



# What's new in Microsoft Dynamics GP 2013 R2

# Agenda

## What's new

System-wide features

Financials

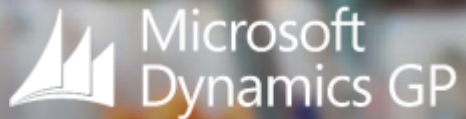
Distribution

Companion apps

## Roadmap







Quick to implement, simple to use  
business solution from Microsoft  
with the power to support your business ambitions



# Microsoft Dynamics GP 2013 R2 Benefits

Increase  
productivity &  
collaboration  
with Office 365

Protect data with  
enterprise-class  
backup on  
Microsoft Azure

Streamlined  
workflow and  
requisitions  
capabilities

# System Wide Features

# Requisition

New design in core with workflow

Order items and goods

Combine requisitions to a single PO

The image shows two overlapping windows from a software application. The background window is titled "Purchase Requisition Inquiry" and the foreground window is titled "Purchase Requisition Inquiry Zoom". Both windows show a menu bar (File, Edit, Tools, View, Help) and a toolbar with buttons like OK, Purchase, Redisplay, and Find. The Zoom window displays a form with the following fields:

Requisition Number	REQ000000001002	Requisition Date	4/12/2017
Description	Windows 8 Computer	Required Date	4/12/2017
Comment ID		Requested By	Theresa N.
Ship to Address	MAIN		

**Line Items by Order Entered**

Line	Item Number	U of M	Quantity Ordered	Unit Cost	Extended Cost
1	DELL 4710	EACH	1.0	\$2375.00	\$2,375.00
Dell Latitude 4710 - 32 GB RAM, 200 GB HD, Docking Station, DVD Driv			WAREHOUSE		DELL

Additional fields in the Zoom window:

Account	100 - 1300 - 0000	Required Date	4/12/2017
Currency ID	Z-US	Requested By	Theresa N.
Shipping Method	OVERNIGHT	Freight	\$0.00
Ship to Address	MAIN	Tax	\$0.00
Comment ID		Status	New

Navigation buttons: Previous, Next

Total: \$2,375.00

Status: Saved

# Workflow

Replace existing workflow inside Core

Four Approval Workflows:  
Purchase Order  
Requisition  
Project Time  
Time and Attendance

Email Approval

The screenshot shows the 'Workflow Maintenance' application window. The title bar reads 'Workflow Maintenance'. The interface includes a toolbar with icons for 'Save Workflow', 'Clear', 'Delete Workflow', 'Copy', 'Workflow', 'Step', 'Help', and 'Add Note'. Below the toolbar are three tabs: 'Actions', 'New', and 'Help'. The main area is divided into a left-hand tree view and a right-hand configuration panel.

The left-hand tree view shows a hierarchy of workflows. Under 'Purchase Order Approval', 'PO Approval Workflow 2' is selected and highlighted. Below it, a sub-tree shows the steps: 'Check existing orders', 'Supervisor approval', and 'Manager approval'. Other workflows listed include 'Customer Credit Limit Override Approval', 'Customer Entry Approval', 'General Ledger Batch Approval', 'Requisition Approval', and 'Sales Order Approval'.

The right-hand configuration panel for 'PO Approval Workflow 2' includes the following fields:

- Workflow Name:** PO Approval Workflow 2
- Description:** Dual-step approvals for POs
- Workflow Type:** Purchase Order Approval
- Active:**

Below these fields is a table with three columns: 'Step', 'Condition', and 'Assignment'.

Step	Condition	Assignment
Check existing orders	Always run	Workflow originator
Supervisor approval	PO Subtotal Amount > 2500	Originator's direct manager
Manager approval	PO Subtotal Amount > 5000	Originator's skip-level manager

Below the table are two sections of options:

**Options:**

- Allow approver to manually delegate tasks
- Allow originator to be an approver
- Always require at least one approver
- Use alternate final approver: Task owner's direct manager

**When a task is overdue:**

- Take no action
- Delegate to next approver
- Delegate to: Task owner's direct manager
- Automatically reject the overdue task

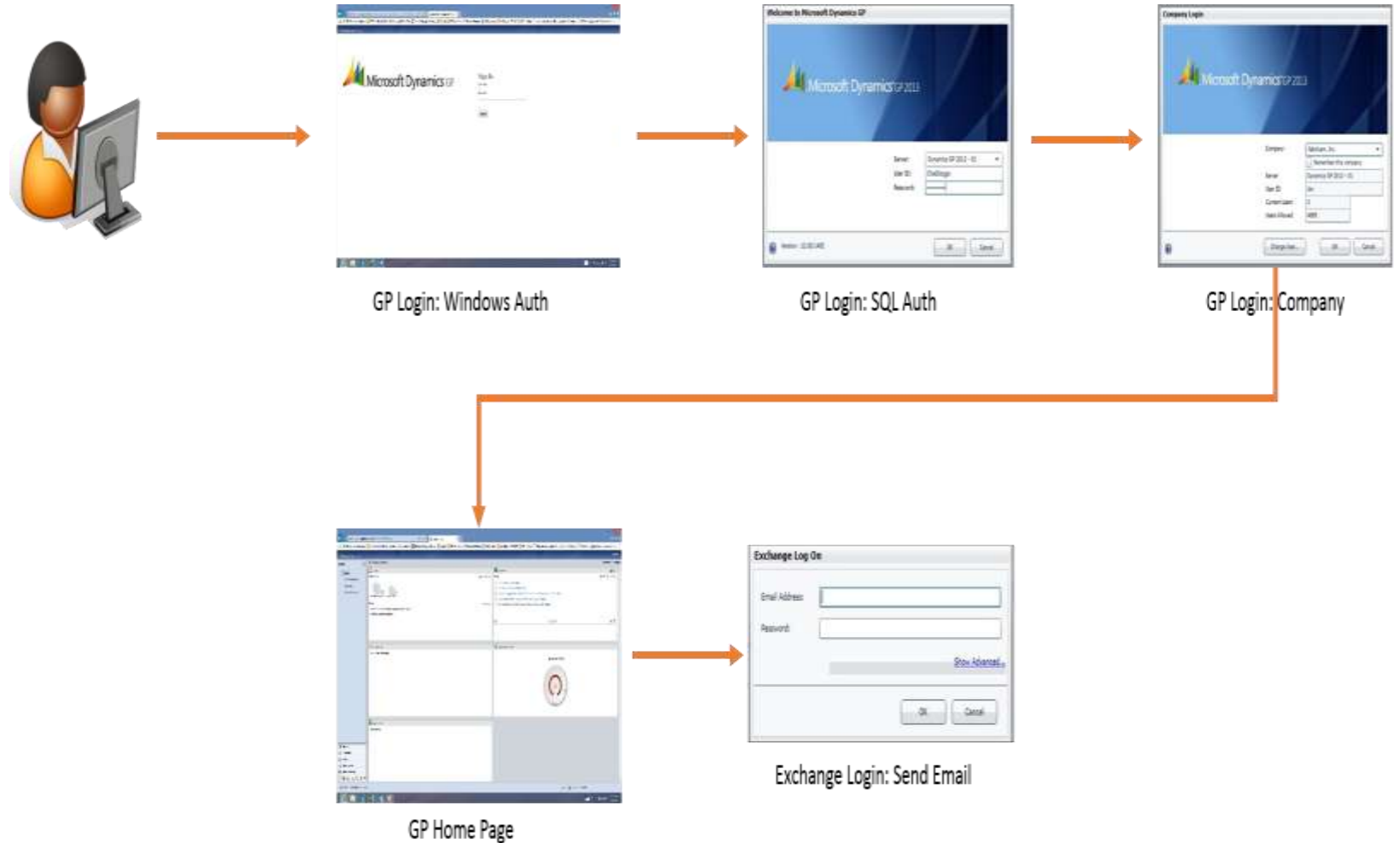
# Identity Management

Simplify Web Client login

Reduce Identity Maintenance between apps

Support companion app and Service Based Architecture scenarios

## Microsoft Dynamics GP 2013





# Web Client Functionality

Self Service Home Page

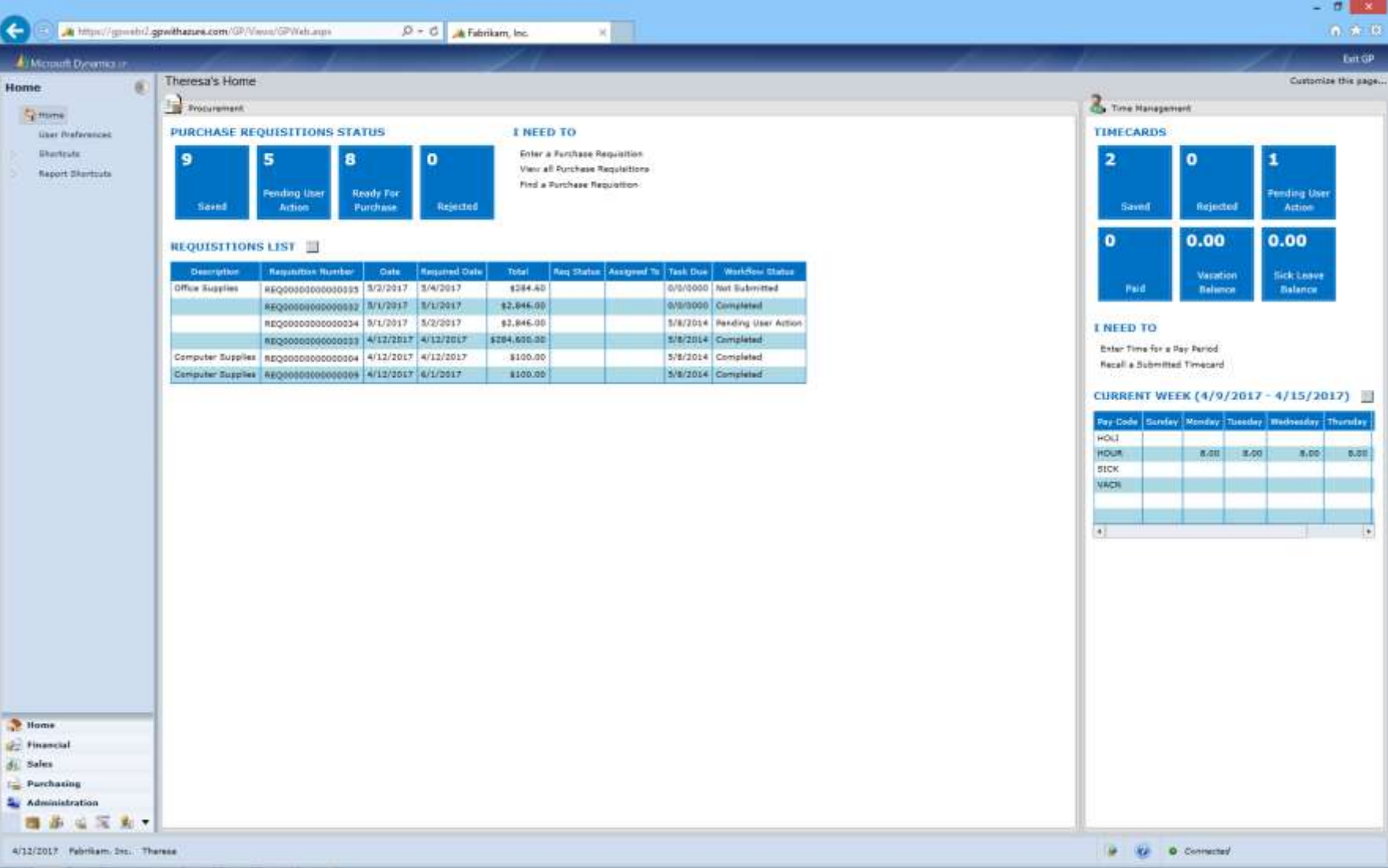
Time & Attendance

Project Time

Requisitions

Workflow

Identity Management

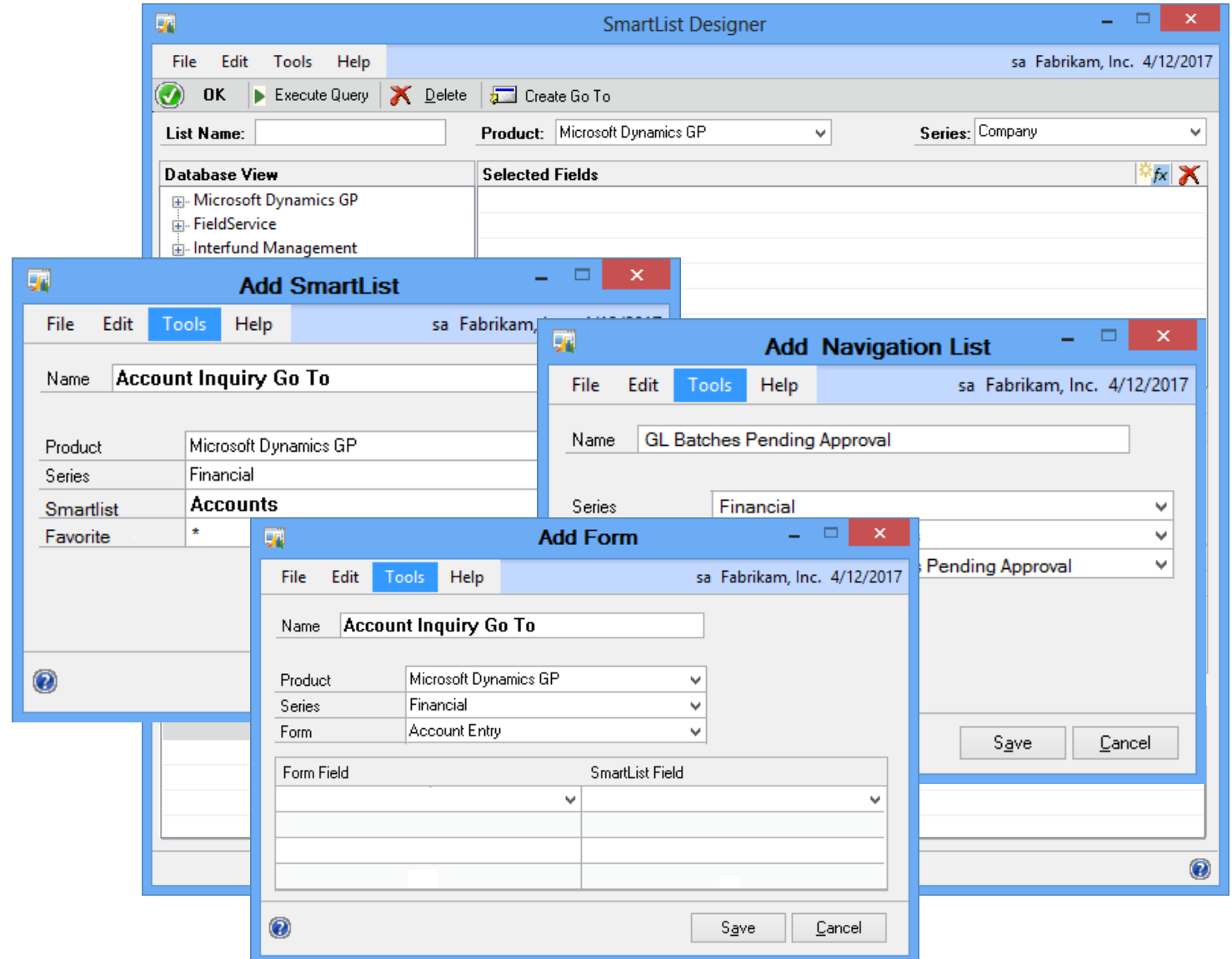


# SmartList Designer Additions

Create New Go To

Integrate with Existing Go To Options

Open Form, Navigation List, SmartList, or Web Page

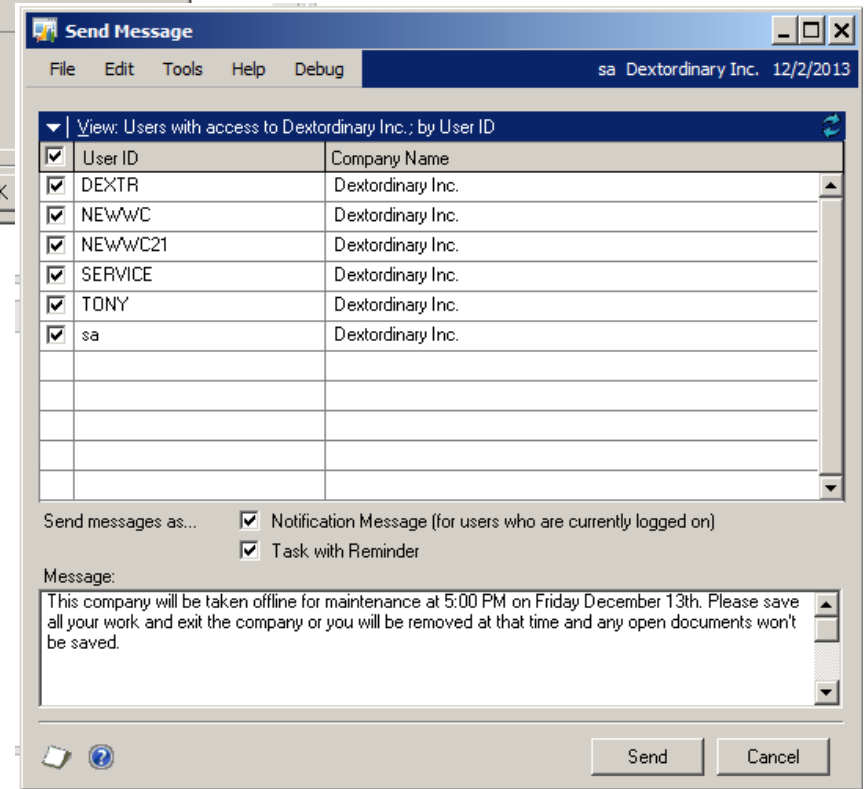
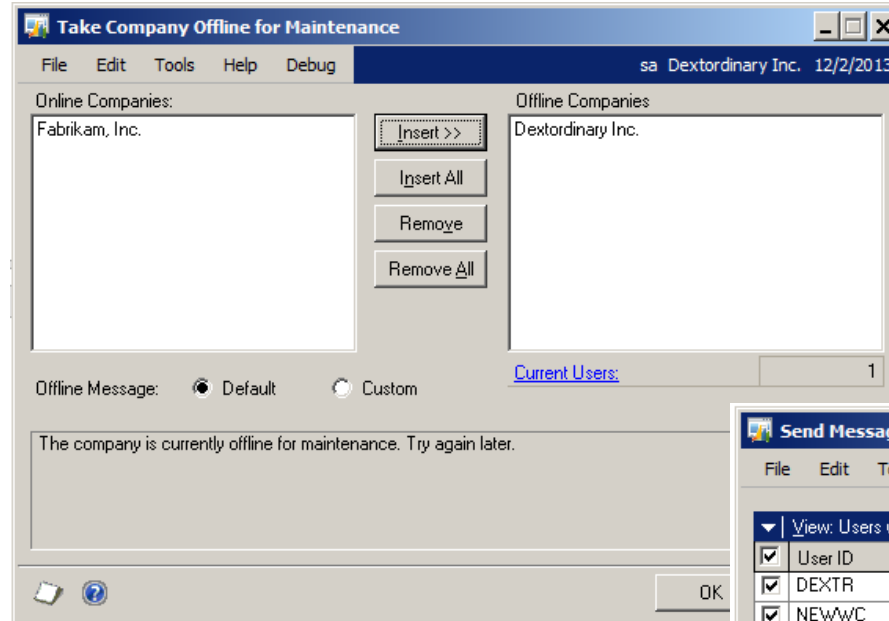


# Take Company Offline

Limit company access for maintenance

Assign user with access

Message users



# Microsoft Azure Backups

Disaster recovery

Restore directly to/from  
Windows Azure Storage

Option in Microsoft Dynamics  
GP window

**Back Up Company** sa Fabrikam, Inc. 4/12/2017

File Edit Tools Help

Select the company to backup.

Company Name: System Database

Database Name: DYNAMICS

Use local storage

Use Windows Azure storage

Storage account name:

Access key:

URL to container:

File Name:

Use compression Verify account

OK Cancel

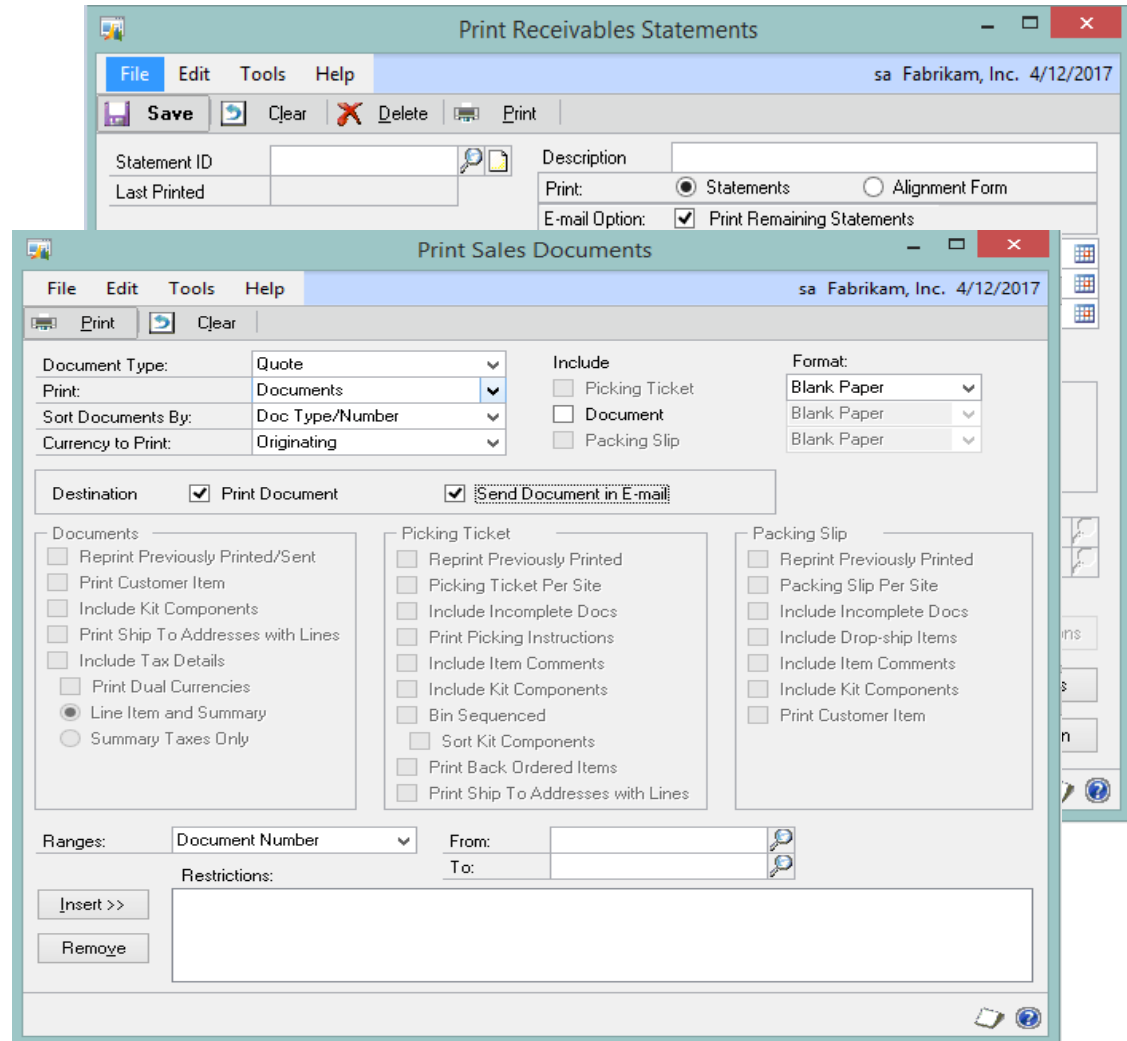


# Print Reaming Docs for Email

Print and E-mail in one step

Available for E-mail batch Process

Available for E-mail Statements Process

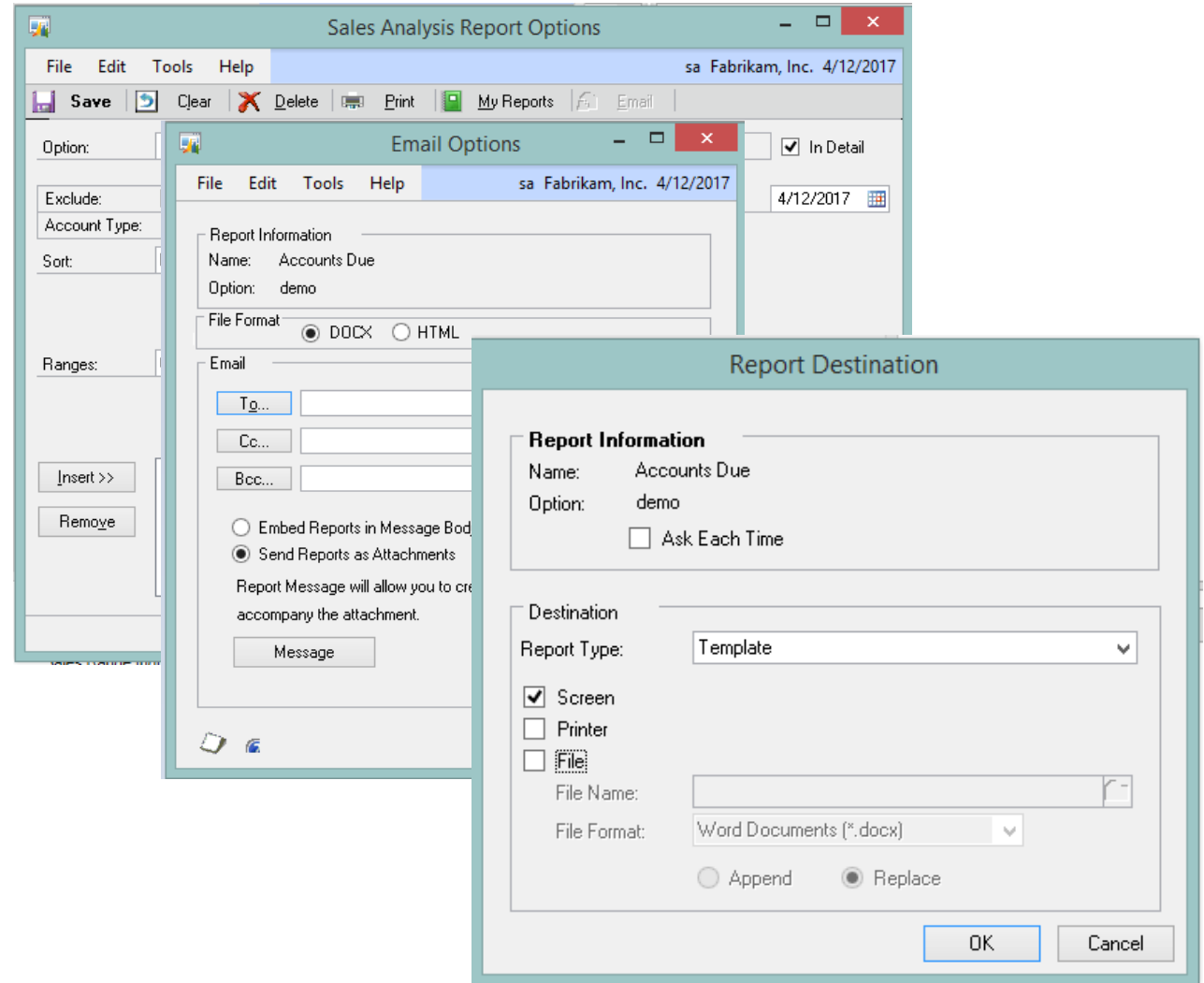


# Email or Print any report in Microsoft Word

Ability to send reports in  
Word format

Ability to print reports as  
Word templates

Use Word tools to modify the  
reports



# Email based on document type

Allow Customer's to Email documents based on the on specific document type

Can Enable or Disable the feature

Customer ID: AARONFIT0001 Name: Aaron Fitz Electrical

Select Document Options

Send Documents as Attachments  Embed Document in Message Body

Attachment Options

Multiple Attachments per E-mail

Set Maximum File Size: 0.00 Megabytes

Email Address based on Doc Type

Enable  Disable

Send Forms as E-mail

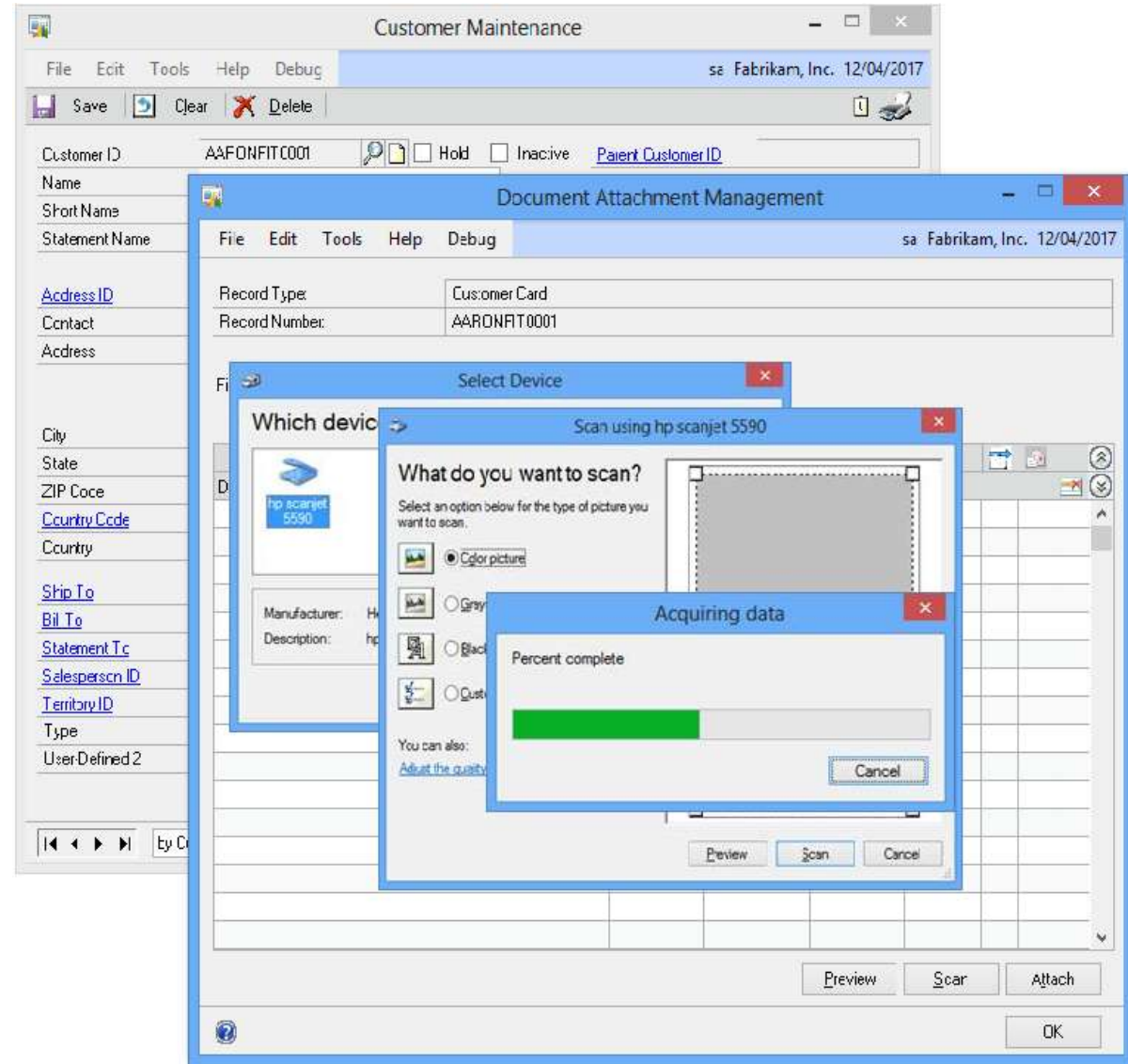
Enable	Message ID	Format	Email Address
<input checked="" type="checkbox"/>	Sales Quote	DOCX	csogge@microsoft.com
<input checked="" type="checkbox"/>	Sales Order	DOCX	csogge@microsoft.com
<input checked="" type="checkbox"/>	Sales Fulfillment Order	DOCX	bmeier@microsoft.com
<input checked="" type="checkbox"/>	Sales Invoice	DOCX	igrant@microsoft.com
<input checked="" type="checkbox"/>	Sales Return	DOCX	igrant@microsoft.com
<input checked="" type="checkbox"/>	Sales Back Order	DOCX	bmeier@microsoft.com
<input checked="" type="checkbox"/>	Packing Slip	DOCX	igrant@microsoft.com
<input checked="" type="checkbox"/>	Receivables Invoice	DOCX	igrant@microsoft.com
<input checked="" type="checkbox"/>	Receivables Return	DOCX	bmeier@microsoft.com
<input checked="" type="checkbox"/>	Receivables Debit Memo	DOCX	igrant@microsoft.com
<input checked="" type="checkbox"/>	Receivables Credit Memo	DOCX	igrant@microsoft.com
<input checked="" type="checkbox"/>	Receivables Finance Charge	DOCX	bmeier@microsoft.com
<input checked="" type="checkbox"/>	Receivables Service/Repairs	DOCX	igrant@microsoft.com
<input checked="" type="checkbox"/>	Receivables Warranty	DOCX	igrant@microsoft.com
<input checked="" type="checkbox"/>	Customer Statement	DOCX	bmeier@microsoft.com

OK Cancel

# Document Attach Additions

Scan Documents Directly to Doc Attach from Scanner

Add Doc Attach to Payables  
Convert OLE Notes to Doc Attach



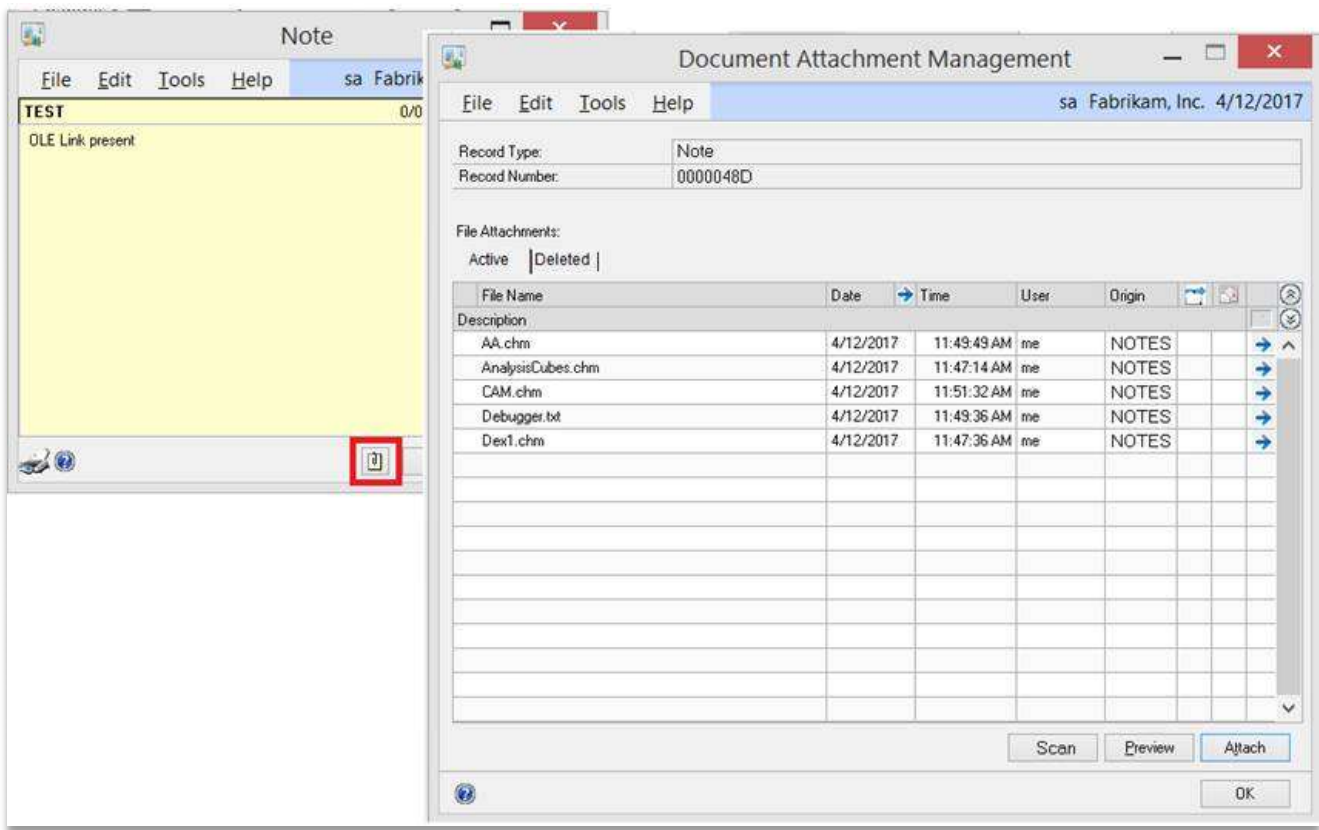


# Document Attach - OLE Notes

OLE File Attachments replaced with Doc Attach

Available on both Desktop Client and Web Client

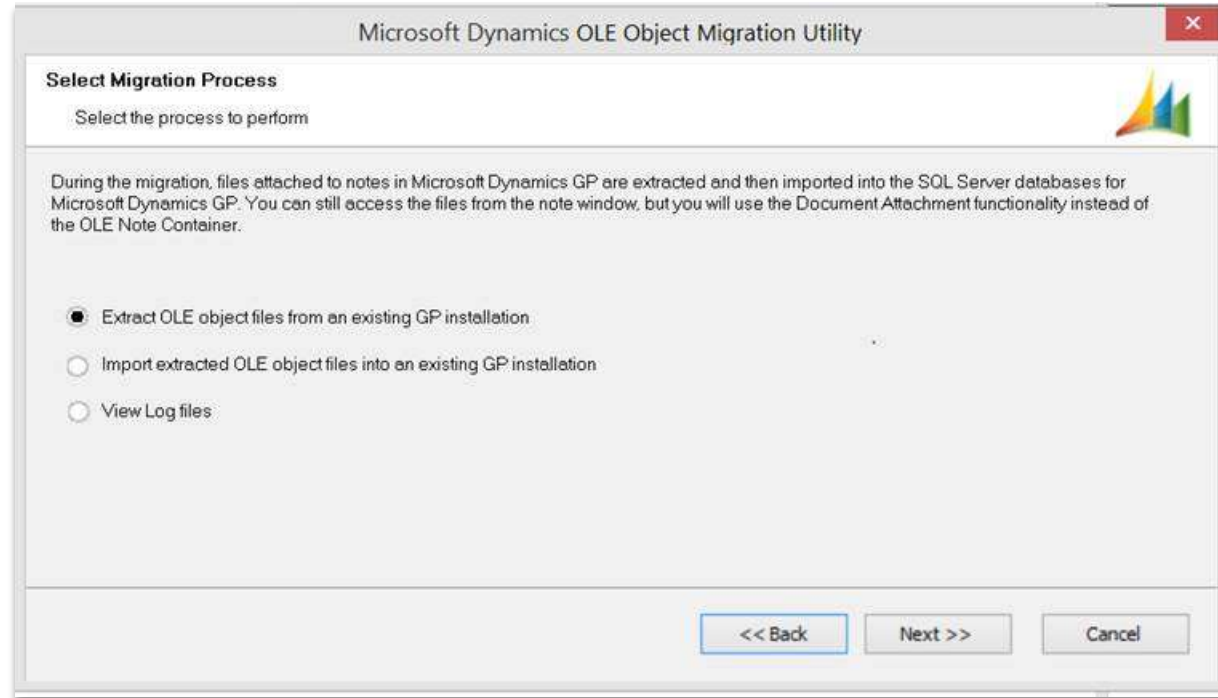
Attachments saved in the SQL database



# Document Attach: OLE Object Migration Utility

External, one time utility for existing users to extract existing OLE attachments and import into Doc Attach files

For Core Dynamics GP, HR, and Manufacturing



# Microsoft SQL Reporting Services on Transaction Forms

Enables Report Rendering from Transaction Windows

Personalized SSRS Reports Based on Your BI Needs

**Sales Transaction Entry**

Sales Transaction Entry | Customer Detail Entry | Item Detail

Save | Actions | AA | Attach | Options | View | Additional | Go To | Print | Available Reports | E-mail | Help | Add Note

**Type/Type ID:** Quote | STDQTE | **Date:** 15

**Document No.:** | **Batch ID:** | **Default Si:** | **Customer:** | **Currency:**

**Customer ID:** | **Customer Name:** | **Assign Reports...**

**Ship To Address:** | **Help**

Line Items by Order Entered

Item Number	D	U of M	Quantity Quoted	Unit Price	Extended Price
-------------	---	--------	-----------------	------------	----------------

Amount Received: \$0.00 | Subtotal: \$0.00

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

On Account: \$0.00 | Freight: \$0.00

Comment ID: | Miscellaneous: \$0.00

Tax: \$0.00

Total: \$0.00

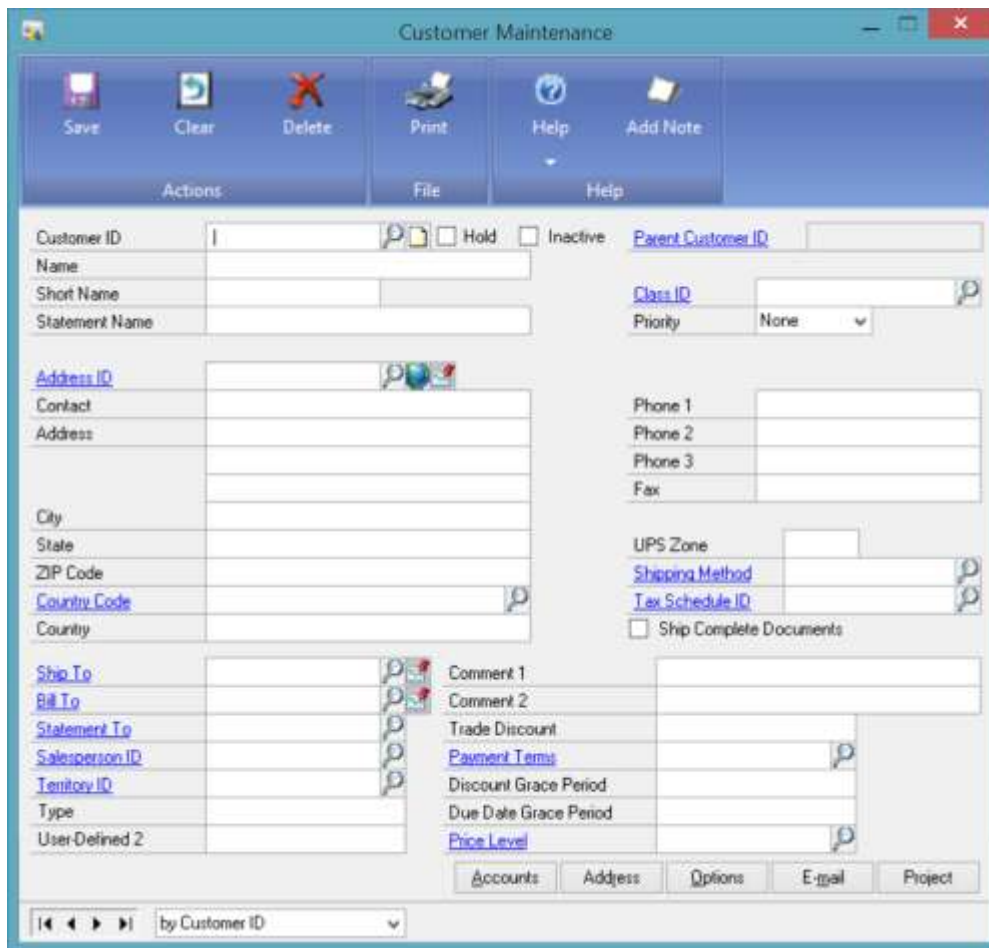
by Document No. | Document Status

# Ribbons in Desktop Client

Refresh Desktop Client UI

Include ribbons on all forms

Update desktop font





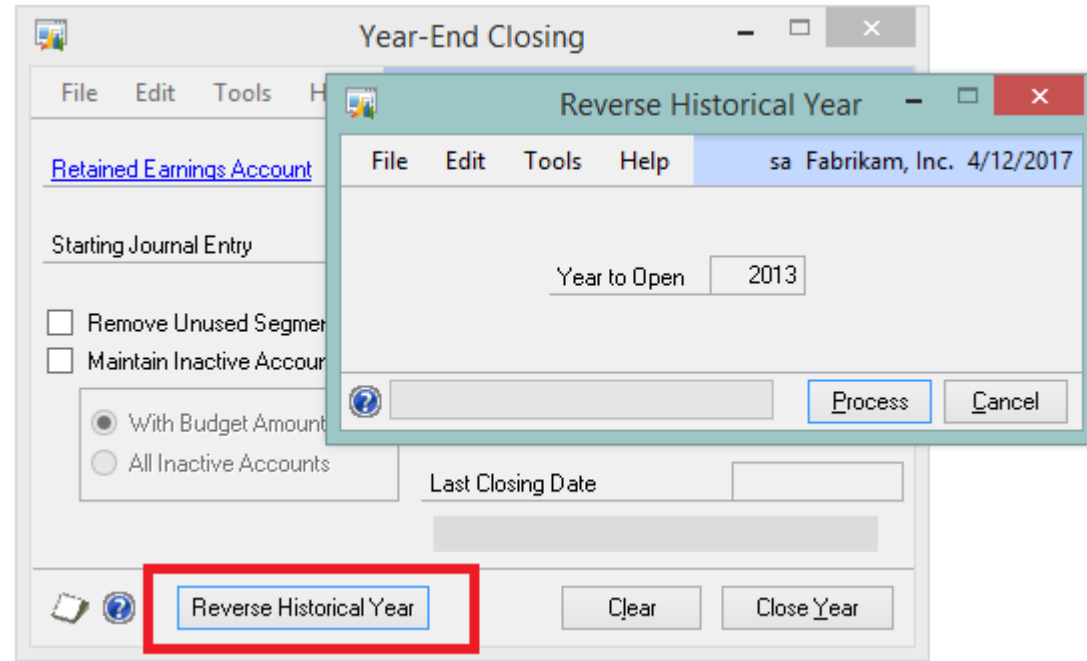
# Financials

# Reverse Fiscal Year

Ability to reverse the GL Year End Close process

Will open the previously closed fiscal year

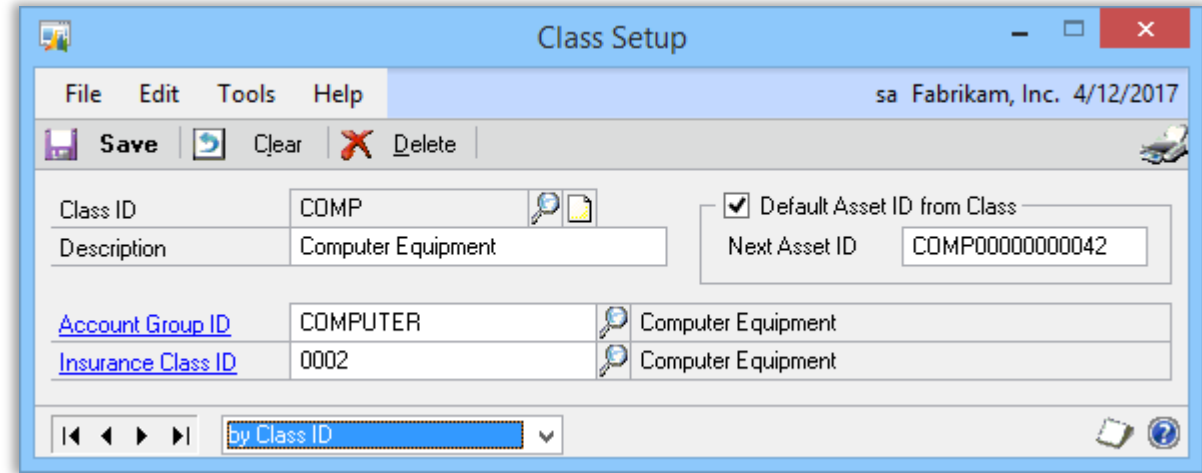
Will warn users to create backups and verify all users out of GP prior to process



# Fixed Assets Default Asset ID from Asset Class

New option for Asset IDs

More quickly set up asset records

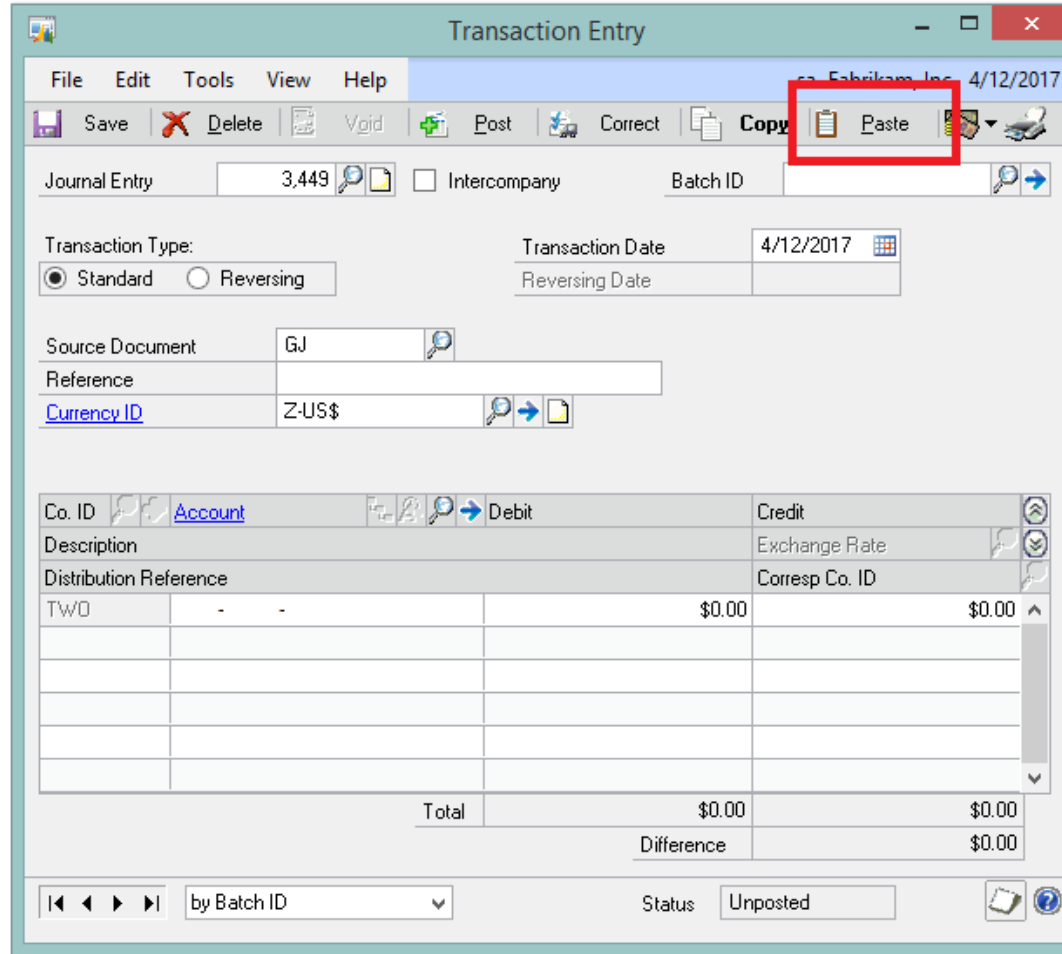




# Copy and Paste to General Ledger

Ability to paste from Excel to General Ledger

Will validate the data that is being pasted into the Transaction Entry



# Reprint outstanding transactions report from Bank Reconciliation

Reprint Outstanding  
Transactions Report

Print posting report after  
posting

System:	10/4/2013	10:18:26 AM	Fabrikan, Inc.	Page:	1
User Date:	4/12/2017		OUTSTANDING TRANSACTIONS REPORT	User ID:	sa
			Bank Reconciliation		
Checkbook ID: FLEX BENEFITS					
Description: Flex Benefits-Lakes Bank					
Sorted By: Type					
Audit Trail Code: B00000129100					
Type	Number	Date	Paid To/Rcvd From	Trx Amount	
-----					
DAJ	DAJ000000014	1/30/2014		(\$600.00)	
DAJ	DAJ000000015	1/30/2014		(\$1,520.00)	
2 Transaction(s)					
Totals:					
Number of Payments			2		
Amount of Payments			\$2,120.00		
Number of Deposits			0		
Amount of Deposits			\$0.00		

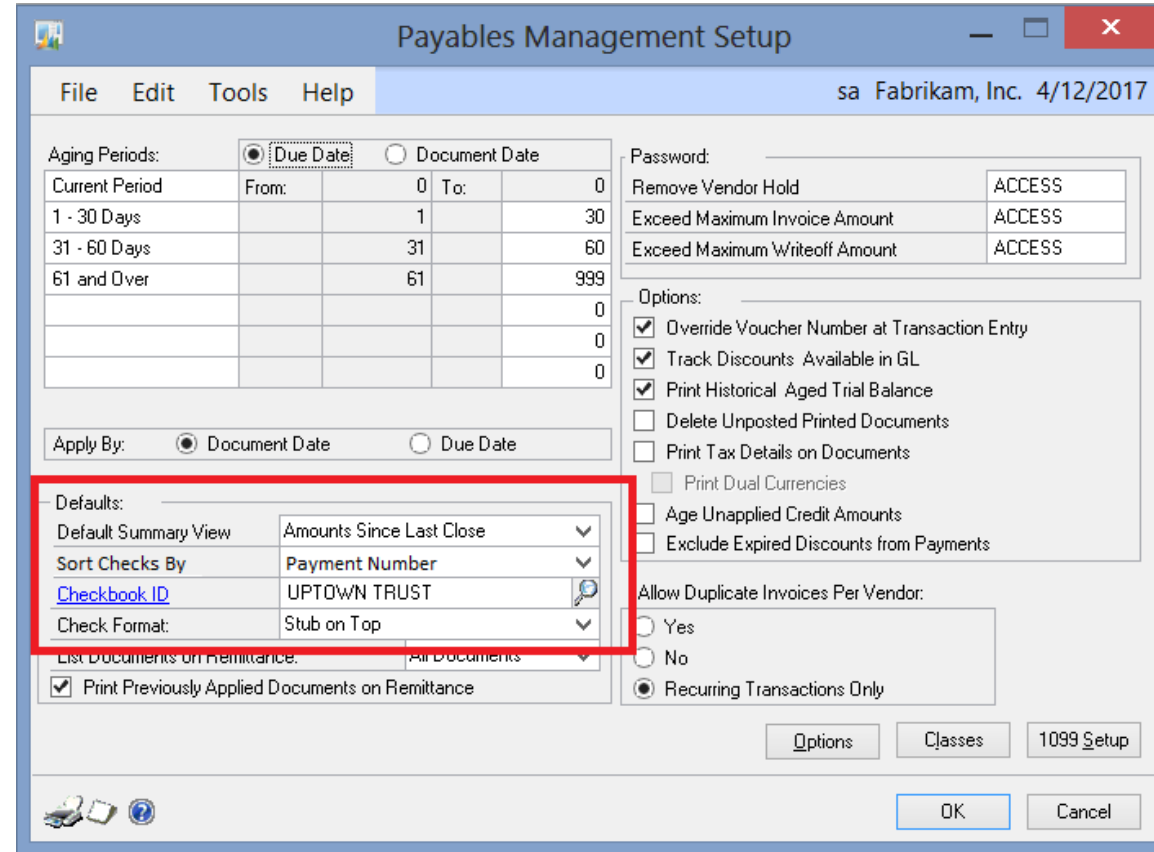


# Default Sort Order for Payables Checks

Sort Checks by option will be found in the Payables Management setup

Sort options: Payment Number, Name, State-City or Zip Code

Time-saving feature



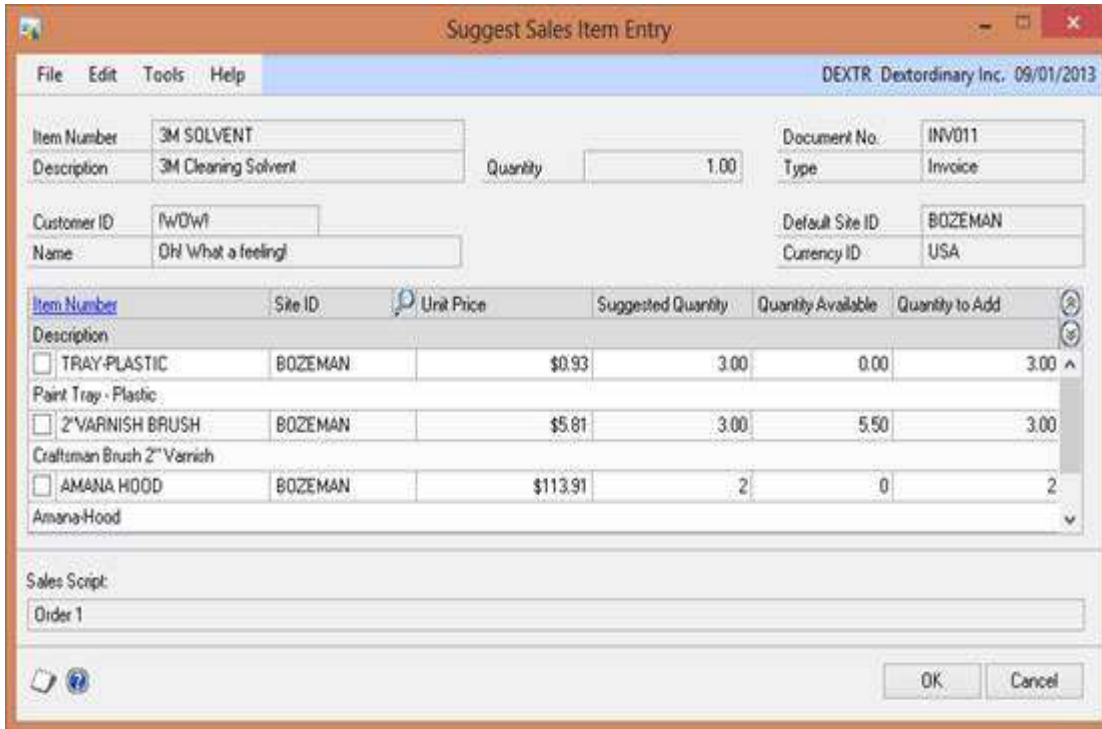
Distribution

# Suggested Item

Sales script for each item

Analyze option to suggest quantities

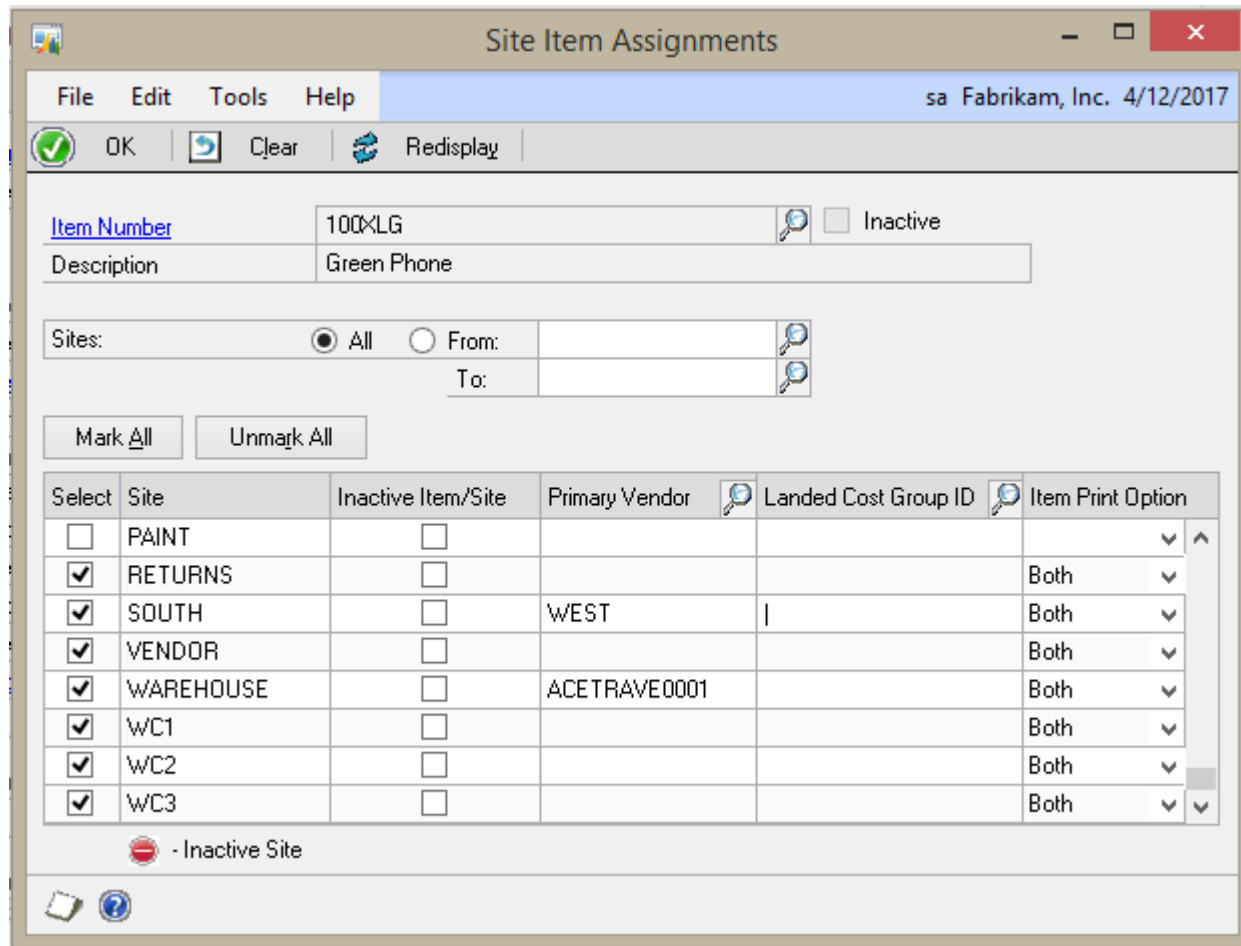
New fields: Price, Qty. Available, Site ID



# Assign Item to multiple Sites

Assign an Item to multiple Sites

Available from Site Maintenance



# Payables Prepayment Additions

Integrate with Analytical  
Accounting, Multi-Dimensional  
Analysis, Cash Flow  
Management and Project  
Accounting

Show PO Number in Check  
Inquiry

The screenshot shows the 'Payables Payments Zoom' window for user 'sa' at 'Fabrikam, Inc.' on '4/12/2017'. The window contains a form for entering payment details. The 'Payment No.' is 00000000000000439 and the 'Date' is 4/12/2017. The 'Vendor ID' is ACETRAVE0001 and the 'Check Name' is 'A Travel Company'. The 'Payment Method' is set to 'Check'. The 'Checkbook ID' is UPTOWN TRUST and the 'Document No.' is 20058. The 'Amount' is \$100.00 and the 'PO Number' is PO2078. The 'Batch ID' is 'sa' and the 'Date Voided' is 0/0/0000. The 'Currency ID' is Z-US\$. The 'Terms Discount Taken' and 'Terms Discount Available' are both \$0.00. The 'Writeoff' is \$0.00. The 'Unapplied' amount is \$100.00, 'Applied' is \$0.00, and 'Total' is \$100.00. At the bottom, there are buttons for 'Revaluation', 'Apply', 'Distribution', and 'Re-create Check Stub'.

Payment No.	00000000000000439	Batch ID	sa
Date	4/12/2017	Date Voided	0/0/0000
Vendor ID	ACETRAVE0001	Currency ID	Z-US\$
Check Name	A Travel Company		
Payment Method:	<input checked="" type="radio"/> Check	<input type="radio"/> Credit Card	
	<input type="radio"/> Cash	<input type="radio"/> EFT	<input type="checkbox"/> Electronic
Checkbook ID	UPTOWN TRUST	Amount	
Document No.	20058	Unapplied	\$100.00
Amount	\$100.00	Applied	\$0.00
Comment		Total	\$100.00
PO Number	PO2078		
Terms Discount Taken	\$0.00	Writeoff	\$0.00
Terms Discount Available	\$0.00		

Buttons: Revaluation, Apply, Distribution, Re-create Check Stub

# New Encumbrance SQL Reporting Services Reports

SSRS Reports that display Encumbrance data

Summary and Detail Reports

Enable Print SSRS Reports from Encumbrance forms

View By: Budget Budget ID/Year: Budget 4  
 From Account: 000-1300-01 To Account: 000-1300-01  
 Display: Net Change Exclude Prebudget in Total: No

**Encumbrance Summary Inquiry**

BUDGET	Account Number	Period ID	Actual	Pre-Budget	Pre-Encumbered	Encumbered	Total	Budget	Variance	Variance %
BUDGET 4	000-1300-01	Beginning Balances	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
		2017 PERIOD 1	(\$24,132.62)	\$0.00	\$0.00	\$0.00	(\$24,132.62)	\$10,000.00	\$34,132.62	341.32%
		2017 PERIOD 2	\$95,054.70	\$0.00	\$0.00	(\$11,853.62)	\$83,401.08	\$10,000.00	(\$73,401.08)	(734.01%)
		2017 PERIOD 3	(\$80,223.52)	\$0.00	\$0.00	\$0.00	(\$80,223.52)	\$10,000.00	\$90,223.52	902.23%
		2017 PERIOD 4	(\$32,263.94)	\$3,322.90	\$0.00	\$680.48	(\$28,260.56)	\$10,000.00	\$38,260.56	382.60%
		2017 PERIOD 5	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10,000.00	\$10,000.00	100.00%
		2017 PERIOD 6	\$0.00	\$0.00	\$5,960.00	\$598.00	\$6,558.00	\$10,000.00	\$3,422.00	34.22%
		2017 PERIOD 7	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10,000.00	\$10,000.00	100.00%
		2017 PERIOD 8	(\$4,430.00)	\$0.00	\$0.00	\$0.00	(\$4,430.00)	\$10,000.00	\$14,430.00	144.30%
		2017 PERIOD 9	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10,000.00	\$10,000.00	100.00%
		2017 PERIOD 10	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10,000.00	\$10,000.00	100.00%
		2017 PERIOD 11	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10,000.00	\$10,000.00	100.00%
		2017 PERIOD 12	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10,000.00	\$10,000.00	100.00%
		<b>Total</b>	<b>(\$45,995.38)</b>	<b>\$3,322.90</b>	<b>\$5,960.00</b>	<b>(\$10,375.14)</b>	<b>(\$47,067.62)</b>	<b>\$120,000.00</b>	<b>\$167,067.62</b>	<b>139.22%</b>

View By: Budget Budget ID/Year: Budget 4 Report Generated: 10/14/2015 3:48:35 PM  
 Beginning Account: Ending Account:  
 Display: Net Change Exclude Prebudget in Total: No



# Business Portal Replacement Strategy

Replace Business Portal with employee self service functionality within GP web client

Business Portal will not be released for GP 2015



## **Web Client**

- Limited User Role
- Requisition Management
- Employee Self Service
- Project Time
- Project Expense



## **Apps**

- Business Analyzer
- Procurement
- Time Management
- Others (tbd)

# Self Service Home Page

New Home Page Content Page

Quick & Simplified Navigation

Preview Important Information

The screenshot displays the 'Employee Self Service' interface. At the top, under 'TIME MANAGEMENT', there are five blue boxes with white text: '2 Saved Time Cards', '12 Submitted Time Cards', '14 All Time Cards', '80 Vacation', and '40 Sick Time'. Below this is a section titled 'I NEED TO...' with a list of links: 'Change My Address', 'View Paystub', 'Update Emergency Contact Information', 'Change My W4', and 'Edit Direct Deposit Information'. The main section is 'CURRENT TIME CARD' with a table showing time card details for a week (DEC 1 to DEC 7) and a total. The table has a blue header and light blue rows.

PAY CODE	DEC 1	DEC 2	DEC 3	DEC 4	DEC 5	DEC 6	DEC 7	TOTAL
Hourly		8.00						8.00
Hourly - Dept. A			8.00					8.00
Hourly - Dept. B				4.00				4.00
Hourly - Dept. C				4.00				4.00
Vacation					8.00	8.00		16.00







# New Companion Apps



# Microsoft Dynamics GP Workspace

Easily create and securely share executive dashboards

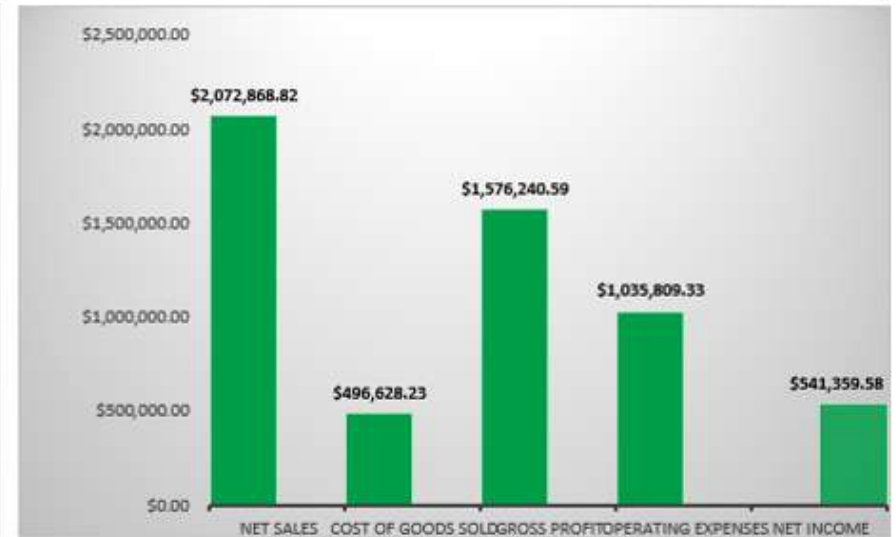
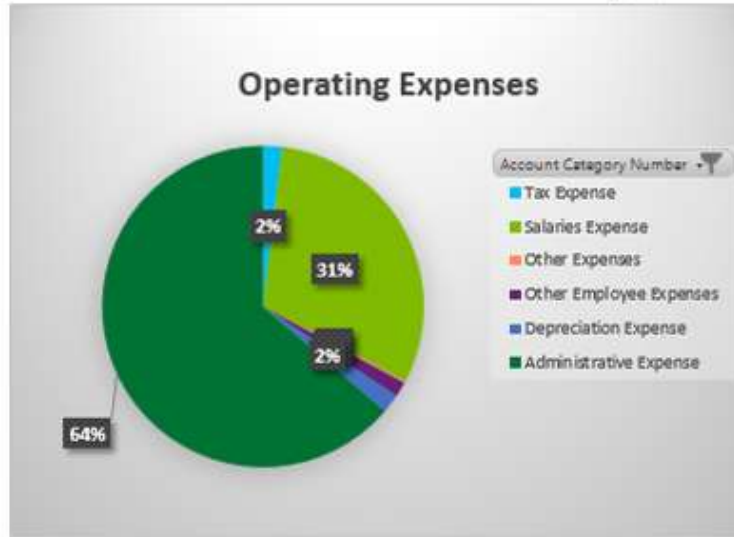
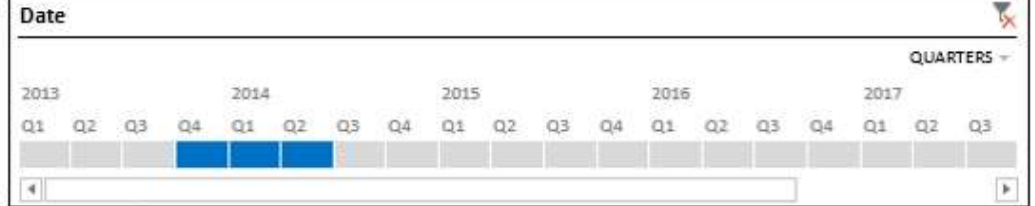
Seamlessly click-through to Dynamics GP client for rich data

Coming soon ! Office 365 app to simplify set up.

[Click here to Test drive](#)

## Financial Dashboard

Indicator	Current
Net Sales	\$2,072,868.82
Cost of Goods Sold	\$496,628.23
Gross Profit	\$1,576,240.59
Operating Expense	\$1,035,809.33
Net Income	\$541,359.58



Financial Ratios	This Period	Last Period	% Change
Current	1.82	0.83	119.28%
Quick	3.46	1.05	229.52%
AR Days Outstanding	28.36	32.52	12.80%
Debt to Equity	0.00	0	0.00%
Receivables Turnover	1.14	1.62	29.63%

Checkbook	Checkbook ID	Currency ID	Current Balance
Computer-Uptown Trust	UPTOWN TRUST	Z-US\$	65,994.14
Flex Benefits-Lakes Bank	FLEX BENEFITS	Z-US\$	345.32
Payroll - Lakes Bank	PAYROLL	Z-US\$	227,136.29
Petty Cash-Uptown Trust	PETTY CASH	Z-US\$	4,316.51
FIRST BANK	FIRST BANK	Z-US\$	0.00



# Business Analyzer R6

Supports Excel Content within the app

Windows 8 Design

Business Analyzer R7 is planned to be released soon.

**BUSINESS ANALYZER**  
CONTOSO ENTERTAINMENT SYSTEM USA - CHIEF FINANCIAL OFFICER

**KPIS** + Add

**Net sales - Daily**  
USD (thousands)  
Bar chart showing daily net sales from Monday to Monday. Values range from approximately 100 to 230 thousand USD.

**Today's bank balances - Summary view**  
Pie chart showing bank account balances: Bank account (USD), Bank account (EUR), and Bank account - payroll (USD).

**Days inventory outstanding**  
622.49  
Goal: 200.00  
Status: Red dot  
Trend: Up arrow

**Receivables vs payables**  
\$3,168,330  
Goal: \$1,500,000  
Status: Green dot  
Trend: Up arrow

**Liquidity: quick ratio**  
1.90  
Goal: 1.60  
Status: Green dot  
Trend: Down arrow

**Liquidity: working capital**  
\$28,989,771  
Goal: \$23,968,667  
Status: Green dot  
Trend: Down arrow

**Open accounts payable**  
\$3,755,540  
Goal: \$5,000,000  
Status: Green dot  
Trend: Down arrow

**REPORTS** Show All ▾ + Add

- Departmental Income Statement 1/21/2014
- Financial Matrix 1/21/2014
- Weekly Material Usage 1/21/2014

Faded version of the Business Analyzer R6 dashboard, showing the same KPIs and reports as the top image.

# Procurement

(planned to be released soon)

Self-Service user App

Request Items

Windows 8 Design

Tightly integrate with DynGP

Cross Platform



# Time Management

(planned to be released soon)

Self-Service user App

Enter Time Off

Windows 8 Design

Cross Platform

The screenshot displays the Microsoft Dynamics Time Management application interface. At the top, it shows the title "MICROSOFT DYNAMICS TIME MANAGEMENT" and the month "January 2014". Navigation arrows are present on either side of the month name. In the top right corner, there are "Submit" and "Cancel" buttons. The main area is a calendar grid for January 2014, with days of the week labeled at the top. The calendar shows time off entries: 8.00 hours of Vacation on Monday (30) and Tuesday (31); 2.00 hours of Sick Time on Thursday (2); and 8.00 hours of Vacation on Friday (3) and Thursday (9). The right-hand side of the screen features a summary panel. The "ATTENDANCE" section shows the date "1/1/2014" and two rows: "Vacation" with a balance of 104.00 and 0.00, and "Sick Time" with a balance of 62.00 and 0.00. Below this is the "TIME CARDS" section, which lists "Check Date" and "Hours Submitted" for several dates: February 28, 2014 (0.00); February 15, 2014 (0.00); January 31, 2014 (0.00); January 15, 2014 (0.00); and December 31, 2013 (0.00). Each entry has a pencil icon next to the hours submitted value.

# Microsoft Dynamics GP Roadmap

