Packaging of Functionality & Product Capabilities in Microsoft Dynamics GP 2015
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Become a Dynamic Business with Microsoft Dynamics GP

For more than 25 years, Microsoft Dynamics GP has delivered the quick to implement and easy to use business management solution that powers diverse small and mid-size businesses around the world. From financials and human resource management to manufacturing and operations, Microsoft Dynamics GP brings people and systems together to support your business ambitions.

Whether you are considering Microsoft 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 Microsoft Dynamics GP, grouped by the functional area they address across your business, and how those modules are licensed.

How to Buy Microsoft Dynamics GP

Microsoft Dynamics GP is available exclusively through Microsoft Dynamics Certified Partners. These Value Added Resellers provide planning, implementation, customization, and support services aimed at optimizing the solution for each customer’s specific needs.

Regardless of how and where the software is deployed, customers have the choice of purchasing their Microsoft Dynamics GP licenses up front, or paying a monthly fee to a service provider.

Microsoft Dynamics Perpetual Licensing

Perpetual Licensing for Microsoft Dynamics GP is designed to help small and midsize 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, and access to that functionality is secured by licensing users.

Service Provider’s Subscription Licensing

Service provider’s Subscription Licensing for Microsoft Dynamics GP is designed to help keep the upfront cost to a minimum through a “per user per month” licensing fee. This helps small and midsize 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. Customers have the choice of two concurrent-user types, Limited User and Full User, a named-user type Self-Serve user and the option to give those users access to advanced functionality through the “Extended Pack”.

Packaging of Functionality & Product Capabilities in Microsoft Dynamics GP 2015
Starter Pack and Extended Pack – Functionality Full, Limited User and Self-Serve Types

The Starter Pack

Small and midsize businesses can quickly and affordably get started with Microsoft Dynamics GP. The Starter Pack offers core Financials and Distribution functionality, plus three Full User licenses for one price.

The functionality included in the Starter Pack is designed to help customers:

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

For many businesses, this is the only license component required.

Note: Additional software licenses may be required, such as Microsoft Windows Server, Microsoft SQL Server, Microsoft Office 365 and Microsoft SharePoint. These licenses are not included with the Starter Pack. Additional software must be licensed according to the applicable license terms.

The Extended Pack

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

- Manufacturing to support and control the creation of goods
- Field Service and Project Accounting to support managing and billing jobs for professional services, construction and other unique needs.
- Advanced forecasting and budgeting for keeping control over finances.

Note: The Starter Pack is a prerequisite to the Extended Pack. On purchasing the Extended Pack, the functionality is extended to the customer’s current and future licensed users. The Self-Serve user is an optional low cost user type that can be added to any of the application packs.

Additional Packs

Microsoft Dynamics GP provides two ancillary packs to extend the overall solution: the Customization Pack and Extended Human Resources and Payroll.

Customization Pack

Customers needing to integrate or customize Microsoft Dynamics GP can purchase the Customization Pack. 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.
### Microsoft Dynamics GP Functionality Overview

#### Microsoft Dynamics GP, Starter Pack Functionality

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Packaging of Functionality & Product Capabilities in Microsoft Dynamics GP 2015
## Microsoft Dynamics GP, Extended Pack Functionality

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## Customer Relationship Management

- Contract Administration
- Service Call
- Depot Management
- Preventive Maintenance

## Microsoft Dynamics GP, Additional Functionality

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Microsoft Office 365
Microsoft Dynamics GP works together with Office 365 to extend the value of your business solution with enhanced productivity, collaboration, mobility and business intelligence. Microsoft 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
Microsoft Dynamics GP can be deployed in the cloud on Microsoft Azure. This approach brings together the quick to implement, easy to use and powerful Microsoft Dynamics GP with the flexibility and enterprise-class security, reliability and scalability of Microsoft Azure.

Microsoft Dynamics CRM
Microsoft 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 Microsoft Dynamics GP connects information for the most common touch points between the ERP and CRM system. Additional connections can be added using the SDK.

Foundations of Functionality & Product Capabilities

SERVICE BASED ARCHITECTURE (SBA)
SBA supports exchange of information between Microsoft Dynamics GP and other applications, such as Microsoft products, third party applications and mobile applications, using common standards. SBA services support operations on resources in modules such as Financials, Inventory, Purchasing, Receivables, Requisitions, Administration and System services. This enables SMBs to more easily connect multiple systems to improve information exchange between departments, automate more lightweight processes and become responsive with their vendors.

COMPANION APPLICATIONS
Companion applications are lightweight client apps designed for users who need to interact with Microsoft Dynamics GP only to execute a specific task. These applications enable you to automate more processes without providing full access to Microsoft Dynamics GP functionality. The companion applications are available on popular mobile platforms such as Microsoft Office 365, Windows RT, Windows 8.1, iOS and Android.

Business Analyzer: A mobile application that provides business intelligence using Microsoft Dynamics GP, Microsoft SQL Reporting Services and Microsoft Excel charts. This application is optimized for tablets powered by Windows, iOS and Android.

APPLICATION ACCESS CHOICE
Microsoft Dynamics GP offers two methods of accessing the application: the Windows desktop client and web client. The web client enables secure access to Microsoft 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 Microsoft Azure Active Directory.
DOCUMENT ATTACHMENTS
Track additional information related to transactions and contacts by attaching pictures, contracts, copies of invoices or other related information to records. Documents can also be directly scanned into Microsoft Dynamics GP. In addition, reporting is available within Microsoft Excel to extract data and provide more context to your data.

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 for Microsoft Dynamics GP significantly accelerate the configuration of a company in Microsoft Dynamics GP, as well as the migration of data from competitive products or Excel data into Microsoft Dynamics GP. By using RapidStart Services for Microsoft Dynamics GP, you can reduce the number of days required to deploy the product 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 organizations 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 Microsoft 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 DATABASE
Microsoft Dynamics GP utilizes Microsoft SQL Server technology including the Microsoft SQL Server database, Microsoft SQL Server Reporting Services, and Microsoft SQL Server Analysis Services. The named system database allows companies to separate their databases offering more choices when deploying the system. Database multi-tenancy reduces the number of SQL instances that may be required.

TASKS AND REMINDERS
Help people work together by assigning tasks and tracking status of 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. The native workflow currently supported by the product includes Purchasing, Payroll, Project, Financials and Sales.
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 verses 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 reporting processes. Control your purchasing process with limited 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 deprecate 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 all of your financial journal entries and budgets with a double-entry accounting ledger that supports up to 999 periods. Also after years of using Microsoft Dynamics GP you can purge historical data. 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. Easily copy and paste data from excel or text into general ledger.

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

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 distributions of intercompany transactions from other companies. Void the whole intercompany transaction, including destination company distributions, from the originating company.

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.

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 payables warning 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.

BANKING
Several modules are available around banking and managing your checkbooks.

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 Microsoft 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.

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.

Business Intelligence and Reporting

BUSINESS ANALYZER
Gain powerful, role-specific insight with charts and graphs both inside of Microsoft Dynamics GP client and outside through a companion application, plus perform tasks and collaborate with others. View SQL Reporting Services reports and Microsoft Excel charts from one central location, giving you the ability to work with a preferred device and location. Business Analyzer is optimized for tablets powered by Windows 8.1/RT, iOS and Android platforms.
Microsoft Excel Reports
With over 200 built in Microsoft Excel reports that connect directly to the data source, Microsoft Dynamics GP offers a solid foundation to create reporting. Refreshable excel reports provide easy and quick access to latest data.

Microsoft Dynamics GP workspace
An Office-365 store application to easily create and securely share executive dashboards showing financial, sales, purchasing and inventory information. Dashboards also enable users to drill back to Microsoft Dynamics GP to analyze specific transactions.

Microsoft SQL Reporting Services Reports
Leveraging the power of Microsoft SQL Reporting Services, Microsoft 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.

Microsoft Forecaster
Forecast accurate budgets and gain control of the entire budgeting and planning process. Coordinate plans dynamically and collaborate easily with your management team.

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 Microsoft 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 purchase order management.

REQUISITION MANAGEMENT
Allow people to order materials needed to run the business with the necessary approvals with Requisition Management built through the base application.

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 to extend the manufacturing functionality.

MANUFACTURING BILL OF MATERIALS
Deliver complete, consistent, and current product information. Manage materials, components, and assemblies more precisely—including costs, locations, and routing sequences—to gain tighter control of finished goods, reduce costs, and increase productivity and 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 out-of-pocket expenses.

Field Service Management

CONTRACT ADMINISTRATION
Manage 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.

Human Resource Management

BENEFIT SELF SERVICE SUITE—UNITED STATES
Reduce paperwork and manual entry by moving benefit processes online, including yearly benefits, change of status, and more.

FEDERAL MAGNETIC MEDIA
Help maintain full compliance with government reporting requirements by generating Federal Magnetic Media files.

HUMAN RESOURCES
Attract and retain top talent and offer employees better services with customizable hiring processes, scheduling, pay rates, and performance evaluation tools.

HUMAN RESOURCES—ADVANCED
Track critical health and wellness information to monitor the well-being of your employees and ensure government compliance. Manage employee certifications and license and training requirements to help your employees meet their potential and maximize the value they bring to the organization.

PAYROLL—ADVANCED
Extend Payroll capabilities with Pay Policy Manager, Labor Accrual Manager, Advanced Labor Reporting, and Payroll Hours to General Ledger functionality.

PAYROLL—CANADA
Automate payroll processing, equip staff to handle complex payroll requirements, and offer better service to your employees while reducing overhead costs. This functionality is also now available using the Microsoft Dynamics GP Web Client.

PAYROLL—UNITED STATES
Automate payroll processing, equip staff to handle complex payroll requirements, and offer better service to your employees while reducing overhead costs.

PAYROLL CONNECT
Automate data transfer from ADP/PC Payroll for Windows into General Ledger, using a turnkey solution that eliminates the need to reenter data.

PAYROLL DIRECT DEPOSIT
Add payroll funds to employees’ bank, savings and loan, or credit union accounts through an automated clearing house (ACH) file.

POSITION CONTROL
Manage labor budgets and human resources based on specific job functions and a specific head count. Apply data throughout the Human Resource and Payroll system to enforce the business rules and to manage the movement of human resources throughout the organization.
EMPLOYEE PROFILE and EMPLOYEE PAY

Allow employees to view or update their personal data, create and manage their absences, and enter personal requisitions. With the Employee functionality, employees can spend more time focusing on their day-to-day business and tasks and worry less about administrative burdens.

Configuration and Development

CUSTOMIZATION SUITE

This suite includes all of the tools available to customize the Microsoft Dynamics GP to meet specific business needs. The tools included are eConnect, Web Services, Microsoft Visual Studio® SDK, and Dexterity. Dexterity is the programming language used to create and customize Microsoft Dynamics GP.

INTEGRATION MANAGER—CONVERSIONS

Import data into Microsoft 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 Microsoft 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.

Microsoft Resources

Microsoft Dynamics Website Learn about what Microsoft Dynamics solutions can do for your organization and how to get started.


Microsoft Dynamics GP Community Website Learn from others from the vast community of customers and partners.


Microsoft Dynamics Marketplace Find the right experts, applications and services for your needs.


Software License Terms Get product license terms.


CustomerSource - Microsoft Dynamics CustomerSource is a password-protected site for customers who use Microsoft Dynamics products. Included as a benefit of your service plan, CustomerSource allows you to search a powerful Knowledge Base for Microsoft Dynamics, view online training for Microsoft Dynamics, download updates, and find other timely information and resources virtually 24 hours a day. (Sign-in required.)

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