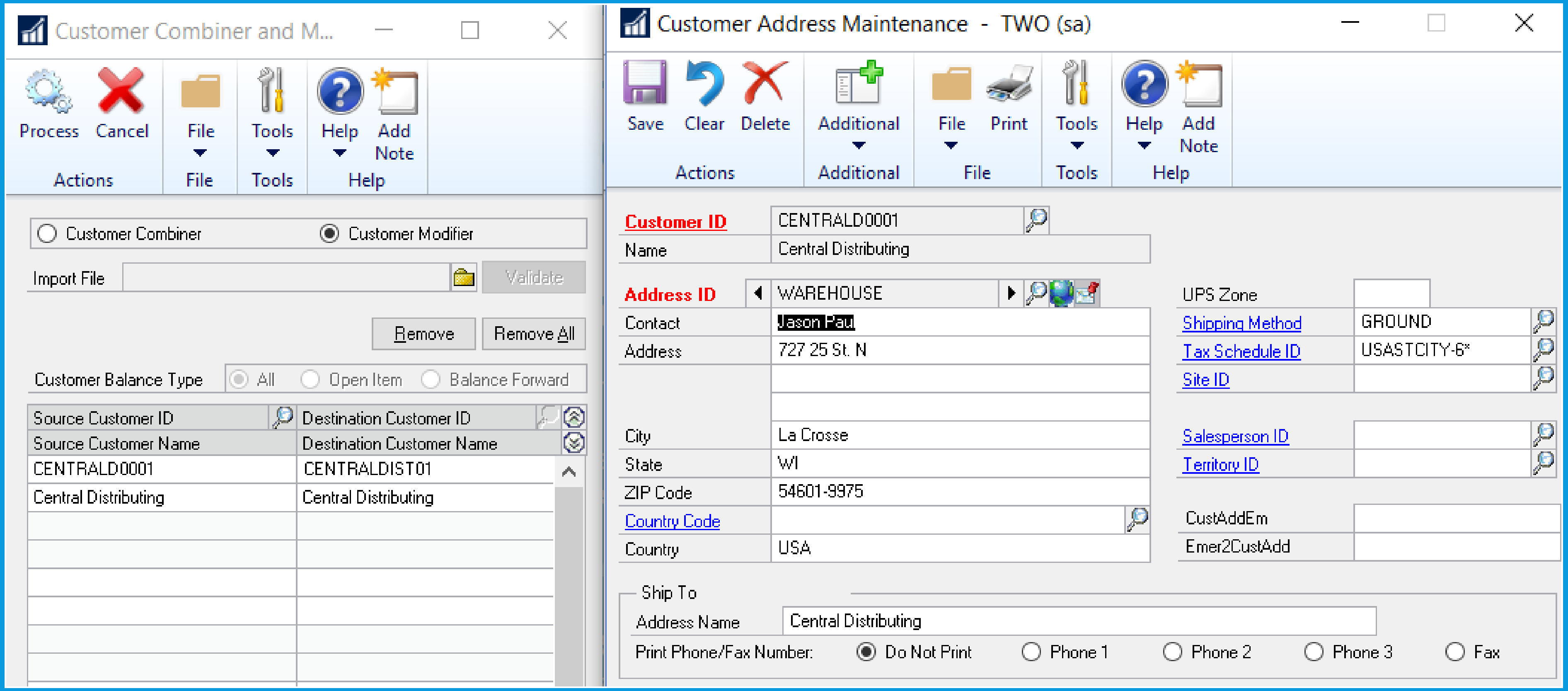
If you drill back on the transaction in the Purchase Requisition Inquiry zoom, there will be a red icon as a visual indicator to show that the quantity was only partially ordered.



RETAIN SHIP-TO-ADDRESS NAME WITH CUSTOMER MODIFIER

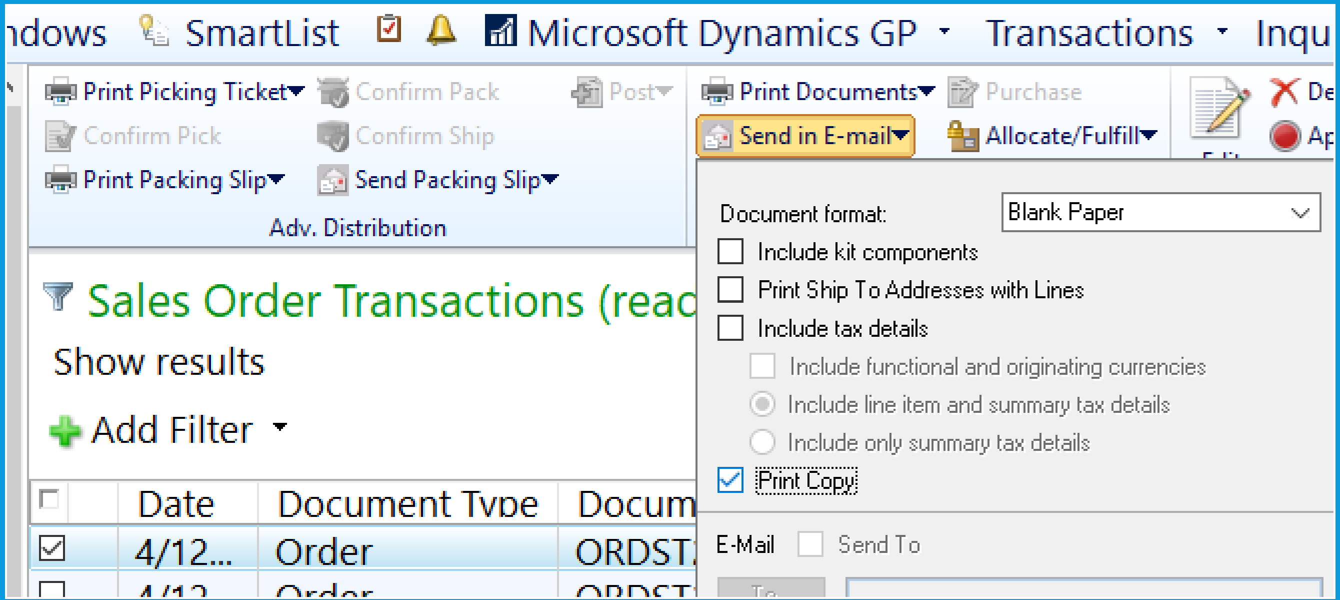
The Ship-To-Address Name value is retained when a customer is modified with the Customer Combiner and Modifier Utility.

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



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.



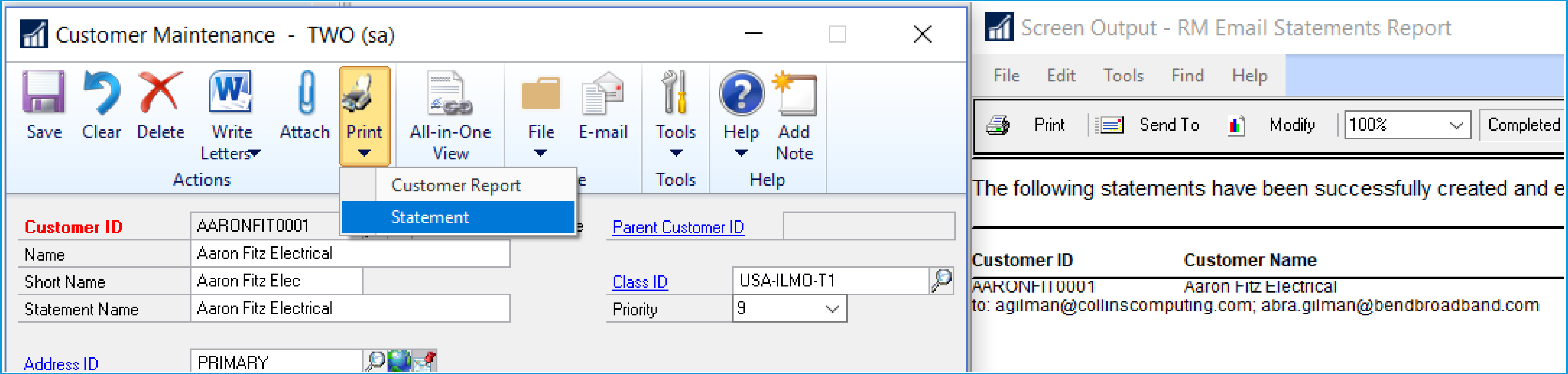
In the Sales Document Print Options and Print Sales Document windows, new fields specify if you
want to print or email the document. In the Sales Order Transactions Navigation List window,
when you choose the action to send a transaction in email, you can now choose to print a copy.

*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' .



*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.

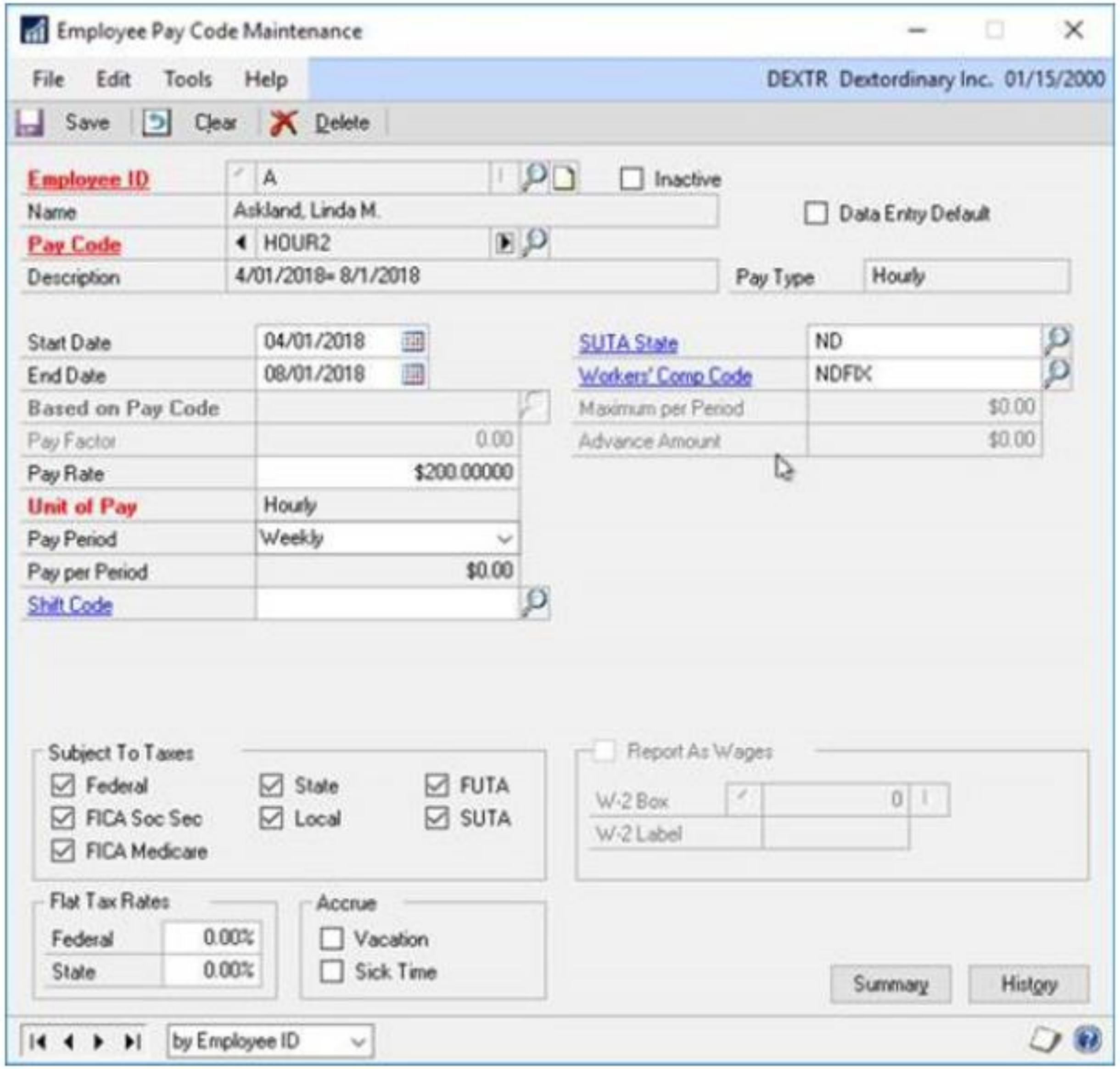
START & END DATES FOR PAY CODES

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 inactivate 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.

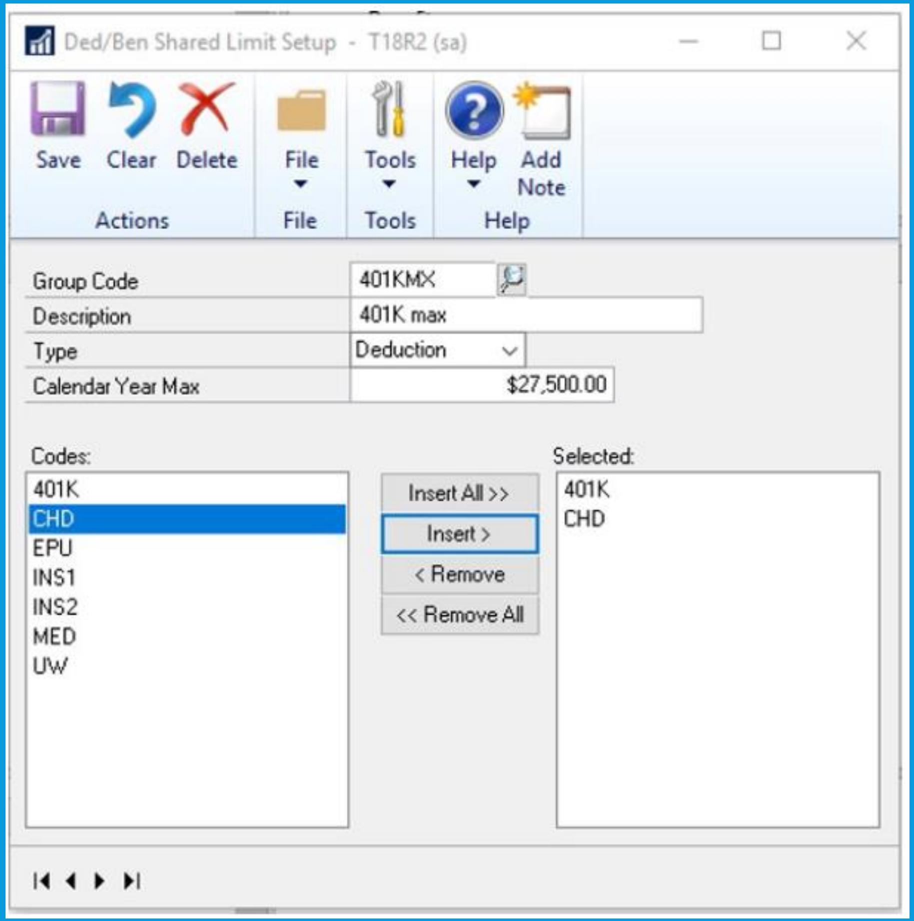


SHARED MAX FOR BENEFITS & DEDUCTIONS

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 fuctionality, the Ded/Ben Shared Limit window.



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.

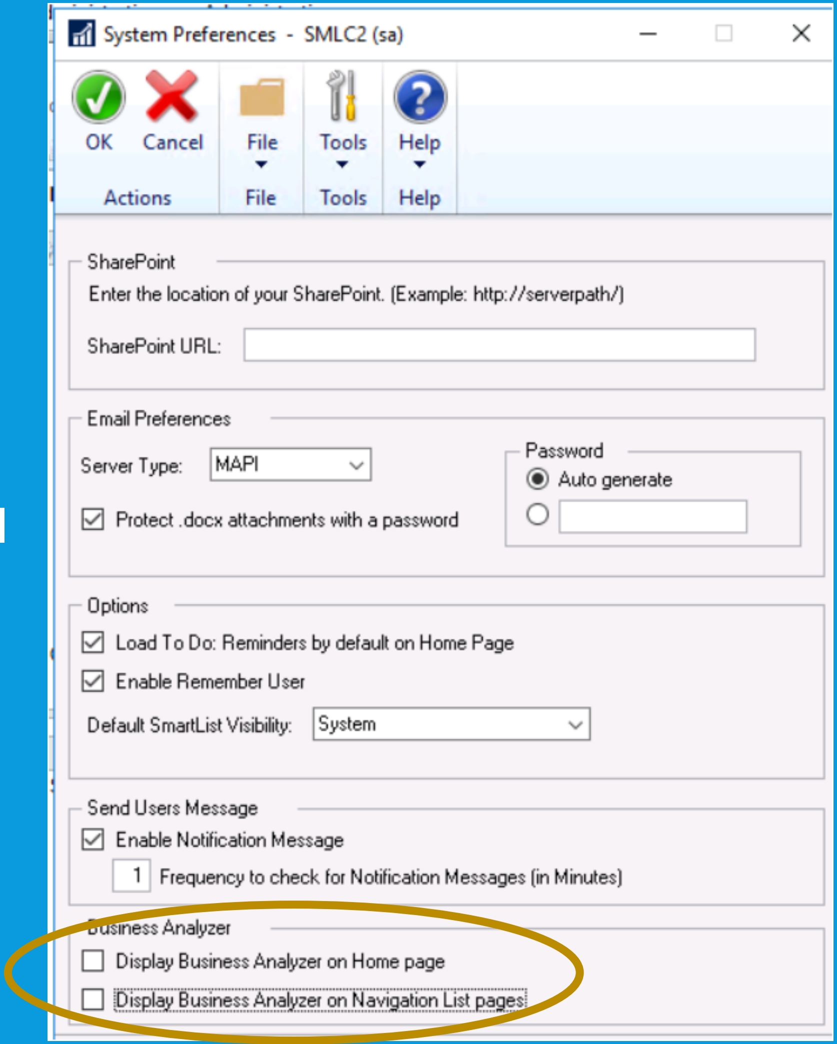
Password expiration notification

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.

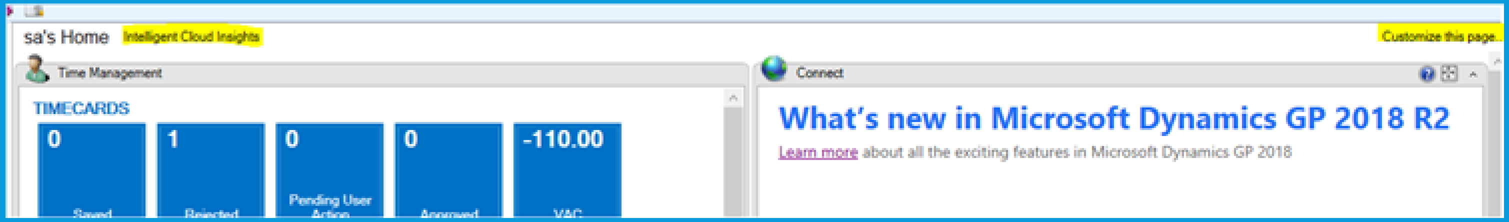
These are global settings. Individual users can still choose to turn on Business Analyzer using customization options.

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.

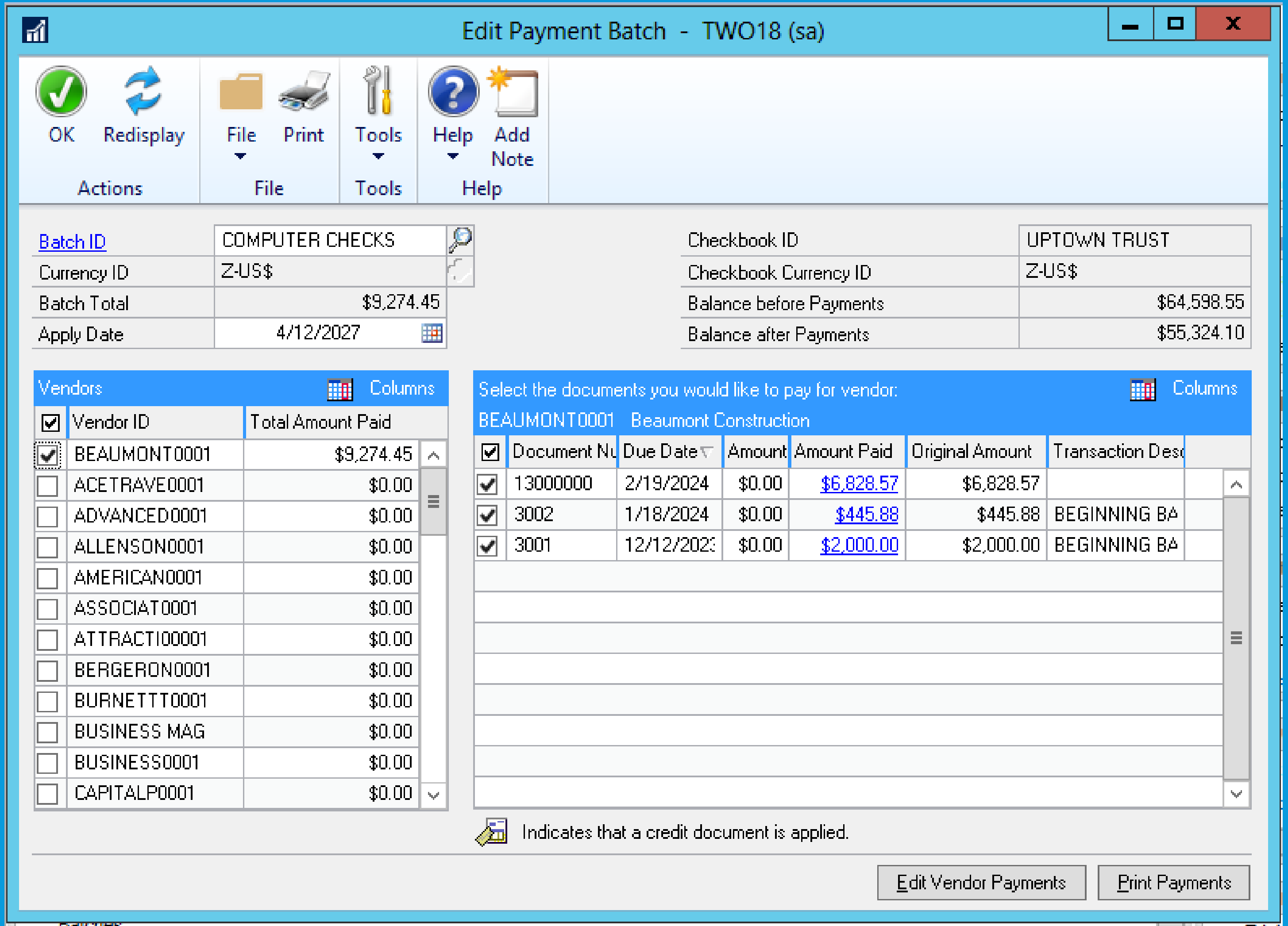
When you upgrade to GP 2018 R2 with an existing install, the users' Home Page tab will default as usual, but you will see a new tab called Intelligent Cloud Insights. If you do a new install of Dynamics GP 2018 R2, the Home Page will default to the Intelligent Cloud Insights tab.
For more information, 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!



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

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