

Gold  
Microsoft Partner



Welcome to CRGroup  
Connections 2018!

# Dynamics GP Roadmap

*Presenter: John Smith*

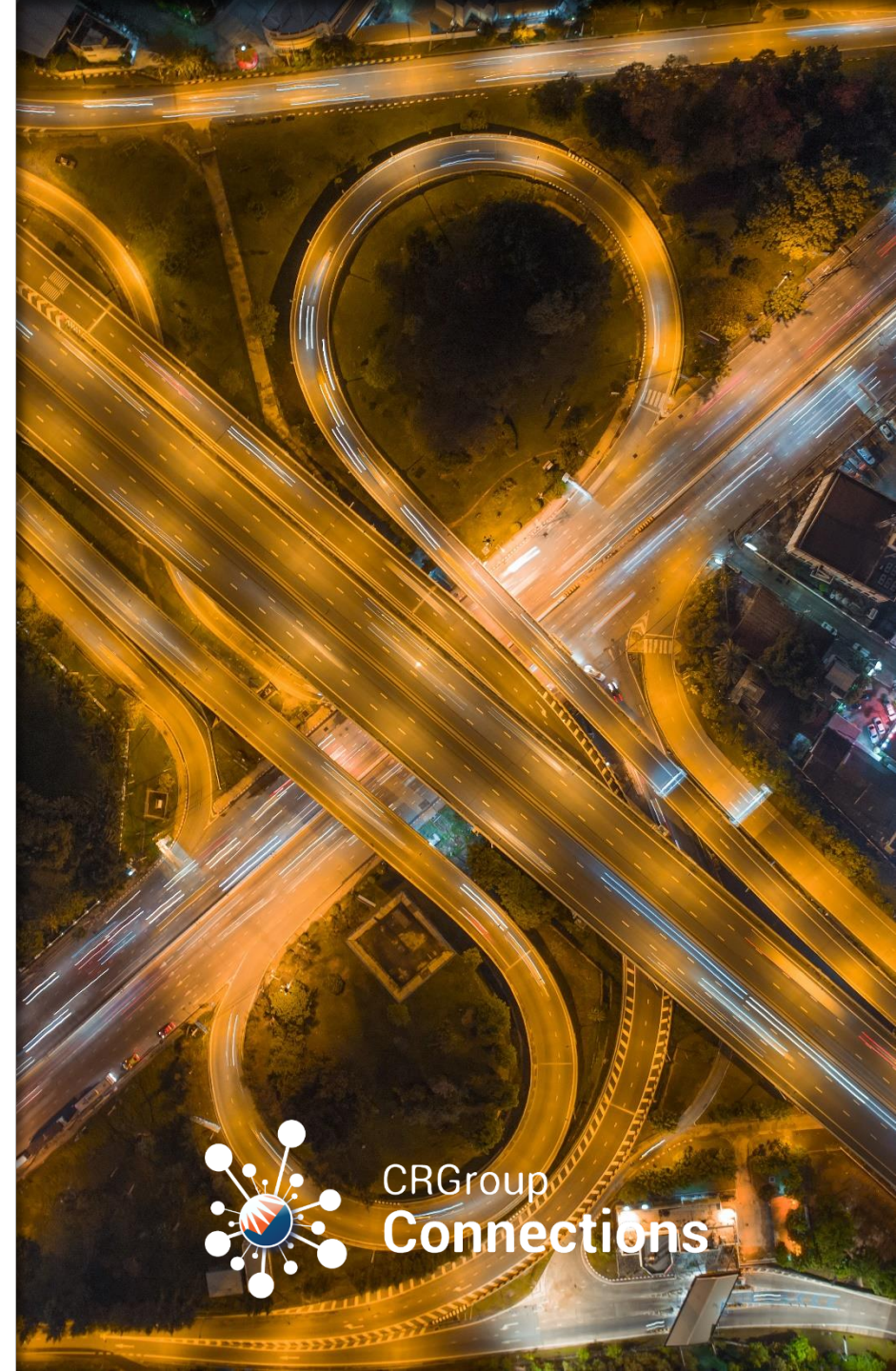


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# Agenda:

- Roadmap
- Quick Review GP2016 to GP2018 main features
- What is Dynamics 365 and how does GP fit?
- Questions



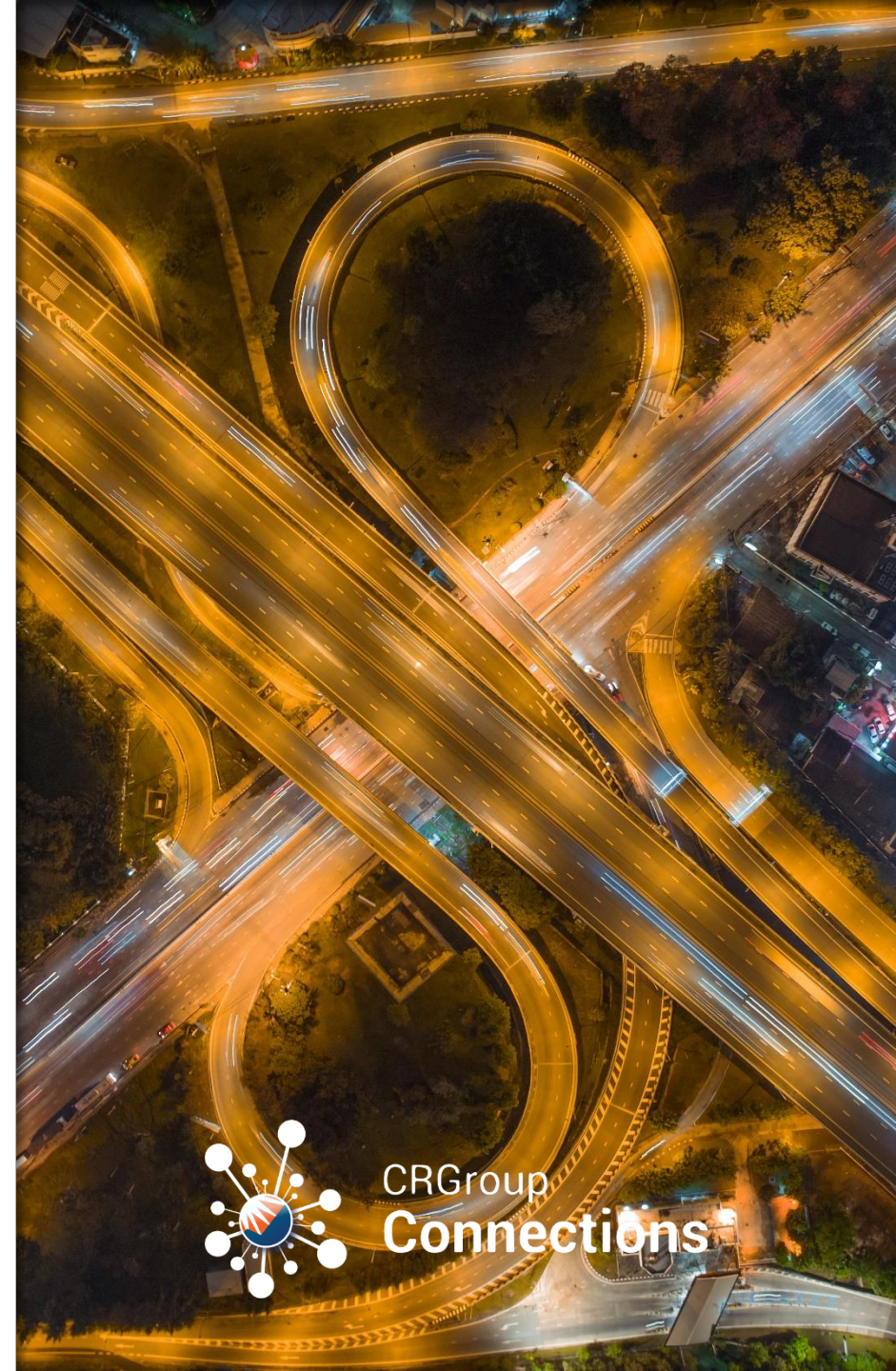
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# Microsoft Dynamics GP Roadmap



## Quick Review:

- Web Client
- Workflow
- Document Attachment
- PowerBI
- Other Notable GP2018 Features



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# Web Client

- Microsoft Dynamics GP 2016 ships with the long-awaited HTML5 Web Client!
- The most exciting feature of this new client is compatibility with more devices and browsers, including Chrome, Safari, Mozilla, Internet Explorer and Edge
- Important changes include:
  - Integrated search function
  - improved navigation
  - a more updated appearance
  - Office 365 look and feel
  - Some new controls such as the date picker
  - the ability to customize the web client's color scheme to match your organization's brand
  - a banner at the top of each screen makes it easy to log in and out and see which company's web client you are currently using

# Workflow

2013:

- Purchase Requisition Approval
- Purchase Order Approval
- Project Timesheet Approval (Project Accounting)

2015:

- General Ledger Batch
- Payables Transaction & Batch
- Receivables Batch
- Vendors
- Project Expense (Project Accounting)

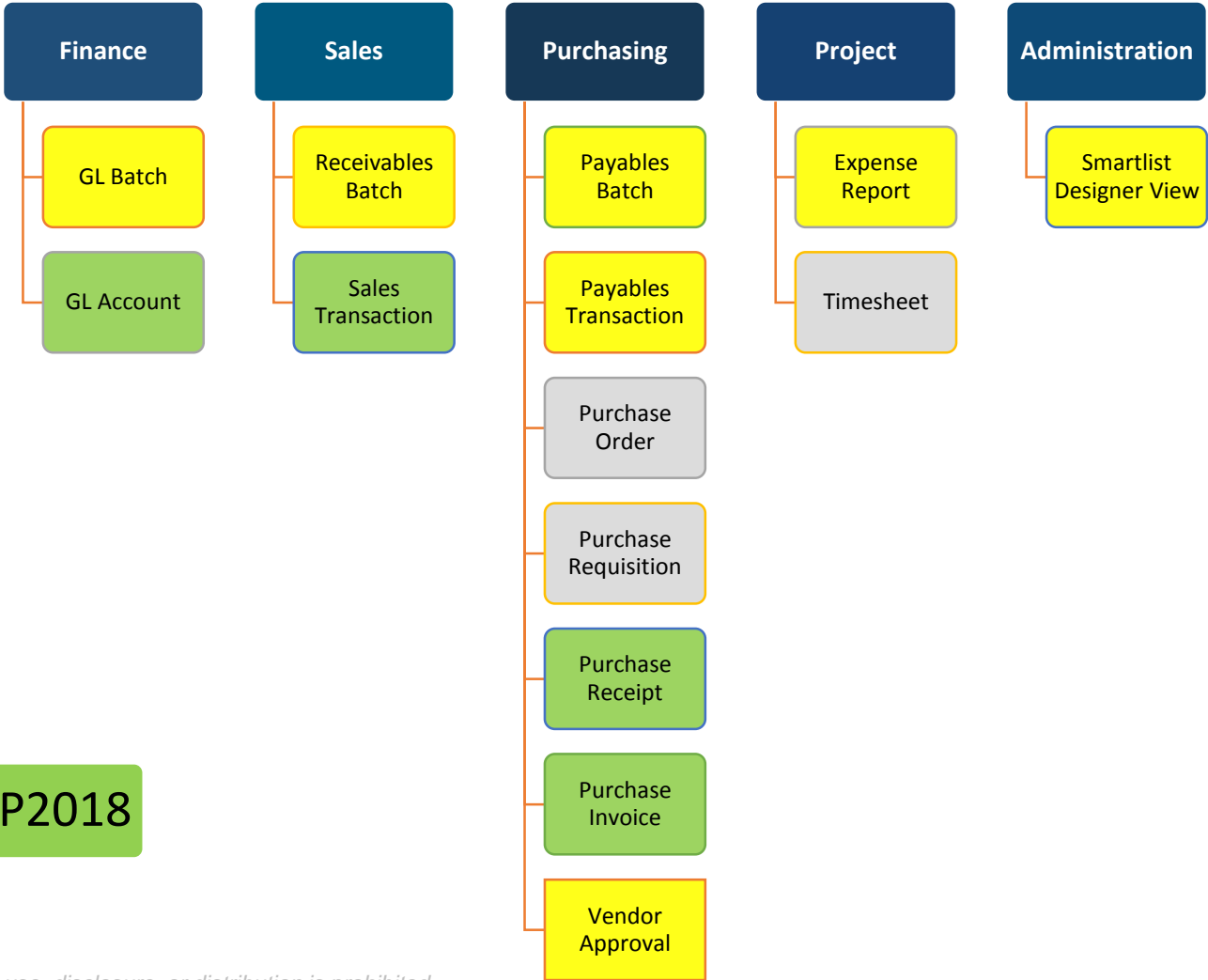
2018:

- GL Account Approval
- Purchasing Receipt Approval
- Purchasing Invoice Approval



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# Workflow Types by Series



GP2013

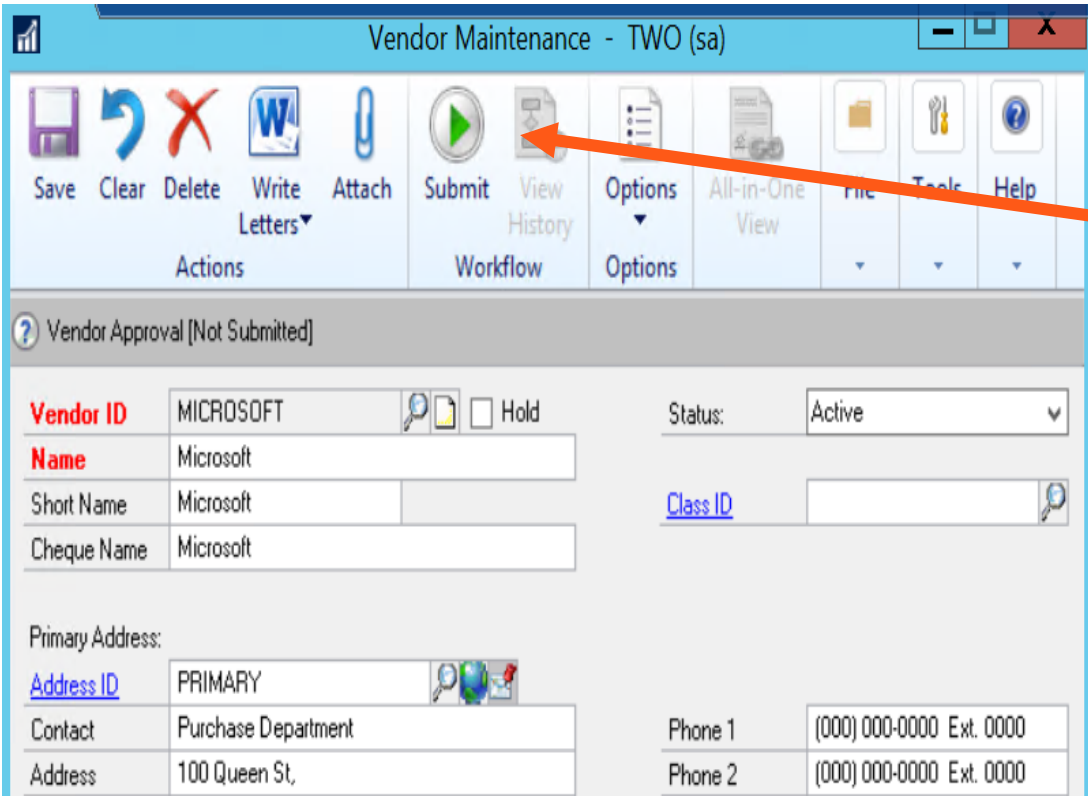
GP2015

GP2018

Note: Excludes Payroll



# Quick Steps – Submit for Approval



Vendor Maintenance - TWO (sa)

Save Clear Delete Write Letters Attach Submit View History Options All-in-One View File Tools Help

Vendor Approval [Not Submitted]

<b>Vendor ID</b>	MICROSOFT	<input type="checkbox"/> Hold	Status:	Active
<b>Name</b>	Microsoft			
Short Name	Microsoft		<u>Class ID</u>	
Cheque Name	Microsoft			
Primary Address:				
<u>Address ID</u>	PRIMARY			
Contact	Purchase Department		Phone 1	(000) 000-0000 Ext. 0000
Address	100 Queen St,		Phone 2	(000) 000-0000 Ext. 0000

Submit for approval

# Quick Steps –Approval via Email

You have been assigned a task for the Approval by Manager Finance step in the Vendor Approval workflow for Vendor Microsoft Ottawa.

Task Deadline: 10/17/2017 1:12:00 PM

Edit or view the record: MICROSOFT

[Approve](#)

[Reject](#)

[Delegate](#)



Document Type: Vendor Approval

Vendor: Microsoft Ottawa

Vendor ID: MICROSOFT

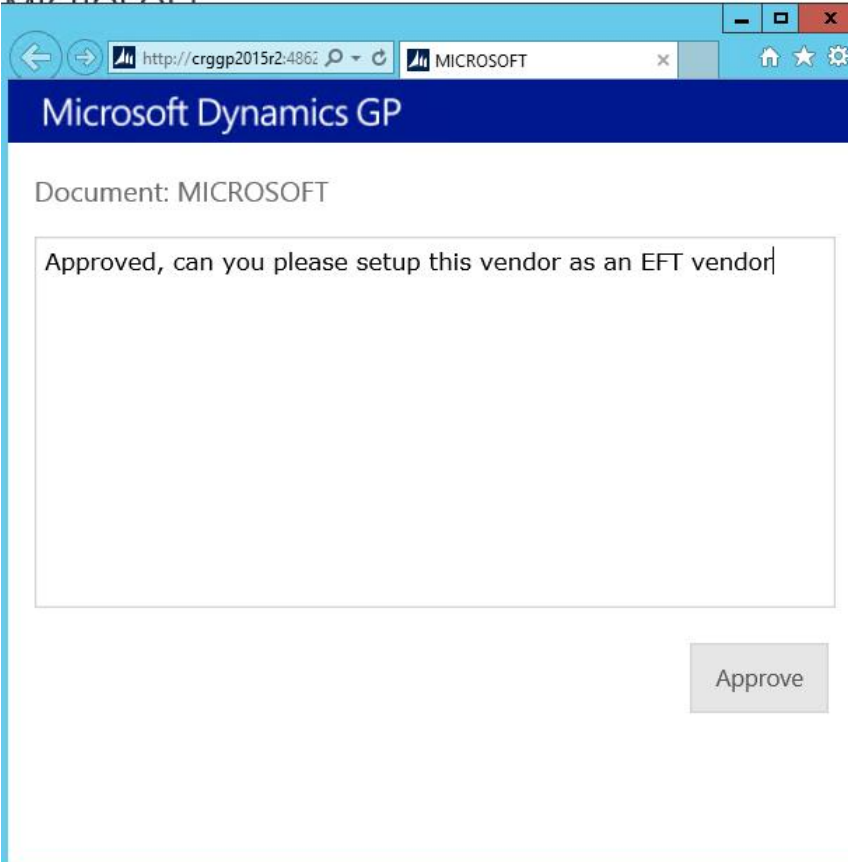
Class ID:

Payment Terms:

Vendor Address 1	Vendor Address 2	Vendor City	Vendor Country	Vendor Phone 1	Vendor State	Vendor Zip Code
100 Queen St.		Ottawa		00000000000000		

Comments:

Mansoor Lakhani, 10/16/2017 2:12:00 PM: Please approve this vendor



Microsoft Dynamics GP

Document: MICROSOFT

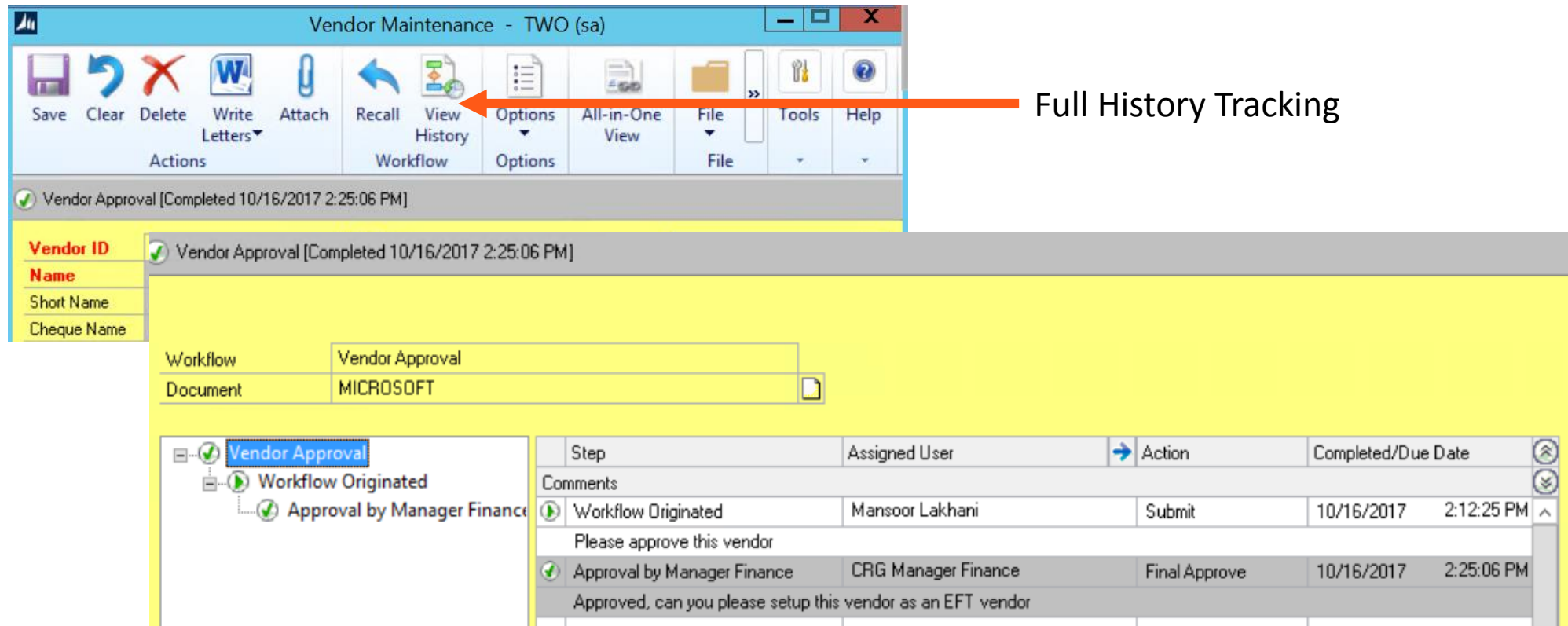
Approved, can you please setup this vendor as an EFT vendor

Approve

Reject



# Quick Steps – Complete with History



The screenshot shows the 'Vendor Maintenance - TWO (sa)' application window. An orange arrow points to the 'View History' button in the 'Workflow' menu, with the text 'Full History Tracking' next to it. The main interface displays a 'Vendor Approval' workflow for a document named 'MICROSOFT'. Below this, a detailed history table is shown.

Step	Assigned User	Action	Completed/Due Date
<b>Vendor Approval</b>			
Workflow Originated			
Workflow Originated	Mansoor Lakhani	Submit	10/16/2017 2:12:25 PM
Please approve this vendor			
Approval by Manager Finance	CRG Manager Finance	Final Approve	10/16/2017 2:25:06 PM
Approved, can you please setup this vendor as an EFT vendor			

# Comprehensive Document Attachment

- Originated in GP2013
- It makes it easier to get information by having instant access to documents like signed documents, Contracts, Credit Reports, Customer POs, pictures etc.
- Any document you can think of can be attached or you could attach a link to a OneDrive site or SharePoint.

## In GP 2018 Document Attach added:

- Transaction entry windows
  - General Ledger Transaction Entry
  - Receivables Transaction Entry
  - Asset General Information (FA)
- Inquiry windows
  - Employee Inquiry
  - Customer Inquiry
  - Vendor Inquiry
  - Project Inquiry
  - PA Project Inquiry

Document Type:	Sales / Invoices	Batch ID	RM BATCH
Number	SALES00000001001	Document Date	5/9/2017
Description			
Customer ID	AARONFIT0001	Currency ID	Z-US\$
Name	Aaron Fitz Electrical	Payment Terms	Net 30
Address ID	PRIMARY	Shipping Method	LOCAL DELIVERY
Salesperson ID	PAUL W.	Tax Schedule ID	USASTCITY-6*
Territory ID	TERRITORY 1	P.O. Number	

# Power BI

## What is it?

- Power BI is a visual dashboard reporting tool that gives you real-time access to your KPIs from any data source.

## How can you use it?

- You can use Power BI as a business intelligence tool by plugging in your most important data, creating reports, and publishing those reports to your dashboard for quick viewing.

## How to build a Power BI report?

- Power BI offers easy drag and drop functionality that allows you to build your own reports.



# Power BI

## **How to publish your report to your dashboard?**

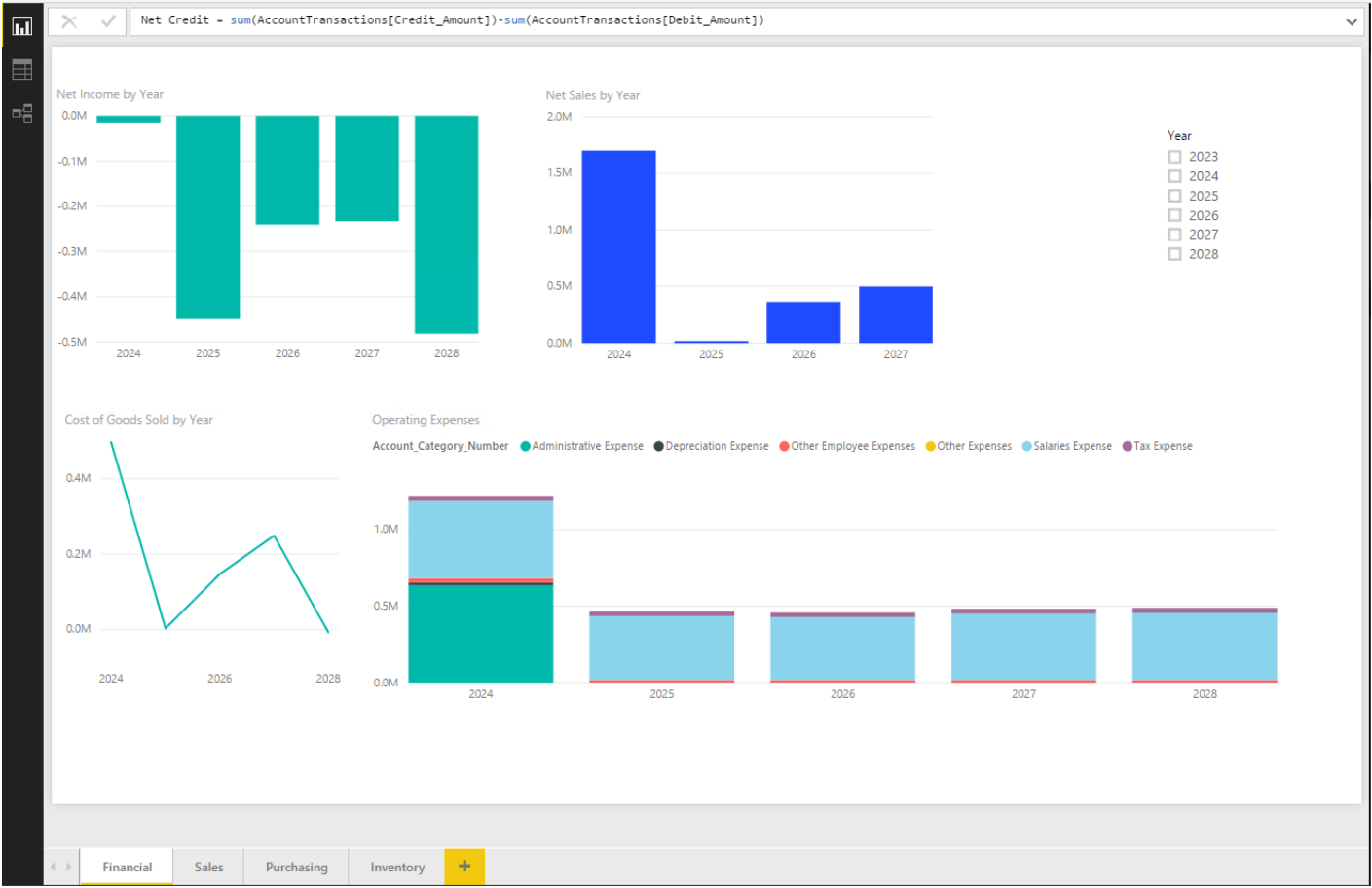
- Once a report is built in Power BI, you can choose whether or not to publish the report to your dashboard. This is a few simple clicks. You can also choose if you'd like to share the report with others in your organization.

## **How Does it Relate to Dynamics GP?**

- Reports and Dashboards can be built on GP data
- Can appear on your home page
- GP 2018 even has a new Power BI Content Pack

CRGroup can help you determine which reports and KPI's would be most valuable for you, and can help you build your reports and dashboards.

# GP 2018 Power BI Content Pack



Pre-configured dashboards for Financial, Sales, Purchasing and Inventory using OData



# Power BI Data Sources

## **Open Data Protocol (OData):**

- The GP OData service has been updated to include paging and filtering, as well as adding support for OData version 4.
- The OData Service allows Dynamics GP data to be read by any tool that supports OData feeds. The open data protocol, typically referred to as OData, defines a data model and a protocol that can let any client access information that's exposed by any data source.

## **Analysis Cubes:**

- Dynamics GP Analysis Cubes library includes cubes for Financial, Sales, Purchasing, Inventory and Receivables – excellent data source for creating Power BI views



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# Power BI Data Sources

## **Other on-Premise and Cloud Applications:**

- Custom SQL views, Smartlists, Excel late files, Google Analytics, Microsoft Dynamics CRM, and many more!

Get Trained! Mansoor has a great 2 day training workshop  
[crgroup.com/crgroup-academy](http://crgroup.com/crgroup-academy)



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# Monthly Recurring Batches:

## Monthly recurring batches

- With the release of Dynamics GP 2018 R2, users can specify if a monthly or bi-monthly recurring batch must end on the last day of the month in Payables, Receivables, and Inventory Management
- When marked, it will automatically set the posting date to the last day of the month
- If this batch is posted the next posting date would be May 31

Receivables Batch Entry - T18R2 (sa)

Save Clear Delete Post File Print Tools Help Add Note

Batch ID: MONTHLY Origin: Transaction Entry

Comment:

Frequency: Monthly (highlighted with red arrow)

Use last day of the month

Posting Date: 4/30/2027

Checkbook ID: UPTOWN TRUST

Recurring Posting: 0

Days to Increment: 0

Times Posted: Last Date Posted:

	Control	Actual
Transactions		
Batch Total		

Approved  User ID: Approval Date: Transactions

# Transaction Level Post Through G/L:

- A new option has been added to Posting Setup for
  - Invoice Entry
  - Receivables Apply Doc.
  - Receivables Cash Receipts
  - Receivables Sales Entry
  - Sales Deposits
  - Sales Trx Entry
  - Voided Trx Maintenance (Sales)
  - Payables Trx Entry
  - Payment Entry
  - Purchasing Invoice Entry
  - Purchasing Prepayments
  - Receivings Trx Entry
  - Returns Trx Entry
  - Assembly Entry
  - Transaction Entry (Inventory)
  - Transfer Entry
  - Manual Checks (Payroll)
  - Project Accounting Transaction windows except Project Closing



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# Print and Email SOP Documents at the Same Time

- In the Sales Document Print Options window, you can now select Print Document and Send Document in E-mail at the same time.
- Before you had to e-mail the documents and then print the remaining but now you can do both at the same time.

The screenshot shows the 'Sales Document Print Options - T18R2 (sa)' window. The 'Destination' section is highlighted with a red box and contains the following options:

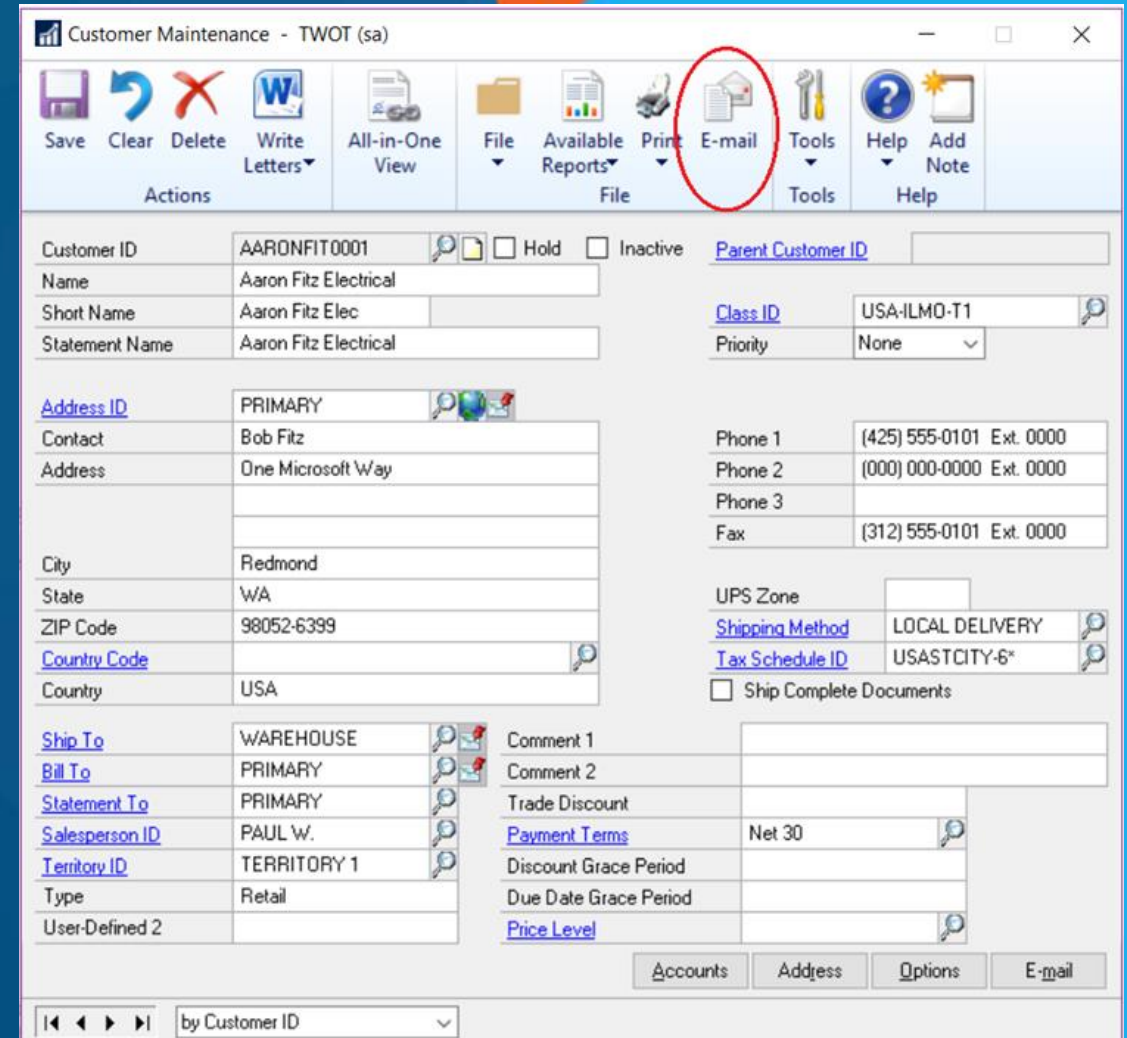
- Print Document
- Send Document in E-mail

The 'Include' section is also visible, with an orange arrow pointing to the 'Invoices' checkbox, which is checked. Other options in the 'Include' section include Quotes, Orders, Fulfillment Orders, Returns, Back Orders, Picking Tickets, and Packing Slips, all of which are unchecked. The 'Format' section shows 'Blank Paper' selected for all document types.

Other sections visible in the window include 'Documents', 'Picking Tickets', and 'Packing Slips', each with various checkboxes for printing options.

# Email Statements from Customer Master:

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



# Microsoft Wants our Feedback

Check out all the new features:

<https://docs.microsoft.com/en-us/dynamics-gp/whats-new/version-2018-r2>



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# What is Dynamics 365 and What Does it mean for GP?



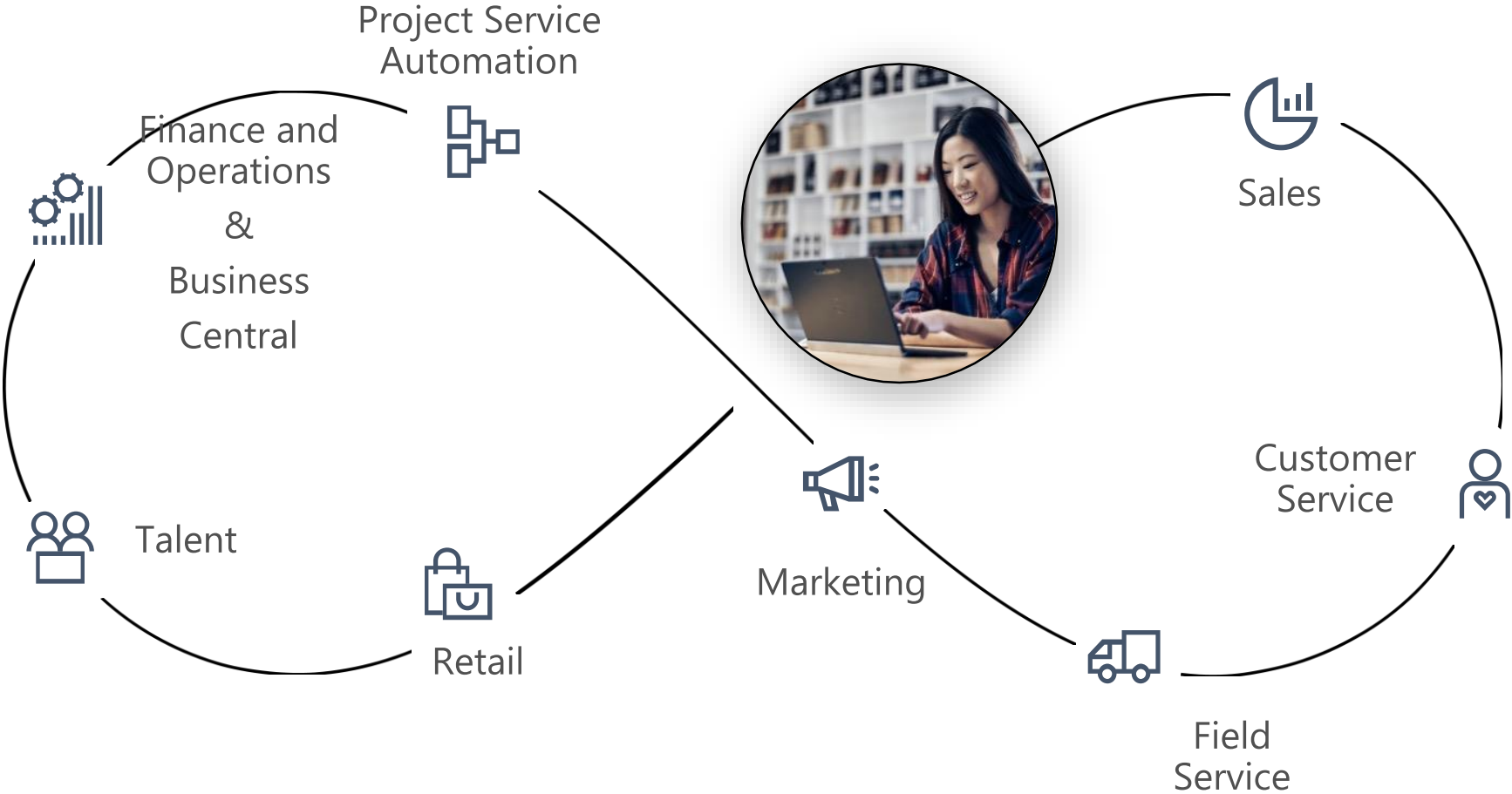
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# Microsoft Dynamics 365

Purpose-built business applications

	Sales
	Customer Service
	Marketing
	Field Service
	Project Service Automation
	Finance and Operations
	Retail
	Talent



# Business Central

- Microsoft's new SMB ERP solution
- Evolved from code name "Tenerife" to Microsoft Dynamics 365 Finance and Operations, Business Edition
- Built on Microsoft NAV
- Available as SaaS and On-premise solution

The screenshot displays the Microsoft Business Central interface. On the left, a bar chart titled "Aged Accounts Receivable | View by Week" shows data for categories DOMESTIC, EU, and FC across weeks 1W, 2W, 3W, 4W, and 5W. The y-axis ranges from 0k to 150k. In the center, an Outlook window shows an email from Jim Glynn requesting a quote for office furniture. On the right, a Business Central window shows account details for C00010 - Jim Glynn, including a balance of 8,036.40 and past due amount of 5,278.78. Below the email, a "Sales Pipeline" funnel chart shows stages: Initial, Presentation (4 opportunities), Proposal, and Sign Contract. At the bottom right, a "Sell-to Customer Sales History" table shows 2 Ongoing Sales Quotes and 0 Ongoing Sales Quoted Orders.

Week	DOMESTIC	EU	FC
Not Overdue	50k		
1W			85k
2W		70k	
3W			90k
4W		75k	
5W			75k

Category	Count
Ongoing Sales Quotes	2
Ongoing Sales Quoted Orders	0



# Why it Stands Out

- Modern Browser User Interface
- Dedicated Mobile App
- Deep Outlook Integration
- Web Services
- Embedded Power BI

**Aged Accounts Receivable | View by Week**

Week	DOMESTIC	EU	FC
Not Overdue	50k	0	0
1W	0	0	0
2W	0	0	90k
3W	0	0	0
4W	0	75k	0
5W	0	0	90k
6W	0	75k	0

**Sales Pipeline**

Sales Cycle: EXISTING

Stage	Count
Initial	6
Presentation	4
Proposal	2
Sign Contract	2

**Sell-to Customer Sales History**

Category	Count
Ongoing Sales Quotes	2
Ongoing Sales Quoted Orders	0
Completed Sales	1
Completed Sales Orders	2



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# New Browser UI

☰
Dynamics 365
Business Central
💡 😊 💬 ⚙️ ? 👤

CRONUS Canada, Inc. | [Finance](#) [Cash Management](#) [Sales](#) [Purchasing](#) [Approvals](#) [Self-Service](#) [Setup & Extensions](#) [Intelligent Cloud Insights](#)

[Customers](#) [Vendors](#) [Items](#) [Bank Accounts](#) [Chart of Accounts](#)

Activities

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Activities

SALES THIS MONTH

\$15,788

[> See more](#)

OVERDUE SALES INVOICE AMOUNT

\$109,057

[> See more](#)

OVERDUE PURCH. INVOICE AMOUNT

\$94,148

[> See more](#)

SALES INVOICES PREDICT... OVERDUE

0

[> See more](#)

REPLICATION SUCCESS RATE

100%

[> See more](#)

ONGOING SALES

SALES QUOTES <span style="font-size: 24px; font-weight: bold;">4</span>	SALES ORDERS <span style="font-size: 24px; font-weight: bold;">21</span>	SALES INVOICES <span style="font-size: 24px; font-weight: bold;">8</span>
--	---	--

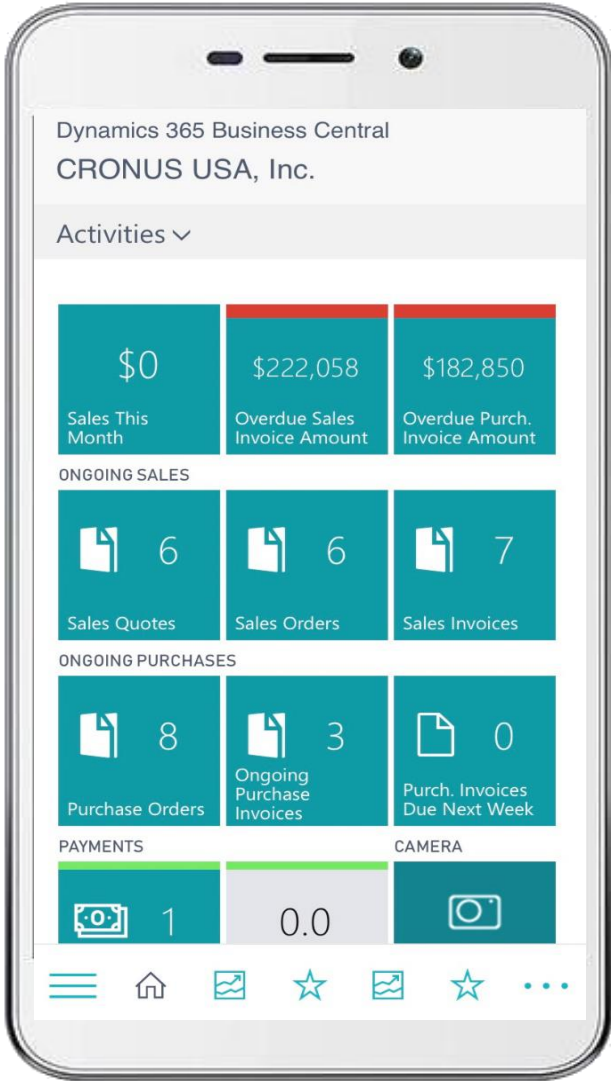
ONGOING PURCHASES

PURCHASE ORDERS <span style="font-size: 24px; font-weight: bold;">30</span>	ONGOING PUR... INVOICES <span style="font-size: 24px; font-weight: bold;">7</span>	PURCH. INVOI... NEXT WEEK <span style="font-size: 24px; font-weight: bold;">3</span>
--	---	---

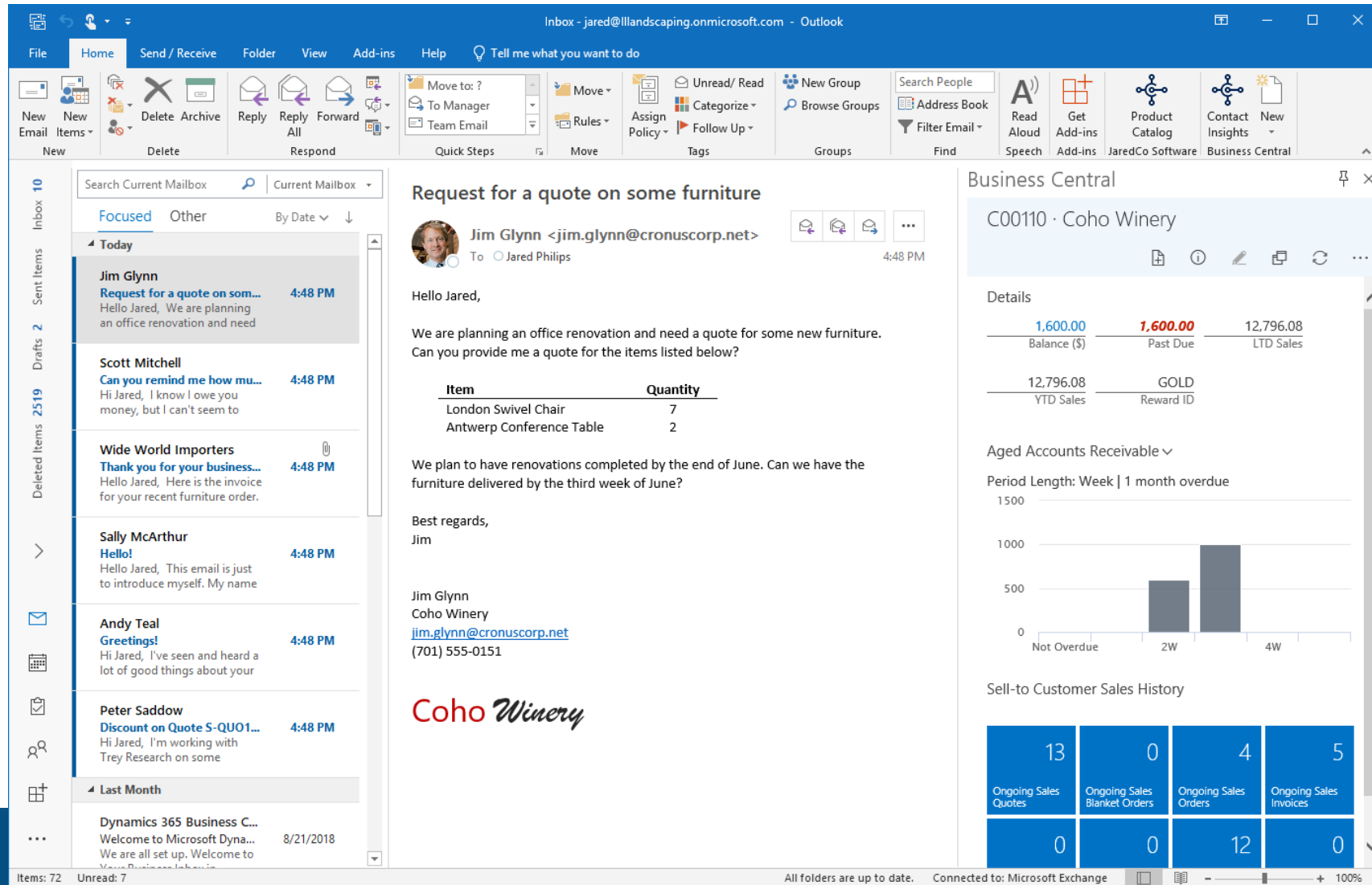
PAYMENTS

UNPROCESSED PAYMENTS <span style="font-size: 24px; font-weight: bold;">1</span>	AVERAGE COL... DAYS <span style="font-size: 24px; font-weight: bold;">5.1</span>	OUTSTANDING ... INVOICES <span style="font-size: 24px; font-weight: bold;">15</span>
--	---	---

# Mobile App



# Outlook Integration



The screenshot displays the Outlook interface with a selected email and a Business Central sidebar. The email is from Jim Glynn at Coho Winery, requesting a quote for furniture. The Business Central sidebar shows account details for Coho Winery, including a bar chart for Aged Accounts Receivable and a summary table for Sell-to Customer Sales History.

**Request for a quote on some furniture**

Jim Glynn <jim.glynn@cronuscorp.net>  
To: Jared Phillips 4:48 PM

Hello Jared,

We are planning an office renovation and need a quote for some new furniture. Can you provide me a quote for the items listed below?

Item	Quantity
London Swivel Chair	7
Antwerp Conference Table	2

We plan to have renovations completed by the end of June. Can we have the furniture delivered by the third week of June?

Best regards,  
Jim

Jim Glynn  
Coho Winery  
[jim.glynn@cronuscorp.net](mailto:jim.glynn@cronuscorp.net)  
(701) 555-0151

**Coho Winery**

**Business Central**  
C00110 · Coho Winery

Details

1,600.00 Balance (\$)	1,600.00 Past Due	12,796.08 LTD Sales
12,796.08 YTD Sales	GOLD Reward ID	

Aged Accounts Receivable

Period Length: Week | 1 month overdue

Not Overdue	2W	4W
~500	~1000	~1000

Sell-to Customer Sales History

13 Ongoing Sales Quotes	0 Ongoing Sales Blanket Orders	4 Ongoing Sales Orders	5 Ongoing Sales Invoices
0	0	12	0

Items: 72 Unread: 7 All folders are up to date. Connected to: Microsoft Exchange 100%

# What is Different & Missing?



## Main Differences vs GP:

- COA is one segment plus dimensions
- MR is built into application
- Simple Project Accounting functionality
- Timesheets can only be approved by employee direct manager

# What is Different & Missing?

## Missing in Action:

- No hard close process
- No Fx rate types
- No Purchase Requisitions
- Payroll - 3rdParty Available for Canadian and US Payroll
- Mass Printing Payables
- No Unit and Allocation Accounts
- No Employee Expense functionality
- Limited 3<sup>rd</sup> party apps available today



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# So Who is this Relevant for Today?

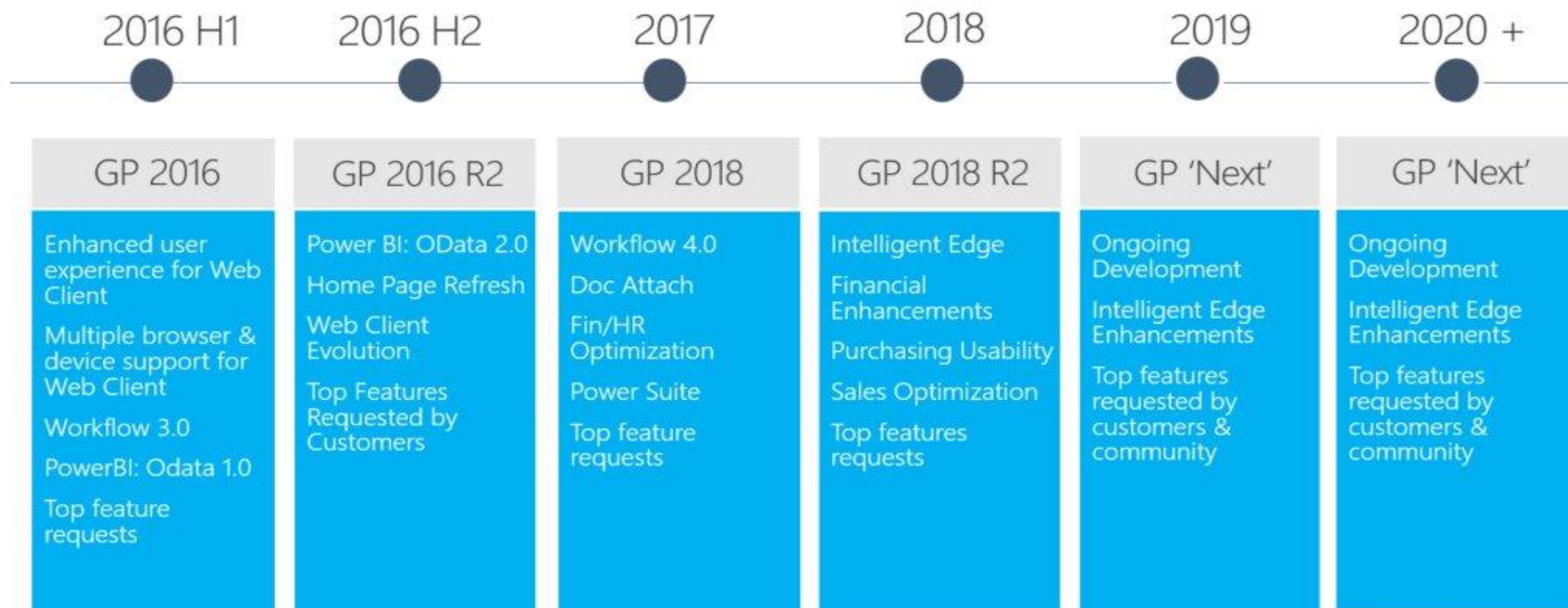
- Small customers no customizations or 3rd parties
- New customers with minimal requirements
- Non remote customers



#crgconnections2018  
@crgroup

# What is the Intelligent Edge?

## Microsoft Dynamics GP Roadmap



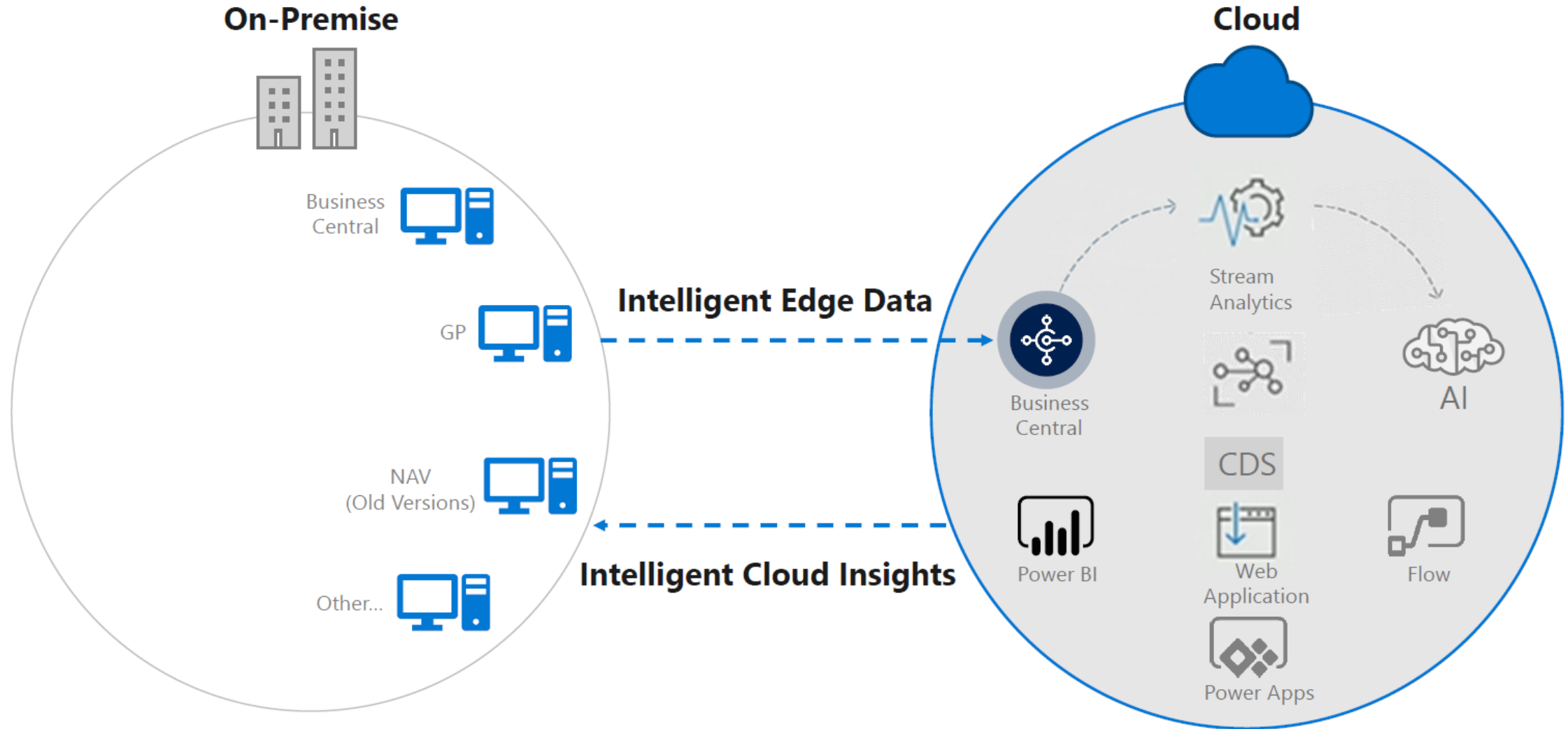
# It's a Great Story for GP!

- This feature illustrates how Dynamics **GP is part of the future** and how GP customers can get the **best of both worlds!**
- Simple premise: you will be able to use your existing on-premises solution of Dynamics GP to connect to the cloud through Business Central

# It's a Great Story for GP!

- Microsoft Dynamics GP customers will have access to **all** the built-in capabilities of Business Central -- its Artificial Intelligence (AI) and Machine Learning (ML) based analytical capabilities, its Power BI powered visualizations and reporting capabilities, the ability to create powerful mobile applications and sophisticated workflows with PowerApps and Flow; and uncompromising data access and storage via Common Data Services, all without giving up their investment in Microsoft Dynamics GP.
- In turn, Microsoft will continue to invest and provide key updates to Dynamics GP as it has been done for the past 25 years.

# Business Central – Intelligent Cloud Insights





# Intelligent Cloud Insights



## KPIs

KPIS

101,9...	-3.2%	-27,562	105,0...
Cash Available	Sales Profitability	Net Income	Inventory Value

## Insights

- 15 of your customers are late with their payments to you
- 2 invoices are supposed to be paid by your customers today
- 14 invoices weren't paid by you on time
- 1 invoices from vendors should be paid today



# Intelligent Cloud Insights



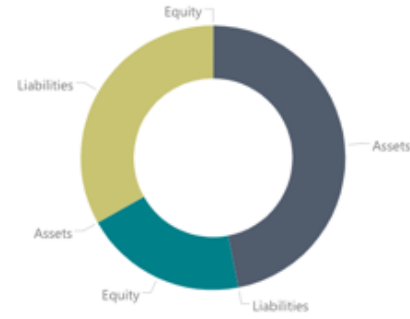
Power BI Report | Select Report | More options

Chart of Account Analysis

Income Statement



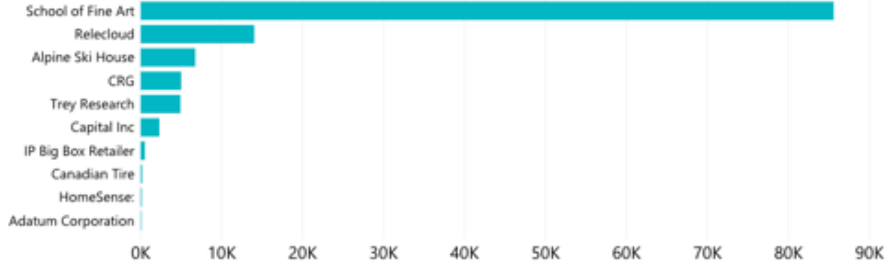
Balance Sheet



Power BI Report | Select Report | More options

Customer Sales Dashboard

Customer Balances



Balance Due	Available Credit	Credit Limit
21.41M	-25.89K	0.00

# Conclusion

- Dynamics GP is a proven and mature solution that simply delivers.
- It is quite simply the best, most configurable, most flexible mid-market solution out there. It's supported by world class add-ons and the best partner channel anywhere.
- There is no reason to consider moving off GP
- Continue to use Dynamics GP with the insights provided by Business Central



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Questions?



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# Thank You!

John Smith

613.232.4295 x:239

[jsmith@crgroup.com](mailto:jsmith@crgroup.com)



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