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Welcome to CRGroup Connections 2018!

Dynamics GP Roadmap

Presenter: John Smith

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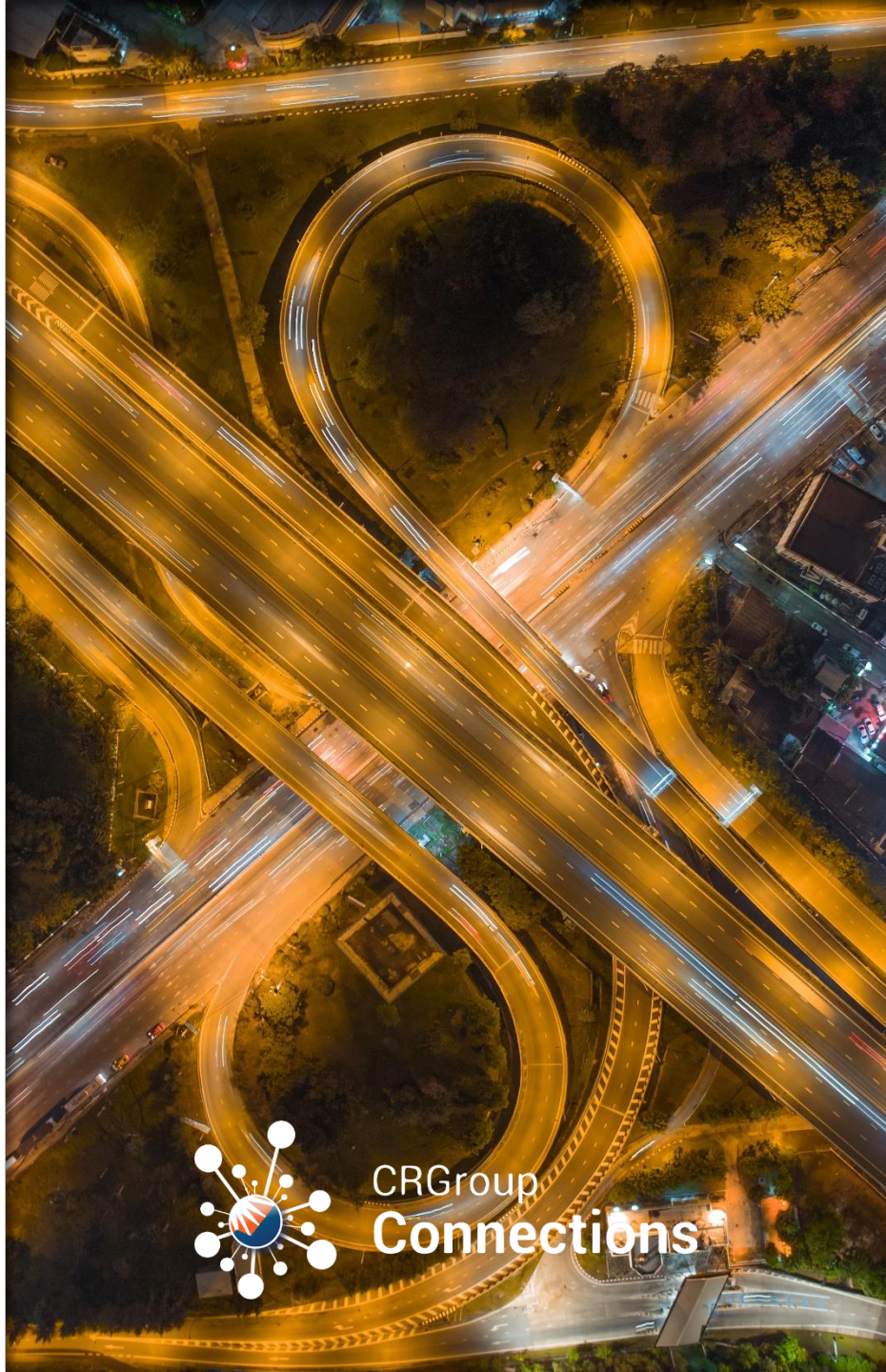
Agenda:

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



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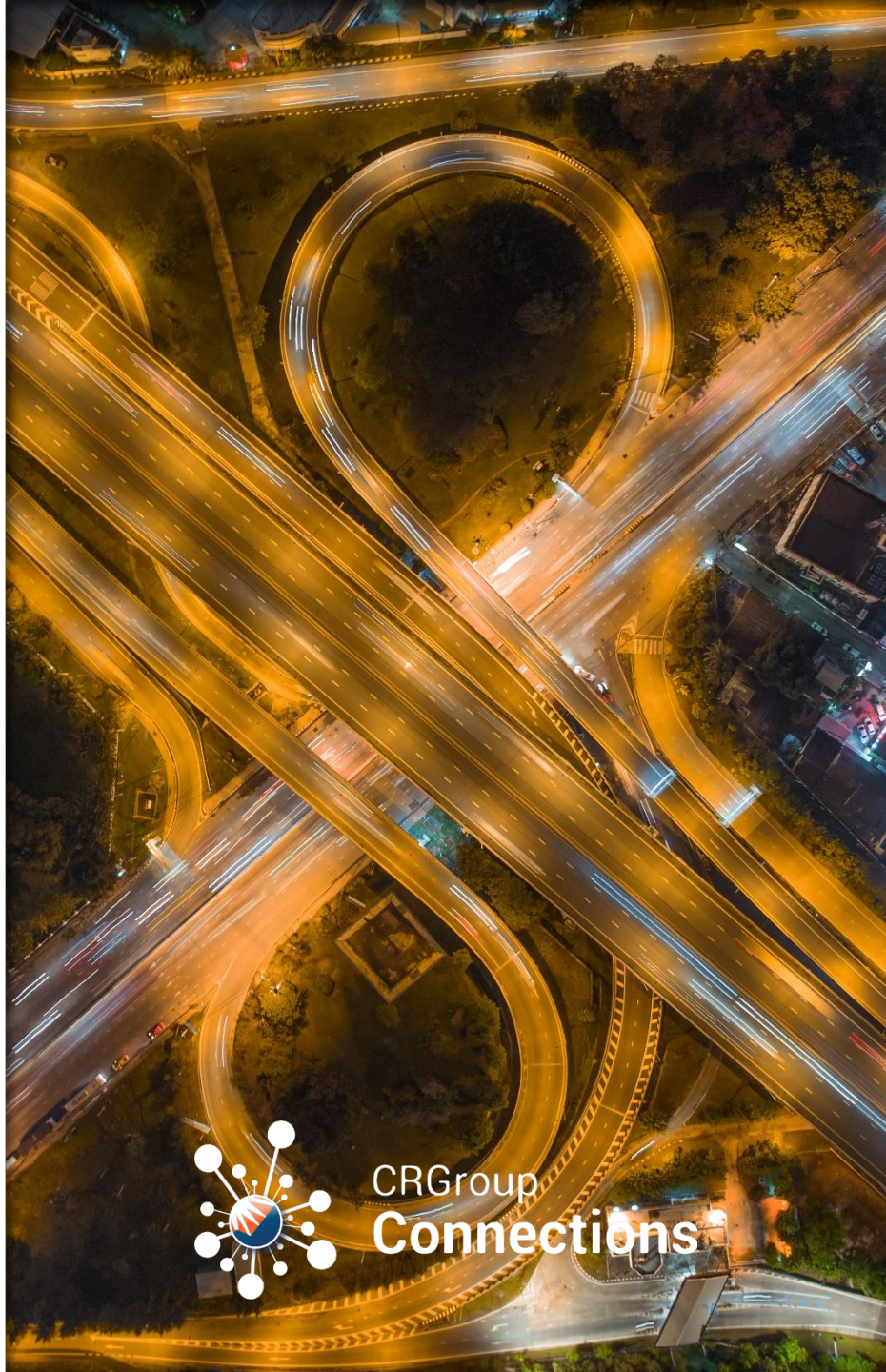
Microsoft Dynamics GP Roadmap

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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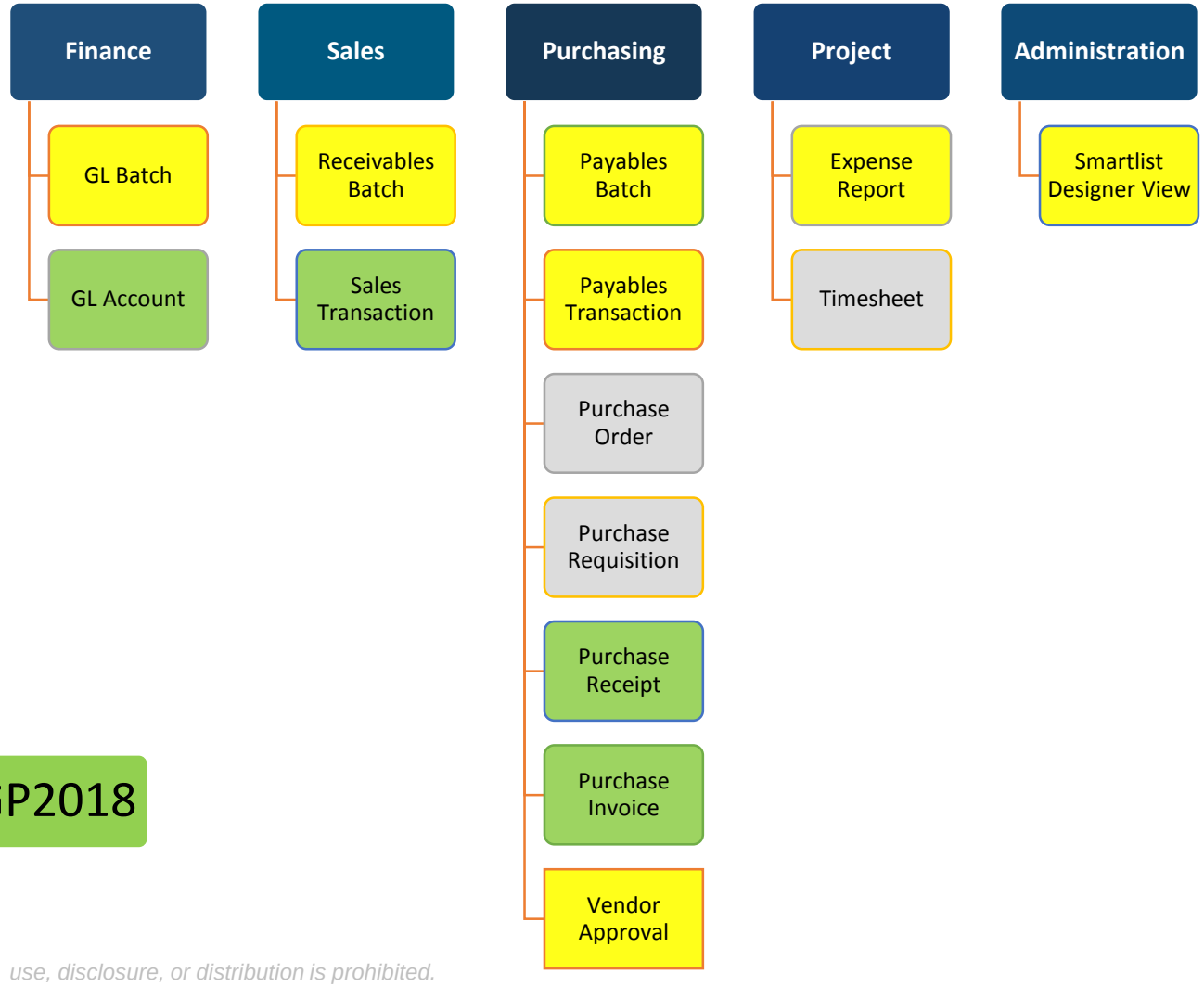
Workflow Types by Series



GP2013 GP2015 GP2018

Note: Excludes Payroll

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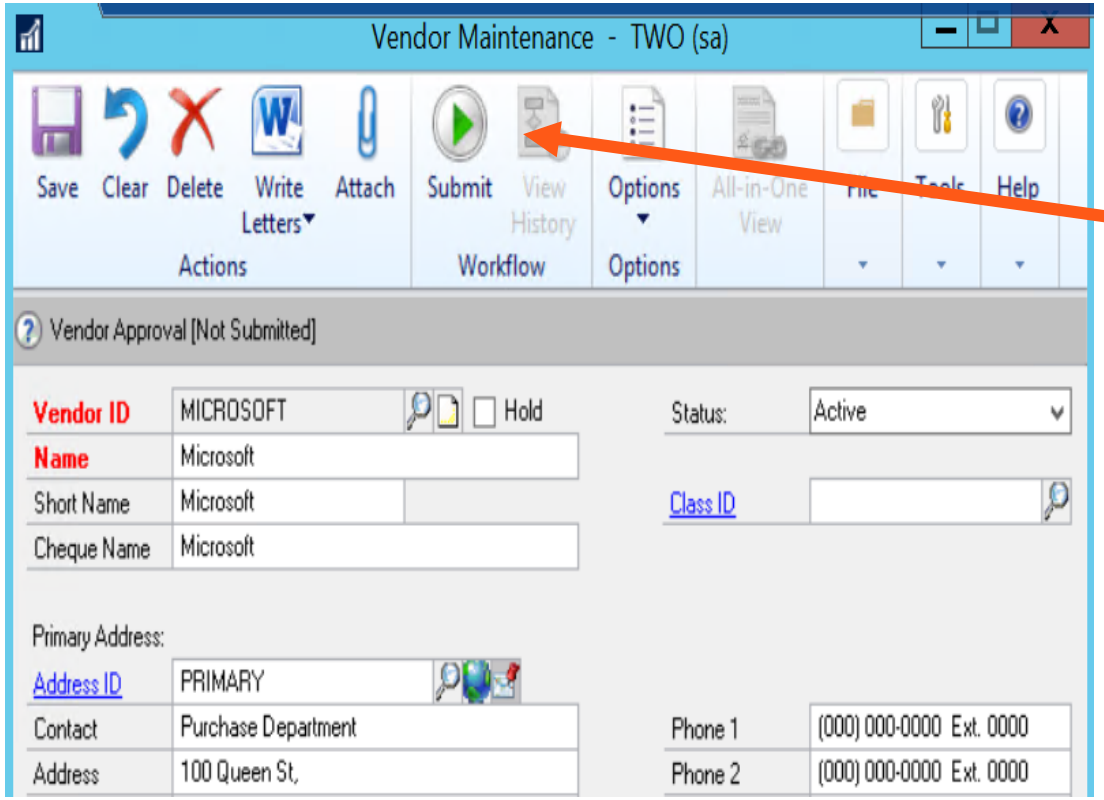
Quick Steps – Submit for Approval



Submit for approval

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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.

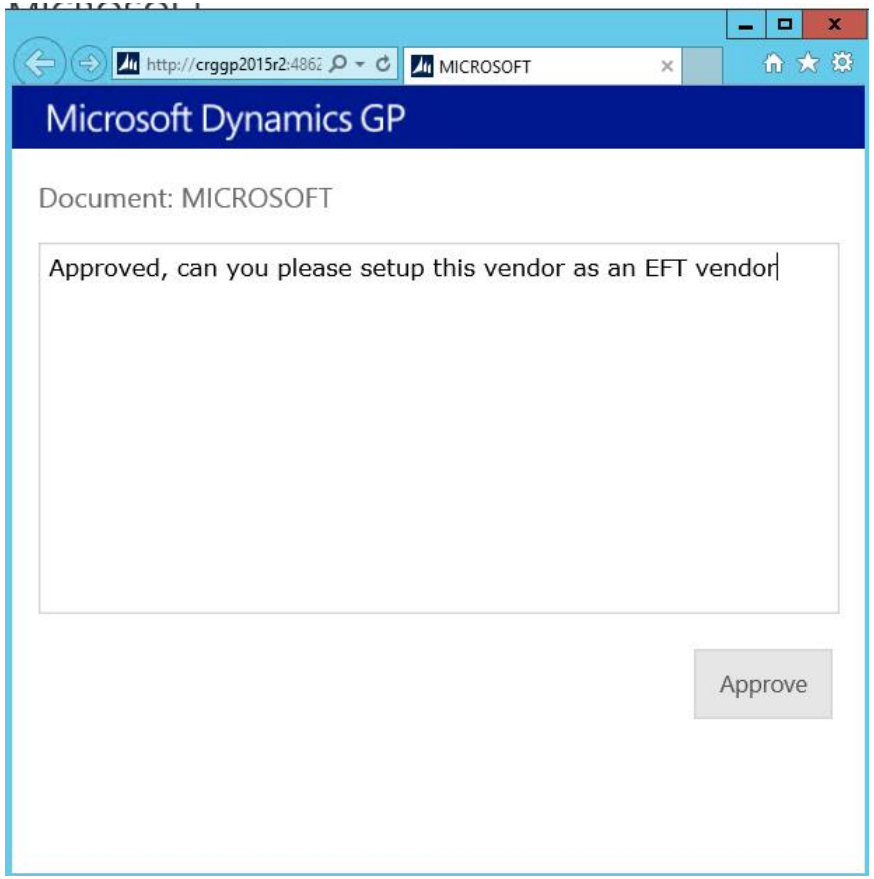
Task Deadline: 10/17/2017 1:12:00 PM
Edit or view the record: MICROSOFT

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



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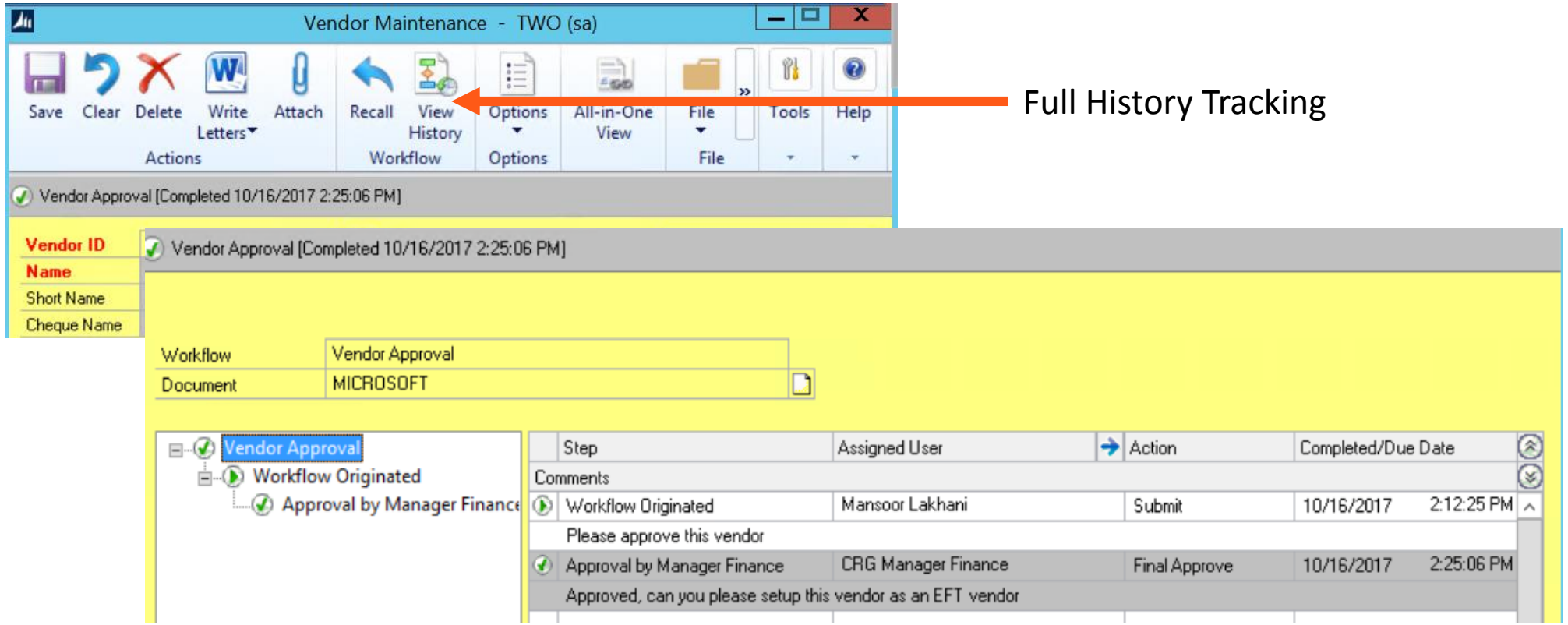
Reject

Quick Steps – Complete with History



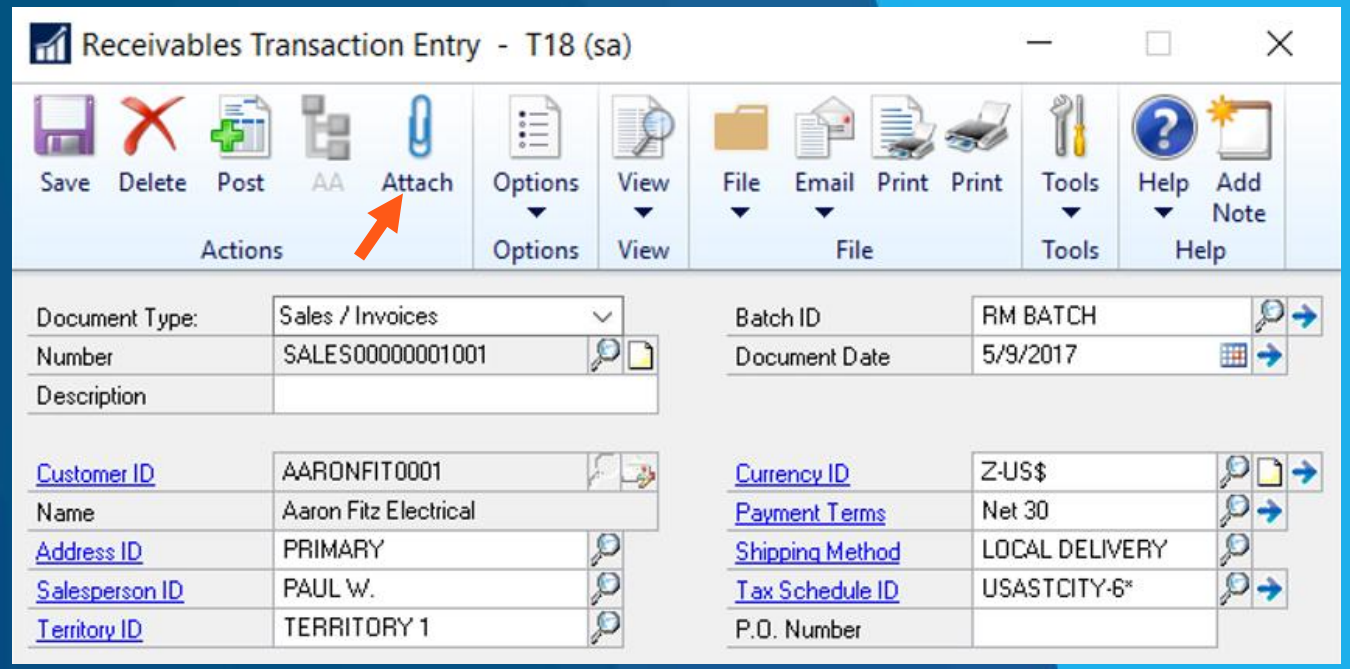
Full History Tracking

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



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 ion 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.

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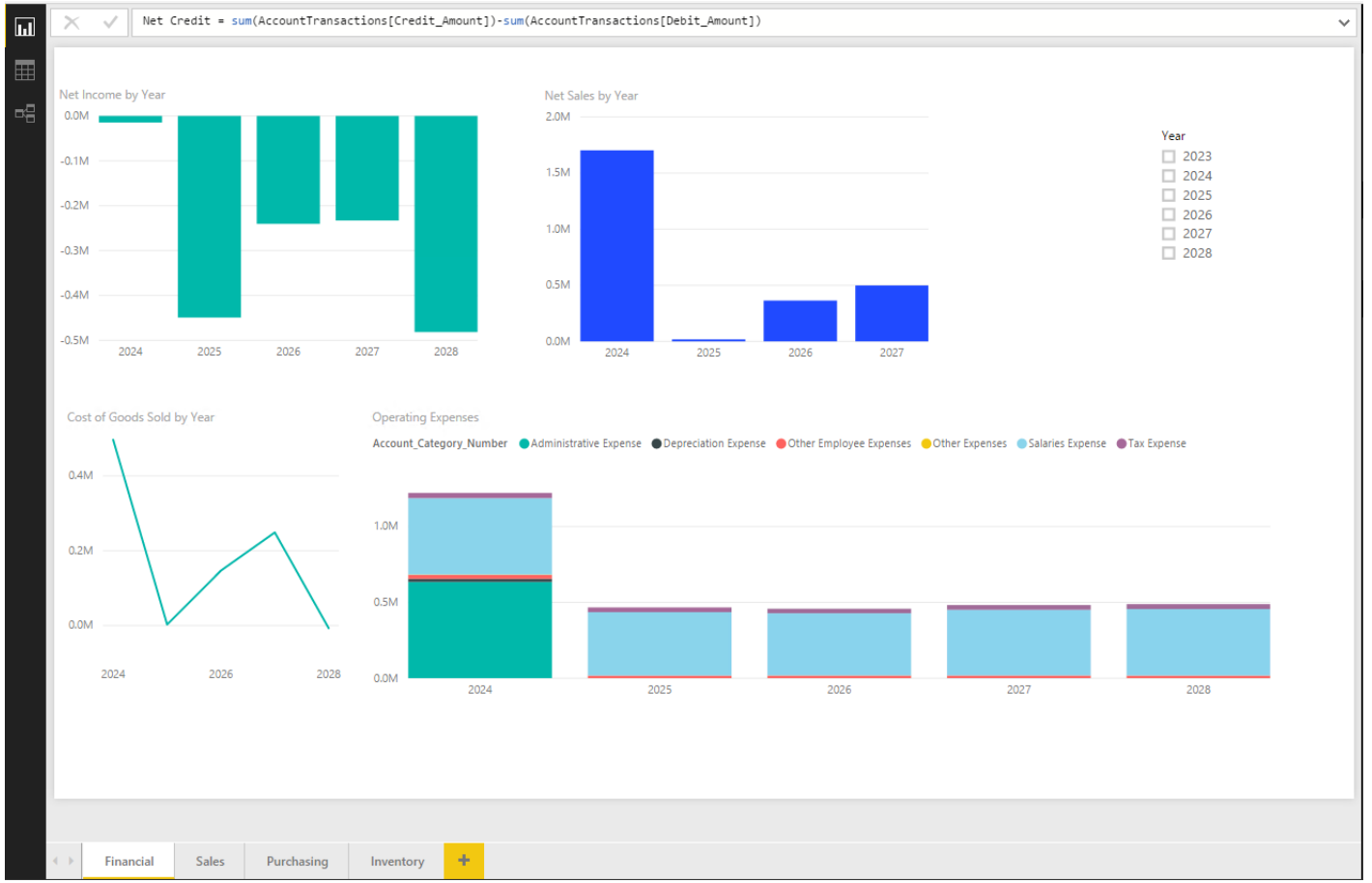
GP 2018 Power BI Content Pack



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

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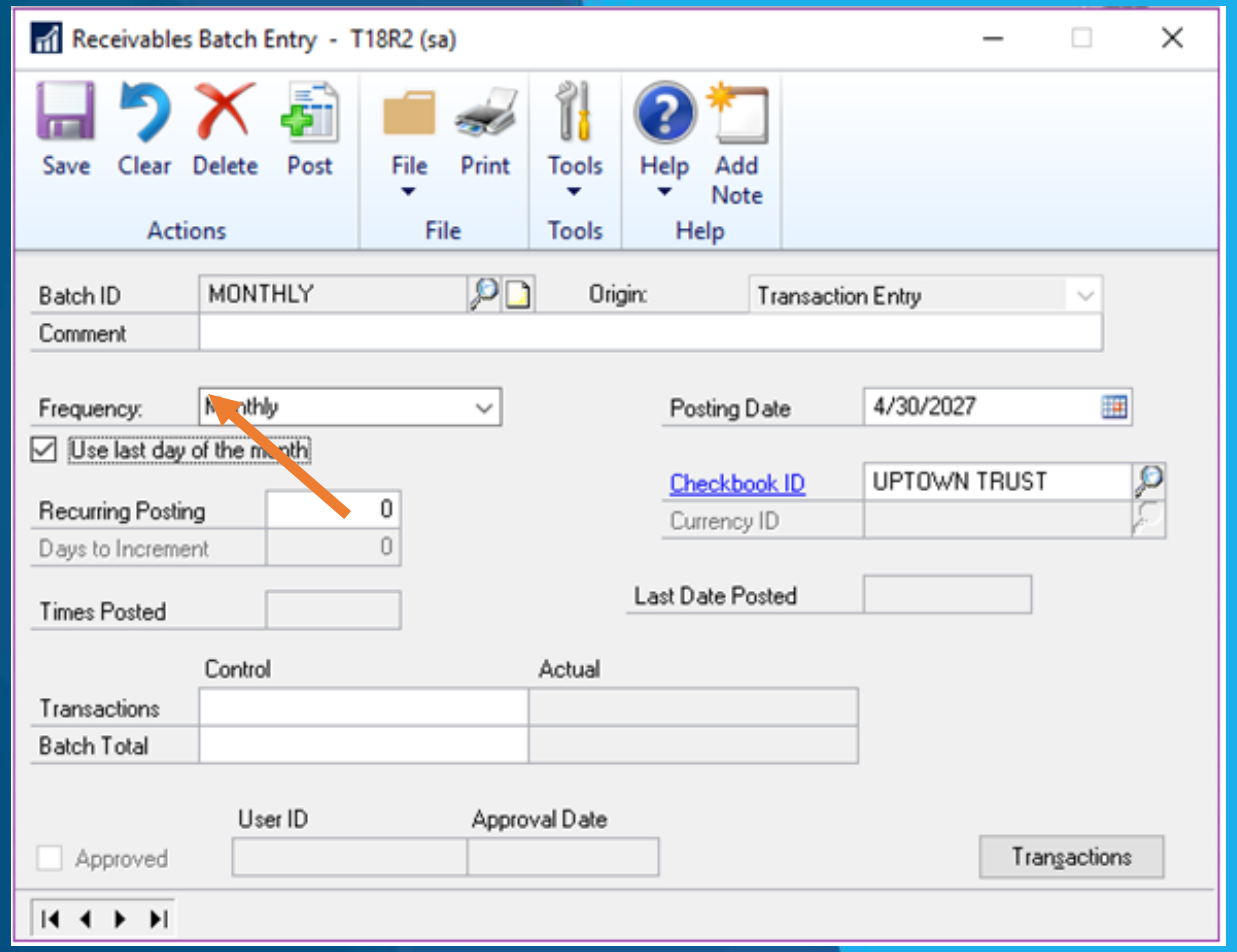
Monthly Recurring Batches:

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



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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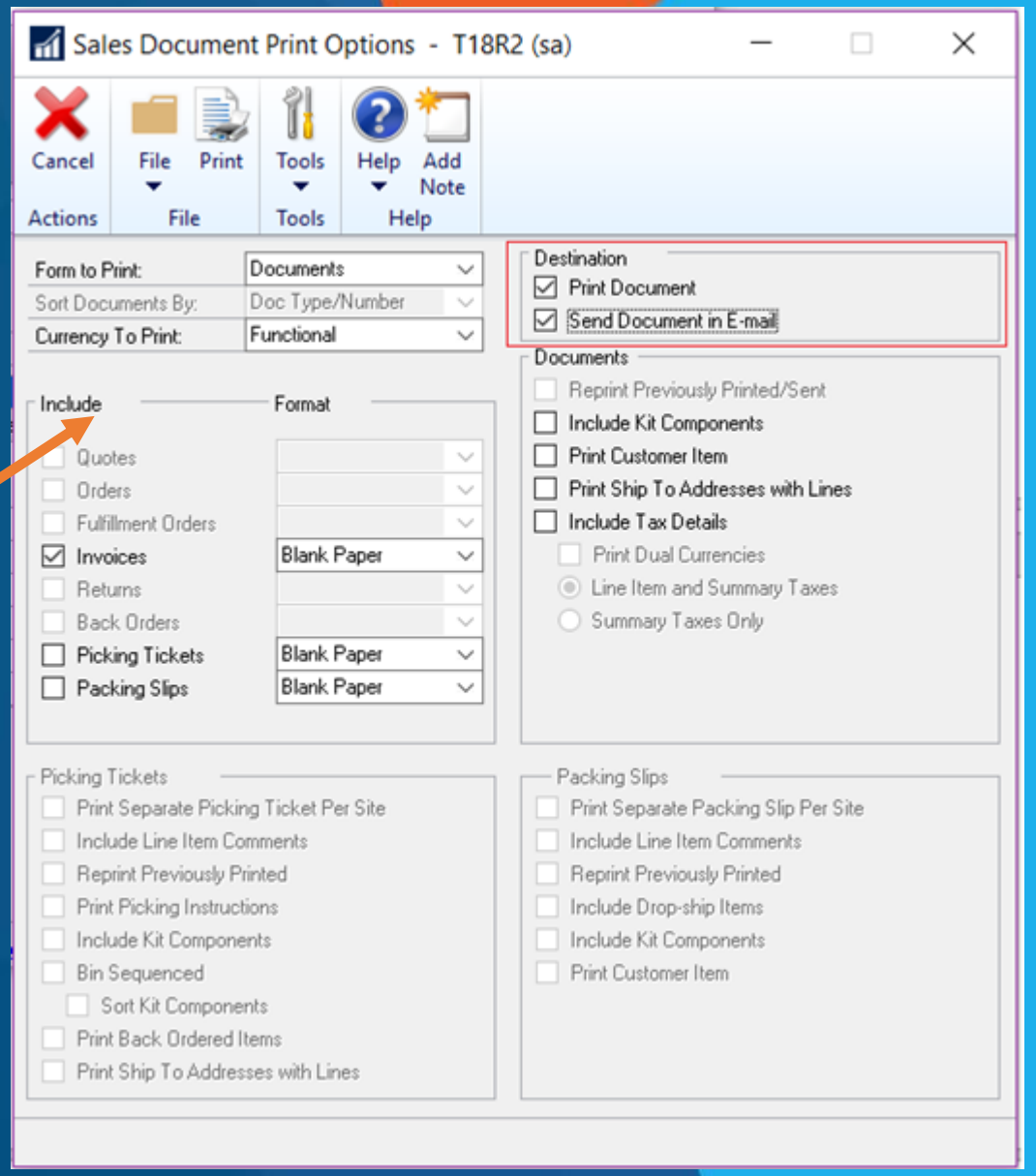
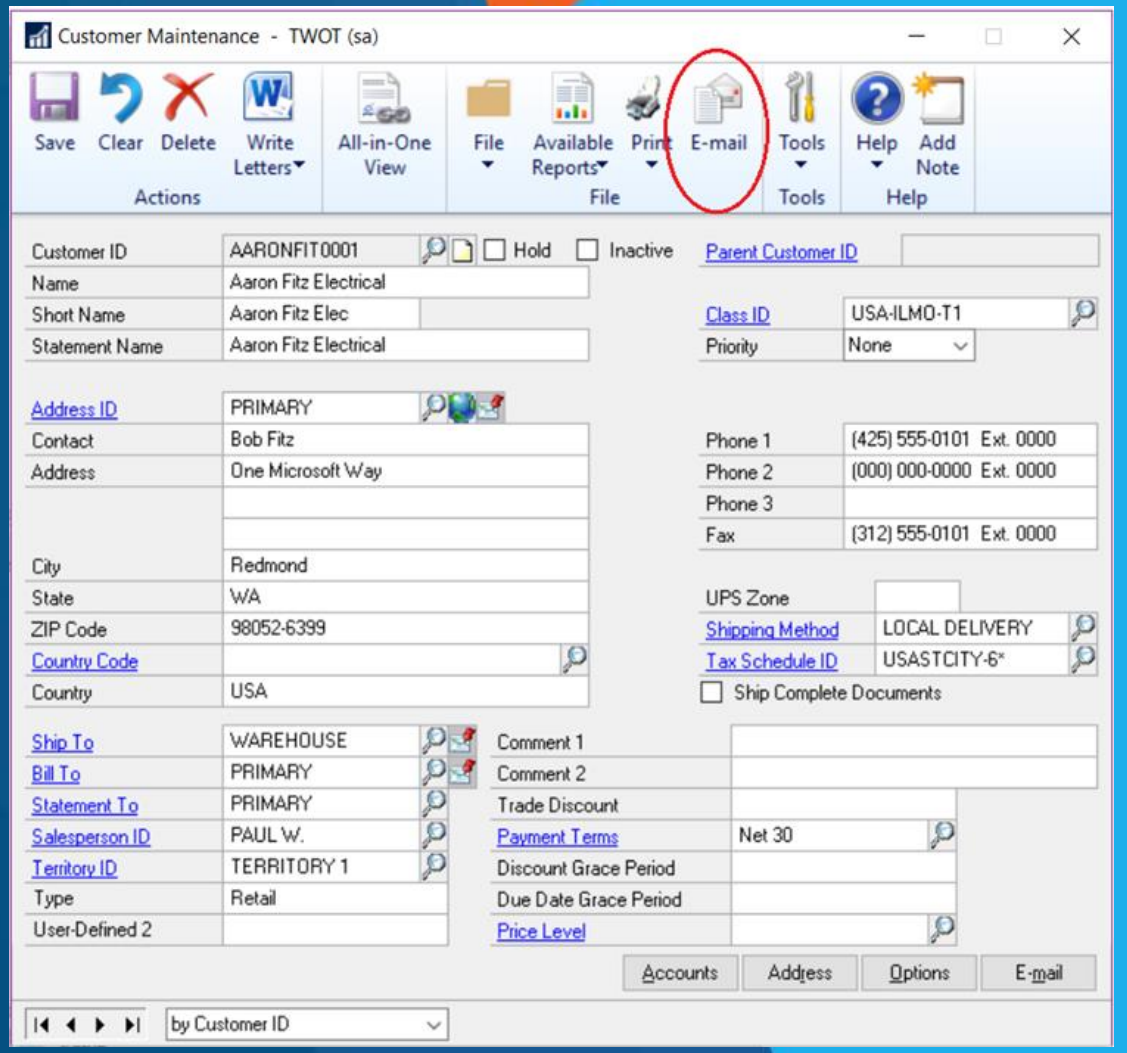
Print and Email SOP Documents at the Same Time

- 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.



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

What is Dynamics 365 and What Does it means for GP?

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Microsoft Dynamics 365

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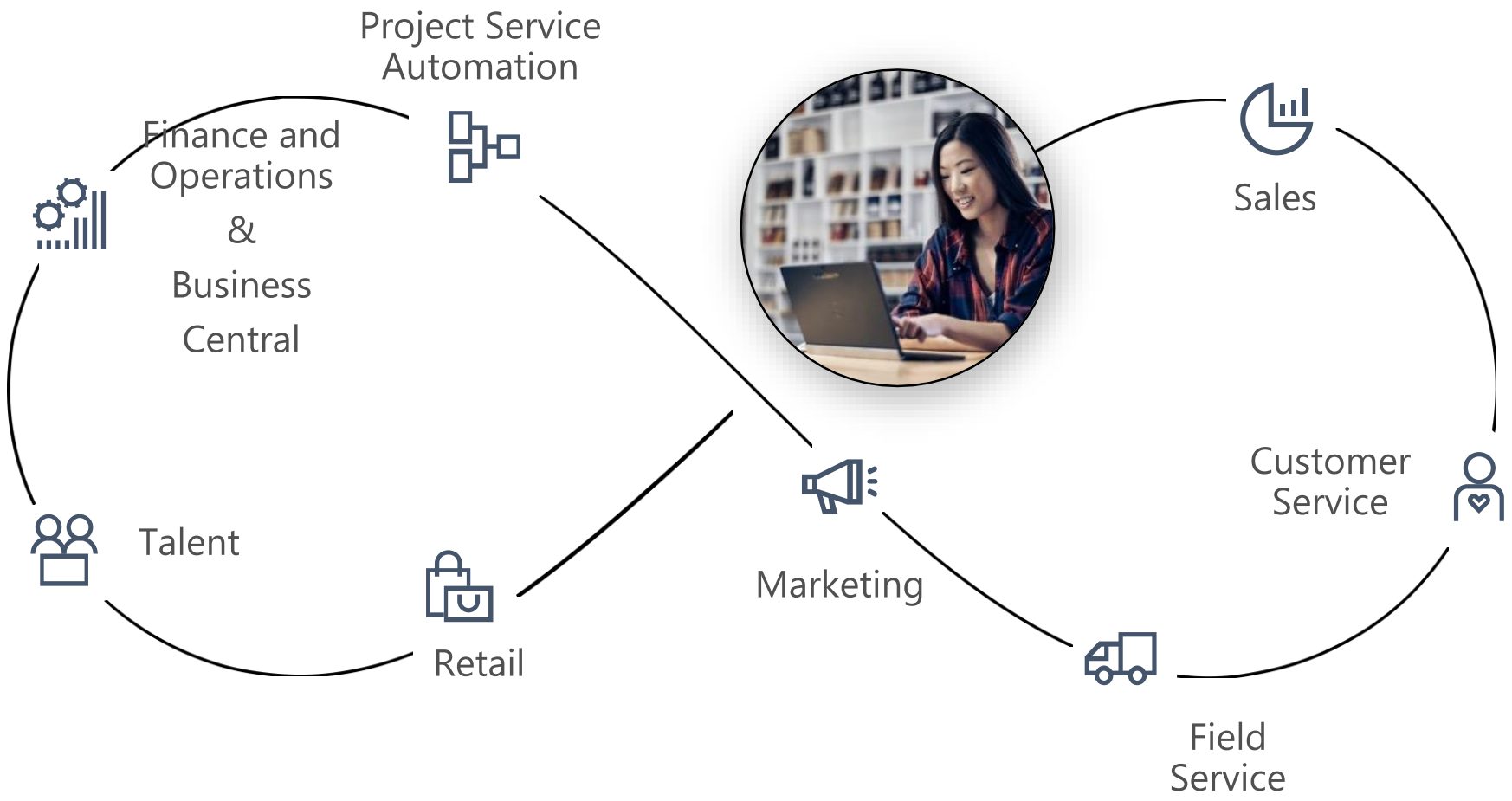
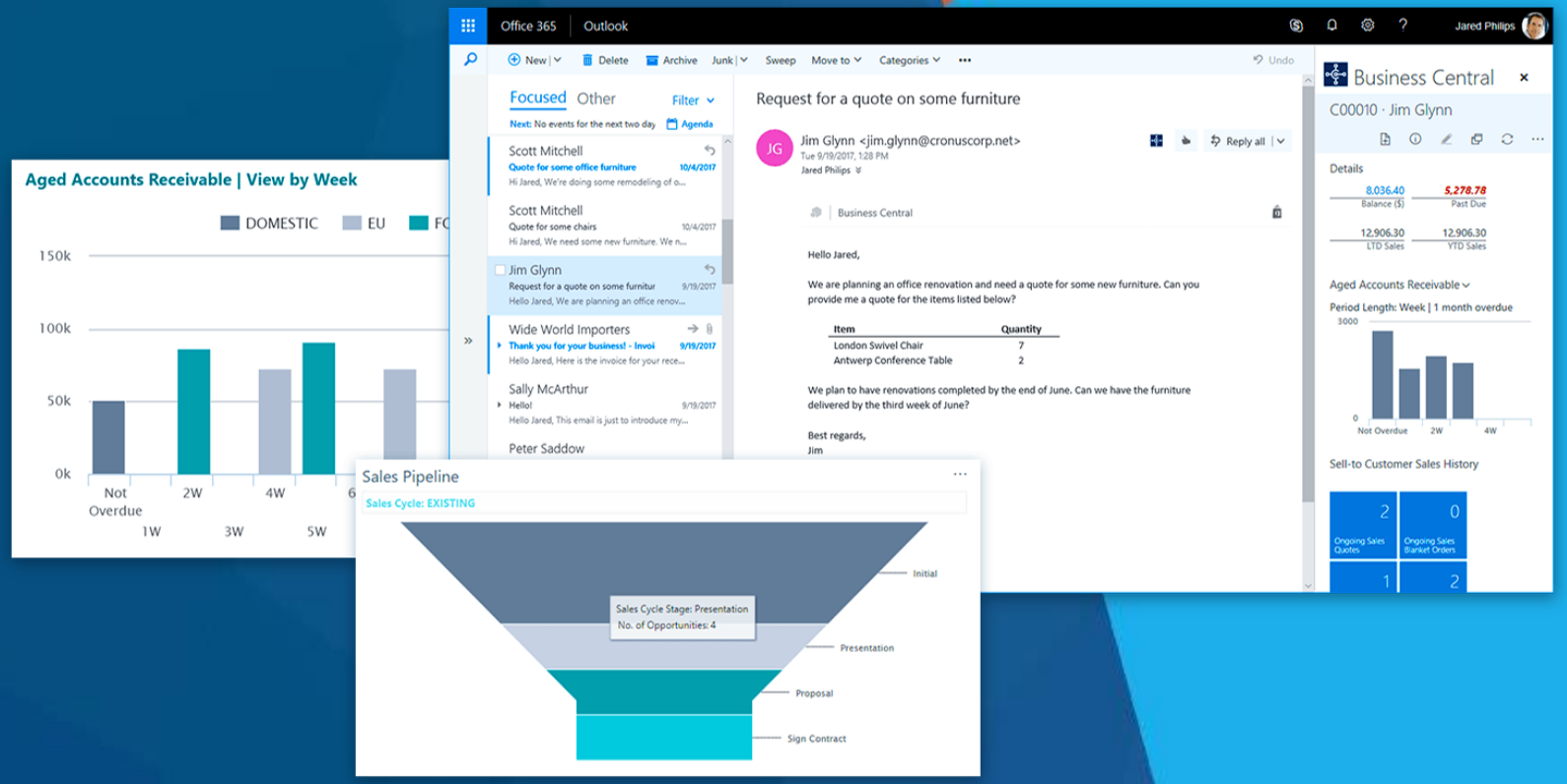
Purpose-built business applications

- 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



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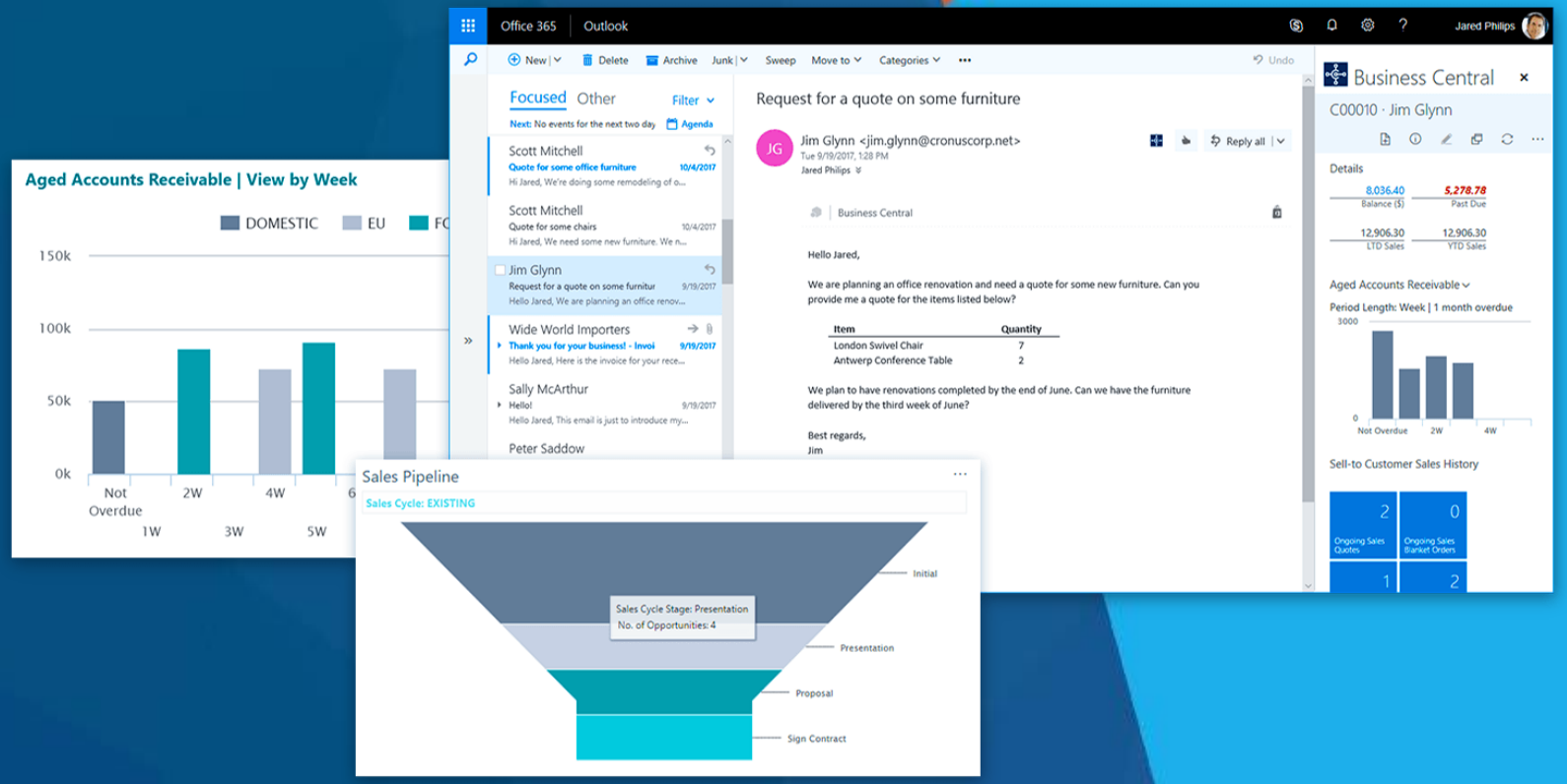
Why it Stands Out

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



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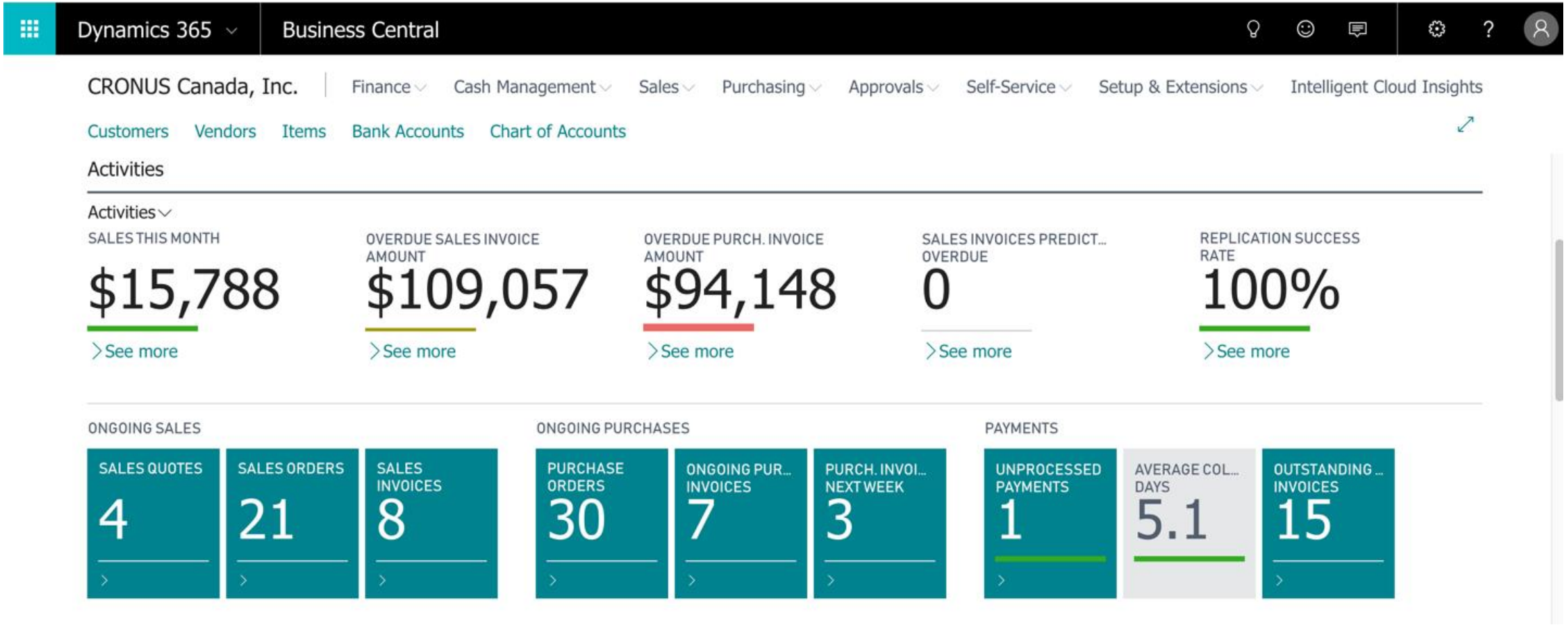
New Browser UI



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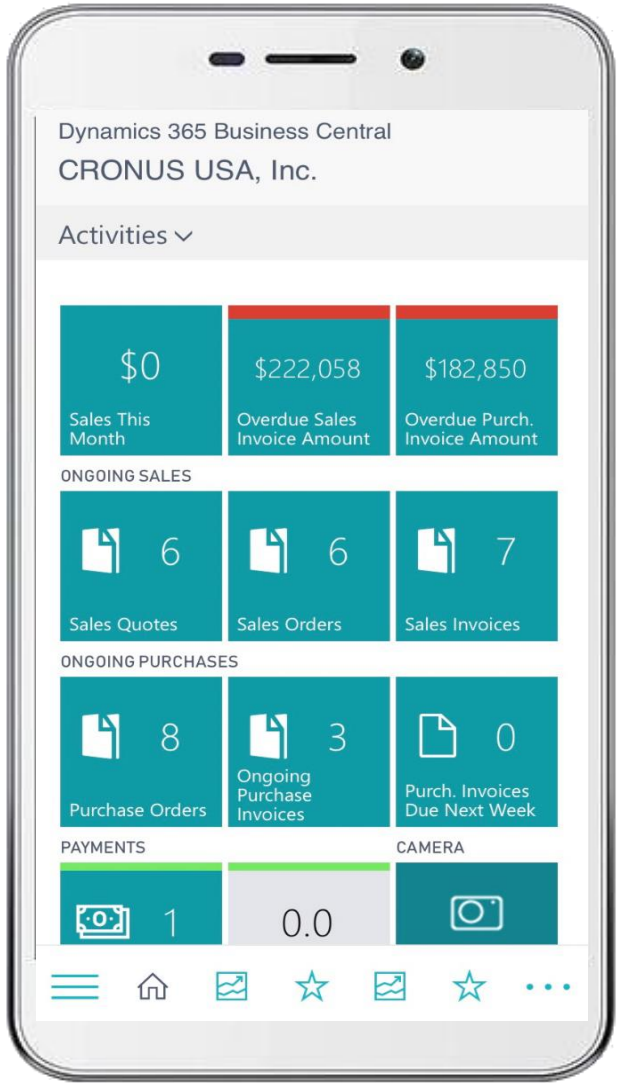
Mobile App



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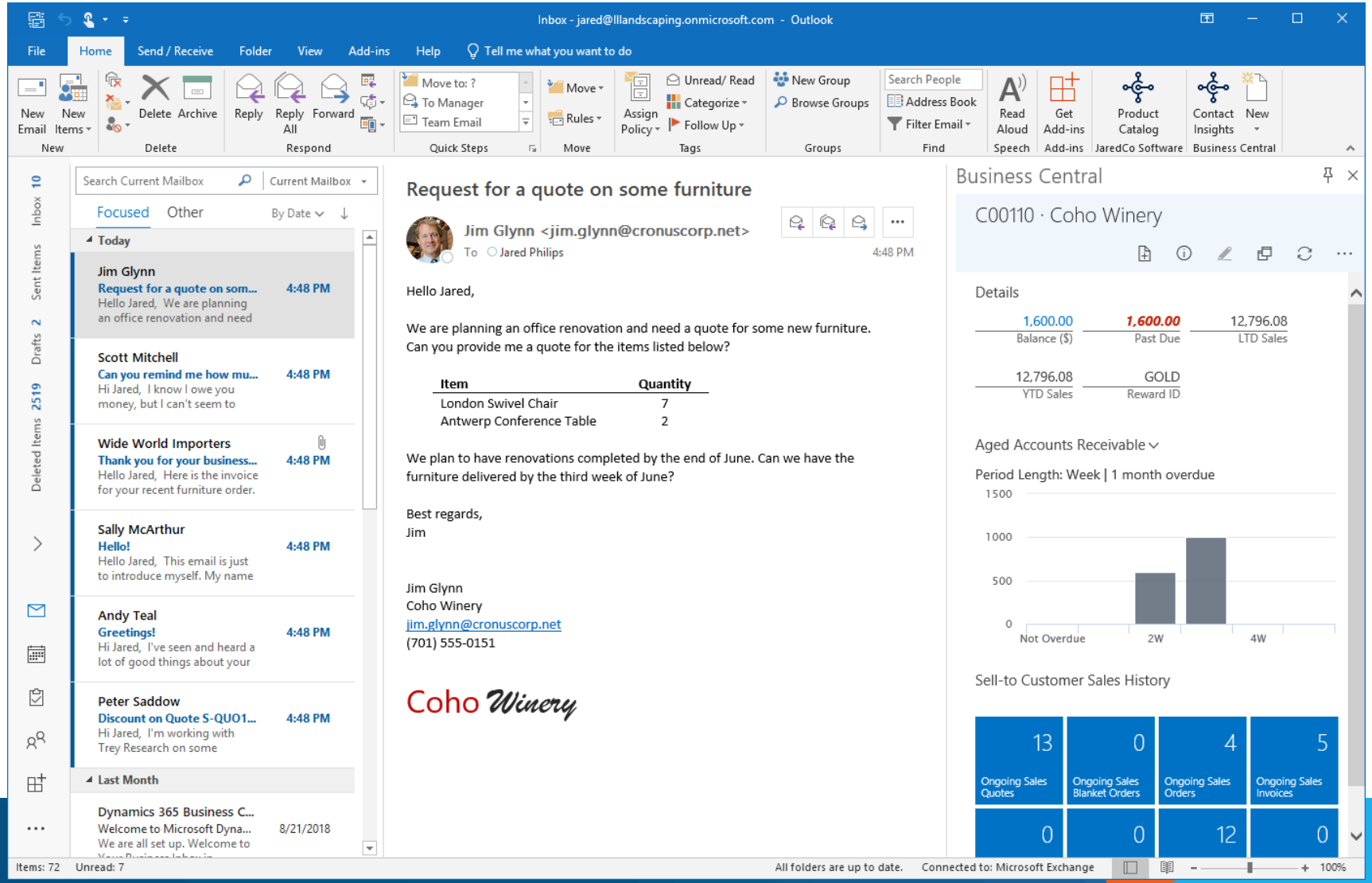
Outlook Integration



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

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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 3rd 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

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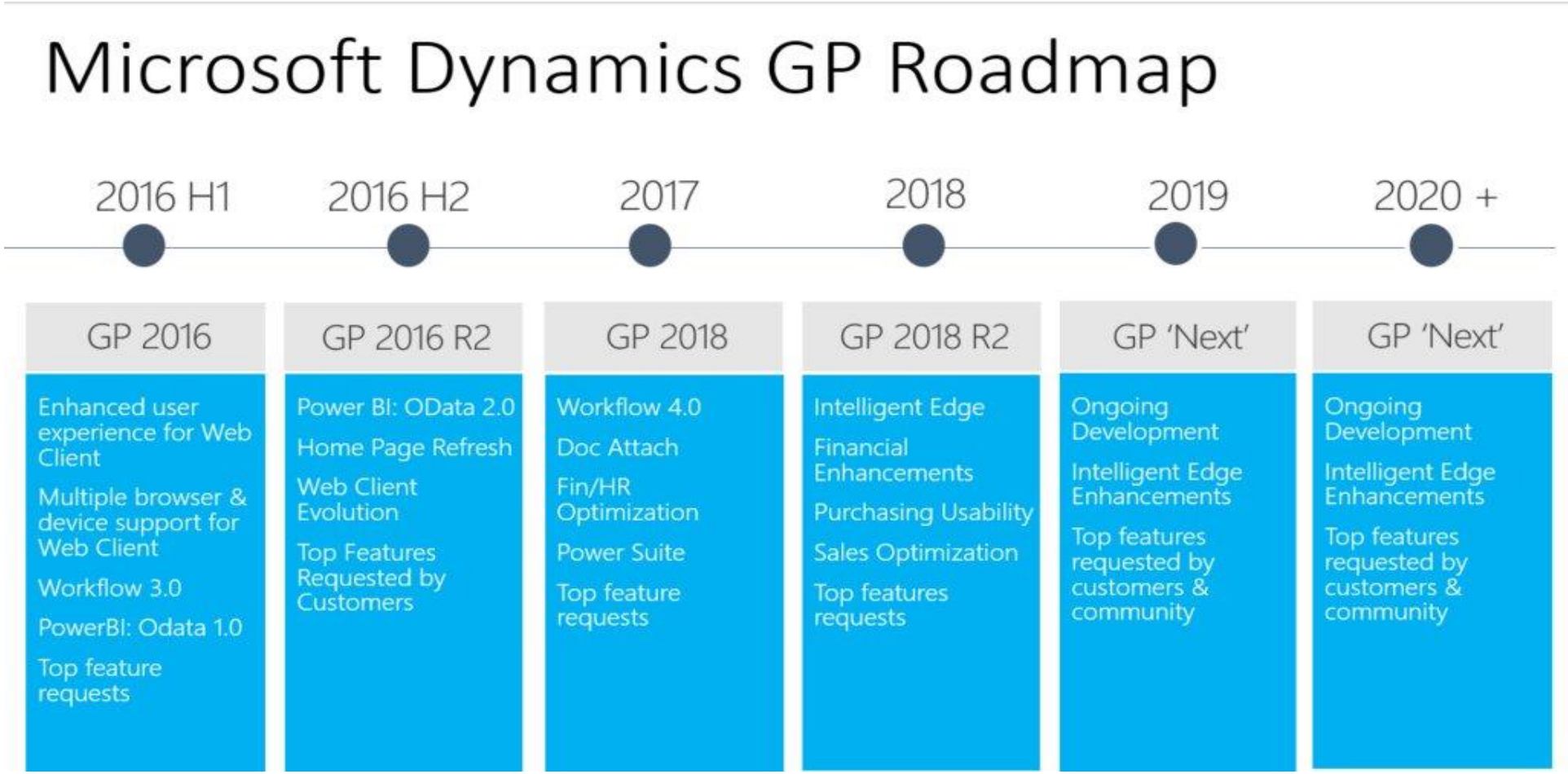
What is the Intelligent Edge?



It's a Great Story for GP!

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- This feature illustrates how Dynamics **GP is part of the future** and how GP customers can get the **best of both worlds!**
- Simple premise: your 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!

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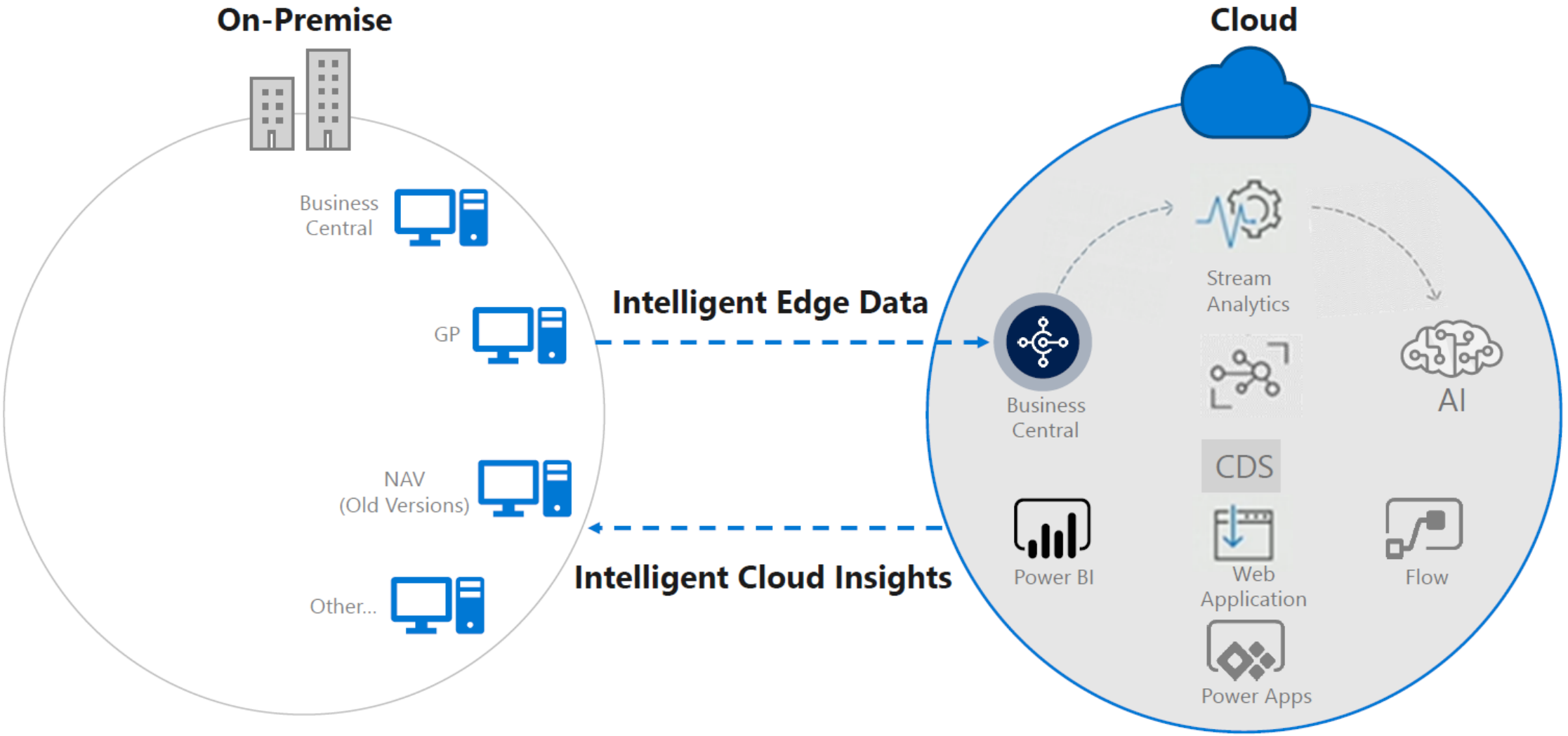
- Microsoft Dynamics GP customers will have access to **all** the built-in capabilities of Business Central -- its Artificial Intelligence (AI) and Machine Learning (ML) based analytical capabilities, its Power BI powered visualizations and reporting capabilities, the ability to create powerful mobile 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



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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

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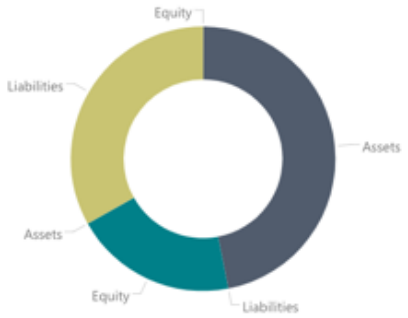
Intelligent Cloud Insights

Power BI Report | Select Report | More options

Chart of Account Analysis

Income Statement

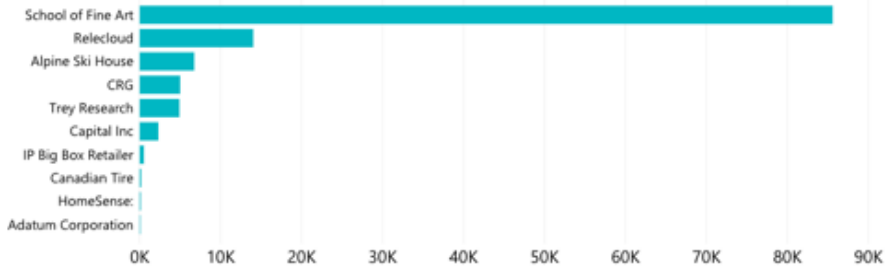
Balance Sheet



Power BI Report | Select Report | More options

Customer Sales Dashboard

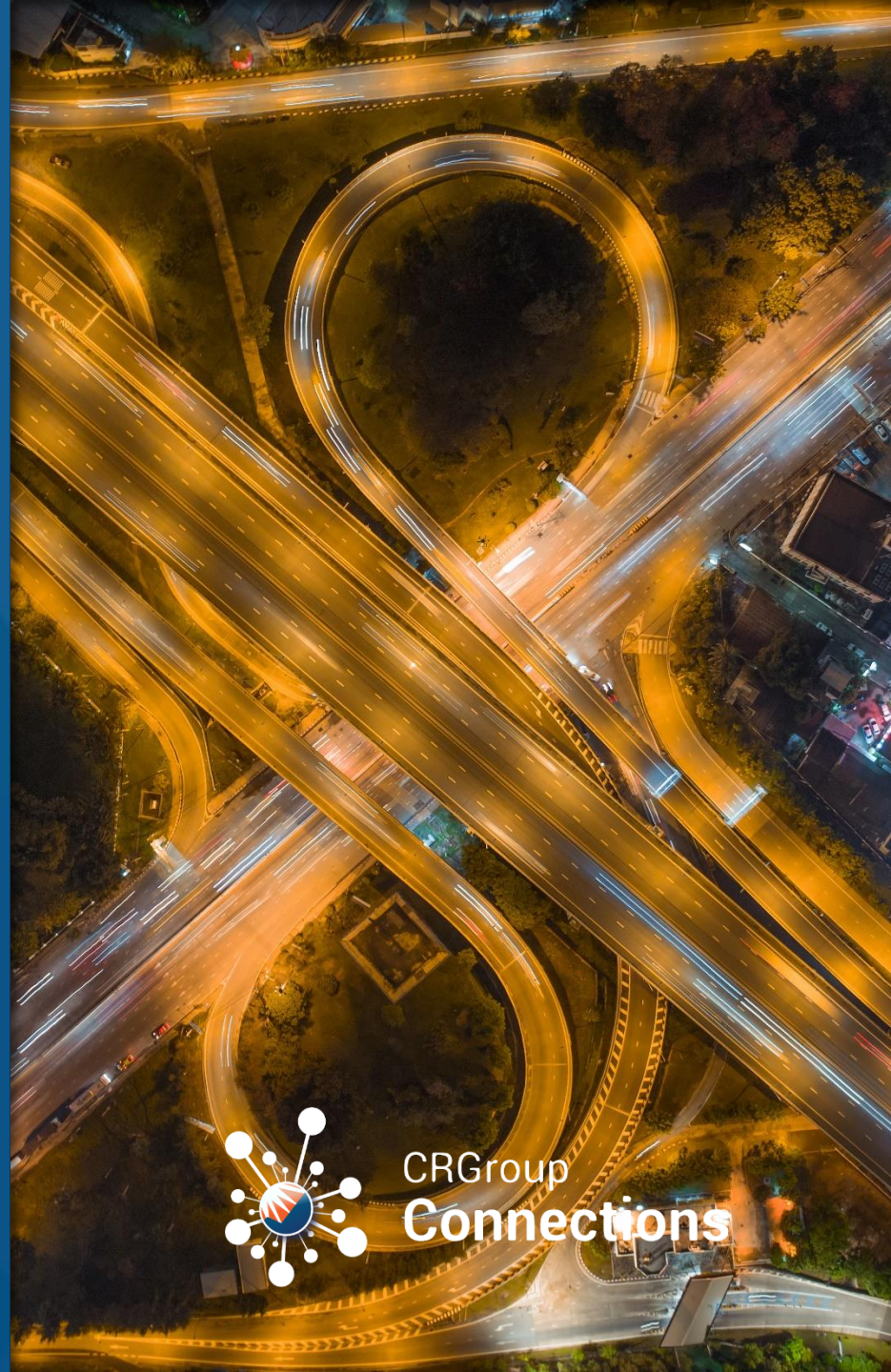
Customer Balances



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



Questions?

Thank You!

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