



# What's new in Microsoft Dynamics GP 2015

 Microsoft Dynamics GP

 Microsoft



# Agenda

## Roadmap

## What's new in Microsoft Dynamics GP 2015

Key Benefits

System-wide Features

Financials

Distribution

HR & Payroll Employee Self Service

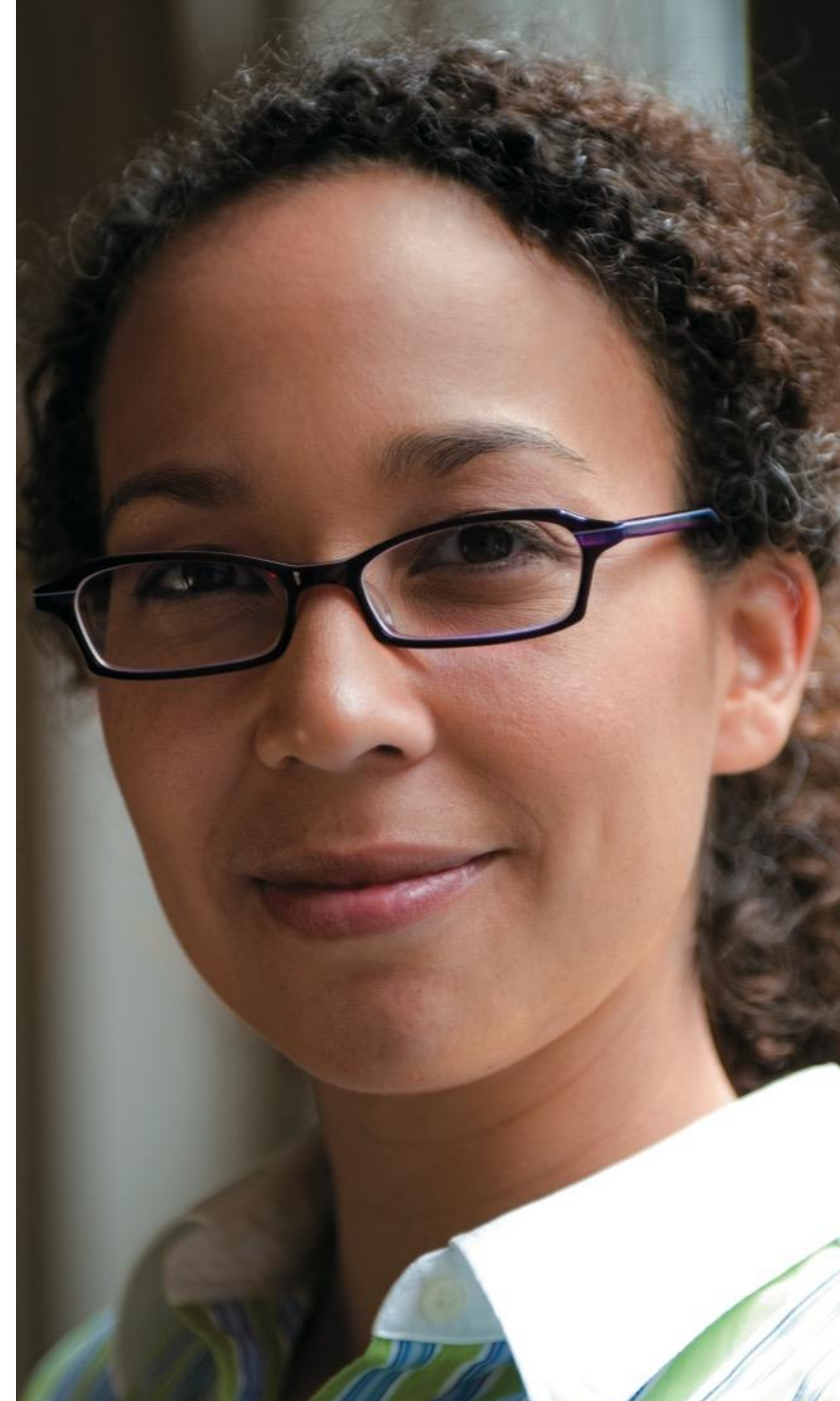
Companion Apps

List of features released since Microsoft  
Dynamics GP 2013



# Microsoft Dynamics GP

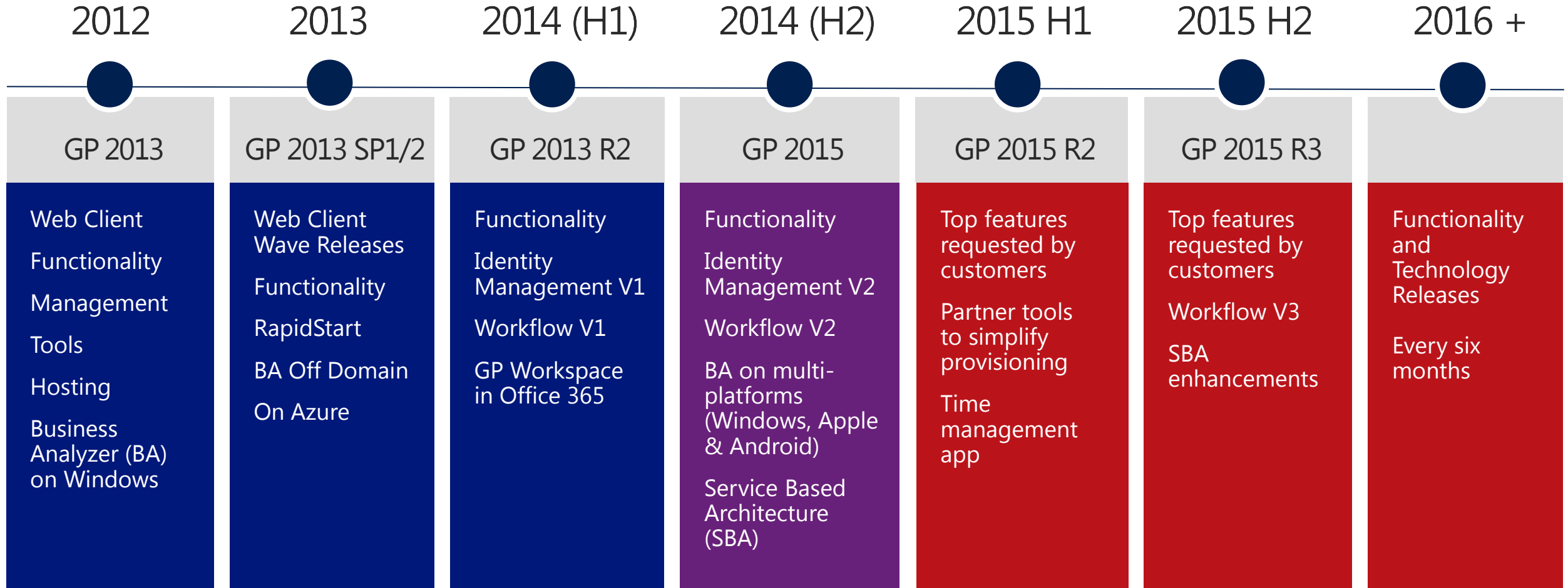
Quick to implement, simple to use business solution from Microsoft with the power to support your business ambitions







# Microsoft Dynamics GP Roadmap



# Microsoft Dynamics GP 2015 Key Benefits

## Expanded workflows

to help streamline financial, purchasing, sales, payroll, and project expense related approvals

## Single sign on

through integration with Microsoft Azure Active Directory to help users work seamlessly across Microsoft Dynamics GP, Office 365, and other cloud-based applications

## Service based architecture

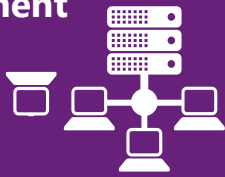
to lower the cost and time required to create or modify business solutions built on Microsoft Dynamics GP

System wide features

# Service Based Architecture 2015

## Scalable Deployment

models fit any sized organization needs.



## GP consumes and exposes services

Logic in any **dictionary** including **ISV products** can be **exposed** as service operations.

[https://Contoso.com/Apps/GP/Company\(ID=2\)/Inventory/Items\(ItemNumber='100XLG'\)](https://Contoso.com/Apps/GP/Company(ID=2)/Inventory/Items(ItemNumber='100XLG'))



**https** protocol with **REST** style API lets you build apps on many different **platforms**



### Secure Access

Use **Windows** or **O365 Identity** to authenticate.



**Enhanced Interoperability** gives developers additional capability to leverage the **Microsoft Platform**.



### Operation Security

Managed within the GP application just like forms and reports.

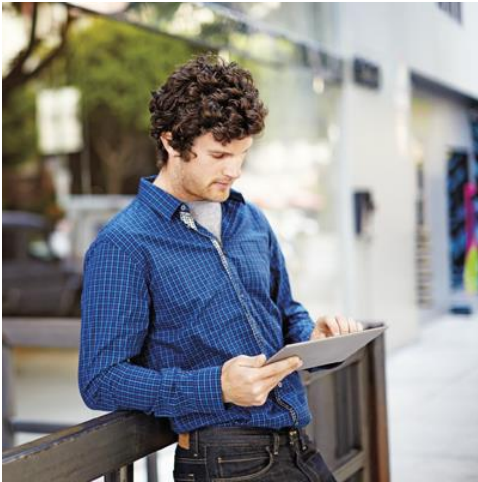
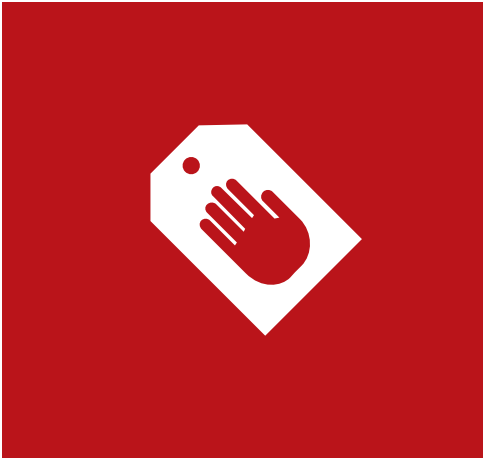
**Discovery operations** inform you of available operations and their **syntax**



**Integrate** to other applications or services

Deployable on  Windows Azure

# Identity management 2015



Log into  
Microsoft Dynamics  
GP Web Client  
using organizational  
account credentials  
(Azure AD account)

**User Setup**

Save Clear Delete Copy Access Summary Print Help Add Note

Actions File Help

User ID: Phyllis  
User Name: Phyllis Gunderson  
Class ID:

Status: Active  
User Type: Full  
Home Page Role: Accounting Manager

☒ Web Client user only (no SQL Server Account) ☐ Payroll View for Human Resources

SQL Server Account Directory Account

Organizational Account  
Phyllis Gunderson (phyllisg@contoso.onmicrosoft.com)

By using an Organizational Account to access Microsoft Dynamics GP Web Client, a SQL Server login account is not required.

Navigation: |< < > >|



# Workflow

## R2

### Purchasing

Purchase Order Approval

### Payroll

Timecard Approval

### Project

Timesheet Approval

## 2015

### Financial

GL Batch Approval

### Purchasing

Payables Batch Approval

Vendor Approval

### Sales

Receivables Batch Approval

### Payroll

Employee Skills Approval

Direct Deposit Approval

Employee Profile Approval

W4 Approval

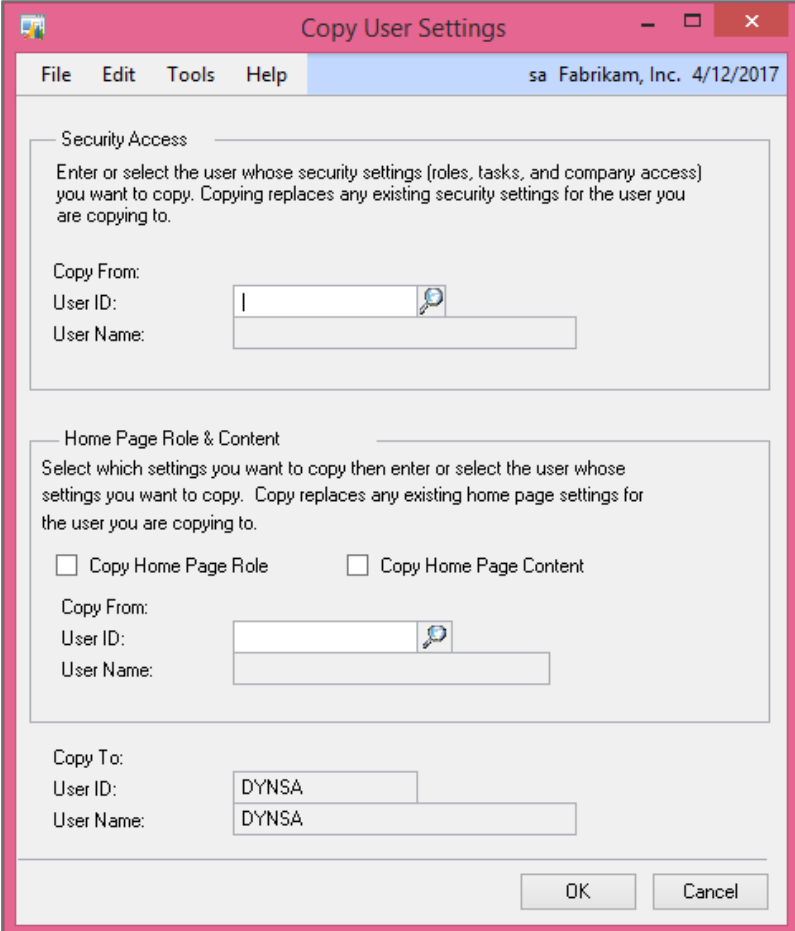
### Project

Expense Report Approval

# Copy Home Page & Area Page 2015

Copy Home Page Settings  
& Content to Other Users

Copy Area Page Settings  
to Other Users



The screenshot shows the 'Copy User Settings' dialog box with a pink title bar and a menu bar containing 'File', 'Edit', 'Tools', and 'Help'. The window title is 'sa Fabrikam, Inc. 4/12/2017'. The dialog is divided into three main sections:

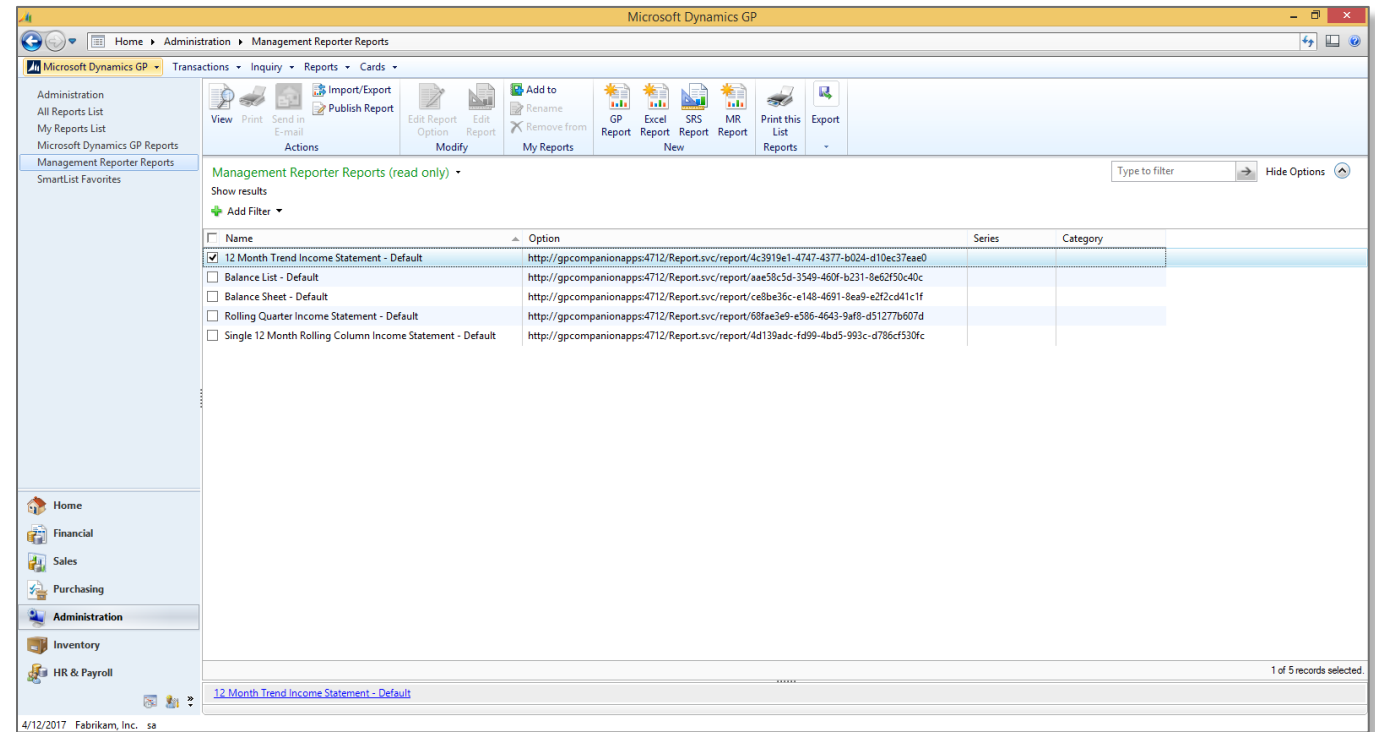
- Security Access:** Contains instructions to 'Enter or select the user whose security settings (roles, tasks, and company access) you want to copy. Copying replaces any existing security settings for the user you are copying to.' It includes fields for 'Copy From: User ID:' and 'User Name:'.
- Home Page Role & Content:** Contains instructions to 'Select which settings you want to copy then enter or select the user whose settings you want to copy. Copy replaces any existing home page settings for the user you are copying to.' It includes two checkboxes: 'Copy Home Page Role' and 'Copy Home Page Content'. Below these are fields for 'Copy From: User ID:' and 'User Name:'.
- Copy To:** Contains fields for 'User ID:' and 'User Name:', both of which are pre-filled with the text 'DYNESA'.

At the bottom right of the dialog are 'OK' and 'Cancel' buttons.

# Navigation to Management Reporter 2015

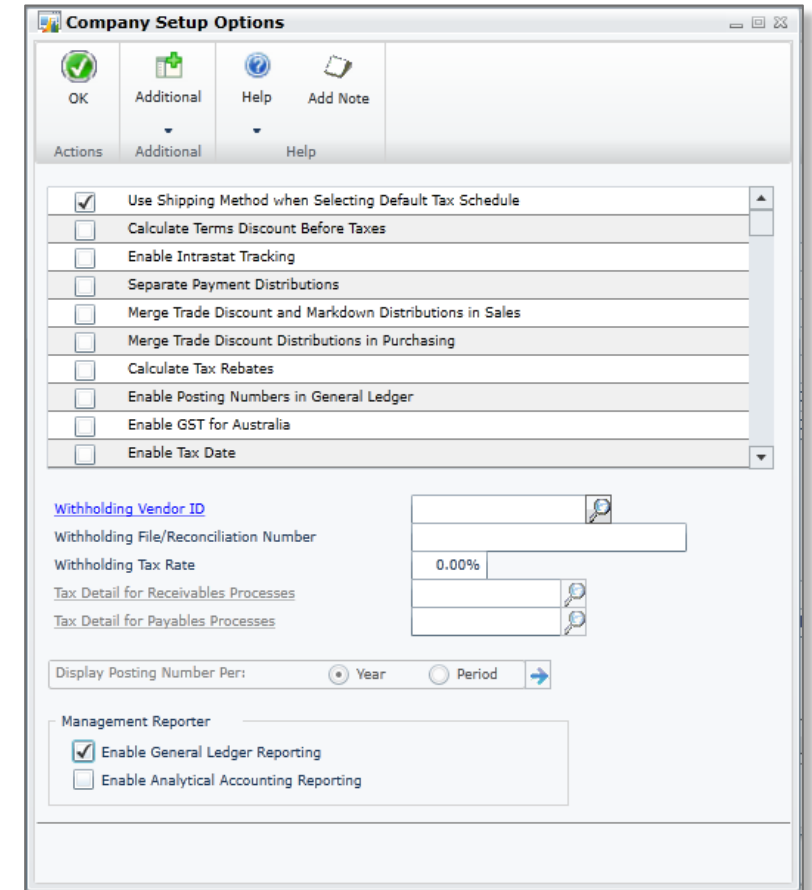
New Navigation List  
for Management  
Report Reports

View, Edit and Create  
Management  
Reporter Actions



# MR Integration Options 2015

In Company Setup options, you control what data Management Reporter uses for General Ledger and/or Analytical Accounting reporting for each company.



**Company Setup Options**

OK Additional Help Add Note

Actions Additional Help

- ☒ Use Shipping Method when Selecting Default Tax Schedule
- ☐ Calculate Terms Discount Before Taxes
- ☐ Enable Intrastat Tracking
- ☐ Separate Payment Distributions
- ☐ Merge Trade Discount and Markdown Distributions in Sales
- ☐ Merge Trade Discount Distributions in Purchasing
- ☐ Calculate Tax Rebates
- ☐ Enable Posting Numbers in General Ledger
- ☐ Enable GST for Australia
- ☐ Enable Tax Date

[Withholding Vendor ID](#)

Withholding File/Reconciliation Number

Withholding Tax Rate

[Tax Detail for Receivables Processes](#)

[Tax Detail for Payables Processes](#)

Display Posting Number Per: ☒ Year ☐ Period

**Management Reporter**

- ☒ Enable General Ledger Reporting
- ☐ Enable Analytical Accounting Reporting



# Financials

# Intercompany Enhancements 2015

Intercompany Journal Entry Inquiry

Void Intercompany Transactions

The screenshot shows the 'Intercompany Journal Entry Inquiry' window. The title bar indicates the user is 'sa: Fabrikam, Inc.' and the date is '4/12/2017'. The window has a menu bar with 'File', 'Edit', 'Tools', 'View', 'Help', and 'Debug'. Below the menu bar is a toolbar with an 'OK' button. The main area is divided into two sections. The top section contains fields for 'Company ID' (CE5), 'Journal Entry' (3,577), 'Fiscal Year' (2017), 'Transaction Date' (4/12/2017), 'Source Document' (FMTRX), and 'Posting Number' (99). The bottom section contains fields for 'Company Name' (Contoso Electronics), 'Audit Trail Code' (ICTR-00000003), 'Batch ID' (FMTRX-00000023), 'Reference' (Payables Trx Entry), 'Currency ID' (Z-US\$), and 'Reporting Ledger' (BASE). Below these fields is a table with columns for 'Account', 'Debit', and 'Credit'. The table shows two entries: '000-2100-00' with a debit of \$0.00 and a credit of \$2,654.25, and '000-8012-00' with a debit of \$2,654.25 and a credit of \$0.00. The table also includes a 'Total' row with a debit of \$2,654.25 and a credit of \$2,654.25, and a 'Difference' row with a debit of \$0.00 and a credit of \$0.00.

Account	Debit	Credit
000-2100-00	\$0.00	\$2,654.25
Accounts Payable		
Accounts Payable		
000-8012-00	\$2,654.25	\$0.00
Due From Contoso Electronics		
Total	\$2,654.25	\$2,654.25
Difference	\$0.00	\$0.00

# Payment Terms 2015

Due Date Option using Transaction Date

Add Days to Due Date

Additional Due Options

Additional Discount Options

Options: Next Month, Months, Month/Day  
and Annual

The screenshot shows the 'Payment Terms Setup' window. At the top, there is a toolbar with icons for Save, Clear, Delete, Calculate, Print, Help, and Add Note. Below the toolbar, the 'Payment Terms' field is set to '60 EOM/5 % Net'. The 'Due Date' section has 'Calculate Days From' set to 'Transaction Date' with 'Add Days' of 10, and 'Due' set to 'EOM' with 'Add Days' of 60. The 'Discount' section has 'Discount' set to 'Days' with 'Add Days' of 0, and 'Discount Type' set to '0.00%'. The 'Calculate Discount On' section has three checkboxes: 'Sale/Purchase', 'Discount', and 'Freight'. The 'Options' section has a checkbox for 'Use Customer' and a dropdown menu for 'Periods for Date/EOM Payment Terms' with options: Days, Date, EOM, None, Next Month, Months, Month/Day, and Annual. The window also has a navigation bar at the bottom with arrows for navigating between different payment terms.

# Fixed Assets Year End Close Report 2015

Printed as part of year end close

Prints for all books and  
assets impacted

Includes end of year information  
for an asset

System: 9/5/2014 6:27:23 M		Fabrikam, Inc.		Page: 1	
User Date: 4/12/2017		FIXED ASSET YEAR-END CLOSING REPORT		User ID: navya	
For: FEDERAL					
CurrentFiscalYear: 2018					
Asset ID	Description	Cost Basis	YTD Depx	Accum Depx	Net Book
Pl in Svc	Depr Thru	Quantity	YTD Maintenance		Status
00001	Office Desk	\$1,000.00	\$0.00	\$416.04	\$583.96
1/1/2015	2/28/2017	1	\$0.00		Active
00002	Office Desk	\$1,200.00	\$0.00	\$499.24	\$700.76
1/31/2015	2/28/2017	1	\$0.00		Active
00003	Side Chair	\$650.00	\$0.00	\$270.42	\$379.58
3/1/2015	2/28/2017	1	\$0.00		Active
00004	Big Automobile	\$42,550.00	\$0.00	\$8,436.85	\$34,113.15
4/1/2015	2/28/2017	1	\$0.00		Active
00005	Little Truck	\$0.00	\$0.00	\$5,489.88	\$13,060.12
5/15/2015	7/1/2016	1	\$0.00		Retired
00006	PC	\$1,500.00	\$0.00	\$826.55	\$673.45
7/1/2015	2/28/2017	1	\$0.00		Active
00007	Monitor 17"	\$400.00	\$0.00	\$220.41	\$179.59
7/1/2015	2/28/2017	1	\$0.00		Active
00008	Duplicator	\$24,000.00	\$0.00	\$9,984.75	\$14,015.25
10/1/2015	2/28/2017	1	\$0.00		Active



# Distribution

# Edit E-mail for Historical Documents 2015

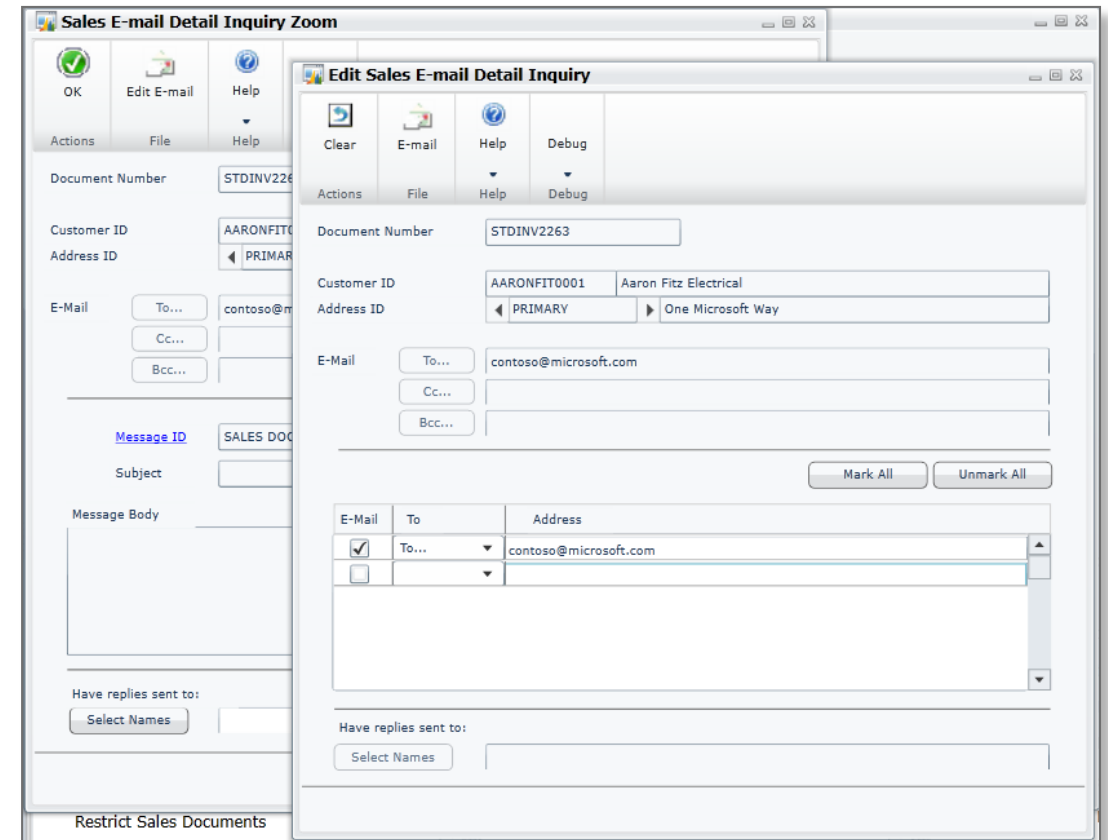
Edit e-mail for historical  
Sales documents

Edit e-mail for historical  
Purchase Orders

Edit e-mail for RM Statements

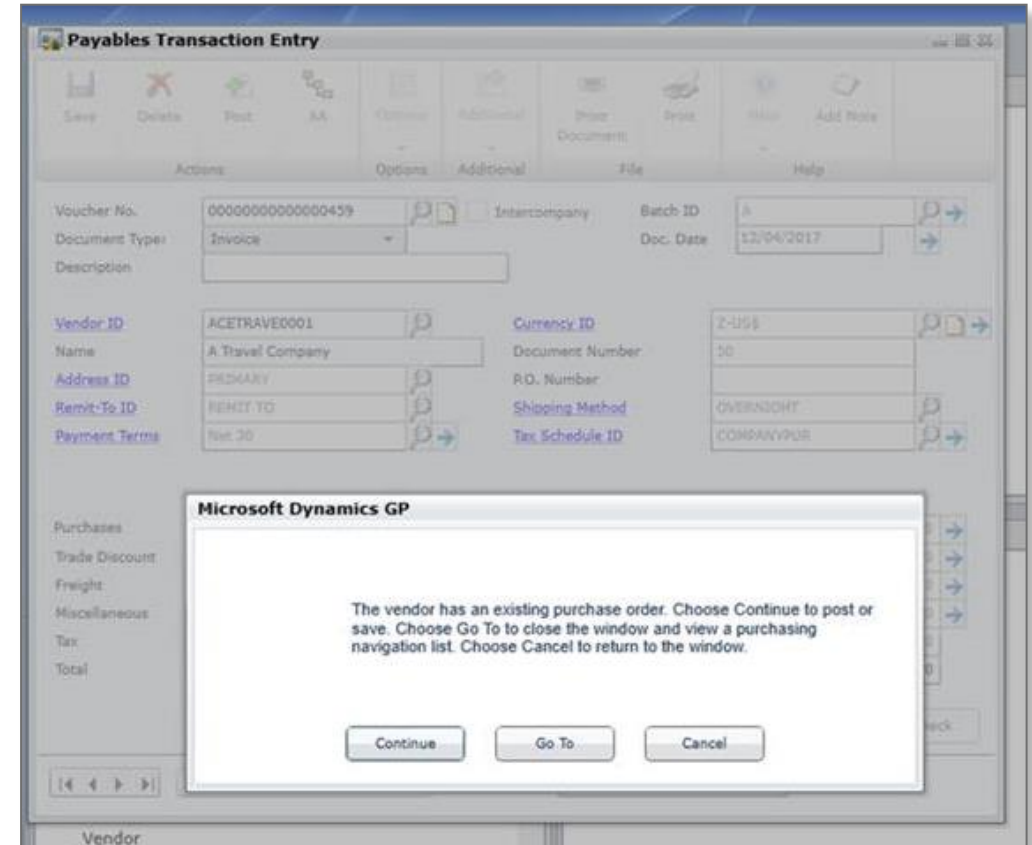
E-mail historical PM  
Remittances

Edit e-mail for PM remittances



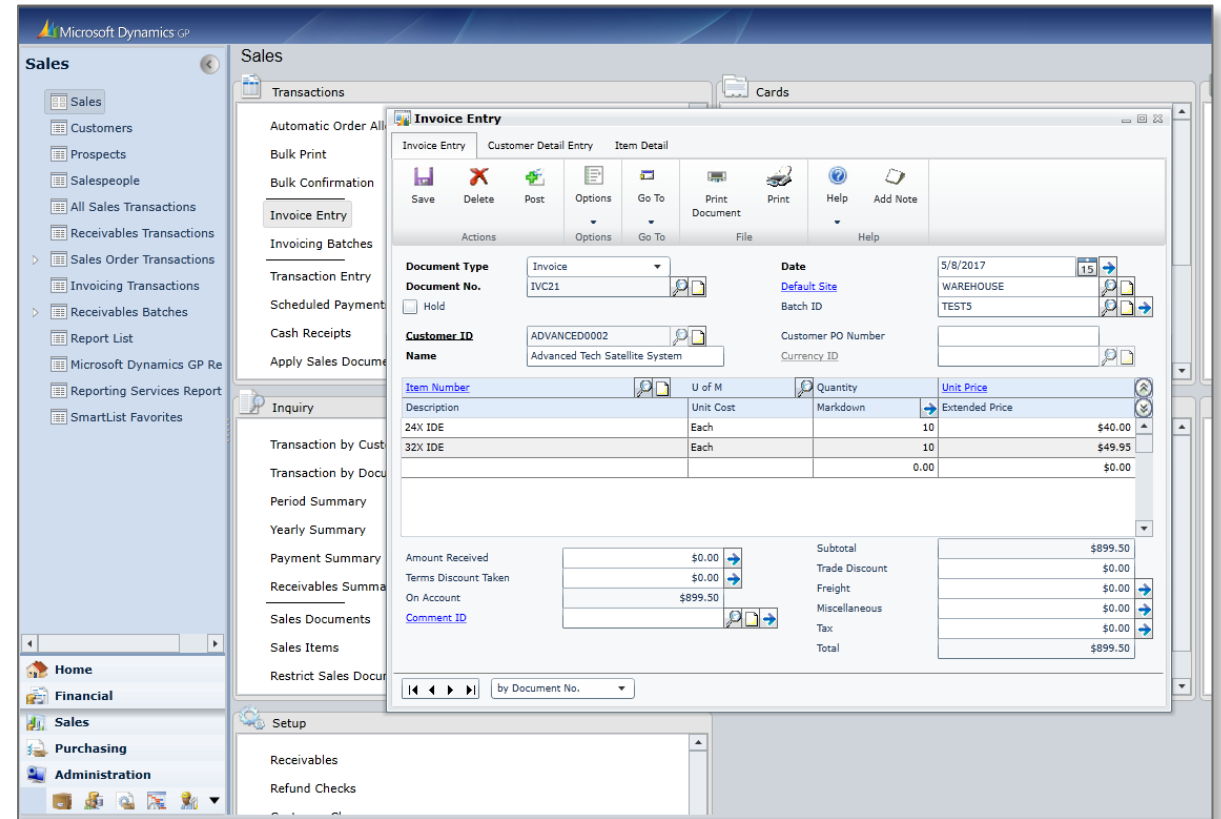
# Payables warning when Open PO 2015

New warning message added when entering payables transaction for a vendor with an outstanding PO or un-invoiced receipt



# Invoicing for Web Client 2015

Invoicing Module is now available in the Web Client



The screenshot displays the Microsoft Dynamics GP Web Client interface for the Invoicing Module. The left-hand navigation pane is titled 'Sales' and includes a tree view with the following items: Sales, Customers, Prospects, Salespeople, All Sales Transactions, Receivables Transactions, Sales Order Transactions, Invoicing Transactions, Receivables Batches, Report List, Microsoft Dynamics GP Reporting Services Report, and SmartList Favorites. Below this, a secondary navigation bar contains icons for Home, Financial, Sales, Purchasing, and Administration.

The main content area is titled 'Sales' and features a 'Transactions' tab. Within this tab, the 'Invoice Entry' sub-tab is active. The interface is divided into several sections:

- Actions:** A row of icons for Save, Delete, Post, Options, Go To, Print Document, Print, Help, and Add Note.
- Document Information:** Fields for Document Type (set to 'Invoice'), Document No. (IVC21), Date (5/8/2017), Customer ID (ADVANCED0002), and Customer Name (Advanced Tech Satellite System).
- Item Detail Table:** A table with columns for Item Number, Description, U of M, Unit Cost, Quantity, Markdown, and Unit Price. It lists two items: 24X IDE (10 units at \$40.00 each) and 32X IDE (10 units at \$49.95 each).
- Summary Section:** A table showing financial totals. The Subtotal is \$899.50. Other items include Amount Received (\$0.00), Terms Discount Taken (\$0.00), On Account (\$899.50), Trade Discount (\$0.00), Freight (\$0.00), Miscellaneous (\$0.00), Tax (\$0.00), and a final Total of \$899.50.

At the bottom of the interface, there is a 'Setup' section with links to 'Receivables' and 'Refund Checks'.



# HR and Payroll Employee Self Service

# Project Employee Expense Report 2015

Project Employee Expense Report and Project Timesheet Entry replace all of the functionality of both Business Portal T&E and PDK!

**PTE Employee Expense Entry**

SaveDeleteSubmitView HistoryViewPrintAvailable ReportsHelpAdd Note

ActionsWorkflowViewFileHelp

Expense Report [Not Submitted]

Employee ID: DIAZ0001  
Employee: Brenda Diaz  
Currency: Z-US\$

Expense Report ID: DIAZ0001-EE-041217-1  
Purpose:

Date	Project	Item	Qty	Amount
4/12/2017	15	COHOREQ	AIRFARE	1.00
04122017	15			0.00

Report Total

\$1,500.00

Reimbursable

\$1,500.00

# Employee Profile 2015

Employee able to view and edit their employment information

Address, Dependents, Emergency Contacts and Position History

The screenshot shows the 'Employee Profile - GPDAT (DEXTR)' application window. The title bar includes standard window controls and the application name. Below the title bar is a toolbar with icons for Save, Cancel, Submit, View History, File, Tools, and Help. The main content area is divided into several sections. At the top, there's a 'workflow [Not Submitted]' status bar. Below that, the 'Employee ID' is EMP005 and the 'Name' is Molly E Manager. A tabbed interface shows 'Personal', 'Emergency Contacts', 'Dependents', and 'Position History'. The 'Personal' tab is active, displaying fields for Name (First: Molly, Middle: E, Last: Manager, Suffix: , Preferred Name: Molly), Address (Street: 1238 5th Street S, City: Fargo, State: ND, ZIP Code: 58105, County: Cass, Country: USA), and Contact Details - Home (Home Phone 1, 2, 3, and Home Fax, all with placeholder (000) 000-0000 Ext. 0000). A 'Personal Information' section at the bottom left contains fields for Soc Sec Number, Hire Date, Birth Date (6/4/1977), Gender (Female), Ethnic Origin (White), Marital Status (Married), and Spouse's Name (George).

Employee ID		EMP005	
Name		Molly E Manager	
Personal   Emergency Contacts   Dependents   Position History			
Name			
First	Molly		
Middle	E		
Last	Manager		
Suffix			
Preferred Name	Molly		
Address			
Street	1238 5th Street S		
City	Fargo		
State	ND		
ZIP Code	58105	County	Cass
Country	USA		
Contact Details - Home			
Home Phone 1	(000) 000-0000 Ext. 0000		
Home Phone 2	(000) 000-0000 Ext. 0000		
Home Phone 3	(000) 000-0000 Ext. 0000		
Home Fax	(000) 000-0000 Ext. 0000		
Personal Information			
Soc Sec Number			
Hire Date			
Birth Date	6/4/1977		
Gender	Female		
Ethnic Origin	White		
Marital Status	Married		
Spouse's Name	George		

# Employee Profile Workflow 2015

Workflow available for Employee Profile information

Setup Workflow for your business process

Route using Active Directory hierarchy



# Manager Team Profile 2015

Manager able to view and edit  
their team members' data

Address, Dependents, Emergency  
Contacts and Position History

The screenshot shows a web application window titled "Employee Profile - GPDAT (DEXTR)". The interface includes a top navigation bar with icons for Cancel, Submit, View History, File, Tools, and Help. Below this is a tabbed interface with tabs for Personal, Emergency Contacts, Dependents, and Position History. The "Emergency Contacts" tab is active, displaying a table of emergency contacts. The table has columns for Contact, Relationship, Home Phone, Work Phone, and Ext. One contact, John Doe, is listed with a relationship of Friend, home phone (701) 394-2834, work phone (701) 838-5732, and extension 234. Below the table, there are input fields for Address (321 9th St), City (Fargo), State (ND), and ZIP Code (58104). Navigation buttons for "Previous" and "Next" are located at the bottom right of the form.

Contact	Relationship	Home Phone	Work Phone	Ext
John Doe	Friend	(701) 394-2834	(701) 838-5732	234

Address: 321 9th St  
City: Fargo  
State: ND  
ZIP Code: 58104

Previous Next

# Employee Skills and Training 2015

Part of self service for employee to view and maintain their education and tests

Employee can view skills and training history

The screenshot shows the 'Employee Skills & Training' application window. At the top, there is a title bar and a ribbon with tabs for 'Actions', 'Workflow', and 'Help'. The 'Actions' tab is active, showing buttons for 'Save', 'Cancel', 'Workflow', 'View History', and 'Help'. Below the ribbon, there are input fields for 'Employee ID' (containing 'ACKE0001') and 'Name' (containing 'Pilar Ackerman'). Below these fields, there are four tabs: 'Education', 'Tests', 'Skills', and 'Training History'. The 'Tests' tab is selected. Below the tabs, there is a table with the following columns: 'Test', 'Date', 'Score', and 'Expires'. The table contains one row with the data: 'Maple Grove High', '1985', '3', and an empty cell. The table has a vertical scrollbar on the right side.

Test	Date	Score	Expires
Maple Grove High	1985	3	

# Employee Skills Workflow 2015

Workflow available for Employee Skills for education and tests

Setup Workflow for your business process

Route using Active Directory hierarchy

The screenshot shows the 'Workflow Maintenance' window in Microsoft Dynamics GP. The 'Payroll' dropdown menu is selected, showing a list of workflows: 'Employee Skills Approval', 'Employee Skills Workflow', 'Education Update' (highlighted with a yellow warning icon), 'Payroll Direct Deposit Approval', and 'Payroll Timecard Approval'. The 'Education Update' workflow is selected, and its configuration is displayed on the right. The 'Step Name' is 'Education Update', the 'Description' is 'Education Update', and the 'Step Type' is 'Approval'. The 'Order' is set to 'This step follows the selected step:'. The 'Condition' is 'where ESS Skills&Training Education.Degree is not '''. The 'Assignment' is set to 'Theresa Nistler' with a time limit of '8 Hours' and the 'Apply Workflow Calendar' checkbox checked. The 'Completion policy' is set to 'Only one response needed'.

**Workflow Maintenance**

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

Actions New Help

Payroll

- Employee Skills Approval
- Employee Skills Workflow
- Education Update
- Payroll Direct Deposit Approval
- Payroll Timecard Approval

**Step Name:** Education Update

**Description:** Education Update

**Step Type:** Approval

**Order:**

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

**Condition:**

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

where ESS Skills&Training Education.Degree is not ''

**Assignment:**

**Assign to:** Theresa Nistler

**Time limit:** 8 Hours

☒ Apply Workflow Calendar

☐ Send Message:

**Completion policy:**

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

# Manager Skills and Training 2015

Part of self service for manager to view and maintain their employee's education and tests

Manager can view employee's skills and training history

Driven from navigation lists

The screenshot shows a web application window titled "Employee Skills & Training". The interface includes a top navigation bar with icons for Save, Cancel, Workflow, View History, and Help. Below this, there are input fields for "Employee ID" (containing "ACKE0001") and "Name" (containing "Pilar Ackerman"). A tabbed interface is visible with four tabs: "Education", "Tests", "Skills", and "Training History". The "Tests" tab is currently selected, displaying a table with the following data:

Test	Date	Score	Expires
Maple Grove High		1985	3

# Employee Benefits 2015

Employee can view their benefits with employer and employee contributions.

**Benefits View**

OK Help  
Actions Help

Employee ID: ACKE0001 Pilar Ackerman

Employer Contributions ☒ All Benefits ☐ Active

Code	Description	Status	Frequency	Method	Amount or %
401K	Retirement Plan	Active			\$0.00
INS	Insurance Premium	Active			\$49.36

Employee Contributions

Code	Description	Status	Frequency	Method	Amount or %
401K	Retirement Plan	Active			\$0.00
EPU	Employee Purchases	Active			\$0.00
INS2	Insurance (family coverage)	Active			\$72.95
MED	Medical Flex	Active			\$20.00

# Employee Paystubs 2015

In Self Service, an employee can now view or print their paystubs from the paystubs navigation list

View

Custom Date ▾

Print

ActionsRestrictionsReports

Paystubs (read only) ▾

Type to

Show results

+ Add Filter ▾

Apply Filter

<input type="checkbox"/>	Check Date ▾	Check Number	Gross Wages	Federal Tax	FICA Medicare	FICA SS	Total Deductions	Total Benefits	Net Wages
<input type="checkbox"/>	12/1/2018	DD00000000000000000178	\$937.50	\$42.06	\$12.25	\$52.36	\$121.08	\$50.77	\$695.26
<input type="checkbox"/>	11/1/2018	DD0							
<input type="checkbox"/>	10/1/2018	DD0							
<input type="checkbox"/>	9/1/2018	DD0							
<input type="checkbox"/>	8/1/2018	DD0							
<input type="checkbox"/>	7/1/2018	DD0							
<input type="checkbox"/>	6/1/2018	DD0							
<input type="checkbox"/>	6/1/2018	DD0							
<input type="checkbox"/>	5/1/2018	DD0							

\*\*\* Employee Paystub \*\*\*

Fabrikam, Inc.

Ackerman, Pilar

987 Willow Ave

Winnetka

IL 98272

Employee ID: ACKE0001

Check Number: DD00000000000000000178

Check Date: 12/1/2018

Pay Period Start: 12/1/2018

Pay Period End: 12/1/2018

Code	Description	Pay Rate	Hours	Current Amount	Year-To-Date Hours	Year-To-Date Amount
SALY	Salary Pay Code	\$22,500.00	86.67	\$937.50	1,000.04	10,817.30
GROSS PAY				\$937.50		\$13,117.30
401K	401(k) Deduction			\$28.13		324.57
INS2	Insurance (family coverage)			\$72.95		875.40
MED	Medical Flex			\$20.00		240.00
TOTAL DEDUCTIONS				\$121.08		\$1,439.97



# Employee W-4 2015

An employee can edit their W4 information, add or change the additional withholding, update the number of deductions and reduce the potential for data entry errors

With workflow, the payroll administrator can route the W4 information appropriately

[illegible]

# Employee W-4 Workflow 2015

Workflow available for Employee W4

Setup Workflow for your business process

Route using Active Directory hierarchy

# Employee Direct Deposit 2015

An employee can edit their deposit information, add accounts or change the distribution reducing the potential for data entry errors

With workflow, the payroll administrator can route the deposit information appropriately

The screenshot shows the 'Employee Direct Deposit' window. At the top, there is a toolbar with icons for 'Clear', 'Stop Deposit', 'Save', 'Workflow', 'View History', and 'Help'. Below the toolbar, the 'Employee ID' is 'ACKE0001' and the 'Name' is 'Pilar Ackerman'. The 'Direct Deposit Status' is 'Active' and the 'Remainder Line Number' is '1'. Below this is a table with two rows of deposit information. To the right of the table are 'Move Up' and 'Move Down' buttons. At the bottom right are 'Add Account' and 'Remove Account' buttons.

Line	Bank Number	Account Number	Checking/Savings	Amount	Percent
1	123456780	12345	Savings	\$0.00	50%
2	123456780	615421	Savings	\$0.00	50%

# Employee Direct Deposit 2015

Workflow available for  
Employee Direct Deposit

Setup Workflow for your  
business process

Route using Active Directory  
hierarchy

The screenshot displays the 'Workflow Maintenance' window. The left pane shows a tree view of workflows under the 'Payroll' category, including 'Employee Skills Approval', 'Payroll Direct Deposit Approval', 'Employee Direct Deposit' (highlighted), and 'Payroll Timecard Approval'. The right pane shows the configuration for the 'Payroll Admin' step. The 'Step Name' is 'Payroll Admin', the 'Description' is 'Notification to Payroll Admin', and the 'Step Type' is 'Task'. The 'Order' section has two radio buttons: 'This step is a first step' (selected) and 'This step follows the selected step:'. The 'Condition' section has two radio buttons: 'Action is always required for this step' (selected) and 'Action is required only when the following condition is met:'. The 'Assignment' section has 'Assign to:' set to 'Payroll Admin', 'Time limit:' set to '8 Hours', and 'Apply Workflow Calendar' checked. The 'Send Message:' checkbox is unchecked. The 'Completion policy' section has three radio buttons: 'Only one response needed' (selected), 'Majority must take action', and 'All must take action'.

# HRP Pending Approval Nav List 2015

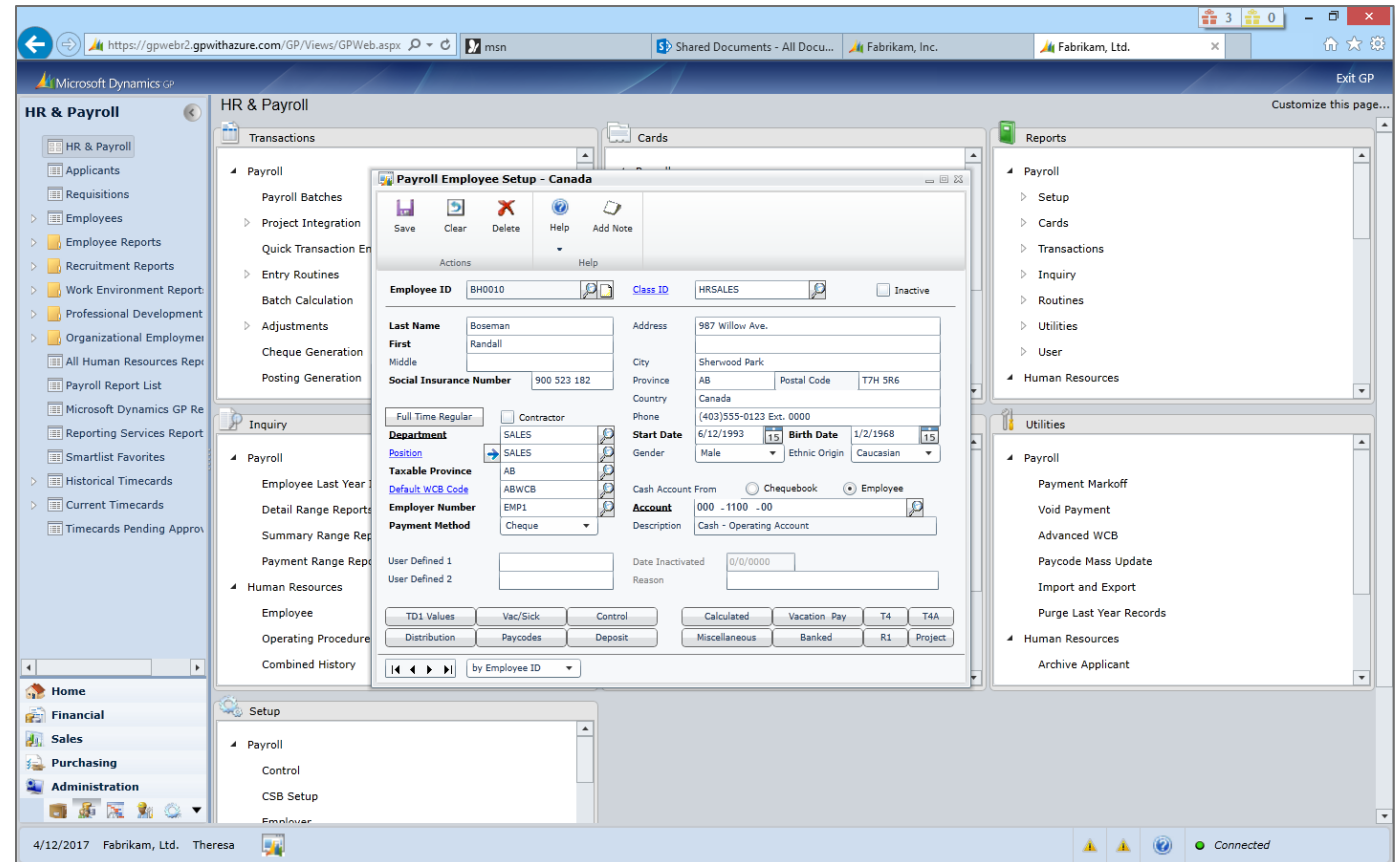
Navigation list for HRP Workflow Approvers

Displays all workflow tasks assigned to a user across the HRP Workflows

Can complete workflow actions across active workflows

# Canadian Payroll for Web Client 2015

Canadian Payroll is now available on web client.



# Business Intelligence



# Refreshable Excel Reports 2015

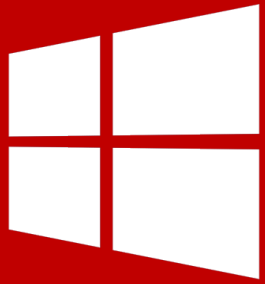
Continue to add new functionality

Enable tighter integration with Smartlist Designer and Excel

ITEMNMBR	SUGITEMNMBR	SUGITEMDEC	SUGQUANTITY	SALESSCRIPT	CURRCOST
ACCS-CRD-12...	ACCS-RST-DXBK	Shoulder Rest-Del...	2.00000		3.29000
ACCS-CRD-25...	ACCS-RST-DXBK	Shoulder Rest-Del...	1.00000		5.98000
ACCS-HDS-1E...	ACCS-HDS-2EAR	Headset - Dual Ear	1.00000		38.59000
ACCS-HDS-2E...	ACCS-HDS-2EAR	Headset - Dual Ear	2.00000		41.98000
ACCS-HDS-2E...	ACCS-RST-DXBK	Shoulder Rest-Del...	1.00000		41.98000
ACCS-HDS-2E...	ANSW-ATT-1000	Attractive Answeri...	1.00000		41.98000
ACCS-RST-DX...	BOT100G	Handset Bottom	1.00000		4.55000
ACCS-RST-DX...	100XLG	Green Phone	1.00000		4.55000
ANSW-ATT-1...	ACCS-HDS-2EAR	Headset - Dual Ear	1.00000		59.29000
ANSW-ATT-1...	ACCS-RST-DXBK	Shoulder Rest-Del...	1.00000		59.29000

# Companion Apps

# Business Analyzer Release 7



Cross Platform

Content  
Management  
Improvements



Support for  
Management  
Reporter Content



# List of features released since Microsoft Dynamics GP 2013

# System

2015

Service Based Architecture

Identity Management

SmartList Designer – Refreshable Excel Reports

Navigation Integration for Management Reporter

Copy Home Page settings

Management Reporter Integration Options

# Financials: Combined

## SP2

Display Checkbook ID on Cash Receipts Inquiry  
Customer Combiner & Modifier  
Vendor Combiner & Modifier  
Payables Void Enhancements  
Reconcile Checkbook without Marking Transaction  
AA Finance Charge Assessment  
AA and Sales Order deposits

## R2

Copy and Paste to GL  
Roll Down Account Segment Description  
Reverse Fiscal Year  
Reprint Outstanding Transactions Report  
Default Sort order for Payables Checks  
Payables Transaction Document Attach  
Default Asset ID from Fixed Asset Class  
Integrate Multi-currency Revaluation with AA

## 2015

General Ledger Batch Workflow  
Payables Batch Workflow  
Vendor Approval Workflow  
Receivables Batch Workflow  
Payables Warning when open Purchase Order  
Payment Terms Enhancements  
Fixes Assets Year End Close Report  
Edit E-mail for historical Statements and Payables Remittance

# Distribution

## R2

- Suggested Item Enhancements
- Assign Item to Multiple Sites
- Purchase Requisitions
- Purchase Requisition Workflow
- Purchase Order Workflow
- Prepayment Additions
- Encumbrance SSRS Reports
- Project Time
- Project Time Workflow

## 2015

- Edit Email for Historical documents – Sales and Purchasing
- Payables warn when open Purchase Order
- Payment Terms Enhancements
- Invoicing on Web Client



# Payroll, PTO Manager and Human Resources

## SP2

Applicant E-mail Address  
Payroll Inquiry Check Date Sort

## R2

Employee Time Management  
Time on Behalf of  
Timecard Workflow

## 2015

Employee Self Service:  
Employee Profile  
Employee Profile Workflow  
Manager Team Profile  
Employee Paystubs  
W4  
W4 Workflow  
Employee Benefits  
Direct Deposit  
Direct Deposit Workflow  
Employee Skills and Training  
Employee Skills Workflow  
Manager Skills and Training  
HRP Workflow Pending Approval  
Nav List  
Canadian Payroll on Web Client

# Business Intelligence

## SP2

Business Analyzer Release 5  
HTML 5/JS  
Companion Application Service

Business Analyzer WP8  
Release

SmartList Designer 2.0

SmartList UI Enhancements

## R2

Business Analyzer Release 6  
Excel Content

SmartList Designer 2.0

Encumbrance Summary SSRS  
Report

Print or Email Word Forms

Dynamics GP Workspace

## 2015

Business Analyzer R7  
Windows 8  
iOS  
Android  
Management Reporter Content

Management Reporter  
Navigation Integration

Refreshable Excel Reports  
Created from SmartList  
Designer

# Web Client

## SP1

### Modules

Human Resources

US Payroll

Returns Management

Contract Management

Inventory Bill of Materials

Excel Based Budgeting

Field Level Security

ADP Integration

### Features

Lync Integration

Autocomplete

Business Analyzer on Navigation Lists

## SP2

### Modules

Project Series

Manufacturing

Fixed Assets Enhancements

Service Call Management

Bank Activity Statements

Payment Document Management

### Features

Keyboard shortcuts

Visual Studio Tools – V1

Same port for web site & runtime service

## 2015

Invoicing

Canadian Payroll

# Workflow

## R2

### Purchasing

Purchase Order Approval

### Payroll

Timecard Approval

### Project

Timesheet Approval

## 2015

### Financial

GL Batch Approval

### Purchasing

Payables Batch Approval

Vendor Approval

### Sales

Receivables Batch Approval

### Payroll

Employee Skills Approval

Direct Deposit Approval

Employee Profile Approval

W4 Approval

### Project

Expense Report Approval

# Employee Self Service

R2

Purchase Requisition

Payroll Timecard

Project Timesheet

Home Page Parts

Simplified Navigation

2015

Employee Profile

Paystubs

W4

Benefits

Direct Deposit

Skills & Training

Project Expense