

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

# Microsoft Dynamics GP 18.6



### 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.



It will take approximately 120 minutes to train the features in Microsoft Dynamics GP.



The features for Microsoft Dynamics GP are built around: Ease of Use - Customer Requests - Extend Functionality



After this course/module you will be able to:

Understand the Microsoft Dynamics GP Features.

# Microsoft Dynamics GP Lifecycle

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The time to complete this lesson, including exercises, is 30 minutes.

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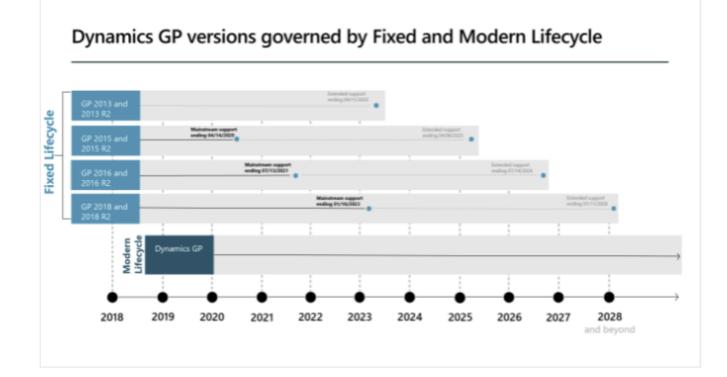
After this lesson you will be able to:

Understand the Lifecycle and what is Modern Lifecycle

# Lifecyle for Microsoft Dynamics GP

Understand the Lifecycle Policies for Dynamics GP:

Software lifecycle policy - Dynamics GP | Microsoft Docs Microsoft is fully committed to supporting our Dynamics GP customers for years to come The exciting future of Microsoft Dynamics GP - Lifecycle Update What Does Modern Lifecycle mean for Dynamics GP?



### System Requirements Updates

The following changes have been made to the Dynamics GP System Requirements for 18.6 release.

Here is a summary of the supported SQL versions based on Microsoft Dynamics GP version.

- -GP 2013 supports SQL 2014, 2012 and 2008
- -GP 2015 supports SQL 2014 and 2012
- -GP 2016 supports SQL 2016, 2014 and 2012
- -GP 2018 supports SQL 2017, 2016 and 2014
- -GP 18.2 and later supports SQL 2019 plus SQL 2017, 2016 and 2014
- -GP 18.5 &18.6 supports SQL 2022, 2019, 2017 and 2016 (SQL 2014 dropped)

Microsoft Dynamics GP System Requirements

### Upgrading to Microsoft Dynamics GP 18.6

#### Upgrade Hot Topic

The only supported upgrade path to the current release is from the release 1 year back from current in accordance with the <u>Modern Lifecycle</u> noted above.

Microsoft Dynamics GP 2023 Upgrade Blog Series



**Note:** As an example of a supported (tested by Microsoft) upgrade path to 18.6 (October 2023 Release) or 2023 Year-End would be from GP 18.4.1361 or later.

# Application Features

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The time to complete this lesson, including exercises, is 30 minutes.

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After this lesson you will be able to:

Familiarize yourself with the features related to Application Modules.

# Financial Summary Inquiry Redisplay

If transactions are posted while Financial Summary Inquiry is open (Select Inquiry, choose Financial, click Summary), you can now redisplay instead of having to close the window. How simple is that right?

With Microsoft Dynamics GP 18.6, a redisplay button is added to the Financial Summary Inquiry Window (Similar to Detail Inquiry window). When the user clicks the redisplay, the system will refresh the data for the account entered, display the same account and year information and redisplay the refreshed data. That way, if the summary inquiry window is open with an account selected, if the user posts a transaction, they can redisplay to see the updated posted information.

🚮 Summary Inqu	iiry - TV	/O05 (sa)			—		$\times$
Clear Redisplay	View	File Print	<b>T</b> ools	Help Add			
Actions	View	File	-	Help			
Account	000 - 11	100 -00		$\rightarrow$			
Description	Cash - C	)perating Account			Year:	2027	~

Period	<u>Debit</u>	Credit	Net Change	Period Balance
Beginning Balance	\$0.00	\$0.00	\$0.00	\$0.00
Period 1	\$0.00	\$0.00	\$0.00	\$0.00
Period 2	\$56,583.42	\$2,994.59	\$53,588.83	\$53,588.83
Period 3	\$33,422.79	\$96,695.26	(\$63,272.47)	(\$9,683.64)
Period 4	\$185,709.22	\$12,945.09	\$172,764.13	\$163,080.49
Period 5	\$0.00	\$50.00	(\$50.00)	\$163,030.49
Period 6	\$0.00	\$0.00	\$0.00	\$163,030.49
Period 7	\$0.00	\$0.00	\$0.00	\$163,030.49
Period 8	\$0.00	\$0.00	\$0.00	\$163,030.49
Period 9	\$0.00	\$0.00	\$0.00	\$163,030.49
Period 10	\$0.00	\$0.00	\$0.00	\$163,030.49
Period 11	\$0.00	\$0.00	\$0.00	\$163,030.49
Period 12	\$0.00	\$0.00	\$0.00	\$163,030.49
Totals	\$275,715.43	\$112,684.94	\$163,030.49	\$163,030.49

# Reverse Fiscal year end close by Company

When the <u>Reverse Fiscal year feature was added</u>, it required all users to be out of ALL Dynamics GP companies. Now with the release if 18.6, you only need all users to be out of company you are in to reverse Fiscal Year End Close for that company only.

You no longer need to have all users logged out of all companies. What a time saver and allows your users to keep processing in other companies.

Example of the error message you would receive prior to the 18.6 release.

You can click Tools, choose Routines, click Financial and then select Year-End Closing.

n Yea	r-End Clo	osing - E	BANK (sa)			—		×
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Clear	File	Tools	Help Add					
Actio	File	-	Help					
<u>Retain</u>	ned Earn	ings Acc	<u>ount</u> 1		-	-	Ş	) →
Startin	ng Journa	al Entry		1	Year	202	22	
Micro	soft Dyna	amics GP						
(1)	J	cannot rev ed in to the	verse the historica e system.	al year b	ecause o	ther users a	are	
-								
_				OK				

## Customer statements display open items

With the release of 18.6, an option was added for Customer statements to display or remove Fully Applied Transactions.

This will remove any payments, credits, debits, invoices that have been fully applied.

Prior to 18.6, if you use the option for 'exclude fully paid PAYMENTS', then it only drops off the payment, but the invoice is still listed (but with a zero balance). The RM statement pulls ALL documents from the RM20101 OPEN trx table.

Prior to 18.6

Document No.	Date	Code	Description	Amount	Balance
PYMNT000000710810	4/12/2027	PMT			\$0.00
SALES0000001409	4/12/2027	SLS		\$100.00	\$100.00
PYMNT000000710810	4/12/2027	PMT	Applied: SALES0000001409	(\$100.00)	\$0.00
SALES0000001410	4/12/2027	SLS		\$50.00	\$50.00

What we heard from customers is that there is a need to exclude fully paid DOCUMENTS', where it would exclude all documents with a CURTRXM = 0.00 in the RM20101 table.

From the Sales area page, under Routines, choose Statements

n Print Receiv	ables Statements	s - TWO05 (sa)					—		$\times$
Save Clear	Delete E-mail	File Print	<b>T</b> ools	(?) Help	Add Note				
Acti	ons	File	-	He					
Statement ID	BLANK FOR	и 🎾 🗋	Desci	iption		nk Form		_	
Last Printed			Print:		0	Statements	<ul> <li>Alignment</li> </ul>	Form	
	[	0 -		Option		Print Remaining St		0.00	
Address ID	On Diants Damas		ate to Pr		Enter Da Enter Da		~	2/15/2027	
Form:	On Blank Paper by Customer ID		ummarize		Enter D		~		
Customers:	by Customer ID by Document Nu		ut-Off Da				~		
Documents:	by Document Nu			e Oldest		eriod Amounts by U	napplied Credit	Amounts	
Print For: Show Applied Pa Exclude Fully Ap		Include	Туре:		Pri	nt: Credit Limits	🔽 Pay	ment Terms	
Consolidated Na			n Item Ince Forw	vard		Finance Charge Individual Child Sta	_	ssages	
						marriada entra ex	3.01101100		
Ranges:	by Customer ID	~	O All	0	From:				P
	Restrictions:			_	To:				E.
Insert >>		t to γγγγγγγγγγγγγγγγ	j						
Inser(>>		· ··· <i>333333333333</i> 333333333	r					E-mail <u>O</u> ptio	ons
Remo <u>v</u> e								Mess <u>ag</u> e:	s
								Desti <u>n</u> atio	n

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If you choose the Exclude Fully Applied Payments option from the above window, many lines will be removed from the statement.

ēabrikam, Inc.			STATEMENT	Date: Accou	4/30/2 int: ADAM nt Paid:	2027 IPARK0001
ADAM PARK ROBERTA M SUITE 9876 321 CHESTN INDIANAPOL	ASOURAS	91		Credit Limit: 4 Payment Term Finance Charg Deposits Rece	ns: Net 30 ge APR: 18.	00% \$0.00
Document No	Date	Code	*Please return this portion with your paymer		I	Balance
Document No. RMA003001	Date 8/31/2027	Code SLS	^Please return this portion with your paymen Description RMA003001	t^ Amount	\$933.58	Balance \$933.5
RMA003001			Description			\$933.5
RMA003001 SALES00000001006	8/31/2027	SLS	Description		\$933.58	
RMA003001 SALES00000001006 SLS13014 SLS13015	8/31/2027 3/15/2027	SLS SLS SLS SLS	Description		\$933.58 \$153.01	\$933.5 \$1,086.5
RMA003001 SALES0000001006 SLS13014 SLS13015 SLS3004	8/31/2027 3/15/2027 1/23/2024 1/29/2024 11/23/2023	SLS SLS SLS SLS SLS	Description		\$933.58 \$153.01 \$8,500.00 \$5,470.19 \$2,535.76	\$933.5 \$1,086.5 \$9,586.5 \$15,031.7 \$17,423.1
RMA003001 SALES00000001006 SLS13014 SLS13015 SLS3004 STDINV2225	8/31/2027 3/15/2027 1/23/2024 1/29/2024 11/23/2023 4/12/2027	SLS SLS SLS SLS SLS SLS	Description RMA003001 STDINV2225		\$933.58 \$153.01 \$8,500.00 \$5,470.19 \$2,535.76 \$96.25	\$933.5 \$1,086.5 \$9,586.5 \$15,031.7 \$17,423.1 \$17,519.3
RMA003001 SALES0000001006 SLS13014 SLS13015 SLS3004 STDINV2225 STDINV2229	8/31/2027 3/15/2027 1/23/2024 1/29/2024 11/23/2023 4/12/2027 4/12/2027	SLS SLS SLS SLS SLS SLS SLS	Description RMA003001 STDINV2225 STDINV2229		\$933.58 \$153.01 \$8,500.00 \$5,470.19 \$2,535.76 \$96.25 \$2,567.95	\$933.5 \$1,086.5 \$9,586.5 \$15,031.7 \$17,423.1 \$17,519.3 \$20,087.3
	8/31/2027 3/15/2027 1/23/2024 1/29/2024 11/23/2023 4/12/2027	SLS SLS SLS SLS SLS SLS	Description RMA003001 STDINV2225		\$933.58 \$153.01 \$8,500.00 \$5,470.19 \$2,535.76 \$96.25	\$933 \$1,086 \$9,586 \$15,031 \$17,423 \$17,519

The most common request we receive from our customers regarding statements is to only show open items, like the example above. Prior to the 18.6 release, the only solution is to use the Paid Transaction Removal tool.

With this new feature, it is still important to use the Paid Transaction Removal routinely, you may be able to get away with not running it as frequently as you used to on prior Dynamics GP versions.

# Email/Reprint Vendor Remittance with message fields

Many customers modify the Message setup specific to information they want the vendor to understand with the email. When you email or reprint the vendor remittances, the customized fields you added from email message setup are not included.

Go to Purchasing > Inquiry > Transaction by Vendor > Select Vendor ID > Select the Payment > click on the blue Document Number> Click on Re-create Check Stub button > send re-print EFT remittance email.

With the release of 18.6 the customized fields that you added and printed on the original form, will now also print or be included when you email or reprint the remittance from the Inquiry window.

n Message Setu	p - TWO (sa)						—		$\times$
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Save Clear De	elete Copy	File T	Tools	Help Add • Note	Debug T				
Action	s	File	•	Help	Debug				
Message ID	REMITTANC	E			Ş	0			
Description									
Message Type	Standard			~					
Series	Purchasing			~					
Doc. Type	Vendor Remit	tance		~					
Subject									
Body		Docu	ument Line	es				Valida	te
Hello,									^
Attached is your ጸ	Document Nu	mber%} rer	nittance ir	n the amount o <mark>f {</mark> %	Check Tot	al%}.			
Should you have a	ny questions, p	lease con	tac the AF	<sup>o</sup> department a <mark>t {</mark>	&Address 13	%}			

# ALL Payables 1099 forms print with LINES.

With the 18.5 release, we were really excited to have the feature <u>which allowed you to print a 1099-NEC</u> form with boxes/lines on blank paper. (Similar to what we do with Payroll W-2's)

With this positive feedback from customers with the release of 18.6, all the Payables 1099 forms will now print on blank paper, Miscellaneous, Dividend and Interest.

The new report writer forms will print on 8.5 X 11 blank paper and prints one 109 per page. This will be a nice feature to print your forms to screen and verify 1099 information. It also could be used as the form that is delivered to the vendor.

Microsoft Dynamics GP does not print the 3-part 1099-NEC form with boxes by the IRS (<u>About Form</u> <u>1099-NEC</u>, <u>Nonemployee Compensation | Internal Revenue Service (irs.gov)</u> ). Usually, customers will submit the forms electronically to the IRS vs a printed copy.

To print the 1099 forms with boxes follow these instructions:

Go to Purchasing >> Routines >> Print 1099

1099 Year: select the current year

Form Type: select "One Wide with Box"

Add the remaining information in this window and click the "Print Forms File"

n Print 1099 - T	WO05 (sa)	- 🗆 X						
▼ Fo	Ìile v Help		PAYERS name, street address, city or or foreign postal code, and telephone n Pabrikam, Inc. 4277 West Oak Parkwa	10		RRECTED (if checke 1 Rents S 2 Royalties	OMB No. 1545-0115 Form <b>1099-MISC</b> (Rev. January 2022) For calendar year	Miscellaneous Information
Company	Fabrikam, Inc.		Chicago (312) 436-2671 Ext.		01-4277	S 3 Other income S	2027 4 Federal Income tax withheld S 0,88	Сору В
<u>Address ID</u> Address	Primary 24277 West Oak Parkway		PAYER'S TIN	RECIPIENTS TIN	I	5 Fishing boat proceeds	6 Medical and health care payments	For Recipient
City	Chicago		RECIPIENTS name A Travel Company			Paver made direct sales     totaling 55.000 or more of     consumer products to     mecipient for resale	<ul> <li>8 Substitute payments in lieu of dividends or interest</li> <li>\$</li> </ul>	This is important tax
State ZIP Code	IL 60601-4277 (312) 436-2671 Ext. 0000		Street address (including apt. no.)			9 Crop insurance proceeds	10 Gross proceeds paid to an attorney \$	Information and is being furnished to the IRB. If you are required to file a return, a negligence penalty or other senction may be imposed on you if this income is taxable
Phone Email Address	(312) 436-2671 EXC 0000		City or town, state or province, country,	, and ZIP or foreign		11 Fish purchased for resale	12 Section 409a defferais	and the IRS determines that it has not been reported.
Payer's Federal ID N	2027				13 FATCA filing Requirement	14 Excess oolden parachute payments	15 Noncualified deferred compensations	
1099 Type		Form Type One Wide with Box V	Account number (see instructions)		1	16 State tax withheid S	17 State/Payer's state no.	18 State income S
Vendors	Vendor ID  Vendor ID  Void All  From To	یم با	Form 1099-MISC (Rev.1-2022)	(keep	p for your records)	S www.irs.gov/Form1099MISC	Department of the Treasu	S ary - Internal Revenue Service

**Note:** With the 2022 Year-End form changes from IRS the "For calendar year" field is now blank. In prior years it was populated/printed with a year. On this new form, the year is printed from the "1099 Year" field in the above Print 1099 window.

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# Drop Down List Selection for Batch Source on Navigation Lists.

As we talk about adding to core features and building on existing functionality, our customers stated the <u>Batch Number and Batch Source added to Navigation lists was a HUGE hit in GP 18.5</u>. They wanted more!

With the release of 18.6, again on the Navigation List as everyone loves them and uses them, we added a filter on Batch Source (which was there before), but now you can have a drop-down list of all your batch sources. What users found was it was hard to find the source and type it in exactly correctly, Now we have the lists added for you for easy access to filter based on it.

Post	Print Do	E-mail	Apply Sales Waive Finan NSF▼	ce Charge	Edit X		1 Sales / Invoices 1 Payments 1 Scheduled Payme	» nts	The set 90	) Days▼ e Historic Transacti▼	All-in-One View	Reports	Go To	
	Actions		Mana	ge	Modi	fy	New			Restrictions	Sales	-	-	
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	4/12 4/12	Paymen Paymen		PYMNT0 PYMNT0			Sales Entry		375.00 352.94					
	4/12	Sales / I		STDINV2			Invoice Entry		128.30					
	4/12	Sales / I		STDINV2			Cash Receipts Transaction Entry		567.95					
	4/12	Sales / I		STDINV2			ure & Trav		139.70					
5	4/12	Sales / I		STDINV2			m Park Res		\$96.25					
	4/12	Sales / I		STDINV2			er's Empori		670.80					
	4/12	Sales / I		STDINV2			on Fitz Elec		171.10					
	4/12	Sales / I		INVPS10	07		t Central D		\$99.75					
	4/12	Sales / I		STDINV2	237	Offi	ce Design S		1,910					
	4/12	Sales / I	nvoices	STDINV2	241	Law	rence Tele	\$	513.50					
	4/12	Sales / I	nvoices	STDINV2	240	Asso	ociated Ins	\$	695.40					
	4/12	Sales / I	nvoices	STDINV2	245	Met	ropolitan F	\$7,	051.25					
	4/12	Sales / I	nvoices	STDINV2	246	Con	nmunicatio		\$31.94					
	4/12	Sales / I	nvoices	STDINV2	247	Con	nmunicatio		\$42.59					
	4/12	Sales / I		STDINV2		Visi	on Inc.		3,947					
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	1/12	ا / عماد؟	nvoices		210	Con	toso Itd	¢7:	2 0/7					

	II Purch	nasing Transact	ions (reac	l on	ly) •	
≈ \	Where -	Batch Source	- is -		~ >	
🔶 A	dd Filter	•		C	Receivings Transaction Entry Purchasing Invoice Entry	
	Date	Document Type	Documen		Returns Transaction Entry	
	4/12	Payment	00000000		Voided Receivings Voided Invoices	)6
	4/12	Payment	00000000	C	Voided Receivings Invoice Matches	)0
)	4/12	Payment	00000000		Purchase Order Prepayments	)0
	4/12	Standard	PO2074		Payables Transactions Payables Payments	16
)	4/11	Invoice	00000000		Payables Checks	)6
	4/8/	Payment	00000000		Payables Manual Payments	50
	4/2/	Invoice	00000000		Trx Level Receivings Trx Level Invoices	)0
	4/2/	Payment	00000000	-	Trx Level Invoices	31
	4/1/	Blanket	PO2071			34,152
	4/1/	Drop-Ship Bla	PO2072		A Travel Comp \$3	39,480
	4/1/	Shipment	RCT1156		Signature Syste \$	1,197.00

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### Print and Email Cash Receipts

With the release of 18.5 (2022) we added the <u>functionality to print out a copy of your Customer's Cash</u> <u>Receipts or email a copy of the Customer's payment with a new word template</u>.

Customers took on to this feature and LOVED it and asked for more!

As a reminder, to activate this feature, go to the Sales Area page, under Setup choose E-mail Settings. In the Sales E-mail Setup window, you will see the new option for Cash Receipts. You can also use the Customer Setup button in this window to launch the Customers Navigation List and mass update your Customers for this feature.

From the Customer Maintenance Card, the email address will pull from the Bill To Address ID. The email address must be added to the Internet information window on your selected Address ID.

In Dynamics GP 18.5, this feature was missing from the Mass Customer E-mail setting window, but has now been added. This will allow users to set this up much quicker.

ect Document Options			
Send Documents as Attachment	C Embed Docume	nt in Messag	je Body
Attachment Options			
□ Muticle Attachments and E and			
Mutiple Attachments per E-mail     Set Maximum File Size	0.00 Menahutes		
	0.00 Megabytes		
nd Forms as E-mail			
Enable	Message ID		Format
Sales Quote	SALES DOCUMENT	P	DOCX
Sales Order	SALES DOCUMENT	Q	DOCX
Sales Fulfillment Order	SALES DOCUMENT	Q	DOCX
Sales Invoice	SALES DOCUMENT	Q	DOCX
Sales Return	SALES DOCUMENT	Q	DOCX
Sales Back Order	SALES DOCUMENT	Q	DOCX
Packing Slip	SALES DOCUMENT	Q	DOCX
Receivables Invoice	SALES DOCUMENT	Q	DOCX
Receivables Return	SALES DOCUMENT	Q	DOCX
Receivables Debit Memo	SALES DOCUMENT	Q	DOCX
Receivables Credit Memo	SALES DOCUMENT	Q	DOCX
Receivables Finance Charge	SALES DOCUMENT	Q	DOCX
Receivables Service/Repairs	SALES DOCUMENT	Q	DOCX
Receivables Warranty	SALES DOCUMENT	Q	DOCX
Customer Statement	SALES DOCUMENT	Q	DOCX

The following areas added the email detail icons to cash receipts entry/inquiry windows.

Transactions--> Sales --> Cash Receipts Entry

Transactions--> Sales --> Cash Receipts Entry --> E-mail Detail Entry

Display the default email address ID on the e-mail detail entry window.

Transactions--> Sales --> Cash Receipts Entry --> E-mail Detail Entry

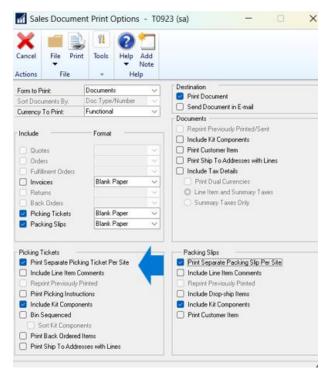
Cash Receipts En	itry - TWO05 (sa)						_		$\times$
🔚 🖄 着	) 🗙 🖪			P	<del>, d</del>		₿ <mark>1</mark>	?	*
Save Auto Post Apply	t Delete AA	Additional	File	E-mail	Print I	Print	Tools	Help T	Add Note
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Amount Checkbook ID Credit Card ID	Cash Credit	\$9	FT .00	Aut	o Apply T AARON		п () и	ational A	ccount Apply
Check/Card Number Comment								Dis	tribution

You cannot bulk print or email from the Receivables Batches window, only from the All-Sales-Transactions Navigation List. If you are going to use the Batch Number Filter, best practice would be to use unique batch IDs or also add a date filter also so that you do not process Payments from previous Batches with the same ID. In the example below, the All-Sales-Transactions Navigation List is filtered using a Document Type of Payment and Batch Number so that only Cash Receipts for the specific batch will appear. I can then mark them all on the list and click Actions then Send in E-mail and then click the Send button to send all 9 Cash Receipts at once.

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Press Pr	rint Packing SI	p 🔻 🔣 Send Packing Slip 🛪	Send in E-mail 🔻	Allocate/Fulfill -	Remove Hold 🔻		
	Adv	. Distribution			Modify		
Y A	II Sales Tran	nsactions (read only) -	Click below to proceed.				
Show	results			Send			
× V	Where - Doo	ument Type 🔻 is 🔻 Pa	yments				
3 A	And 🔻 Bate	h Number 👻 contains	▼ TEMPLATE	>			
	dd Filter 🔻	contains		100			
-							
2	Date	Document Type	Document Number	Customer Name	Amount		
2	4/12/2027	Payments	PYMNT0000000274	Aaron Fitz Electrical	\$1,000.00		
2	4/12/2027	Payments	PYMNT00000000275	Aaron Fitz Electrical	\$100.0		
	4/12/2027	Payments	PYMNT00000000276	Adam Park Resort	\$100.00		
	4/12/2027	Payments	PYMNT0000000277	Adam Park Resort	\$0.0		
2	4/ 12/2021	ruymenco			30.0		
-	4/12/2027	Payments	PYMNT0000000278	Adam Park Resort	\$1,000.0		
2	4/12/2027	3	PYMNT00000000278 PYMNT00000000279	Adam Park Resort Adam Park Resort	\$1,000.0		
2 2 2 2 2	4/12/2027	Payments					
	4/12/2027 4/12/2027	Payments Payments	PYMNT00000000279	Adam Park Resort	\$1,000.0 \$0.0		

# Print Sales Order Processing blank picking ticket template

Prior to 18.6, the SOP Blank Picking Ticket Bin Sequenced and SOP Blank Picking Ticket Order Entered will not print the template version when Print Separate Picking Ticket Per Site is checked and sending directly to the printer. The system will now print the template to the printer. It will print a template for each site and also a final document that includes all sites combined.



Report Informa	tion	
Name: Pac	king Slip	
Option:		
	Ask Each Time	
Destination –		
		_
Report Type:	Template	~
Screen		
Printer		
File		
File Name:		r-1
File Format	Word Documents (*.docx)	
File Futiliac.	Word Documents [ .docx]	
	Append O Replace	

# Set Unit of Measure from the PO Requisition to the Purchase Order

In the 18.6 release a set up option was added to the Requisition Setup window for the user to choose the Unit of Measure. A similar feature is available when creating a Purchase order from Sales Order, but cannot find a similar configuration available for Purchasing module.

On the 18.6 release, when selected, we will use the U of M from the PO Requisition to create the line on the Purchase Order

When this is not set correctly, the unit cost for the Item is changing during the receiving process which leads to an effect on our P/L. The main issue as an example is I have created a Purchase Requisition with 20-CTN. The Vendor accepted to provide the goods in the same UOM. When we convert the UOFM changes to PKT.

This is an issue during Receiving's as the Vendor may not invoice/receipt in the base UoM (think of cases of water - the vendor will send/invoice 1 case, not 24 bottles)

An option was added to Purchasing Setup --> Requisition --> Requisition Purchase for a setting to use Requisition Item U of M (This is similar functionality to SOP --> Purchase.)

Requisition 3	Setup - T092	3 (sa)	—		×												
	dditional File			Add Note													
Requisition Date:	Prev	vious Doc. D	)ate	$\sim$													
Requisition Line Site I	D: Prev	/ious Line's :	Site ID	$\sim$													
Vendor Selection:	Site	Primary Ver	ndor		$\sim$	Pi Pi	urchase Or	ders Pre	view - T092	3 (sa)						- 0	
Cost Selection:	Ven	dor Last Orij	ginating Inv	voice Cost	$\sim$												
Display Requisitions D	uring Entry for: Requested By	All	Requisitio			Validat	e Generate	X Cancel	File Print	Tools		dd ote					
DYNSA		A		115			Actions		File	-	Help	one					
sa					-		6			Ve	endor	P0		Item		sitions	
										<u>Item</u>		WIRE-SCD-00		🗋 Single co		ire	
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U of M: Requisit	ion Line Item's U of	M	~	>						Bece	nt POs for th	is item		_			
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User-Defined 2		efined 2										PO2047		1/21/2		\$0.16	~
Line User-Defined 1	Line D	efined 1								JUNE	LINLAN	102047		1/21/2	2027	ψ0.10	
Line User-Defined 2	Line D	efined 2															
			Procure	ement Feat	ured Items	_								_			

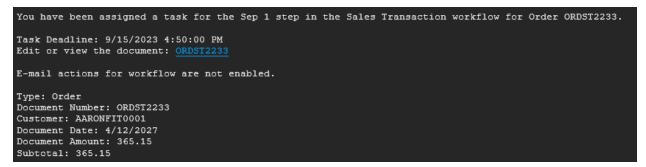
## Format Workflow emails with item decimals

We heard you with over 50+ votes on this feature it was something our customers desperately needed.

Prior to release 18.6, the notification emails from the Workflow feature would default to five decimal places. For example, this is an assignment email for a Sales Order that has been submitted for approval in the previous releases:



In the October 2023 release of Dynamics GP this same notification will look like this:



Notice how the Document Amount and Subtotal values are only displaying two decimals.

You will notice a similar change in the following assignment email for a Purchase Requisition in both the document header and line information:





This change applies to the following workflow types:

Sales Transaction Approval

Purchase Order Approval

Purchase Requisition Approval

**Receiving Transaction Approval** 

Table Physical Names	
POP10100WF	New company view
POP10110WF	New company view
POP10200WF	New company view
POP10210WF	New company view
POP10300WF	New company view
POP10310WF	New company view
POP10500WF	New company view
SOP10100WF	New company view
SOP10103WF	New company view
SOP10200WF	New company view

# Project Time & Expense Workflow My Expenses/ Delegates List

We have added 2 new Navigation Lists for Project Time & Expense specific to Expenses that are designed to help you filter down the clutter and focus on Expenses that involve you and your team if you are a manager or are set up as a delegate for others. These new lists are labeled as My Expenses and My Team Expenses.

My Expenses list – Displays your Expenses, any Expenses submitted by you on behalf of others, and any Expenses that are Pending your approval.

My Team Expenses list – Displays your Expenses, Expenses submitted by users that you are a delegate for (your team), and any expenses that are pending your approval.

Power Users can also add the Workflow user Column to these navigation Lists to make it easier for users to know whether they are the pending approver, or if the Expense is pending someone else's approval.

Select the Customize option under the My Team Expenses Drop Down List.

7	My Team Expenses •						
	Save	Ctrl+S					
	Save As	Ctrl+Shift+S					
	Rename	Ctrl+Y					
Г	Delete						
	Show/Hide						
L	Add to Navigation Pane as Shortcut Add to Home Page						
	Remove Personalizations						
	Customize						
	Refresh	Ctrl+R					

Click Columns and Mark Workflow User under Column Details.

List View Cus	tomization			Columns Details	
View Name: Visible In: Mark Cont Show I		ettings for this view.		Display Columns in this order information Conserved to the second of t	Move <u>Up</u> Move <u>D</u> own <u>R</u> eset
0	Preview	Save	Cancel		

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You will now see the Workflow User column with the User that the Expense is Pending Approval by.

T My Team Expenses • Show results									
× Where ▼ Status ▼ is ▼ Pending User Action									
Expense Report ID	Document Date	Status	Purpose	Total Cost	Workflow User				
ACKE0001-EE-041227-2	4/12/2027	Pending User A	Submitted by Employee	\$200.00	CONTOSOGP\USER1				
ACKE0001-EE-041227-3	4/12/2027	Pending User A	by Manager for Employee	\$300.00	CONTOSOGP\USER1				
BARR0001-EE-041227-2	4/12/2027	Pending User A	submitted by Manager for themselves	\$500.00	CONTOSOGP\USER2				
DOYL0001-EE-041227-2	4/12/2027	Pending User A	submitted by other user	\$700.00	CONTOSOGP\USER1				

NOTE: This process can be repeated for the My Expenses List and the My Timesheets List as well.

# Project Time Expense Workflow my Timesheets List

We have added a new Navigation List for Project Time & Expense specific to Timesheets that is designed to help you filter down the clutter and focus on Timesheets that involve you. This new list is labelled My Timesheets.

My Timesheets list – Displays your Timesheets, any Timesheets submitted by you on behalf of others, and any Timesheets that are Pending your approval.

Transactions + Inq	uiry 🕶 Reports 👻 Cards 👻						
Microsoft Dynam	ics GP 👻						
Project PTE Timesheets Not Submitted Pending Appro	Approve/ Complete* Workflow	Edit Enter Time Modify	Last 90 Days T Include Histo T Include All Ti Restrict	ric Transacti▼ mesheets ▼	Reports		
My Timesheets PTE Expenses	Timesheet ID	Document Date	Status	Start Date	End Date	Total	
Report List	ATKI0001-TS-042314-1	04/24/2014	Pending User A	04/23/2014	04/29/2014	42.00	
Microsoft Dynam	ATKI0001-TS-042314-2	04/24/2014	Pending User A	04/23/2014	04/29/2014	21.00	
SmartList Favorites	ATKI0001-TS-042314-3	04/24/2014	Pending User A	04/23/2014	04/29/2014	42.00	

### Payroll Year-End Wage Report Formatting

Honestly, I can't believe we have lived with this report so long with no formatting!

A very common report we all use at payroll year end time is the year end wage report.

On this report by default the commas display in the header, but are not used in the body of the report. Would make it more readable if wages, taxes etc. used the value definitions like commas.

With the 18.6 release, commas are added to numbers that display on the Year End Wage Report in Payroll. From the Payroll Home page, under Routines, choose Payroll Year-End wage report.

#### Prior to 18.6

FICA Soc Sec Tax Ra FICA Soc Sec Wage L FICA Medicare Tax R EIC Maximum Withhol	imit: ate:	6.2000 160,200. 1.4500 0.0	00 0%					
Ranges: Reporting Year: Employee ID:		- End						
Sort by:	MQGE / Empl	loyee ID						
Employee ID: 13 13456789 abc aneta, ND 592222			Wages,Tips,Oth	her Comp.: y Wages: & Tips: y Tips: yments:	4000000.00 40000.00 40000.00 0.00	Social Sec Medicare T Allocated Dependent	come Tax Withheld: urity Tax Withheld: 'ax Withheld: Tips: Care Benefits:	
18.6 Release								
Imployee ID: TERRY ULIE LBC LNETA, ND 58212	JOHNSOI	Wages,I N Social Medicar Social Advance		987,634.55 Fe 160,200.00 So 200,000.00 Me 0.00 Al		x Withheld: ax Withheld: held:	0.01 5.00 10.00 0.00 0.00	
mployee SSN: 496-69-988	5							
mployment Type: Regular epartment: ACCT	non-MQGE							
N-2 Check Boxes: Statutory Employee	Retiremen	nt Plan						
Number of Employees: Wages, Tips, Other C Social Security Wage Medicare Wages & Tip, Social Security Tips Advance EIC Payment: Nonqualified Plans:	omp: s: s:	29 11,382,607.95 567,130.83 606,930.83 0.00 0.00 0.00	Federal Incom Social Securi Medicare Tax Allocated Tip Dependent Car	ty Tax Withh Withheld: s:	eld: 25 5	,391.45 ,234.72 ,910.50 0.00 0.00	Looks really r bottom totals	
Special Items Box:			Other Items B 401K	o <b>x:</b>		598.01		
IN WI NE MI	Wages 219,368.89 40,279.03 18,114.84 40,991.74 18,758.50 17,778.80 23,316.92 16,364.68	Tax 5,518.87 1,315.11 1,000.39 1,669.75 607.41 752.00 929.50 448.00	Locality		Wages	Tax		

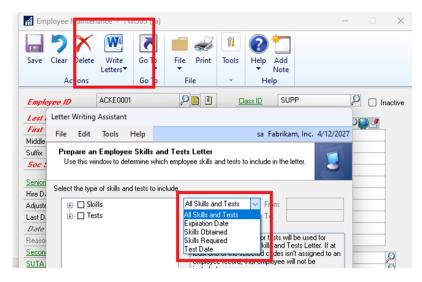
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# Letter Writing Assistant Expiring Test in Human Resources

Test tracking in Human Resources has been very useful to customers for tracking a variety of test information for their business. A nice way to notify employees about the test information is through the Letter Writing Assistant.

Typically, customers like to use this mail merge reporting option as a way to notify of Expiration and test due dates.

From the Employee Maintenance window, you can choose to Write Letters and prepare a new letter or modify an existing letter.



4/12/2027

Pilar Ackerman 987 Willow Ave Winnetka, IL 98272

Dear Pilar,

Our records indicate that your following skills and tests have approaching expiration dates.

Skill Set	Skill	Skill Obtained	Expiration Date	Skill Required
Office	Excel	Yes	0/0/0000	Yes
Office	Powerpoint	Yes	4/10/2023	Yes
Office	Word	No	0/0/0000	Yes

Test Code	Description	Test Date	Test Score	Expiration Date
OFFICE	Office	1/1/2026	84	12/31/2026
AI	AI	4/1/2027		0/0/0000

Sincerely,

# Letter Writing Assistant Final Notice Collection Letter

Many customers like to use the Letter Writing Assistant reports for first, second and third notifications. What we have seen is many of the customers modify the letters and add the Invoice detail information to notify the customer of this information.

With the final notice collection letter, the system did not allow you to print the notice and add invoice details.

With the release of 18.6, you can now modify any of the Collection Letter notices (1, 2 or 3/final) and add the Invoice details to the report and it will print the information for the customer.

Г

		<b>Fabrikam, Inc.</b> 4277 West Oak Parkway Chicago, IL Golol 4277 (312) 436-2671 Ext. 0000
Letter Writing Assistant		4/12/2027
File         Edit         Tools         Help           Letter Templates         Use this window to select the template you would like to use.	sa Fabrikam, Inc. 4/12/2027	Adam Park Resort Roberta Masouras P.O. Box 1391 Indianapolis, IN 46206-1391 Dear Roberta Masouras,
Final Notice First Notice Second Notice	Next > Cancel	Please contact us immediately regarding your outstanding invoice(s).         Document #       Date       Arnount Due         SLS13014       1/23/2024       Net 30       2/22/2024         SLS13015       1/29/2024       Net 30       2/28/2024         SLS3004       11/23/2023       Net 30       2/28/2023         Your account will be turned over to a collection agency if payment arrangements are not made within seven days. This will have a negative effect on your credit rating.         Please send your payment in full or call us to make payment arrangements. We will be required to take further action if you do not contact us regarding your account.         Sincerely,         TWO Inc.         HR         (000) 000-0000       Ext. 0000

# System & Workflow

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The time to complete this lesson, including exercises, is 30 minutes.

Ø

After this lesson you will be able to:

Setup Shared Mailbox with Modern Authentication

## Completely Delete Document Attachments

This new feature in the Dynamics GP October 2023 release will allow you greater control over documents you've attached to records in Dynamics GP. Previously, when you deleted an attachment, it was still maintained in the database and moved to the Deleted tab in the Document Attachment Management window.

With the Microsoft Dynamics GP 18.6 release, you have the ability to completely remove attachments from Dynamics GP. To enable this functionality, you need to navigate to Microsoft Dynamics GP > Tools > Setup > Company > Document Attachment Setup. Once there you need to mark "Allow attachments to

be deleted."

Document A	ttachment	Setup -	TWO2	3 (sa)				-		$\times$
OK Cancel	File	100ls	() Help	Add Note						
Actions	File	*	He	elp						
Allow Docume	nt Attachme	ents								
Attachment Loca	tion Option:									
Default Locatio	in:									<u> </u>
Delete file fi	rom Default	Location	after att	achment						
Maximum File S	·		0	00.00	00 00 M	jabyte Max				
			5	33.33 3	33.33 Meg	зарусе мал	amum			
Attachment Man					_					
Allow attac		e deleted					Attribu	te Defau	ults:	
Delete Pass	sword						۲			
Allow attac	hments to b	e added i	n inquiry	windows	5		0			
Inquiry Pas	word						0			_
Allow attachme	nts to flow fr	om Maste	Recor	de to Dor	uments:		0			-
Allow a						uindouu	0			
Type:	O Flow		<ul> <li>Not I</li> </ul>			11001				
Type.	0				nce windo	NA NA				
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Type:	O Flow		Not I							
Send Attac	hments in e	mail								

When you want to delete an attachment the user's process would then be:

1) Pull up the Document Attachment Management window that contains the attachment you want to delete

2) Highlight the line for the attachment you want to delete

3) Click the Delete button. This will move the attachment to the Deleted tab on this window. If you specified a password on the deletion process this is where you will be challenged for that.

4) When you switch to the Deleted tab on this window you will see that a new button, Delete, is added to the Action Pane. When you click on that it will completely remove the attachment.

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OK	File	Tools	Help															
ctions	File	-	Help															
Record T	lune:			Custome	r Card													
Record N				AARON										_				
File Attack	hments:	ed 1																
	File Nar	•					Date	→ Time	U	ser	Origin				8			
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Delete Action	OK OK	Fi	le	Tools	Help Help Help	Card	(3 (sa)		2re view	N	can	Aţta	ch			_		3
Delete Action	OK OK	Fi	le	Tools	Pelp Help Help	Card	(3 (sa)		2re view	N	can	Aţta	ch			_		3
Delete Acti Record	OK OK d Type: d Numbe	Fi Fi	le	Tools	Help Help Help	Card	<sup>23</sup> (sa)		2review	N 2	can	Aţta	ch			_		
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# Shared Mailbox with Multi-Factor Authentication(MFA)

One of the exciting new features in the Dynamics GP October 2023 release is another request that comes directly from customer feedback. You are now able to set up the Sales and Purchasing series to use a shared mailbox for sending email.

With all the work we have done around Modern Authentication (MFA) and customers using it heavily, Shared Mailbox was something customers found they needed.

The initial setup for this occurs in the Sales E-mail Setup (Microsoft Dynamics GP > Tools > Setup > Sales > E-mail Settings) and Purchasing E-mail Setup (Microsoft Dynamics GP > Tools > Setup > Purchasing > E-mail Settings) windows.

In these windows you will see a new checkbox, Use Shared Mailbox. When you mark that the "Have Replies Sent to:" field will clear and change to "Shared Mailbox:".

You can enter the e-mail address you want documents e-mailed from that series (Sales or Purchasing) to both appear to be e-mailed from and have replies sent back to,

	Cancel	File	Tools	Help A				
	ctions		-	Theip A				
- Purc		File	Tools	Help				
	chasing Docu	ument Setu	an ar					
	Enable				D			
	Purchase (	Order			SING			
	Vendor Re	mittance			NCE			1
SF	nared Mailbox	ĸ						
$\rangle$	Select Nam	es gp	email@gp.	onmicrosof				
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	🛛 Use Share	ed Mailbox				Ven	dor Setup	

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ок	Cancel	File	Tools	Help	Add Note				
Ac	tions	File	Tools	He					
Sales	s Document	Setup							
	Enable				Mess	age ID			
	Sales Quol	-			SALE	S DOCUMENT			ø
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	Sales Fulfil		er			S DOCUMENT			Ø
	Sales Invo				SALE	S DOCUMENT			
	Sales Retu	ım			SALE	S DOCUMENT			Ø
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Packing Slip			SALE	S DOCUMENT			P		
Receivables Invoice			SALE	S DOCUMENT			ļ ļ		
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	Select Nam	es gp	email@gp.	onmicros	oft.com		 		
	Allow Chang	ning 'Beoli	uto' Addra	ee at Entr					
_	Allow Updal			oo ac Entig	,				
	Use Shared						Custor	ner Setup	

After that, you will also need to add an additional API permission to the App Registration in Azure

- 1) Log into the Azure Portal (portal.azure.com)
- 2) Navigation to App Registrations

- 3) Open the App Registration that you're using for Modern Authentication in Dynamics GP
- 4) Click on the API permissions setting on the left
- 5) Click on Add a permissions
- 6) In the window pane that opens click Microsoft Graph
- 7) Select Delegated permissions
- 8) In the search box type Mail.Send

9) In the items that are returned you should already have "Mail.Send" marked. You will need to mark "Mail.Send.Shared" for the new feature

 $\times$ 

### **Request API permissions**

< All APIs								
Microsoft Graph https://graph.microsoft.com/ Docs 🗗								
What type of permissions does your application require?								
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.							
Select permissions	expand all							
𝒫 mail.send	×							
The "Admin consent required" column shows the default value for permission, user, or app. This column may not reflect the value in y more	an organization. However, user consent can be customized per $$\times$$ our organization, or in organizations where this app will be used. Learn							
Permission Admin consent required								
✓ Mail (2)								
Mail.Send ① Send mail as a user	No							
Mail.Send.Shared ① Send mail on behalf of others	No							

#### 10) Click the Add permissions button

11) To finalize this, click the "Grant admin consent for %domain%" button on the API permissions window.

All permissions in the list should have a green checkmark in the Status column when this is completed.

Overview						
<ul> <li>Quickstart</li> <li>Integration assistant</li> </ul>	1 The "Admin consent require	d" column shows ti	ne default value for an organization. However, user consent can i	be customized per permission,	user, or app. This column may n	ot reflect the
Manage	Configured permissions					
<ul> <li>Branding &amp; properties</li> <li>Authentication</li> <li>Certificates &amp; secrets</li> </ul>	all the permissions the applicatio		are granted permissions by users/admins as part of the cor ore about permissions and consent t for Microso	isent process. The list of conf	igured permissions should ind	clude
Token configuration	API / Permissions name	Туре	Description	Admin consent requ	Status	
→ API permissions	∽Microsoft Graph (8)					
Expose an API	Mail.Read.Shared	Delegated	Read user and shared mail	No	Sranted for Microsoft	
App roles	Mail.ReadWrite	Delegated	Read and write access to user mail	No	Sranted for Microsoft	
A Owners	Mail.Send	Delegated	Send mail as a user	No	Sranted for Microsoft	
👃 Roles and administrators	Mail.Send.Shared	Delegated	Send mail on behalf of others	No	Sranted for Microsoft	
Manifest	offline_access	Delegated	Maintain access to data you have given it access to	No	Sranted for Microsoft	
Support + Troubleshooting	openid	Delegated	Sign users in	No	Sranted for Microsoft	
P Troubleshooting	profile	Delegated	View users' basic profile	No	📀 Granted for Microsoft	
Proubleshooting New support request	User.Read	Delegated	Sign in and read user profile	No	<ul> <li>Granted for Microsoft</li> </ul>	•••

In terms of a user's experience with this feature, when they first attempt to perform an e-mail action in their Dynamics GP session they will be presented with the same sign-in window that they always see when using Modern Authentication. They would log in as their own account there. When they email the Sales or Purchasing document it will send as the account specified in the Shared Mailbox field.



It is important to note that the account you use to sign into email needs to be able to send on behalf of the Shared Mailbox account. This delegation is something that needs to be setup in Exchange by an appropriate administrator.

If there is a problem with this setup you will get the following when you attempt to e-mail:

Send Document Errors	
The following errors were found while attempting to send the document in e-mail:	
There were one or more issues when processing email, please review the DynamicsGP_MSGraphEmail.log file in the temp directory	^
Close	<u> </u>

You can go to Start > Run, type %temp% and click OK to open the temp directory. When you look at the DynamicsGP\_MSGraphEmail.log file you will see something like the following:

9/6/2023 4:13:43 PM: <MSGraphEmailSendEmail>d\_35.MoveNext - Code: ErrorSendAsDenied

Message: The user account which was used to submit this request does not have the right to send mail on behalf of the specified sending account., Cannot submit message.

ClientRequestId: 0acbbd6f-8b50-4b53-8fcd-c6ae4e87eac3

This error explains they the user is not setup to email on behalf of the shared mailbox account and adjustments need to be made in Exchange/Microsoft 365.

**Table Changes** 

Table Physical Names	Table Technical Name	New Field
SY04902	syEmailSeriesSetup	EmailUseSharedMailbox

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# Modern Authentication - Single Tenant App Registration

The Microsoft Dynamics GP October 2023 release now allows you to create an App Registration in Azure that uses the Single tenant option in addition to the multi-tenant option we previously required.

There are more security-minded customers that require the multi-tenant authentication option in the Azure App Registration. Prior to 18.6 release, if you select the single-tenant option, the Modern Auth window in Dynamics GP will give "Unknown error".

The main difference between Single and Multi-tenant is what the authentication URL looks like, If it contains /common it is going to use multi-tenant. In order to use single tenant, it has to also include the Tenant ID.

This option in the app registration is something you can pick when you're first setting it up, or alternatively in the Authentication settings page in an existing app registration:

Manage	Supported account types				
🧮 Branding & properties	Who can use this application or access this API?				
Authentication					
	<ul> <li>Accounts in this organizational directory only (Microsoft only - Single tenant)</li> </ul>				
📍 Certificates & secrets	O Accounts in any organizational directory (Any Microsoft Entra ID tenant - Multitenant)				
III Token configuration					
- ADI parmissions	Help me decide				

To accommodate this ability a new field, Tenant ID (Optional), has been added to the Company E-mail Setup (Microsoft Dynamics GP > Tools > Setup > Company > E-mail Settings) window:

		21 /	>*					
OK Cancel	File To	ools I	Help Add					
Actions	File To	ools	Help					
elect E-mail Docu	ment Option	15						
Embed Docur			du					
Send Docume		-	uy					
File Formats Allo								
File Formats Alic	wea M H1	ты	PDF	M XPS				
Docx		T ML	✓ FDF					
nable E-mail								
Sales Series								
Purchasing Series	2							
Desktop and Web	Client Prope	erties			_			
Tenant ID (Option	nal)							
Desktop Lilent Pro	operaes							
Application (Clien	t) ID							
Web Client Proper	tion							
Application (Clien Key						_		
Redirect UBL								1
								1

The value for this field comes from the Overview page of your App Registration in the Azure Portal. The specific field is called "Directory (tenant) ID". Copy that value into the Tenant ID field in Company E-mail Setup, along with the Application (client) ID, to enable Modern Authentication e-mail in Dynamics GP.

**Table Changes** 

Table Physical Names	Table Technical Name	New Field
SY04900	syEmailSetupOptions	MSGraphTenantID

# Summary of all Table Changes in 18.6

Company Table Changes

Table Physical Names	Table Name	New field
SY04900	syEmailSetupOptions	MSGraphTenantID
POP40100	POP Setup	UMDEFAULT
SY04902	syEmailSeriesSetup	EmailUseSharedMailbox