

RG Connect 2015

Smarter. Faster. Together.

The 
Resource
Group

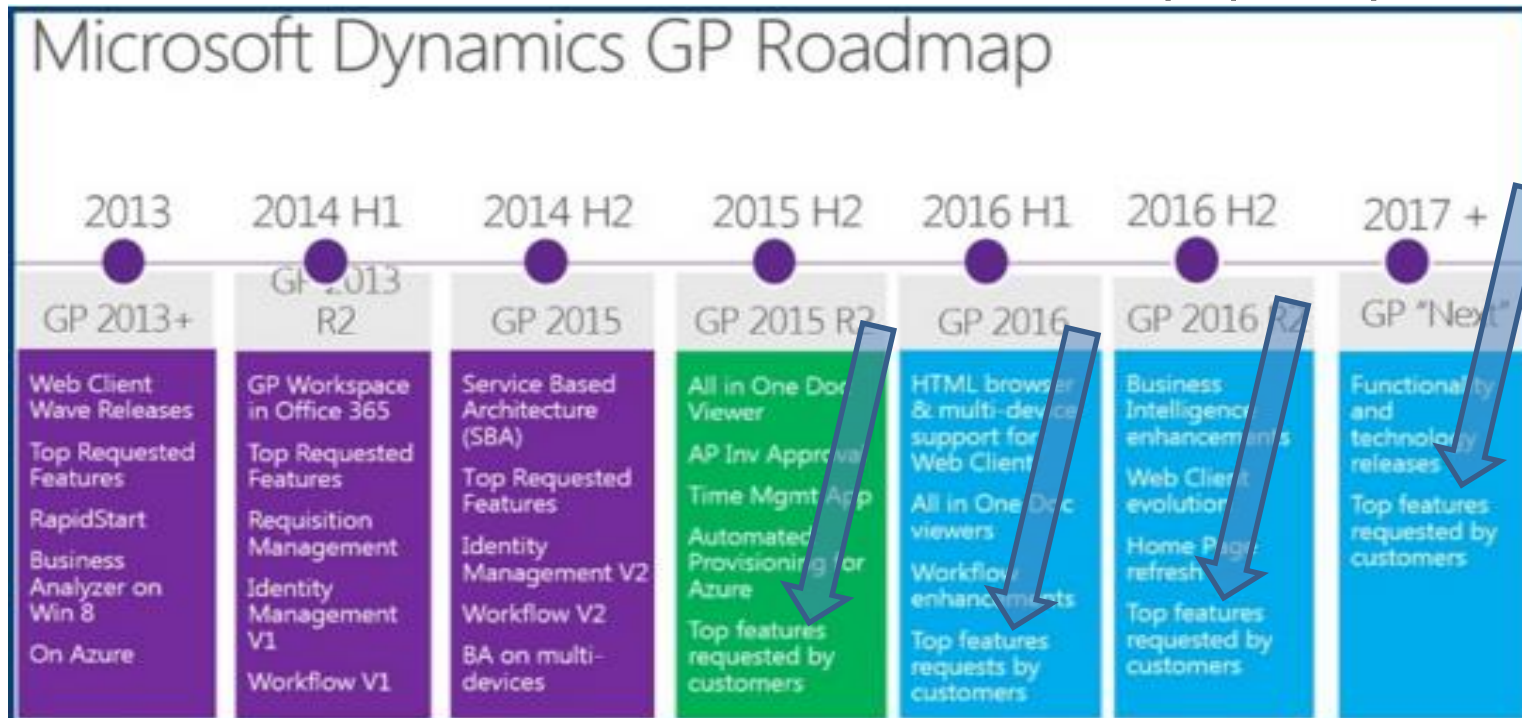


Upgrade...Yes Please!!!

Presented by: Cory Hastings

Top reasons to upgrade

- **Microsoft has recently adopted a 6-month release cycle for Dynamics GP.**
 - Smaller releases; easier to digest
 - Access to new features and functionality quickly



Microsoft Connect

- **Microsoft Connect is an online platform for users to submit feedback and requests for new features and functionality.**
- **Requests and feedback can be voted on by you.**
- **The higher the votes, the higher the chances of these being incorporated in future releases.**
- **<https://connect.microsoft.com/dynamicsuggestions/Feedback>**

Top reasons to upgrade

- **Versions no longer supported.**



- **Mainstream support ending 10/31/2015**

Top reasons to upgrade

**New
Features
And
Functionality**

What's New GP2015 R2

- **Purchasing All-in-one Viewer**

- A Purchasing All-in-One View window is available for locating vendor records and displaying related purchasing documents in the same window.

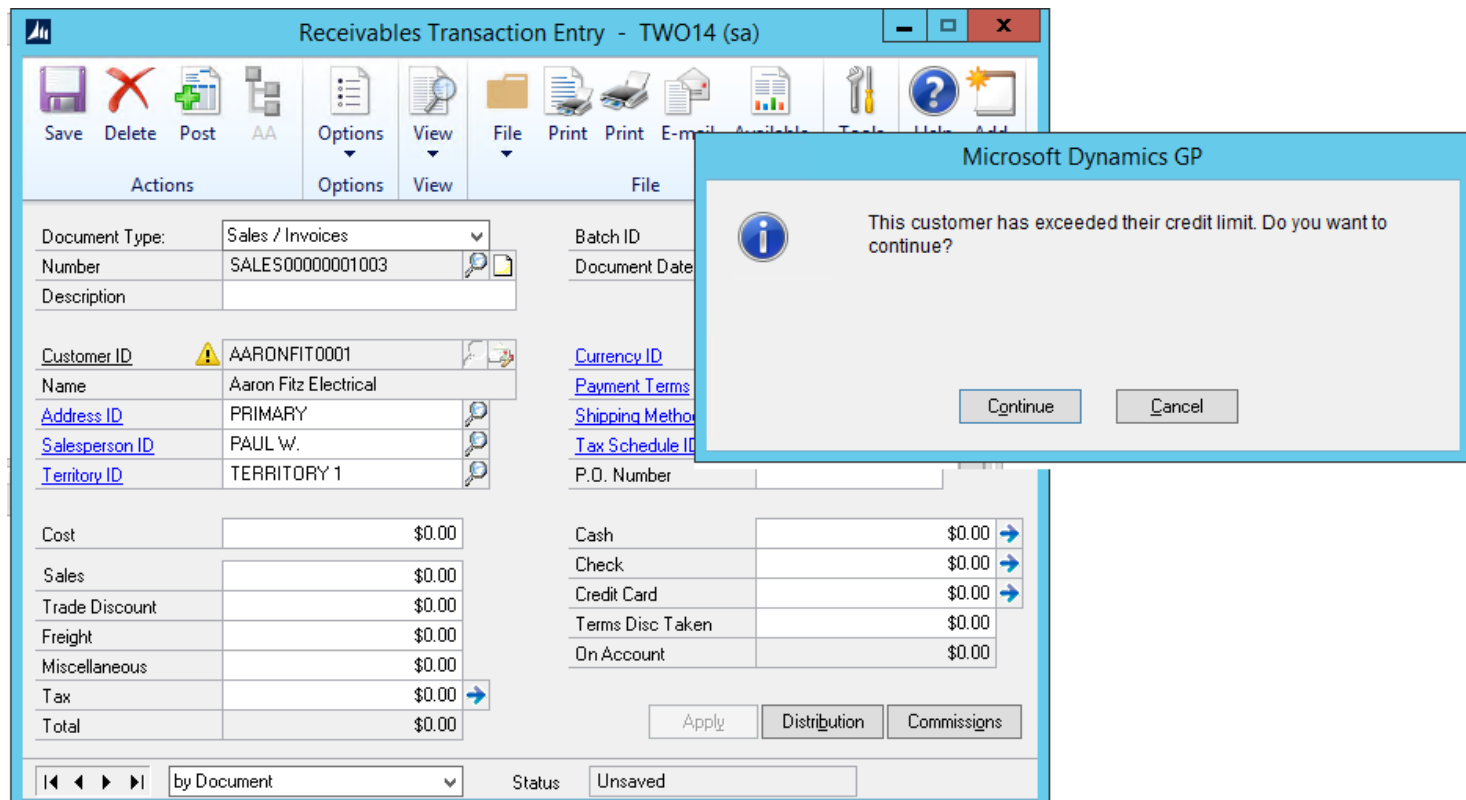
Purchasing All-in-One View - TWO14 (sa)

ACETRAVE0001 A Travel Company

Purchase Orders	Receipts	Invoices	Payments	Returns
Order by PO Date ↑ ↓ \$34,152.00 PO Num: PQ2071 PO Date: 4/1/2017 New	Order by Receipt Date ↑ ↓ Receipt No. Receipt Date: Batch ID:	Order by Invoice Date ↑ ↓ \$0.00 Voucher No. 0000000000000456 Document Date: 5/8/2017 Doc. No. DLKF:LA KJ	Order by Doc Date ↑ ↓ \$100.00 Pmt No: 0000000000000492 Date: 4/12/2017 Doc No:	Order by Doc Date ↑ ↓ Return No. Date: Doc. No.
\$39,480.00 PO Num: PQ2072 PO Date: 4/1/2017 New	Receipt No. Receipt Date: Batch ID:	\$100.00 Voucher No. 0000000000000460 Document Date: 4/12/2017 Doc. No. TEST1234	\$50.00 Pmt No: 0000000000000279 Date: 2/15/2017 Doc No: 20057	Return No. Date: Doc. No.
PO Num: PO Date:	Receipt No. Receipt Date: Batch ID:	\$1,054.39 Voucher No. 0000000000000302 Document Date: 1/28/2014 Doc. No. 11006	\$200.00 Pmt No: 0000000000000009 Date: 10/17/2013 Doc No: 1003.1	Return No. Date: Doc. No.
PO Num: PO Date:	Receipt No. Receipt Date: Batch ID:	\$2,158.75 Voucher No. 0000000000000020 Document Date: 12/18/2013 Doc. No. 1006	\$200.00 Pmt No: 0000000000000008 Date: 9/26/2013 Doc No: 1002.2	Return No. Date: Doc. No.
PO Num: PO Date:	Receipt No. Receipt Date: Batch ID:	\$1,906.44 Voucher No. 0000000000000019 Document Date: 11/24/2013 Doc. No. 1005	\$400.00 Pmt No: 0000000000000007 Date: 8/15/2013 Doc No: 1001.3	Return No. Date: Doc. No.

What's New GP2015 R2

- **Sales visual Customer over Credit Limit**
 - Receive a warning and visual cue when a customer has exceeded their limit.



Top reasons to upgrade

- Warn if vendor has existing PO

The screenshot shows the 'Payables Transaction Entry - TWO (sa)' window in Microsoft Dynamics GP. The window contains various fields for transaction entry, including Voucher No., Document Type, Vendor ID, and a summary table. A warning dialog box is overlaid on the right side of the window.

Microsoft Dynamics GP

The vendor has an existing purchase order. Choose Continue to post or save. Choose Go To to close the window and view a purchasing navigation list. Choose Cancel to return to the window.

Buttons: Continue, Go To, Cancel

Payables Transaction Entry - TWO (sa)

Actions: Save, Delete, Post, AA, Options, Additional, File, Print, Print, Available Reports, Tools, Help, Add Note

Voucher No. 0000000000000491 Intercompany Batch ID TEST
Document Type: Invoice Doc. Date 4/12/2017
Description

Vendor ID: ADVANCED0001 Currency ID: Z-US\$
Name: Advanced Office Systems Document Number: 10000
Address ID: PRIMARY P.O. Number:
Remit-To ID: PRIMARY Shipping Method: GROUND
Payment Terms: Net 30 Tax Schedule ID: COMPANYPUR

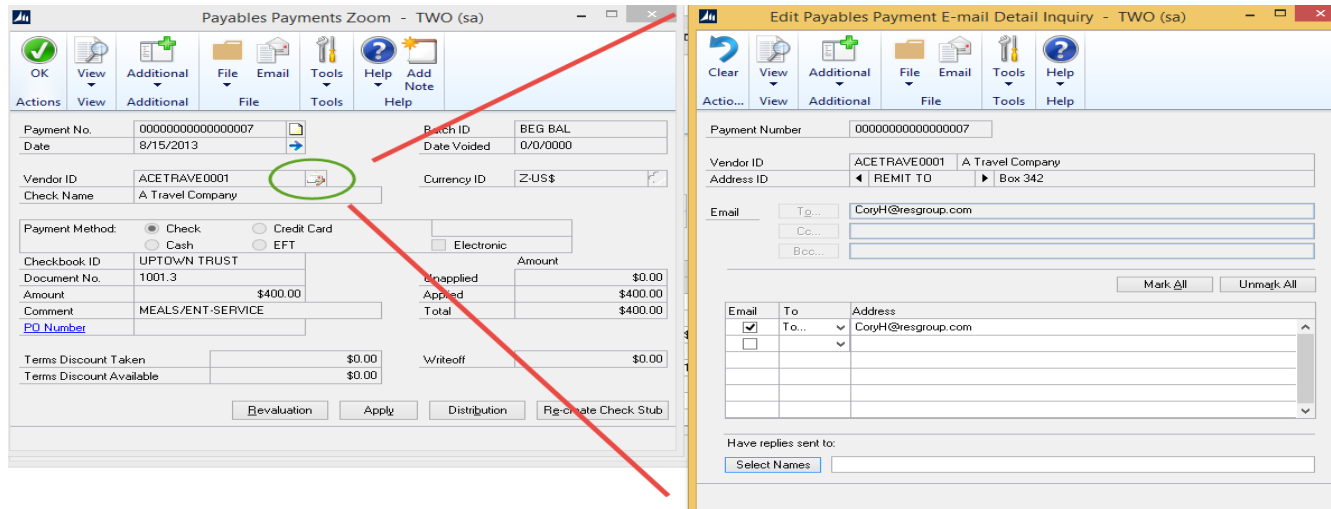
Purchases	\$1,000.00	1099 Amount	\$0.00
Trade Discount	\$0.00	Cash	\$0.00
Freight	\$0.00	Check	\$0.00
Miscellaneous	\$0.00	Credit Card	\$0.00
Tax	\$0.00	Terms Disc Taken	\$0.00
Total	\$1,000.00	On Account	\$1,000.00

Buttons: Apply, Distributions, Print Check

Navigation: by Batch ID, Status: Unsaved

What's New GP2015 R2

- **Edit e-mail for:**
 - Historical vendor remittances
 - Historical customer statements
 - Historical Purchase Orders
 - Historical Sales Documents



What's New GP2015 R2

- **Employee Self Service Enhancements**
 - View and edit employee profile
 - View and print employee paystubs
 - W4 withholding information
 - View and change Employee Direct Deposit
 - View Employee Benefits
 - View and change Employee Skills and Training
 - View and print W2

The screenshot displays the 'Time Management' software interface. At the top, there is a 'TIMECARDS' section with six blue boxes showing counts: Saved (0), Rejected (0), Pending User Action (0), Approved (0), Vacation Balance (0.00), and Sick Leave Balance (0.00). Below this is an 'I NEED TO' section with a list of tasks and links. To the right, there is a 'CURRENT WEEK (4/9/2017 - 4/15/2017)' section with a table showing a weekly schedule.

Pay Code	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday

What's New GP2015 R2

- **Historical Received not Invoiced Report**
 - New SSRS report showing what was received but not invoiced as of a certain date.
- **Combine General Ledger inquiry**
 - View open and historical information for General Ledger transactions in a single window.
- **Enable e-mail on all Purchase orders and Sales orders**
 - Send all document format types (Short, Long, Other) for purchase and sales order documents via e-mail.

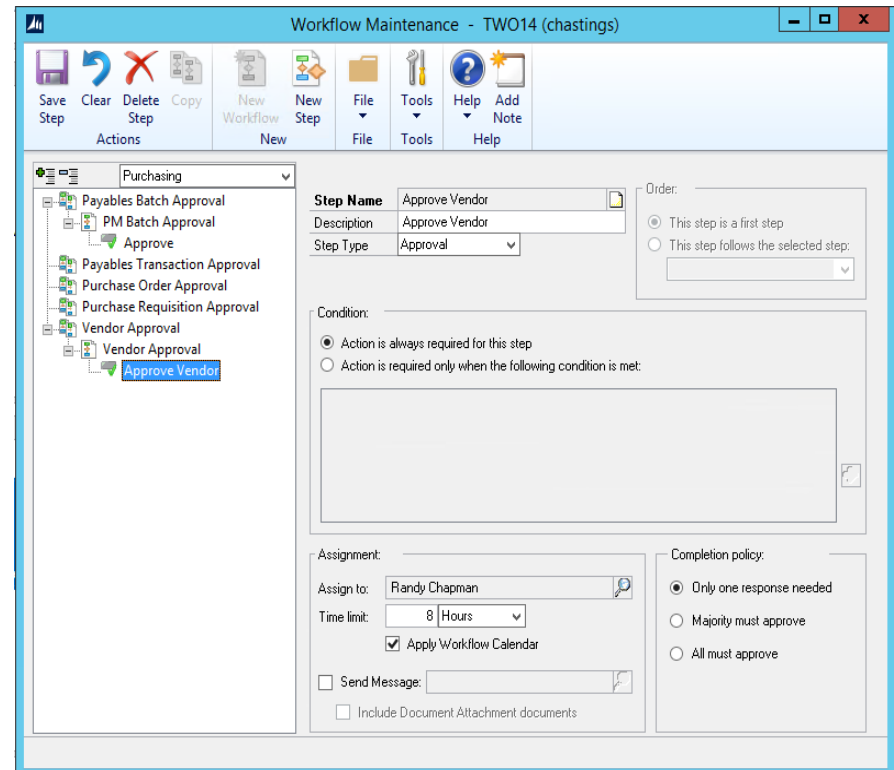
What's New GP2015 R2

- **Automatically Deposit Cash Receipts**
 - You can now choose to have cash receipts directly update the checkbook balance without manually posting the cash receipt deposit.
 - Used with Cash Receipts, Receivables Management Transactions, Sales Order Processing and return documents in Payables Management
 - Register immediately updated.
 - Does not show up on Bank Deposit window.
- **Reporting Enhancements**
 - Display Debits before Credits on Smartlists and Refreshable Excel Reports
 - Modify default Smartlist Visibility.
 - Default Smartlist Visibility
- **Self Service user type**
 - Perform specific tasks including entering hours, recording time spent on projects, or create a requisition.

What's New GP2015 R2

- **Workflow**

- Payables Batch Approval
- Payables Transaction approval
- PO Requisition Approval
- Purchase Order approval
- Vendor Approval



What's New GP2016

- **Top features requested by customers:**
 - Home Page enhancements
 - Optimize screen resolution for display size
 - Intercompany bank transfers
 - Multiple PO enhancements
- **Web client updates**
- **Sales All-in-one Document View**
- **Workflow enhancements**
- **Power BI integration**

So should I upgrade?

- **Decide what is right for your business**
 - Does this new release contain a feature that would greatly benefit our organization?
 - 6 month releases can be overwhelming as software is changing at a rapid pace.
- **Can we effectively digest the upgrade?**
 - Are there appropriate resources and capacity to do so?
 - The older the version, the more difficult an upgrade will be.
- **Do we have a clear strategy?**
 - Is there a project plan in place?



Thank you!