

"Our mission is to empower every person and every organization on the planet to achieve more."

Microsoft Dynamics GP 18.3

Application and System Features for Microsoft Dynamics GP

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Microsoft Dynamics GP Features



This course/module was created for Partners and Customers.



The features for Microsoft Dynamics GP are built around enhancing the core application and platform.

After this course/module you will be able to:



Understand the Microsoft Dynamics GP Feature key areas: Financials Human Resource and Payroll Distribution System Manager

Icons are used throughout this guide to direct you to types of information:



Resource lookup information.



An activity for partners.

Additional note information.



A group activity.



Enhancing the core application and platform



Financial Enhancements

- Additional User-Defined Fields in General Ledger Transaction Entry
- Import Credit Card Transactions
 Automate Financial Full Reconcile
- Match Excel copy and paste decimal places to Currency Setup
- Form 1099 NEC now supported
- 1099 MISC Form Updates
- DBA for Vendor
- Removed fully applied Multicurrency documents from PM HATB
 Copy/Paste Purchasing transactions from Excel

Distribution Enhancements

- Export/Import stock counts to Excel
- Print all Sales Documents

Human Resources/Payroll Enhancements

Human Resource Social Security Number mask

System Enhancements

- Schedule Check Links
- Multi-Factor Authentication
- TLS 1.2
- Save per-user column layouts on Home Page
- Disable print dialog when printing to word
- Enable Self Service user type access to User Preference
- Bulk-edit SmartList Columns

Top Feature Requests

- Match Excel copy and paste decimal places to Currency Setup
- Maximum print output screen

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Financials Enhancements

After this lesson you will be able to:

- Enter user defined information in the General Ledger Transaction entry.
- Import Credit Card transactions from a file.
- Ability to quickly reconcile all years in General Ledger

Additional User Defined fields in General Ledger Transaction Entry

In the General Ledger Transaction Entry window there are now two new user defined fields. When users enter transactions into the General Ledger, they like to add information/comments regarding the transactions.

User Define labels for the user defined fields are at the bottom of the General Ledger Setup Window.

Go to Financial Home Page, under Setup, click Financial and choose General Ledger.

The field length for the User defined label is the same as the other user defined label fields which is 15. The size of the user defined fields is 30 characters in the transaction entry window.

The User Defined fields are added to the following reports:

Edit list and Posting journal

The fields are available in Report Writer to be added to other reports as needed.

The size of the user defined fields is 30 characters in the transaction entry window.

Table Changes

Table Physical Names	Table Technical Name	New field
GL20000	GL_YTD_TRX_OPEN	User_Defined_Text01
GL20000	GL_YTD_TRX_OPEN	User_Defined_Text02
GL30000	GL_YTD_TRX_HIST	User_Defined_Text01
GL30000	GL_YTD_TRX_HIST	User_Defined_Text02

Go to the Financial Home Page, under Setup, click Financial and choose General Ledger.

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Next Reconciliati	ion		1	Orellou	Dalarices				
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Maintain History:	A	Allow:							
🗹 Accounts	5	Posting to H	History	6	🗹 Update /	Accelerator Inf	ormation		
Transactions	L.	Deletion of	Saved Transactic	ns					
Budget Tran	sactions		rrecting of Subsidi						
	L	_ Back Out o	f Intercompany Tr	ansactions					
risporting Let	lgers -								
Allow	Igers				Account	Balance for			
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	-	Description Base Ledger		^					
Allow Ledger Name	-			^	Subsidiar				
Allow Ledger Name	-			~	Subsidiar				
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Allow Ledger Name BASE User-Defined	- Field Labels			~	Subsidiar BASE		13		
Allow	Field Labels	Base Ledger			Subsidiar BASE	y Windows			
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Allow Ledger Name BASE User-Defined User-Defined	Field Labels 1 Us 2 Us Transaction	Base Ledger		v User-Defin	Subsidiar BASE ed 3 ed 4	y Windows			

To see the User Defined fields you setup above you can go to Transaction choose Financial and General

		•	-				
Transaction Entry	TWO03 (sa)					- 0	×
Save Delete Void	Post Correct	Copy Paste	View	File Pri	int Tools	Help Add]
			-	•		 Note 	
	Actions		View	File	8 8	Help	
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Transaction Type:		Tr	ansaction D	ate	5/8/2027		
Standard O Re	versing	Re	eversing Dat	e	0/0/0000		
Source Document	CMXFR	"©					
Reference	Bank Transfer	Entry					
Currency ID	Z-US\$	\sim					
Extra TRX 1	Quarterly Paym	ent			1		
Extra TRX 2	Car, Truck & B	uilding Payment					
Co. ID	1. J	🖇 🔎 🔶 Debit			Credit		6
Description					Exchange R	ate	\mathcal{P}
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TW003 000 -11	00-00			\$250.00		\$0	00
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Example report for the General Posting Journal

System: 9/17 User Date: 4/12 * Voided Journal # Intercompany J	Entry	4 PM		GENERAL POS	am, Inc. TING JOURNAL l Ledger		
Batch ID: 5 Batch Comment:	a						
Approved: Approved by: Approval Date:	No	Batch Tota Trx Total			\$0.00 0	Batch Tota Trx Total	
Journal Entry	Transaction Type	Transaction Date	n Reversing Date	Document	Transaction Reference		
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	Standard ly Payment				Bank Transfer	Entry	¢
	Account		Description	1			
	000-1100-00 000-1100-00		-	ating Accou			
Total	Distributions:	2				Totals:	

Once a transaction has been posted with user defined information populated you will be able to see this in the inquiry windows. Located under the Financial Home page, choose Inquiry, then Financial and Journal Entry Inquiry

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İnter	company				Tot	al		 \$250.00 Difference		\$250.00 \$0.00	

You can also add the new Extra fields to a SmartList. We can also use the new feature to quickly add multiple fields at once to a SmartList!

Display Name	Original Name	
Journal Entry	Journal Entry	~
Series	Series	
TRX Date	TRX Date	
Account Number	Account Number	
Account Description	Account Description	
Debit Amount	Debit Amount	
Credit Amount	Credit Amount	
Error State	Error State	
🖉 Trx User Defined 2	Trx User Defined 2	•
Trx User Defined 1	Trx User Defined 1	~

Columns			
<u>Find Next</u>			
👻 All Columns			
Field Name		Туре	^
TRX Date		Date	
TRX Source		String	
Trx User Defined 1		String	
Trx User Defined 2		String	
Typical Balance		Drop	
User Defined 1 <		Strina >	~
Select <u>A</u> ll	OK	Cancel	

Import Credit Card Transactions

Importing a credit card statement to a vendor account in Dynamics GP makes it fast and easy to enter invoice transactions. Users can import the credit card transactions as payable invoices or manual payments. Using the import functionality helps reduce the chances of data entry errors and brings invoices for a vendor into a batch.

The imported transactions must be saved as a batch and appropriate distributions must be created for each transaction.

Once the transactions import process is completed, a report will print with a list of transactions and status of the transactions.

An example of how this will work is a company gets their credit statement electronically or they can download the transactions to a qbo/qfo/qfx file locally. This allows the user to bring that data into Microsoft Dynamics GP and generate invoices for the credit card that is setup as a vendor within the Dynamics GP system.

Vendor Mapping and Transaction Type mapping setup needs to be completed before the functionality will work.

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Additional Notes:

ONLY debit type transactions will be brought in with the import. Credit type transactions will still need to be manually entered.

Table Changes

There are two new tables.

PMVendorMapCreditCardSetup - PM40107 with two fields OriginText and VENDORID

PMCreditCardAccountSetup - PM40108 - 3 fields CreditCardTrxType, ACTINDX, ACTNUMBR

In the Payable Management Setup page, under the Purchasing Home page, choose Setup, click Payables. Two buttons have been added: Vendor Map and Trx Type Map.

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OK Cancel	File File	<i>Print</i>	Tools	(2) Help	Add Note						
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							📃 Age Unaj	pplied Credit Arr	nounts		
- Defaults:							Exclude E	Expired Discour	its from Payments		
Default Summary	View	Amoun	ts Since	Last Clo:	se	~			ing Purchase Ord		
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Print Previous	ly Applied D	ocumer)	nts on Re	mittance			Recurring	Transactions () nly		
						Options	Classes	1099 Setup	Vendor Map	<u>Trx</u> Typ	o M

The Vendor Mapping window is used to map the Credit Card (Org) field in the file format .qbo, .qfo, .qfx, to the corresponding Vendor ID you have setup in Microsoft Dynamics GP.

This mapping will determine which Vendor ID is used when the invoices are created from the import. Without this information populated in Microsoft Dynamics GP the system will not know what Vendor ID should be used to create the invoices for the credit card statement being imported. This setup is required.

To find the Credit Card Org, open the qbo/qfo/qfx file using a text file program and search for <ORG>AMEX</ORG>. This will be the Credit Card (Org) field. Map that name to the Vendor ID being used for the Credit Card in Dynamics GP. In the example below you will see AMEX as the Credit Card Org, as an American Express Credit Card QBO file. It has been mapped to Vendor ID AMEX0001 which is the vendor that has been created to track invoices and payments for the American Express Credit Card the Fabrikam, Inc. company uses. The 'Credit Card (Org) field is freeform and is 10 characters in length.

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Credit C	ard (Org)			Vendor ID		P
AMEX				AMEX0001		^
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Additional Notes:

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If there isn't a vendor setup in the vendor mapping for the file when the user chooses process, they will get an error This vendor hasn't been mapped.

Transaction Type Account Mapping will give the user the ability to map the transaction type from the qbo file to the Account Number in Dynamics GP. This information isn't required but will allow a different purchases account to be posted other than the default "purchases account" on the vendor card. To pull the account number from this window, the transaction type string will need to match. If there are multiple "matches" the GP will not pull the account number into the invoice.

The "transaction type" field in the window will be a freeform field. This field will have a max length of 50.

The Account field will be a lookup field that will give the user the ability to look up the Account Numbers and select an existing Account to be used when the invoices are created during the import.

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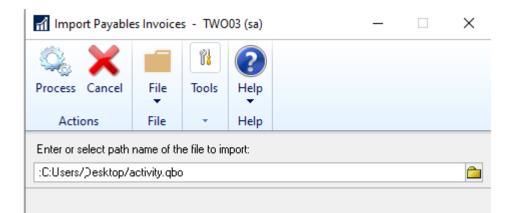
(i

Additional Notes:

The name of transaction type can be mapped to an Account. That account will then be used for the Purchases Account type on the Invoice transaction distributions. The Transaction Type will be compared to the <NAME>DELTA AIR LINES</NAME> within the import file. The entire name in the .qbo file needs to be entered into the Transaction Type field to match and use the account setup. If this is not setup with any account mappings or there are no matches between the import file and the transaction type account mapping the Purchases account on the vendor card is used by default.

To import the credit card transactions from the Payables Home page click Transactions choose Payables and Import Payables Invoices.

Use the yellow folder icon to map to your saved import file.



The process button will give the user the ability to import from the file location.

If the user wants to modify the information on the transactions, they will need to do that after the import when the transactions are in the batch.

Once the import is completed you will get a message below:

Microsoft	Dynamics GP
٤	The selected list(s) has been imported successfully.
	ΟΚ

Additional Notes: Transactions will be entered into the system using the functional currency.

Once the import process has run, a batch is created and needs to be posted by the user. Creating the batch and not posting gives the user the ability to verify the batch before it posts. This would also allow the user to change the distributions if needed before they post the batch.

If you click Transactions and then choose Purchasing, click Batches. You should see your imported batch.

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Find by Batch ID + O	igin		Payables Trx Entry	✓ [™] New	子 <u>O</u> pen
▼ View: All Bate	hes; by Bat	ch ID + Origin			88
Batch ID	Origin		Status	Frequency	
MANUAL	Manua	al Payment	No Transactions	Single Use	
MANUAL CHECK	Manua	al Payment	Available	Single Use	
IMPORTAMEX0001	Payab	les Trx Entry	Available	Single Use	
COMPUTER CHECK	1 Compu	iter Check	Available	Single Use	
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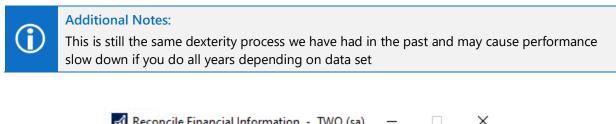
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			1099 A	Amount				\$0,00			
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Trade Discount		\$0,00	Check					\$0,00			
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Automate Financial Full Reconcile

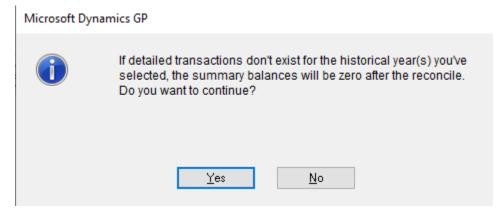
In the Reconcile Financial Information window, from the Financial Home page, choose Utilities, select Financial and then Reconcile, users can now choose "ALL" for all years to be reconciled from the oldest year to newest year. Prior to this new feature, users would have to reconcile one year at a time.

The process will complete one year before it starts reconciling the next year. Just like now we don't allow the user to select another year until the first reconciliation is complete.



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A warning message will appear if detailed transactions do not exist for any historical years selected.



Match Excel copy and paste decimal places to Currency Setup

Prior to Microsoft Dynamics GP 18.3, the Excel copy/paste function ignored the Decimal/Thousand separators in the Currency Setup. This is located by choosing Administration, then Setup, click System and then choose Currency.

When using the Excel Paste feature, Microsoft Dynamics GP is importing the data directly into the SQL tables. This does not interlace with the GP front end in any way. What this means is that this data is not checked against the Currency setup. This, therefore, means your settings for separators is not considered when using this feature.

Other currencies have spaces and periods for the thousand separators, and commas for the decimal separator. Prior to this fix, Excel copy/paste would use the period as the decimal separator, spaces, and periods as the thousand separators, and commas for the decimal separator; ignoring the currency setup and brought the data in incorrectly.

This was a large REQUEST by our customers to change how this works.

With this new feature, Dynamics GP now recognizes the Excel copy/paste Decimal/Thousand separators in the Currency Setup window.

Eliminates rounding issues that are, sometimes, almost impossible to find.

This update will use the decimal places defined in currency setup instead of the data in Excel.

The value will be stored in SQL based on the currency decimal places defined in Currency Setup and not Excel.

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Form 1099 NEC now supported

The IRS is releasing a new 1099 NEC form for the 2020 tax year. Non-Employee Compensation, which had been included in the 1099 MISC form, has been moved to its own form.

In the Vendor Card in Options, you now have the option of selecting Nonemployee Compensation as a 1099 tax type. The Utility "Update 1099 Information" also includes selecting Nonemployee Compensation.

To access the Nonemployee Compensation tax type, choose Purchasing select Cards and then choose Vendor, once you choose a vendor click Options. In the Tax Type drop down menu, select Nonemployee Compensation.

To make a Mass Update go to the Purchasing, choose Utilities and select Update 1099 Information, make the selections in this window for Tax Type From and To.



Additional Notes:

This feature will be rolled back to Microsoft Dynamics GP 2016 in the 2020 Year-end update.

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Additional Notes:

If you patched an existing install of 18.2 from the February or June Hotfix build, or may notice missing 1099 and NEC Box information, <u>run this script for each company in SQL Management</u> <u>Studio</u> to populate the drop down and Box information. This will be fixed in US Year-End.

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You can review the 1099 Details from the Purchasing home page under cards click 1099 Details.

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To print the form, from the Purchasing home page, choose Routines and Print 1099

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1099 MISC Form Updates

Reaction to IRS changes. Non-employee compensation has been moved to its own form as stated above and other values are moving to different boxes on the 1099 MISC form.

The 1099-MISC form has been revised to meet the IRS regulatory changes for the 2020 tax year. In the Vendor Card point to Options, point to 1099 Box, click the drop-down menu.

Box 9: Crop insurance proceeds are reported in.

Box 10: Gross proceeds to an attorney are reported in.

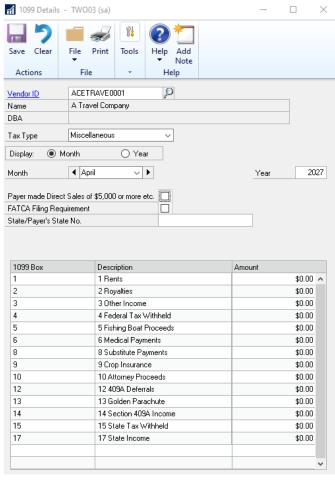
Box 12: Section 409A deferrals are reported.

Box 14: Nonqualified deferred compensation income is reported.

Boxes 15, and 17 report state taxes withheld, and amount of income earned in the state, respectively.

Box 7 was moved to the 1099 NEC form as a checkbox Payer made Direct Sales of \$5,000 or more, etc.

Box 16 the state number is not a currency field and it is available at the header level of the 1099 details window. Hence the data entered in the header will be shown in the form.



Additional Notes:

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This feature will be rolled back to Microsoft Dynamics GP 2016 in the 2020 Year-end update.

DBA for Vendor

When a business is created in the United States or Canada many times, they have the option of using a DBA, or "Doing Business As" name, in addition to the legal entity name. The DBA name is the operating name of the business, or how the business is known to customers, or operating name. As opposed to the legal name of the business.

Vendors that have a DBA name, in addition to the legal company name, and want to have the DBA name appear on the 1099 that is issued to them, can now do so.

Add DBA (Doing Business As) field to the Vendor maintenance window, reporting and 1099s.

It is common for companies to have a legal name registered but do business under another name, the name customers see. The feature enables the user of both the legal name of a company and DBA.

From the Purchasing home page under Cards, choose Vendor and click Options.

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Additional Notes:

This feature will be rolled back to Microsoft Dynamics GP 2016 in the 2020 Year-end update.

By default, this was added to the following reporting:

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	Vendor Name	A Travel Company	A Travel Company
Chicago IL 60601-4277	Vendor Class	First	Last
(312) 436-2671 Ext. 0000	Туре	First	Last
2500.00	Contact	First	Last
	Telephone	First	Last
	Sorted By: Ver	ndor ID	
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	Vendor Name:	A Travel Company	Status:
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	Check Name:	A Travel Company	Class ID:
Sydney NS 2086	DBA:	Adventure Travel	

Additional Notes:

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A column (Char, 65 in length) was added to the PM00200 table, VENDDBA

This new field will be in all country installs for Microsoft Dynamics GP.

No changes were made for this new field in eConnect or Integration Manager.

Removed fully applied Multicurrency documents from PM HATB

With Microsoft Dynamics GP 18.3, you will now be able to Exclude Fully Applied Multicurrency documents from the PM Historical Aged Trial Balance.

()

In previous releases of Microsoft Dynamics GP, if an invoice went through a revalue before it was paid, the document(s) (Invoice and payment) would print on the report even though they were fully applied. They would show with an aged total of \$0.00 which made the report longer due to unnecessary data listed.



Previously, in most cases the only workaround to removing these fully applied documents was to update in SQL the SettledGainLossCurTrxAmt field to 0.0000 in the MC020105. There were other scenarios as well with other field manipulations, but in all cases manipulation in the backend was the only solution to remove these types of documents from the report.

This new change allows you, without manipulation to data in the backend, to print the report without seeing fully paid MC documents.

In the example below, an invoice that was entered, revalued, and then paid. Now when printing the PM HATB the documents are no longer listed. In previous versions the documents would appear.

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Copy/Paste Purchasing transactions from Excel

We all know how much our users like the Copy and Paste functionality in General Ledger, why not add it in other areas? The new feature enables users to define purchase transactions, along with distributions, and import them into the Payables Transaction entry window in GP. This will improve efficiency, reduce rekeying errors, and enhancement user experience.

With this feature, you can choose to do distributions or not, similar to our General Ledger copy paste.

Use the Transaction Entry window to copy/paste PM Transactions and PM Distributions.

The Excel Spreadsheet must have the required fields in this order to copy paste correctly; not all amount fields need to have an amount. You must copy/paste all data fields only; do not include the header fields.

	А	В	С	D	E	F	G	Н
1	Vendor	Purchase	Trade Disc.	Freight	Misc.	Document Number	P.O. Number	Cash
2	ACETRAVEL0001	\$1,000.00	\$10.00	\$100.00	\$10.00	12345	8675309	\$500.00
3	[

Vendor

Purchases

Trade Discount

Freight

Misc.

Document Number

P.O. Number

Cash - if the cash field has an amount, the Payables Cash Entry window will automatically open after clicking the "Paste" button.

In the Payables Transactions Window found under Purchasing, click Transactions, and choose Transaction Entry. Choose the Vendor ID and put your cursor in the 'Purchasing' field and then click the 'Paste' button in the tool bar.



Additional Notes:

This feature will also work in Web Client.

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Distribution Enhancements

After this lesson you will be able to:

 Describe and use the new Distribution Enhancements in Microsoft Dynamics GP October 2020 release.

Export/Import stock counts to Excel

With Stock counts, you now have the ability to export and import data with Excel within the Stock Count windows giving you more flexibility with this process.

The Stock Count Schedule window now has a new action called Export/Import. This will allow you the ability to export the data to an excel file. The Export/Import Action will not be available until the Start Count action has been selected. If the Cancel count option has been selected, the export action will be disabled again. The export can be done several times as long as the count has been started.

The export action will create a file called stockcountmmddyy.xlsx that you can save to a location of your choosing. From there, you can edit the file.

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We recommend you add in the qty, serial/lot numbers as you would if you were doing it manually in the stock count entry window.



Import action will not be available from the Stock Count Schedule window. Only Export is available.

To open the Stock Count schedule window, go to Inventory, click Transactions, choose Stock Count Schedule.

Stock Count Schee	dule - TR2 (sa)					- 0	×
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Save Delete Start		mport File	Print	Tools	Help Add		
Count	t Count 🝷	· · · .	ile		▼ Note		
Actions			ne	Ť	Help		
Stock Count ID	DEMO	\mathcal{P}		<u>Defa</u>	ult Site ID	Į.	
Description demo stock count schedule Reuse Stock Count							
Status	Available			Last l	Used Date	0/0/0000	
Sort By:	Site ID	~					
Item Number	Ç	Site ID	🔎 U a	fМ	Next Count	Count Time	\otimes
Description		Bin		P	Last Count	Overdue	3
ACCS-CRD-12wH		WAREHOUSE	E Ea	ch	5/30/2027	8:00:00 AM	^
ACCS-CRD-25BK		WAREHOUSE	E Ea	ch	5/31/2027	8:00:00 AM	
					0/0/0000	12:00:00 AM	
							-
							-
							~
On Hand Qty	0.00					<u>M</u> ass Add	

The Stock Count entry window also has the Export/Import action. Once you export the file in the stock count schedule, updated the information in the excel file you saved, you can come back to this window and choose the Export/Import button where you can import the excel file.

n Stock Count Entry - TR2 (sa)				-		×
🖬 🏷 🔍 🚯		2				
Save Clear Process Export/Import Count	File Too	ls Help Add ▼ Note				
Actions	File -	Help				
Stock Count ID TEST	\mathcal{P}	Dr	ocument Date 4/12/	2027 🏢 -	}	
Description test			Autopost Stock Count V	ariances	_	
Status: Entered						
Sort By: Site ID / Bin / Item	Number	~				
Item Number	U of M 🗧	Counted Qty	Variance Qty	Verified		(
Description		Count Date	Count Time	Site ID		6
Bin Reaso	n Code 🖇 🖇	Captured Qty	On Hand Qty	Allocated Q	lty	
100×LG	Each	28	3 (2)	\checkmark		1
128 SDRAM	Each	15	i 5	\checkmark		
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2-A3284A 24× IDE 256 SDRAM	Each Each Each	0 10 9) Ľ) O) (1)	2 2 2 2		

To open the Stock Count Entry window, go to Inventory click Transactions and choose Stock Count Entry.

The excel file format should be modeled after the IV Stock Count Forms by Site ID report. This should give you the correct format to print off and do a stock count and then be able to put the right information into the excel file. Refer to export2.csv file to see the formatting that should be used for the excel file.

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If the stock count is not in the status of "started" the import action will be grayed out. If you have already run an import, and you want to run another import on the same stock count, you will need to select the stock count ID and choose 'clear count'. This will reset the status to started.

Excel file example:

	А	В	С	D	E	
1	WAREHOUSE		SERIAL/LOT	Serial/Lot #	QTY on Hand	
2	100XLG	Green Phone	Serial	Each		
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						
18						
19						
20						
21						
22						
23	128 SDRAM	128 meg SDRAM		Each		
24	1GPROC	1 Ghz Processor		Each		
25	2-A3284A	Dual Core Server	Serial	Each		

FIELDS In the spreadsheet

A1 - Site ID; C1 - Header for Serial/Lot indicator; D1 - header for Serial/lot#; E1 - header Quantity on hand

A2 Item Number; B2 Item Description; C2 indicator if item is serial/lot/blank; D2 UofM e2 Quantity that has been counted; D3-D... Serial #s/Lot #s that have been counted.

There is error logic if the format of the excel file has been edited. If there is missing information when trying to import, you should receive an error message that not all required information has been provided. The import should still complete and the stock count should be "saved". When saving the records, the status for the stock count will change to entered.

The user will need to open the stock count entry window and finish making edits to the count before they could finish the "process". We should NOT run the process of the stock count. We should only be importing the information and saving. The rest of the stock count process would need to be manually completed.

Print all Sales Documents

You now can select how you want Microsoft Dynamics GP to Print and E-mail Sales documents in the Print Sales Documents window. There are now three options to choose from. The new option available is called 'Print ALL Documents'. You can mark both 'Send Documents in E-mail' and 'Print ALL Documents' and the system will E-mail every customer setup for E-mail and then print ALL documents whether emailed already or not. You can also select to 'Send Document in E-mail' only or 'Print Document' only. And lastly, you can 'Print Document' and 'Send Document in E-mail' at the same time and Microsoft Dynamics GP will E-mail all customers setup for E-mail and then print out the remaining documents that are not setup for email.

To open the Print Sales Documents window, go to the Transaction Menu point to Sales and click on Print Sales Documents. You will then need to select your Sales Document or range of Sales Documents to Print and E-mail. In this window you will now see a new option called 'All documents'.

										_		
n Print Sales	Documen	ts - TW	0 (sa)							-		\times
Clear File Actio Fi	Print	Tools	(?) Help He	Add Note								
Document Type: Quote Print: Documents Sort Documents By: Doc Type/Numb Currency to Print: Originating		ber	> > > >		nclude Document Picking Ticket Packing Slip		Forma Blank Blank Blank	P aper Paper	~			
Destination	ient		🗹 Send	d Docu	ment in E-mail	Г	🗹 Print /	All Docu	ments			
Destination Print Document Documents Print Previously Printed/Sent Print Customer Item Include Kit Components Print Ship To Addresses with Lines Include Tax Details Print Dual Currencies Line Item and Summary Summary Taxes Only			ing Ticket Reprint Pre Picking Tic nclude Inc Print Pickin nclude Iter nclude Kit Bin Sequer Sort Kit C Print Back I Print Ship T	eviously sket Pe complet ig Instr m Compo Compon compon Ordere	r Site e Docs Juctions ments Jonents ents		Packing Include Include Include Include	Previous Slip Per Incomple Drop-shi Item Cor	ete Docs ip Items mments ponents			
Ranges: Document Number Insert >> Restrictions: Insert >> Document Number from STI					From: To: 262 to STI	!	5TDINV2262 5TDINV2265 265		9 9			

In this window the new option called "Print All Documents, gives you the ability to tell Microsoft Dynamics GP when you want to actually print out all documents regardless if it was emailed or not. When you select Email and Print All documents the system will E-mail every document it can, then print all documents included in the range regardless if emailed or not. You can also select both 'Print Document' and 'Send Document in E-mail', and Microsoft Dynamics GP will email every document it can, then print all other documents not setup for email. It will also be including print outs for those documents that could not be emailed during the run.

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Note: Previously when you selected to both Print Document and Send Document in E-mail, the system would E-mail every document it could and then print out ALL documents regardless if emailed already. This would create an additional step of removing out those emailed documents from the printouts. This change with the functionality will not print out all documents unless you choose to specify to Print All Documents.



Note: When selecting both the Print Document and Send Document in E-mail, if the customer was setup for email, but Microsoft Dynamics GP was unable to email for whatever reason, the document will print instead.



Note: E-mail functionality is dependent on Word Templates being enabled and properly configured in your company.

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Human Resource & Payroll Enhancement

After this lesson you will be able to:

• Mask the Social Security Number on Human Resource reports.

Human Resource Social Security Number mask

A few versions back, we added the Social Security Number (SSN) mask for payroll. That has prompted this request why don't we also do this on the Human Resource reports? Great question!

You can go to Tools, point to Setup, choose System, and click Human Resources Preferences.

Towards the bottom of the window you will see the button SSN Mask that was added. By default on the install, everything will be marked as masked, if you would like to see the SSN on the report you will need to unmark it from this window.

n Human Resources Preferences - TWO03 (sa)	- 🗆 X					
🕑 🗙 🔳 🕅 🖓 🗂		📶 Report Masking - TWO03 (sa) — 🗌				
OK Cancel File Tools Help Add		🕑 💼 🛍 💽 📩				
Actions File - Help		OK File Tools Help Add				
Update Seniority Date with Adjusted Hire Date	Auto Create Position/Pav Code links	▼ ▼ Note				
Adjusted hire date for benefits	Edit Attendance Maintenance and Earnings History	Actions File 🔹 Help				
Adjusted hire date for length of service	Enable Reason for Pay Adjustment					
Address change report	Enable Cancel on Reason for Pay Adjustment	Select the reports you want to apply the SSN Mask to. The SSN on selected reports will appear as XXXXXXXX when generated.				
Purge Applicants	Ignore Position/Salary Matrix Links	reports will appeal as AAAAAAAAAA when generated.				
Days before purging (1)	Default Employee Info to Dependent Info					
Last purge date 0/0/0000	Roll Forward System To Do List	Mark <u>A</u> ll Unma <u>r</u> k All				
Pay Steps/Grades	Purge To Do Lists (System/Personal)	Ren Retirement Enrollments				
Use Pay Steps/Grades	To Do purge (#days) (1)	BEN Payroll MSTR				
Base Pay Step Increases on: Hire Date 🗸 🗸		Benefit Enrollment				
Position Training Link	Automatically Create/Update Vacancies					
	Never Always Ask Each Time	Employee History				
		Employee Summary by Emp ID				
EEO Reporting O EEO-1 C EEO-4	Automatically Create/Update Organizational Requisitions Never Always Ask Each Time	Employee Summary by Last				
		✓ Orientation Payroll Notification				
Employee Filters	User Access Duplication	✓ Train Class Employees Not Enrolled				
Division	Grant user	✓ Indiricities Employees Not Enrolled				
Department	Like user 🔎	✓ Irain Employee Classes				
	SSN Mask					

The reports can be found under Human Resource and Reports.

There are many, many Human Resource reports that have SSN on them, we picked a few of the top report's customers use my default.

You will find them in the sections of:

Benefit reports Training reports Orientation reports Employee Summary and History reports

Here is an example of a report with SSN masked.

Enrollment by Benefit Plan

*=Inactive Employee

Plan Name: 401K	Retirement Pl	an		Contribu	tions
Employee Name	Soc. Sec. No.	Benefit Amount	Cost	Employee	Employer
Ackerman, Pilar	XXX-XX-XXXX	\$0.00	\$0.00	8.00%	5.00%
Barbariol, Angela	XXX-XX-XXXX	\$0.00	\$0.00	8.00%	5.00%
Barr, Adam	XXX-XX-XXXX	\$0.00	\$0.00	9.00%	5.00%
Bonifaz, Luis	XXX-XX-XXXX	\$0.00	\$0.00	8.00%	5.00%
Buchanan, Nancy	XXX-XX-XXXX	\$0.00	\$0.00	8.00%	5.00%
Chen, John Y.	XXX-XX-XXXX	\$0.00	\$0.00	8.00%	5.00%

Same report with it not masked in setup.

Enrollment by Benefit Plan

*=Inactive Employee

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Plan Name: 401K	Retirement Pl	an		Contribu	itions
Employee Name	Soc. Sec. No.	Benefit Amount	Cost	Employee	Employer
Ackerman, Pilar	917-23-9833	\$0.00	\$0.00	8.00%	5.00%
Barbariol, Angela	986-22-5953	\$0.00	\$0.00	8.00%	5.00%
Barr, Adam	944-22-9198	\$0.00	\$0.00	9.00%	5.00%
Bonifaz, Luis	982-58-1991	\$0.00	\$0.00	8.00%	5.00%

Additional Notes:

There is no structure change in the table. Only the records will be added in UPR40203.out file. There is a row in this table for each report that we added, there is also a column in this table for MARKED. 1 means it is marked to mask SSN and 0 means it is not marked to mask SSN.

System Enhancements

After this lesson you will be able to:

- Set up Multi Factor Authentication
- Schedule your Check Links process

Schedule Check Links

With the release of Microsoft Dynamics GP 18.3, customers can now set up a schedule to run Check Links outside of normal business hours. This will let users run the processes without having to manually select the Check Links process. A customer can setup which logical file groups they want to run check links on. This process will utilize the Report Scheduler setup and functionality, so it will require that Microsoft Dynamics GP be open and logged into the correct company. Also, this feature is just scheduling the existing Check Links processes, so performance is not expected to be any different than manually running them. This is the same Dexterity code we all know and love in the Check Links process, it was not re-written to anything different in the 18.3 release.

Setup:

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In order to set a default location for the Checks Links reports to save you can go to Click Tools, choose Routines, select Company and Report Setup to open Report Schedule Setup. This is not a required step for scheduling Check Links.

Save Cancel						
Save Cancel			2			
Save Cancer	File	Tools	Help Add • Note			
Actions	File	+	Help			
					18.02	2.1112
Default Location		1				<u></u>
Next Report File Nan	ne	RS0000	00001			
Export File Type		Text file	~			

To select which check links you want to schedule you will navigate to the Report Schedule window by choosing Tools, then click Routines, select Company and click Report Schedule:

2		sa)				- 0	>
) 🔍		11 2				
edisplay App	oly Publish	File Print	Tools Help	Add			
	Now	•		lote			
Actio	ns	File	- Help)			
requency	Daily	~	Every Day				
Start Date	8/20/2020) 🏢	 Weekdays 				
Calculate Next [Date		O Every 0	days			
/ersions Of Rep	ort To Keep: 🔘 I	Current Only	Current & Prior				
oublish To Local			· · ·		<u></u>		
Series	Report Nar	me		Report Option	Frequency	Last Published	(
Next Scheduled	Publish To Loo	cation					(
Financial	Checkbook	k Journal		demo	Not Scheduled	0/0/0000	
Financial	Bank Trans	sfer Journal		demo	Not Scheduled	0/0/0000	_
Financial	Bank Trans	saction History		demo	Not Scheduled	0/0/0000	_
Financial	Bank Trx D	Distribution Histo	ory	demo	Not Scheduled	0/0/0000	_
Financial	Bank Distri	ibution History		demo	Not Scheduled	0/0/0000	
Financial	Account M	laster		CheckLinks	Not Scheduled	0/0/0000	
Financial	Budget Ma	ister		CheckLinks	Daily	8/20/2020	
Financial	Transaction	n Work		CheckLinks	Daily	8/20/2020	
Financial	Quick Jour	nal Work		CheckLinks	Daily	0/0/0000	
Financial	Account Tr	ransaction Hist	ory	CheckLinks	Not Scheduled	0/0/0000	
Financial	General Le	edger Setup		CheckLinks	Not Scheduled	0/0/0000	
Financial	Quick Jour	nal Setup		CheckLinks	Not Scheduled	0/0/0000	

This list will populate depending on what dictionaries you have loaded on the client you are logged into. The Report Option for the new records will be "Check Links". You can choose the frequency of Daily, Weekly, or Monthly and you have further options for Every Day, Weekdays or every X number of days. If you had setup a default publish location in the Report Scheduler Setup window this will default to that location, otherwise you will need to enter a location before you are able to apply your selections. If you want to remove reports from being scheduled, you would use the Report Catalog Maintenance window by choosing Tools, then click Routines, select Company and click Report Catalog Maintenance:

nî Re	Report Catalog Maintenance - TPLUS (sa) - 🗆 🗙							×				
		ile Tools	Help Help	Add Note p								
Check	< the reports you w	vant to delete	from the ca	talog.								
	Report Name				Report Option		Last Publishe					
	Budget Master				CheckLinks			8/20/2	2020	^		
	Sales History					CheckLinks			8/20/2	2020		
\checkmark	Transaction Work			CheckLinks			8/20/2	2020				
											-	
											-	
											-	
											•	

Multi-Factor Authentication

Starting in the Microsoft Dynamics GP Fall 2020 release you will have the ability to use Multi-Factor Authentication for e-mail functionality. This new feature relies on an Azure Active Director App Registration. In this first section we will go over how to perform the Azure side the of the configuration.

- 1. First, you'll need to have an administrator who can log into the Azure Portal (<u>https://portal.azure.com/</u>).
- 2. In the search box, type App Registration and select that option:

~
Dev Tools
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retat

3. Click on New Registration as shown in the below screenshot:

\equiv Microsoft Azure	
Home >	
App registrations 🛛 🖈	
+ New registration 🕀 Endpoints	🥕 Troubleshooting 🞍 Download (Preview) 🛛 🛇 Got feedback?
Starting June 30th, 2020 we will no lo Applications will need to be upgraded	nger add any new features to Azure Active Directory Authentication Library (ADAL) and Azure AD Graph. We will continue to provide technical support and se to Microsoft Authentication Library (MSAL) and Microsoft Graph. Learn more
All applications Owned applicatio	ins
$ \mathcal{P} $ Start typing a name or Application ID	to filter these results
Display name	Application (client) ID

4. You will then choose settings for your new application.

a. Enter the name of Application Name (e.g. GPMBAApp)

b. Support account types: Based on the domain or accounts used in the organization, user can select the respective option.

- c. Account in any organizational directory (Single tenant)
- d. Account in any organizational directory (Any azure AD account Multitenant)

Account in any organizational directory (Any azure AD account – Multitenant) and personal Microsoft accounts (e.g. Skype, Xbox).

Register an application					
The user-facing display name for this application (this can be changed later). GPMFAApp ✓					
Supported account types					
Who can use this application or access this API?					
Accounts in this organizational directory only (sa.global only - Single tenant)					
Accounts in any organizational directory (Any Azure AD directory - Multitenant)					
Accounts in any organizational directory (Any Azure AD directory - Multitenant) and personal Microsoft accounts (e.g. Skype, Xbox)					
Help me choose					
Redirect URI (optional)					
We'll return the authentication response to this URI after successfully authenticating the user. Providing this now is optional and it can be changed later, but a value is required for most authentication scenarios.					
Web V e.g. https://myapp.com/auth					
By proceeding, you agree to the Microsoft Platform Policies 😋					
Register					

- 5. Click on Register button.
- 6. Click on API Permission on the left side panel as shown in the screenshot.

Search (Ctrl+/)	« 📋 Delete 🜐 End	points			
Overview	▲ Got a second? We	e would love your feedback on Microsoft identity platform (previously Az	ure AD for developer). \rightarrow		
Quickstart Integration assistant (preview)	Display name	: GPMFAApp	Supported account types	: Multiple organizations	
M Integration assistant (preview)	Application (client) ID	: 5b40e06d-8ddd-4833-9e7c-ffbac0d5889a	Redirect URIs	: Add a Redirect URI	
anage	Directory (tenant) ID	: 85d3d2d0-e41a-4759-ac99-6bc18c0b5f4b	Application ID URI	: Add an Application ID URI	
Branding	Object ID	: 2f83b84b-7ed4-417f-b8ab-4ff6ea3bbec3	Managed application in I	: GPMFAApp	
Authentication		Ŕ			
Certificates & secrets	Welcome to the r	new and improved App registrations. Looking to learn how it's changed fr	rom App registrations (Legacy)? Learn more		
Token configuration					
API permissions		h, 2020 we will no longer add any new features to Azure Active Directory			
API permissions	longer provide fe	ature updates. Applications will need to be upgraded to Microsoft Auther	ntication Library (MSAL) and Microsoft Graph. Learn m	ore	
Expose an API Owners					
Expose an API	Call APIs		Documentation		

7. Click on Add permission button.

Home > App registrations > 	l per	rmissions 🖈						
Search (Ctrl+/) Overview Quickstart // Integration assistant (preview) Manage	×	Configured permissions Applications are authorized to call AF all the permissions the application Add a permission	is when they are	granted permissions by users/ad about permissions and consent	mins as part of the conse	nt process. The list of con	figured permissions shou	uld include
🔜 Branding		API / Permissions name	Туре	Description		Admin consent req	Status	
Authentication		✓ Microsoft Graph (1)						
📍 Certificates & secrets		User.Read	Delegated	Sign in and read user profile		-		
H Token configuration								
 API permissions 								
 Expose an API 								
Owners								
Roles and administrators (Pre Manifest	L							

8. Microsoft Graph -

By default, Microsoft Graph application will have read permission for the user profile.

To allow graph application to send an email, we need to add "Mail.Send" permission.

Home > App registrations >	ormissions à	Request API permissions					
Search (Ctrl+/) Search (Ctrl+/) Overview Overview Overview Overview Autografic assistant (preview) Manage Banding Muthiculation	Refer in Solution >> Refer in Solutio	Select an API APIs my organization uses My APIs Commonly used Microsoft APIs Microsoft Graph Be adverage of the temetidox amount of data in Office 365, Enterprise Mobility + Society and Windows 10. File adverage of the temetidox amount of data in Office 365, Enterprise Mobility + Society and Windows 10. Society and Windows 10.					
Certificates & secrets Certificates & secrets Cover configuration API permissions Expose an API	User Read Delegated Sign in and read user	Schedule large-scale parallel and HPC applications in the cloud	Azure Data Catalog Programmatic access to Data Catalog resources to register, annotate and search data assets	Azure Data Explorer Perform ad-hoc queries on teratytes of data to build near real-time and complex analytics solutions			
 Owners Roles and administrators (Pre Manifest Support + Troubleshooting 		Azure Data Lake Access to storage and compute for big data analytic scenarios	Azure DevOps Integrate with Azure DevOps and Azure DevOps server	Azure Key Vault Manage your key vaults as well as the keys, secrets, and certificates within your Key Vaults			

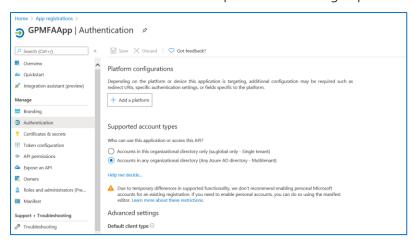
- 9. Click on delegated permission.
- 10. Search for "Mail. Send" in the select permission search box.
- 11. Mark "Mail. Send" checkbox and click on add permission.

	Request API permissions	×
	 CALLAPIS Microsoft Graph https://graph.microsoft.com/ Docs ♂ What type of permissions does your application require? 	
() C(Delegated permissions Your application needs to access the API as the signed-in user.	Application permissions Your application runs as a background service or daemon without a signed-in user.
١,	Select permissions	expand all
	mail.send	
F	Permission	Admin consent required
	∨Mail (1)	
	Mail.Send Send mail as a user ①	·
	Mail.Send.Shared Send mail on behalf of others ①	

12. Mail.Send permission will be added under Microsoft Graph.

Search (Ctrl+/)] «	🜔 Refresh 🛛 💙 Got feedbac	k?			
Overview Quickstart	^	You are editing permission(s) to	o your application, i	users will have to consent even if they've alrea	dy done so previously.	
 Integration assistant (preview) 		Configured permissions				
Manage		Applications are authorized to call A all the permissions the application r			part of the consent process. The list of configured permi	issions should includ
Branding		Add a normission				
 Branding Authentication 		+ Add a permission				
-		+ Add a permission API / Permissions name	Туре	Description	Admin consent req Status	
Authentication			Туре	Description	Admin consent req Status	
Authentication Certificates & secrets Token configuration	J	API / Permissions name	Type Delegated	Description Send mail as a user	Admin consent req Status	
Authentication Certificates & secrets Token configuration API permissions	ļ	API / Permissions name			Admin consent req Status	
Authentication Certificates & secrets		API / Permissions name Microsoft Graph (2) Mail.Send	Delegated	Send mail as a user	Admin consent req Status	

13. Click on "Authentication" on the left panel under Manage option.



- 14. Click on Add Platform.
- 15. Select Mobile and desktop application.

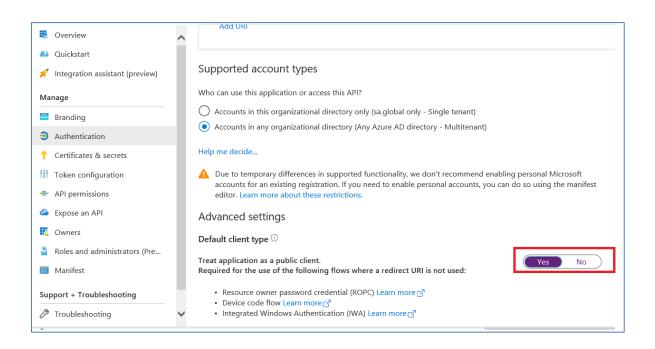
	Configure platforms		Х
	Web applications		
ed	Web Build, host, and deploy a web server applicationNET, Java, Python	Single-page application Configure browser dient applications and progressive web applications. Javascript.	
	Mobile and desktop applications	Android	
	Objective-C, Swift, Xamarin	Java, Kotlin, Xamarin	
t nif-	Mobile and desitop mappleations Window, UWP, Console, IoT & Limited- entry Devices, Classic iOS + Android		

16. Enter the value "urn:ietf:wg:oauth:2.0:oob" in the Custom Redirect URIs text box as shown in the screen shot. This uri will redirect to the original application.

C All platforms	Quickstart	Docs 🗗
Redirect URIs The URIs we will accept as destinations when returning authentication r after successfully authenticating users. Also referred to as reply URLs. L Redirect URIs and their restrictions a		
 https://login.microsoftonline.com/common/oauth2/nativeclieth https://login.live.com/oauth20_desktop.srf (LiveSDK) msal5b40e06d-8ddd-4833-9e7c-ffbac0d5889a://auth (MSAL only) 	2	
Custom redirect URIs		
urn:ietf:wg:oauth:2.0:oob		~
Configure Cancel		

- 17. Click on Configure button
- 18. Save the changes for the application.

19. As of now, Multi-Factor Authentication is not supported in Web Client. Once the Web Client changes are implemented, Default client type must be set to "Yes" as shown in the screen shot.



20. Click on Overview on the left side pane. The Application (client) ID can used in the Microsoft Dynamics GP.

Home > sa.global App registrations > GPMFAApp *										
» ا	🔋 Delete 🌐 Endpoints									
Overview	↑ Got a second? We would love your feedback on Microsoft identity platform (previously Azure AD for developer). →									
	Display name : GPMFAApp	Supported account types : Multiple organizations								
1 Integration assistant (preview)	Application (client) ID : 5b40e06d-8ddd-4833-9e7c-ffbac0d5889a	Redirect URIs : 0 web, 0 spa, 1 public client								
Manage [Directory (tenant) ID : 85d3d2d0-e41a-4759-ac99-6bc18c0b5f4b	Application ID URI : Add an Application ID URI								
Branding (Object ID : 2f83b84b-7ed4-417f-b8ab-4ff6ea3bbec3	Managed application in I : GPMFAApp								
➔ Authentication	8									
Certificates & secrets Token configuration	Starting June 30th, 2020 we will no longer add any new features to Azure Active Directory Authentics we will no longer provide feature updates. Applications will need to be upgraded to Microsoft Authentice.	tion Library (ADAL) and Azure AD Graph. We will continue to provide technical support and security updates but tritication Library (MSAL) and Microsoft Graph. Learn more								

How to configure Multi Factor Authentication in Microsoft Dynamics GP

First, go to the Company E-Mail Settings window at Microsoft Dynamics. Click Tools, Select Setup, choose Company and then click E-mail Settings.

Enter the Application (Client)ID from your Azure Application to the new field of the same name that has been added in this window.

📶 Company E-mail S — 🗌 🗙											
V		1	2								
OK Cancel	File	Tools	Help Add	Debug							
Actions	File	-	Help	Debug							
Select E-mail Document Options Embed Documents in Message Body Send Documents as Attachments File Formats Allowed DOCX M HTML PDF XPS											
Enable E-mail <u>Sales Series</u> <u>Purchasing Series</u>											
Application (Client)) ID 5640)e06d-8dd	d-4833-9e7c-fft	bacOd5889a							



Additional Notes:

There is a new column (MSGraphClientID) added to the company table SY04900, syEmailSetupOptions that stores the Application Client ID value from Azure.

When you tab off from that field you will get the pop-up window for the Multi Factor Authentication. Users must enter the login credentials to authenticate. Below is the sequence of events you will encounter:

Sign in to your account

 Microsoft

 Sign in

 user@contoso.onmicrosoft.com

 Can't access your account?

🚮 Sign in to your account	
Microsoft	
← Imiller@Imillergp.onmicrosoft.com	
Enter password	
Password	
Forgot my password	
	Sign in

Microsoft
Imiller@Imillergp.onmicrosoft.com
Enter code
We texted your phone +X XXXXXXXX78. Please enter the code to sign in.
Code
Having trouble? Sign in another way

The user that you authenticate as in this window needs to <u>have Multi Factor Authentication enabled</u> in Office 365/Exchange Online

Click on Ok to save the changes in the Company E-mail Settings window.

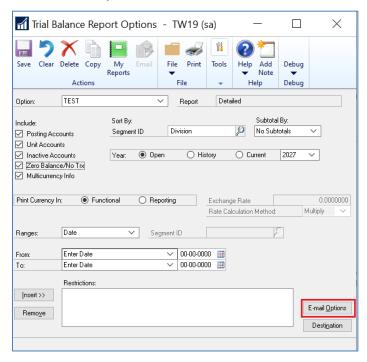
Examples of Multi Factor Authentication in Microsoft Dynamics GP

First, when performing e-mail functionality in Dynamics GP that would normally fall under the Exchange or MAPI features, your experience would look like:

Go to a window where you can e-mail a report, example click Reports, choose Financial and click Trail Balance Report

Open an existing report option or create a new one.

Click on Email Options



Similar to the current Exchange functionality in Microsoft Dynamics GP, once you have successfully responded to the Multi Factor Authentication window you should not need to enter a text code again within your GP session. You may see the MFA window open, but if you click on your account again it should let you proceed without the second authentication. Once authenticated you should be taken to the Email Options window where you can set a recipient for the e-mail.

Once you've set who will receive the email you can click on the Email button in the Action Pane to send the message, which should then send out of Dynamics GP.

📶 Trial Ba		×					
5	XÞ			1	? 🗂		
Save Clear	Delete Copy	My Email	File Print	Tools	Help Add	Debug	
	Actions	Reports	File		 Note 		
	Actions		File	*	Help	Debug	
Option:	TEST	~	Report	Deta	iled		
Include:		Sort By:			Subtota	-	
🗹 Posting Acc	ounts	Segment ID	Division		P No Sub	totals	×~:
🗹 Unit Accour	nts						
🗹 Inactive Acc	counts	Year: 💿 Open	🔾 His	tory	 Current 	2027	×~
🗹 Zero Balanc							
Multicurrenc	y Info						
Print Currency In	n: 💿 Func	tional 🔿 Repor	ting	Exchang	je Rate		0.0000000
				Rate Cal	culation Method:	M	lultiply 🗸
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To:			~ 00-00-000	00 🏢			
	Restrictions:						
Insert >>							
Tugor >>							5 10 1
Remove							E-mail Options
							Destination
						_	

Next, the other main e-mail functionality in Dynamics GP, workflow notifications, uses SMTP and the MFA experience there looks like:

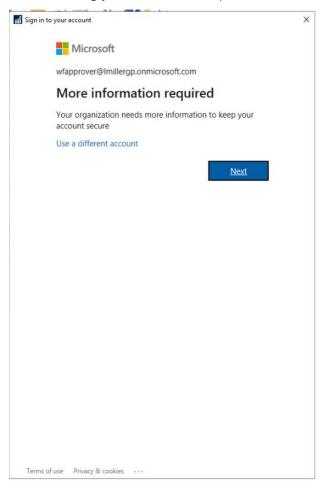
1. The Workflow process will remain the same until you click Submit on the Workflow Action window

ni Pur	chase Ord	der Entry	TW01	8 (sa)							_		\times			
Save	Blanket	Actions	AA	View History	Options	View	Additional	File	Print	E-mail	-	C Help	Add Note			
	Act	ions		Workfl	Options	View	Additional		File		Tools	He	elp			
Туре:		Standa	rd	~	Hold	Ve	endor ID					<i>P</i> 🖸	→ ∮			
P0 Nur	mber				P 🗋	N	ame									
Buyer I	D	_			<i>P</i> 🗋	D	urrency ID	Z-U	S\$			\mathcal{P}) 🔶			
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Comme	nt ID				8) 🗋 🄶	Total			-1-					~	
										_				Submit	Cancel	
	▶ ▶	PO Numbe	r	~		PO Statu:	s New		Revisi	ion	-					

At that point you'll receive the MFA prompt, where you'll need to provide Username and Password for your account.

First time user experience

After entering your username and password in the MFA window you'll see:



Click Next

You'll then be able to select which second method of authentication you would like for your account.

Additional security verification	×
Microsoft	
Additional security verification	
Secure your account by adding phone verification to your password. View video to know how to secure your account)
Step 1: How should we contact you?	
Authentication phone	
Authentication phone	
United States (+1) S551234567	
Method	
O Send me a code by text message	
Call me	
Next	
Your phone numbers will only be used for account security. Standard telephone and SMS	
charges will apply.	
#2020 Minute Land L Brian	
©2020 Microsoft Legal Privacy	

You'll get the initial verification for your account and be presented with an App Password, which can be used by some applications that use MFA.

Additional security verification	×
Microsoft	
Additional security verification	
Secure your account by adding phone verification to your password. View video to know how to secure your account	0
Step 3: Keep using your existing applications	
In some apps, like Outlook, Apple Mail, and Microsoft Office, you can't use a phone to secure your account. To use these apps, you'll need to create a new "app password" to use in place o your work or school account password. Learn more	f
Get started with this app password:	
xtktchjfvwwlkpry	
Done	
©2020 Microsoft Legal Privacy	

You will then see a prompt like the one below asking if you want to trust the Azure App Registration you've previously setup. Click Accept to proceed.

Microsoft wfapprover@Imillergp.onmicrosoft.com Permissions requested	
wfapprover@Imillergp.onmicrosoft.com	
Permissions requested	
Fermissions requested	
GPMFAApp unverified	
This application is not published by Microsoft.	
This app would like to:	
✓ Send mail as you	
 Maintain access to data you have given it access to 	
Sign you in and read your profile	
Accepting these permissions means that you allow this app to use your data as specified in their terms of service and privacy statement. The publisher has not provided links to their terms for you to review. You can change these permissions at https://myapps.microsoft.com. Show details	
Does this app look suspicious? Report it here	
Cancel Accept	
Terms of use Privacy & cookies	

If Multi Factor Authentication fails at any point, then there will be a warning message displayed.



TLS 1.2

Another reason why we are excited for the Microsoft Dynamics GP Fall 2020 release is the fact that it is going to address functionality that will be affected by the upcoming retirement of the TLS 1.0 and 1.1 protocols. To refresh your memory on this, we published the following blog on some limitations with various Dynamics GP functionality:

https://community.dynamics.com/gp/b/dynamicsgp/posts/dynamics-gp-and-tls-1-0

With the Fall 2020 release the following features will now be able to function with TLS 1.0 and 1.1 disabled:

1. E-mailing from within Dynamics GP when using both the Exchange Server Type as well as the SMTP email that is used for the Workflow feature in Dynamics GP.

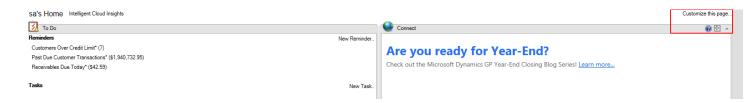
- 2. The Microsoft Dynamics GP Web Client
- 3. Web Services for Microsoft Dynamics GP

NOTE: Web Services for Microsoft Dynamics GP still requires TLS 1.0 when using a SQL Server database for the Authorization Store. If you reinstall Web Services for Microsoft Dynamics GP to an Active Directory partition per <u>this blog article</u> you can operate with TLS 1.0 and 1.1 disabled.

In terms of functionality that still requires TLS 1.0, the refreshable Excel reports that can be deployed from Dynamics GP are still using the SQLOLEDB provider, which requires TLS 1.0. You can manually update the connection string in your Excel files to use the SQLNCLI11 provider as a workaround.

Save per user column layouts on Home Page

In the Microsoft Dynamic GP Fall 2020 release users will be able to customize and save the layout of their Home Page. To use this functionality you start by clicking on Customize this page... in the upper-right corner of the Home Page:



📶 Customize Home Page	- TWO18 (sa)		_		×
🕢 🗙 💼	1 2				
OK Cancel File	Tools Help				
Actions File	Tools Help				
Customize your he	ome page				
Modify the content and layout	of your home pag	в.			
Home Page Type					
O Dynamics 365 Busines	s Central Insights				
Default					
☑ ToDo ☑ Quick Links	→	Business Analyzer		2 • 🖍	
Connect		My Reports		→	
Time Management		Procurement Power Bl		RII	
	0100	Show All		121	
Column Layouts					
O One Column	Tur	Column		e Column	
O one column	© Im	Column	O me	ecolumn	
Column Stack: 🔘	Top O B	ottom 💿 Righ	t ()	Left	
				Change F	Role

You can then use bottom section of the Customize Home Page window to select the Column Layouts:

Also in this window you can select how you want the columns to stack when you maximize a specific section of the Home Page. For example, if you have it set to Bottom and in the Home Page you select the Maximize button:

sa's Home Intelligent Cloud Insights

1 To Do	/ 😨 🕅 🔨
Reminders	New Reminder
Customers Over Credit Limit* (7)	Maximize/Multicolumn mode
Past Due Customer Transactions* (\$1,940,732.95)	
Receivables Due Today* (\$42.59)	
Tasks	New Task
Workflow Tasks	

The window will look like this with the columns stacked at the bottom of the page:

sity Expre Veder Under large 1 Control Response 1 Control Response 2 C	sa's Home Intelligent Cloud Insights		Contractor this serve
Readers Centers for cellur (?) Pad Cellur (?) Rescriete Cellur (?) Rescriete Cellur (?) Rescriete Cellur (?) Rescriete Cellur (?) Rescriete Cellur (?) Teal Net Teal Ved Ker Teal Net Teal			Customize inis page
Readers Centers (17) Pace De Catters (17	To Do		
Packades Parasetion (1920): Tot Nor Tark (1920): Tot Nor Tark (1920): Tot Nor Tark (1920): Packades Parasetion (1920): Packades Packades Packade			New Reminder.
Packades Parasetion (1920): Tot Nor Tark (1920): Tot Nor Tark (1920): Tot Nor Tark (1920): Packades Parasetion (1920): Packades Packades Packade	Customers Over Credit Limit* (7)		
Received De Tody 192 39 Tod Tod Star T			
Test New Test Weaker Test Image: Second			
Wedder Task Yeir Task			
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1 = To Do

While the number of columns you want to display does not carry over to the module area pages (e.g. Financial, Sales, Purchasing, etc.) the column stacking option does. This will help maintain a similar experience as users navigate around Microsoft Dynamics GP.

The column number setting is held in the syHomePageLayout (SY08100) table in the system database. The SectionIDs in this table have the following values:

3 = Business Analyzer
4 = My Reports
5 = Quick Links
6 = Connect
7 = Time Management
8 = Procurement
9 = Project Time and Expense
10 = PowerBI

The Column Stack setting is held in the syHomePage (SY08000) table, specifically the

ColumnStackPosition field.

0 = Top

1 = Bottom

2 = Right

3 = Left

Disable print dialog when printing to word

With the Microsoft Dynamics GP Fall 2020 update, you can now use Named Printers with Word Templates. This lets users access full one-click printing when using Word Templates. No more print dialog when using Templates!

To enable this feature you must first have Named Printers setup, you can find instructions for a new setup here: <u>https://docs.microsoft.com/en-us/dynamics-gp/installation/systemadminguide#setting-up-named-printers</u>

Once you have the basic Named Printers setup, you can mark each printer to use Named Printers for Templates. Just open the Assign Named Printers window. Go to Tool, click setup, choose system, and click Named Printers.

Once you open this window, all you need to do is click the Setup button and select the Printer ID the users usually use, then mark the 'Use Named Printer when printing word Templates' checkbox. Click Save on the Setup Named Printers window, and now when users click print the document will be sent directly to the printer after generation.

Assign Named P	rinters - TWO0	3 (sa)					_		\times
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HPF337DF (HP Office	Jet Pro 8720)								
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Setup Name	Printers - TWO03 (sa)	-	_	×
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Extra Description				
🗹 Use Named F	Printer when printing Word Template	s		
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Additional Notes:

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There is a new column (UseNamedPrnForWordTemplate) added to the System (Dynamics DB) table STN41100, ST_Printer_Options_MSTR.

Enable Self Service user type access to User Preference

Enable Self Service user type the ability to manage User Preference and Workflow Delegation settings.

This feature is pretty self-explanatory and was a long-time request by our customers. You need to access this window to set delegation and if you are a manager setup as a user type of self-service prior to Microsoft Dynamics GP 18.3, you could not access this window to set up delegation.

In the user setup, I have a user setup as a self-service user type. You can access this by choosing Tools, then Setup, click System and then choose User.

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Web Client user only (no SQL Server Account) Payroll View for Human Resources SQL Server Account Directory Account	\sim
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SQL Server Account SELFSERVICE A SQL Server login account is not	
Password required for a user that will only access	
Confirm Password Microsoft Dynamics GP Web Client. To create or modify a SQL Server login	
Advanced SQL Server options account, you must have elevated SQL Server permissions, such as a system	
Enforce Password Policy administrator.	
Enforce Password Expiration	
Change Password Next Login	

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The access to this window is under Microsoft Dynamics GP, click User Preferences then choose the Workflow Delegation option.

d User Prefere	ences - TWO03	(SELFSERVICE)		_		×			
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Maximum print output screen

With the release of Microsoft Dynamics GP, you are getting the largest requested feature of all time, Maximum print to output screen. This was a huge request by our customers over the last few years and we have finally put this into the core product.

As we all are uses of Microsoft Dynamics GP, how many times in a day do you print a report to screen and now by habit you are always going to the top right to expand the report to FULL SCREEN. With 18.3, no longer, with a blink of your eye, the report will automatically pop out to full screen mode for you, WOW!!

Improve customer print experience. User no longer must manually maximum the print output screen each time they print to screen.

I think Shawn who entered the request summed it up the best.



"Print to Screen" Size Change Shawn Dorward, MVP on 3/3/2018 10:33:06 AM

Why oh WHY do I have to resize the print preview window every time I run a report to the screen? This seems like a simple fix and would save 1000's of click and drags... maybe even every day! :) Category: System

🚮 Screen Output - RM Cust	omer Report		– o >
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🎒 Print 🖃 Send To 👔 Mod	ily 100% V Completed 2 Pages		Page 1
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-	: PAUL W PAUL W.		98052-6399 - 98052-63
Customer Class	: USA-ILMO-T1 - USA-ILMO-T1	State:	
Type:		-	42555501010000 - 4255
			Bob Fitz - Bob Fitz
Customer Name:	Aaron Fitz Electrical - Aaron	Fitz Electrical	
Customer ID:	AARONFIT0001	Hold:	No
Customer Name:	Aaron Fitz Electrical	Inactive:	No
Short Name:	Aaron Fitz Elec	Parent Customer ID:	
Statement Name:	Aaron Fitz Electrical	Class ID:	USA-ILMO-T1
Address ID:	PRIMARY	Phone 1:	(425) 555-0101 Ext. 0
Contact Person:	Bob Fitz	Phone 2:	(000) 000-0000 Ext. 0
Address:	One Microsoft Way	Phone 3:	(000) 000-0000 Ext. 0
		Fax:	(312) 555-0101 Ext. 0
City:	Redmond	UPS Zone:	
State:	WA	Shipping Method:	LOCAL DELIVERY
ZIP Code:		Tax Schedule:	USASTCITY-6*
Country:	USA		
1		Comments:	
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Additional Notes:

This is not available in Web Client, due to different user experience.

Bulk edit SmartList Columns

With the release of the Microsoft Dynamics GP Fall 2020 you now have the ability to mass edit the columns on a SmartList.

In order to see this new functionality you will need to start by opening SmartList (Microsoft Dynamics GP and click SmartList). You'll then navigate to the specific SmartList you want to edit, for example we will look at the default Sales, then choose Customers and * for example.

Then click on the Columns button:

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>	Customers - *									
>	Customer Number	Customer Name Aaron Fitz Electrical	Address 1 One Microsoft	Address 2	City Redmond	State WA	Zip 98052-6	Phone 1 (425) 555-01	1	
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When the Change Column Display window opens, you'll notice that there is a new column with checkboxes.

Display Name	Original Name	
Customer Number	Customer Number	
Customer Name	Customer Name	15
Address 1	Address 1	2
Address 2	Address 2	
🗌 City	City	1
State	State	
🗌 Zip	Zip	_
Phone 1	Phone 1	
_		
		~

If you want to remove more than one column you can mark them, then click Remove.

Similarly, if you mark multiple columns and use the arrow buttons on the right you can reorder more than one column at a time.