



Packaging of
Functionality &
Product
Capabilities in
Microsoft
Dynamics GP
2016 R2



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Focus on Growing Your Business, not Running It

Dynamics GP is a complete enterprise resource planning (ERP) solution for small and medium sized businesses. Dynamics GP helps you gain greater control over your financials, inventory, and operations. It's easy to implement and use and empowers informed decisions that lead to business success. From financials and human resource management to manufacturing and operations, Dynamics GP brings people and systems together to support your business ambitions.

Whether you are considering Dynamics GP as your organization's new business management solution, or are an existing customer looking to expand your solution with additional modules, this guide provides an overview of the product modules available within Dynamics GP, grouped by the functional area they address across your business, and how those modules are licensed.

Buying Dynamics GP

Dynamics GP is sold exclusively through Microsoft Dynamics Partners. These Dynamics partners provide planning, implementation, customization, and support services aimed at optimizing the solution for each customer's specific needs. They have the expertise to ensure your solution works for your business needs.

Regardless of how and where the software is deployed, either on premises, private cloud, public cloud or a combination customers have the choice of purchasing their Dynamics GP licenses up front, or paying a monthly fee to a service provider.

Microsoft Dynamics Perpetual Licensing

Perpetual Licensing for Dynamics GP is designed to help your businesses get started with an affordable upfront starting price, rapid start tools and built in functionality. With Microsoft Dynamics Perpetual Licensing, customers license the ERP Solution functionality up front, and access to that functionality is secured by licensing users. A yearly maintenance renewal is available.

Microsoft Dynamics Subscription Licensing

With Subscription licensing, customers receive term-based rights to use Dynamics GP products and services as a part of a service offering. It designed to provide a lower initial licensing cost and flexibility to increase or decrease subscription license counts from one subscription term to the next. This helps businesses get started with a low initial cost while leveraging the built-in functionality and rapid start tools.

Both licensing models are designed to simplify the purchase process. Various user types are available to provide different types of access at lower price points giving businesses more flexibility.

Functionality Packs and User Types

The Starter Pack

Businesses can quickly and affordably get started with Dynamics GP. The Starter Pack offers core Financials and Distribution functionality. It is available in English, Latin American Spanish, and French Canadian languages.

The Starter Pack is designed to help you:

- Gain control and insight over their finances
- Purchase and sell services, items and materials
- Pay and manage employees

For many businesses, this is the only Dynamics GP license required.

Note: Additional software licenses may be required, such as Windows Server, SQL Server, and Office 365. Software must be licensed per the applicable license terms.

The Extended Pack

Businesses that require more advanced functionality can license the additive Extended Pack that enables you to integrate core financials and distribution management with broader functionality extensions such as:

- support and control the creation of goods
- managing and billing jobs for professional services, construction and other unique needs.

Customization Pack

The Customization Pack gives you the ability to integrate or customize Dynamics GP. This pack provides access to the tools required to make deep integrations with other products, and to make customizations that extend the application to meet specific needs of the business.

Extended Human Resources and Payroll

The Starter Pack includes standard US and Canadian Payroll and Human Resources for an unlimited number of employees. The additive functionality in the Extended Human Resources and Payroll Pack brings specific features that offer more flexibility in how companies pay and manage their employees.

Note: The Starter Pack is a prerequisite to the Extended Pack, Customization Pack and Extended Human Resources and Payroll. These do not include user licenses.

User License Types

Businesses can license three types of users: full, limited and self-service. This gives you the ability to reduce the cost of your solution. Self-service users are names users and are designed for employees to do non-business related tasks. The limited user can view business information in addition to what a self-serve user can do and is a concurrent user. The full user allows full access and is a concurrent user.



Dynamics GP Functionality Overview

Dynamics GP, Starter Pack Functionality

Financial Management	Financial Management	Business Intelligence & Reporting	Human Resource Management
General Ledger with AFA Account Level Security Cash Flow Management Fixed Asset Management Intercompany National Accounts Multicurrency Management Analytical Accounting Revenue/Expense Deferrals Bank Reconciliation Electronic Banking Suite Safe Pay	Cashbook Bank Management Electronic Bank Management Electronic Reconciliation Management Payables Management Receivables Management Customer/Vendor Consolidations Lockbox Processing Refund Checks Grant Management Encumbrance Management Field Level Security Process Server	All In One Document Viewer Unlimited Mgmt Reporter Designer User Unlimited Mgmt Reporter Viewer User Analysis Cubes Library Advanced Analysis Cubes Library Refreshable Excel Reports SmartList Designer Office 365 Workspace PowerBI Dashboards PowerBI Reports	Human Resources Unlimited Employees Payroll (US) Unlimited Employees Payroll (Canada) Unlimited Employees Payroll Direct Deposit Federal Magnetic Media Payroll Connect Position Control Employee Pay Employee Profile Human Resources Time and Expense Management

Dynamics GP, Pack Functionality

Supply Chain Management	Configuration and Development
Invoicing Sales Order Processing w/ Adv Invoicing Extended Pricing Order Management Inventory Control Bill of Materials Purchase Order Processing/Receivings Landed Cost PO Generator Procurement	Modifier with Visual Basic for Applications Customization Site License Integration Manager - Conversions Connector for Microsoft Dynamics Service Based Architecture Identify Management Workflow Customer and Vendor Combiner

Customization Pack	Extended Human Resource and Payroll
Integration Manager eConnect WebServices Dexterity Software Development Kit Customization Suite	HR Advance Payroll Advance PTO Manager Benefits Management and Enrollment

Dynamics GP, Extended Pack Functionality

Supply Chain Management	Manufacturing	Project Management	Customer Relationship Management
Advanced Distribution Advanced Picking Available to Promise Returns Management	Manufacturing Bill of Materials Manufacturing Order Processing Master Production Scheduling Materials Requirements Planning	Project Accounting Project Time and Expense	Contract Administration Service Call Depot Management Preventive Maintenance

A Business Solution from Microsoft

Microsoft Office 365

Dynamics GP works together with Office 365 to extend the value of your business solution with enhanced productivity, collaboration, mobility and business intelligence. Dynamics GP interoperates with Office 365 functionality such as document management and collaboration, Excel-based analysis, presence and instant messaging, transaction initiation through Microsoft Lync, and many other features available in the cloud with Office 365.

Microsoft Azure

Dynamics GP can be deployed in the cloud on Microsoft Azure, either public or private. This approach brings together the quick to implement, easy to use and powerful Dynamics GP with the flexibility and enterprise-class security, reliability and scalability of Microsoft Azure.

Microsoft Dynamics CRM

Dynamics GP interoperates with **Microsoft Dynamics CRM** to connect your business by sharing common data across front office and back office teams. The Connector for Dynamics GP connects information for the most common touch points between the ERP and CRM system. Additional connections can be added using the SDK.

Foundation Capabilities

SERVICE BASED ARCHITECTURE (SBA)

SBA supports exchange of information between Dynamics GP and other applications, such as products, third party applications and mobile applications, using common standards. SBA services support operations in Financials, Inventory, Purchasing, Receivables, Requisitions, Sales, Administration and System. SBA easily connects systems to improve information exchange between departments, automate more lightweight processes and become responsive with their vendors.

COMPANION APPLICATIONS

Companion applications are lightweight apps designed for users who need to interact with Dynamics GP to execute a specific task. These applications enable you to automate more processes without providing full access to Dynamics GP. The companion applications are available on popular mobile platforms such as Microsoft Office 365, Windows, iOS and Android.

Business Analyzer: A mobile application that provides business intelligence using Microsoft SQL Reporting Services and Microsoft Excel charts.

Time Management: A mobile application that provides the ability to enter, view and submit employee time. Time cards are moved through an approval process inside Dynamics GP.

APPLICATION ACCESS POWER OF CHOICE

Dynamics GP offers two methods of accessing the application: the Windows desktop client and web client. The web client enables secure access to Dynamics GP using a browser thereby enabling anytime, anywhere access. The web client also offers convenient identity management features such as single sign on to Office 365 and other cloud-based applications that use Azure Active Directory.

ALL IN ONE DOCUMENT VIEWER

View related documents all within one window that are in various states of being processed, saving users time in searching for all relevant information for a purchasing document.

DOCUMENT ATTACHMENTS

Track additional information related to transactions and contacts by attaching or scanning pictures, contracts, copies of invoices or other related information to records. In addition, reporting within Microsoft Excel extracts data and provides more context.

FIELD LEVEL SECURITY

Apply passwords or block access to forms and windows. You can also apply passwords to fields. Or, you can hide, lock, or disable fields.

PROCESS SERVER

Move processor-intensive tasks off the computers your employees use every day and onto dedicated process servers, thereby avoiding costly slowdowns.

RAPIDSTART SERVICES

RapidStart Services significantly accelerates the configuration of a company in Dynamics GP, as well as the migration of data from other products into Dynamics GP. Reduce the number of days required to deploy the solution while also making it easier to engage the right people and teams in your business during the implementation process.

ROLE BASED SECURITY

Limit access to sensitive information by role through Role Based Security. Predefined roles come with the application to help you get started quickly, and to maintain separation of duties to reduce risk.

SMARTLIST DESIGNER

Allow your people to slice, dice and filter your business data to provide answers quicker through SmartLists, one of the most popular features in Dynamics GP. Hundreds of SmartLists are built into the application and you can also edit them and build your own.

SOURCE DOCUMENT TRAIL

Track transactions throughout the system with source documents that connect documents together giving users insight into where historical transactions flowed through the system.

SQL SERVER

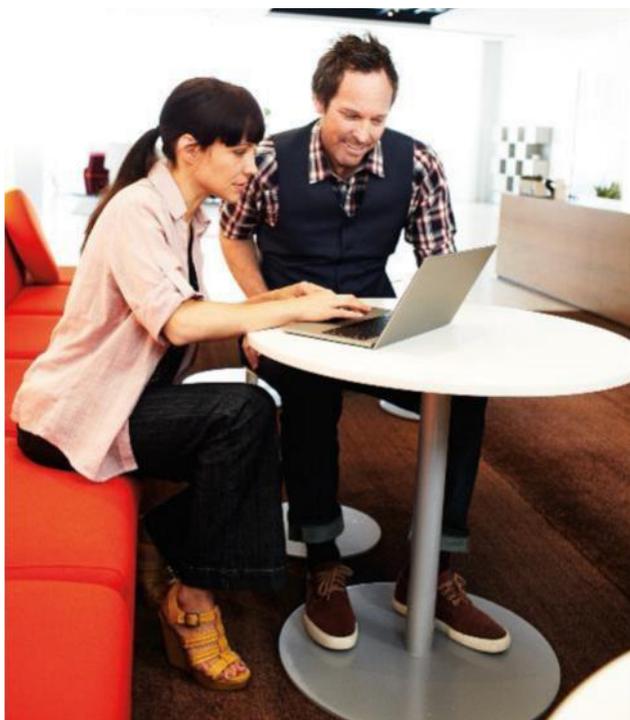
Dynamics GP utilizes SQL Server technology including the Microsoft SQL Server database, SQL Server Reporting Services, and SQL Server Analysis Services. Database multi-tenancy reduces the number of SQL instances that may be required and simplifies the deployment. A SQL View builder enables fast and easier reporting.

TASKS AND REMINDERS

Help people work together by assigning and tracking tasks. Also setup reminders that proactively inform you when specific incidents occur such as customers going over their credit limit, short stock items, or payables due. Reminders are defined per user, so each user can get the reminders they need to be more proactive.

WORKFLOW

Provide structured steps and approvals of business processes through native workflows that can be modified easily to your unique business needs. Workflows currently supported are General Ledger Batch, Receivables Batch, Payables Batch, Vendor, Purchase Order, Requisition, Employee, Time, Employee Profile, Employee Skills, Direct Deposit, W4 and Project Expense.



Financial Management

ACCOUNT LEVEL SECURITY

Enhance security features and account views by allowing users to enter, edit, and view information from a reduced account set, based on the access granted for General Ledger accounts on a per-user basis.

ANALYTICAL ACCOUNTING

Analyze financial data by whatever criteria you require for greater reporting flexibility and extensibility. Track financial data by different dimensions, such as region or profit center, without adding to your chart of accounts.

BUDGETING

Track multiple budgets for multiple fiscal years in multiple currencies and General Ledger Accounts. Easily update and maintain budgets by leveraging Microsoft Excel to import and export. Also, get insight into your business by reporting budget versus actual by year, quarter or month. Keep an audit trail of who modifies a budget and when to maintain control over your business.

CASH FLOW MANAGEMENT

Customizable views and forecasting tools enable you to control, predict, and monitor inflows and outflows that track a company's liquidity over time. A calendar gives people the insight into your inflows and outflows in an easy to understand format.

CUSTOMER/VENDOR CONSOLIDATIONS

Quickly transfer information between Receivables Management and Payables Management to create a customer record that uses information already available in a vendor record, and vice versa, giving a consolidated view of the vendor and customer relationships. Also easily combine customer accounts or vendor accounts.

ENCUMBRANCE MANAGEMENT

Locate and track budget information, query current or historical encumbrances, and streamline period-end and year-end processes. Control your purchasing process by limiting purchases through encumbrance posting.

FIXED ASSET MANAGEMENT

Improve financial control and put company assets such as buildings, machinery and equipment to the best possible use with tools for tracking, analyzing, and manipulating fixed assets. For each asset you can track and depreciate by calendar or fiscal year with several methods including MACRS and many others. Track depreciation for tax liabilities for the most common tax books. Analyze and track assets historically to better manage your assets.

GENERAL LEDGER

Maintain your financial journal entries and budgets with a double-entry accounting ledger that supports up to 999 periods. Track non-financial data like unit accounts at the general ledger level. Transfer account balances based on a variable account by percent or unit giving more flexibility to your general ledger. Perform revenue recognition and intercompany transactions. Easily copy and paste data from excel or text into general ledger journal entries.

GRANT MANAGEMENT

Not-for-profit and public sector organizations can automate grant management processes to track funds more easily, demonstrate accountability, prevent overspending and help attract future funding.

INTERCOMPANY

Set up and maintain relationships so that revenues or expenses incurred in one company can be tracked as "due to" or "due from" amounts in other companies. View and void distributions of intercompany transactions from other companies.

LOCKBOX PROCESSING

Automatically import and apply customer payment information from a lockbox transaction file provided by your financial institution. Lockbox Processing provides reliable receivables information, improved funds availability, and greater fraud protection.

MULTICURRENCY MANAGEMENT

Take control of multinational operations and manage currency transactions smoothly and efficiently with flexible, powerful multicurrency capabilities such as easy reevaluation.

MULTIDIMENSIONAL ANALYSIS

Analyze financial data by different dimensions without adding to your chart of account.

NATIONAL ACCOUNTS

National Accounts provides the ability to define a national account relationship between multiple customers. It enables a customer to be defined as the "parent" account to which "child" customers may be added. This allows a payment received from the parent company to be applied across any of the child customers' payments. Credit documents can also be applied from the child customer to any other member of the national account.

PAYABLES MANAGEMENT

Automate routine and complex accounts payable tasks with real-time statistical history, easy reconciliation, account control, payment scheduling, and check printing. Receive warnings when an open purchase order exists. Track vendor details including multiple ship-to addresses, payment terms, credit limits, vendor items and more.

RECEIVABLES MANAGEMENT

Control your accounts receivable with automated processes for invoices, receipts, finance charges, and statements, including the ability to analyze customer activity. Setup and maintain customer records including credit limit, contact names, aging balances and more.

REFUND CHECKS

Print refund checks for customers with credit balances, automatically debiting the customer and updating the ledger.

REVENUE/ EXPENSE DEFERRALS

Simplify deferring revenues or distributing expenses with the ability to make entries for future periods within General Ledger, Receivables Management, Payables Management, Sales Order Processing, Purchase Order Processing, and Invoicing.

SAFE PAY

Easily add Positive Pay functionality, including daily exporting of checks for comparison by the bank when checks are presented for payment.

ELECTRONIC BANKING SUITE

Gives you the ability to integrate with your checkbooks electronically and includes ERM (Electronic Funds Transfer for Receivables Management), EBR (Electronic Bank Reconciliation) and EPM (Electronic Funds Transfer for Payables Management).

ELECTRONIC RECONCILIATION MANAGEMENT

Take advantage of integration with Bank Reconciliation to automate electronic reconciliation and management for transactions, adjustments, and exceptions, using tools that work with any bank that supports automatic reconciliation.

BANKING

BANK RECONCILIATION

Create, manage and reconcile from your checkbook ledger to the bank's account records through a single, automated process across multiple currencies.

CASHBOOK BANK MANAGEMENT

Attach unlimited checkbooks to your bank, make bank transfers, enter General Ledger, Receivables Management, and Payables Management transactions, post batches, and build deposits for your bank transactions. You can also import your bank statements into Dynamics GP, and reconcile transactions at any time.

ELECTRONIC BANK MANAGEMENT

Streamline setup, entry, maintenance, and reconciliation for all transactions that appear on your bank statement including payments to creditors, cash receipts from debtors, and bank charges.



Business Intelligence and Reporting

BUSINESS ANALYZER

Gain powerful, role-specific insight with charts and graphs both inside of Dynamics GP client and outside through a companion application, plus perform tasks and collaborate with others. View SQL Reporting Services, Microsoft Excel and Management Reporter reports from one central location, giving the ability to access data from virtually anywhere. Business Analyzer is optimized for tablets powered by Windows, iOS and Android platforms.

Microsoft PowerBI Dashboards and Reports

Several premade dashboards and reports are available that connect directly the Dynamics GP and accessible through PowerBI Desktop or on the Dynamics GP Homepage.

Microsoft Excel Reports

With over 400 built in Microsoft Excel reports that connect directly to the data source plus an Excel report builder, Dynamics GP offers a solid foundation to create reporting. Refreshable excel reports provide easy and quick access to latest data from a network location, local desktop, or even SharePoint.

Dynamics GP workspace

An app in the Office 365 store is available to easily create and securely share executive dashboards showing financial, sales, purchasing and inventory information. Dashboards also enable users to drill back to Dynamics GP to analyze specific transactions.

Microsoft SQL Reporting Services Reports

Leveraging the power of SQL Reporting Services, Dynamics GP offers over 300 charts, graphs and reports through Reporting Services. The reports can be modified to meet unique needs. New reports can be created easily without a developer.

MANAGEMENT REPORTER DESIGNER and VIEWER USER

Management Reporter is used for the creation, distribution and analysis of financial statements. It includes user types that can generate, design and view information that is secured by role, giving people only the information that is important to them. Management Reporter reports can be viewed and refreshed with a web viewer.



Supply Chain Management

AVAILABLE TO PROMISE

Help ensure the right inventory is available at the right time to meet customer needs, make firm delivery promises, and boost profitability by being able to predict when inventory is available. This functionality uses purchasing, inventory and sales information to determine when inventory will be available to sell.

BILL OF MATERIALS

Increase productivity with fast, flexible tracking of components and subassemblies used in light manufacturing and similar production and assembly operations.

ADVANCED PICKING

Increase visibility and tracking for the pick, pack and shipping process. Advanced Picking in Dynamics GP tailors picking routines to meet individual site's business requirements, bin or bay sequence, or method of operation. This provides organizations with the flexibility needed to lower overhead, reduce handling, and improve accuracy for both single and multi-site warehouse operations.

EXTENDED PRICING

Create flexible pricing options and rules for customers, including standard and personalized percentage-off, value-off, and net pricing options. Implement date-sensitive functionality for sales and promotions.

INVENTORY CONTROL

Monitor inventory stock levels and costs, and set prices on a customer-by-customer basis to stay competitive, speed fulfillment, and build loyalty. Inventory control provides multiple costing methods, tiered pricing, alternate vendors, serial/lot tracking for selling items more efficiently. For added flexibility multiple locations and bins are available with tracking reason codes for transfers and cycle counts to get a more accurate inventory.

LANDED COST

Track and update the true cost associated with an inventory item and then automatically assign or modify costs as items are received.

PO GENERATOR

Automate purchasing by generating a suggested purchase order, with order point or minimum/maximum settings that determine quantities needed based on purchasing, sales, and inventory data.

PURCHASE ORDER PROCESSING/ RECEIVING

Manage commitments and build lasting vendor relationships with automated purchasing and approval processes, flexible extended pricing, and blanket purchase orders. Receive partial shipments with discounts, landed costs and prepayments to better manage your purchasing and receiving process. With tolerance handling, receive items within a threshold percent of the purchase order for more flexible receiving and better purchasing management.

REQUISITION MANAGEMENT

Allow people to request purchases needed to run the business and be personally product while maintaining control with the necessary approvals, process steps and accounting.

RETURNS MANAGEMENT

Generate returns from historical customer invoices, service calls, or manually. Return the item to the vendor or fix it within your company and automatically transfer items from the returns warehouse to the main warehouse.

SALES ORDER PROCESSING

Automate the sales ordering process to improve customer service, control fulfillment and invoicing, and minimize shipping and labor costs. Track quotes, orders, back orders, invoices and allow discounts per item and partial shipments. Enable quicker sales with suggested items that offer upsell opportunities and substitutions for items that out of stock.

Manufacturing

MANUFACTURING SUITE

Delivers Capacity Requirements Planning, Engineering Change Management, Job Costing, Quality Assurance, Sales Configurator, and Sales Forecasting.

MANUFACTURING BILL OF MATERIALS

Deliver complete and consistent product information. Manage materials, components, and assemblies with precision precisely including costs, locations, and routing sequences. Gain control of finished goods, reduce costs, and increase profitability.

MANUFACTURING ORDER PROCESSING

Efficiently track and manage the entire cycle of order processing, including detailed production costs, work orders, routings, outsourcing, and work center definitions.

MASTER PRODUCTION SCHEDULING

Gather information from sales forecasts to form a single, comprehensive production schedule and automatically create manufacturing orders.

MATERIALS REQUIREMENTS PLANNING

Ensure proactive planning, smart procurement decisions, and precise adjustments to production with flexible planning and analysis capabilities in addition to viewing material requirements and vendor information.

Project Management

PROJECT ACCOUNTING

Maintain tight control over project direction, costs, execution, and budget; support resources effectively; and ensure accurate billing and accounting through tight integration with financials, inventory, and accounts receivable.

PROJECT TIME AND EXPENSE

Capture, review, and approve project time sheets and expense reports, enabling prompt, accurate customer invoicing and efficient reimbursement for expenses.

Field Service Management

CONTRACT ADMINISTRATION

Manage an unlimited number of contracts using flexible functionality that includes price books, profitability against service calls, and revenue recognition through five different methods.

DEPOT MANAGEMENT

Track parts, labor, and expense details. Create a Parts Usage report. Manage spare parts and trunk-and-lot-tracked stock inventory.

PREVENTIVE MAINTENANCE

Forecast purchasing and scheduling requirements based on time in service or product usage. Coordinate open service requests with upcoming preventive maintenance calls. Track details of Preventive Maintenance activities.

SERVICE CALL MANAGEMENT

Track and update new and historical service calls against a contract, service warranty, and current inventory. Time execution, coordinate customer schedules, assign appropriately skilled technicians, and escalate calls automatically plus billing through the accounting system.

Configuration and Development

CUSTOMIZATION SUITE

This suite includes all the tools available to customize Dynamics GP to meet specific business needs beyond what our vast network of Independent Software Vendors (ISVs) provide. The tools included are eConnect, Web Services, Microsoft Visual Studio® SDK, and Dexterity. Dexterity is the programming language used to create and customize Dynamics GP.

INTEGRATION MANAGER™ CONVERSIONS

Import data into Dynamics GP using this integration tool during your implementation (available for use for 240 days following purchase for purpose of migrating data).

INTEGRATION SUITE

This suite includes a set of tools used to import data from other applications. Each tool has different functionality that fits preference and needs of users. These tools include Integration Manager for Distribution, Integration Manager for Financials, eConnect, and Web Services.

MODIFIER WITH VISUAL BASIC FOR APPLICATIONS

Modify the appearance and functionality of any Dynamics GP or Dexterity-based third-party window, add new fields, change global resources to affect the entire application, and attach VBA code for less complex business logic.