“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

Table of contents

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

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

After this lesson you will be able to:

- Understand the Lifecycle and what is Modern Lifecycle

Lifecyle for Microsoft Dynamics GP

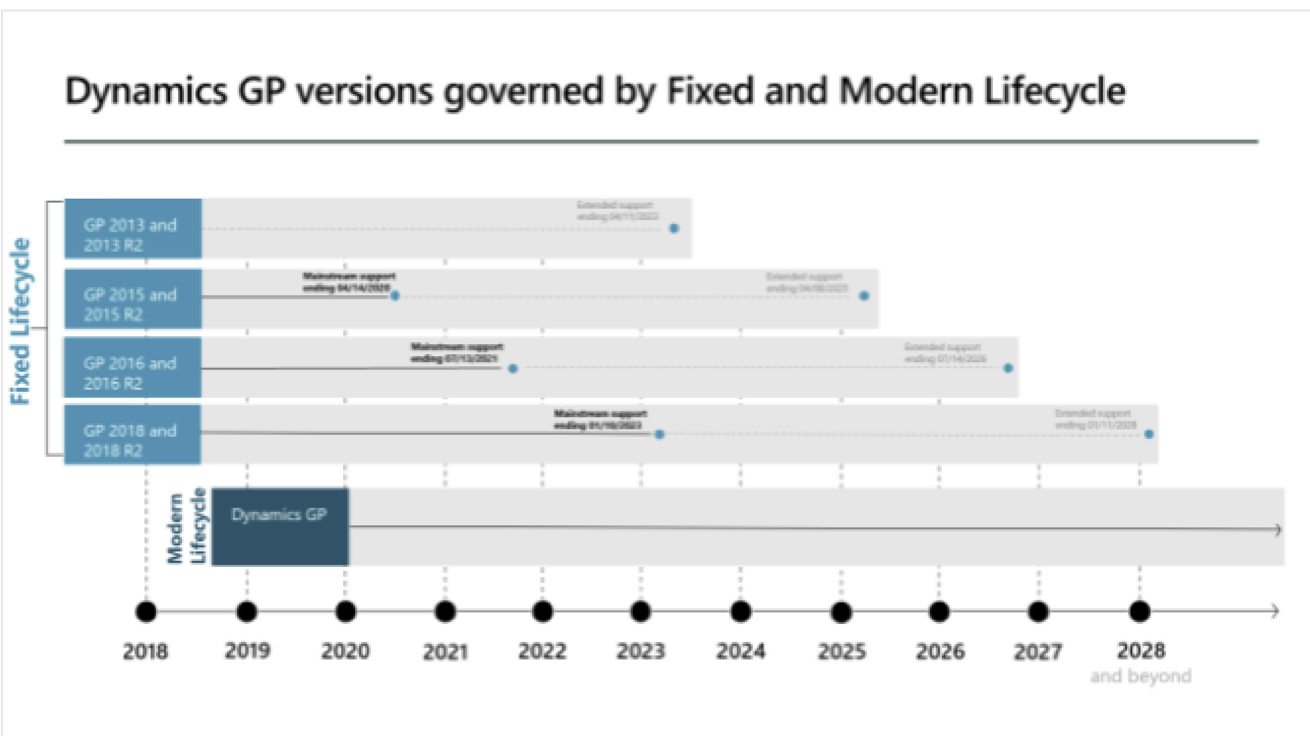
Understand the Lifecycle Policies for Dynamics GP:

[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 Modern Lifecycle 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

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

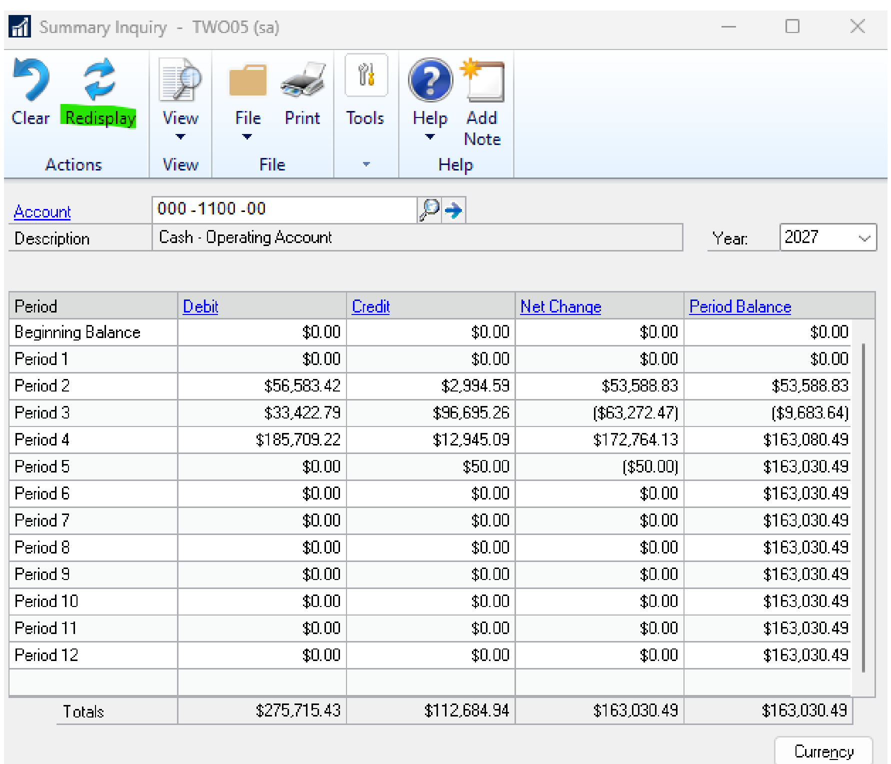
After this lesson you will be able to:

- 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.



Period	Debit	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

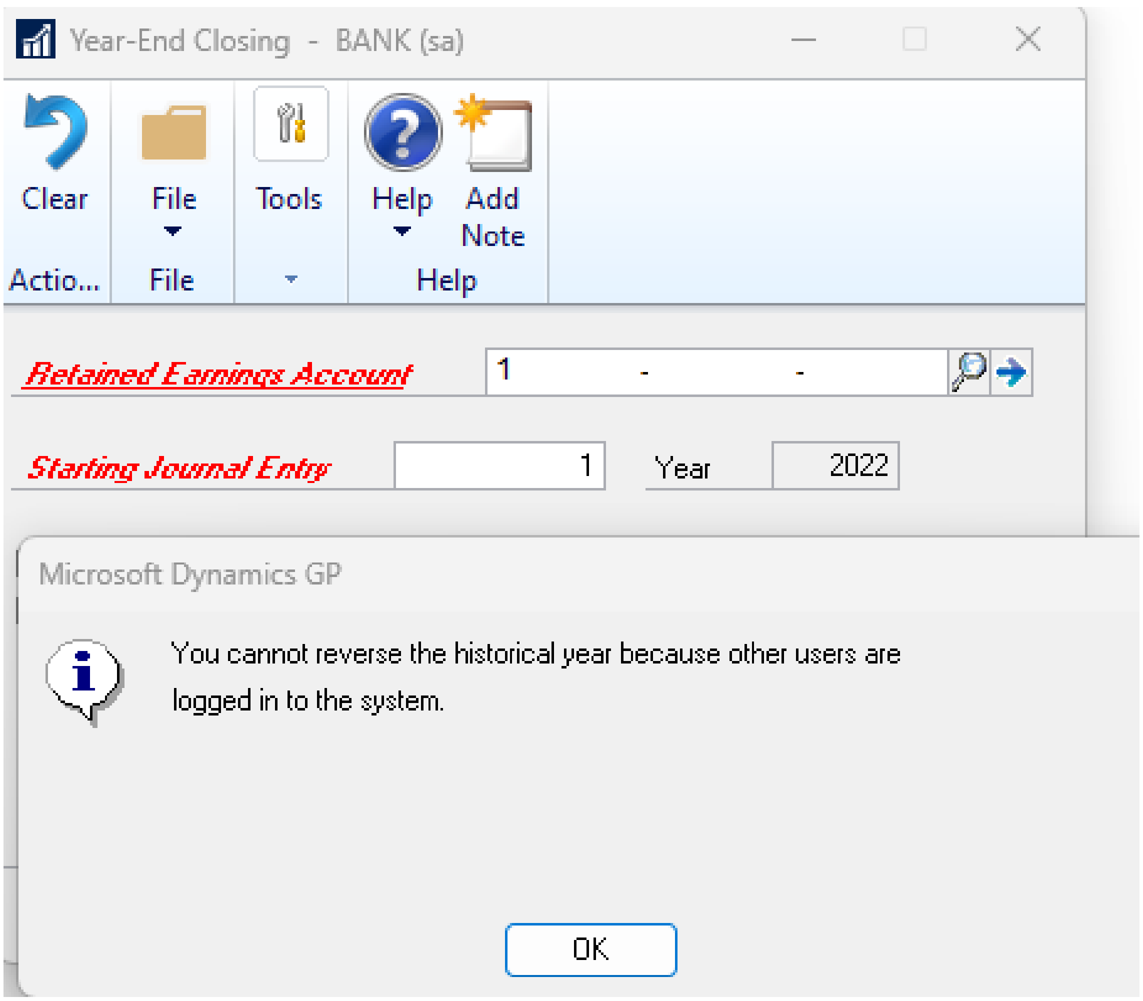
Reverse Fiscal year end close by Company

When the Reverse Fiscal year feature was added, 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.



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.

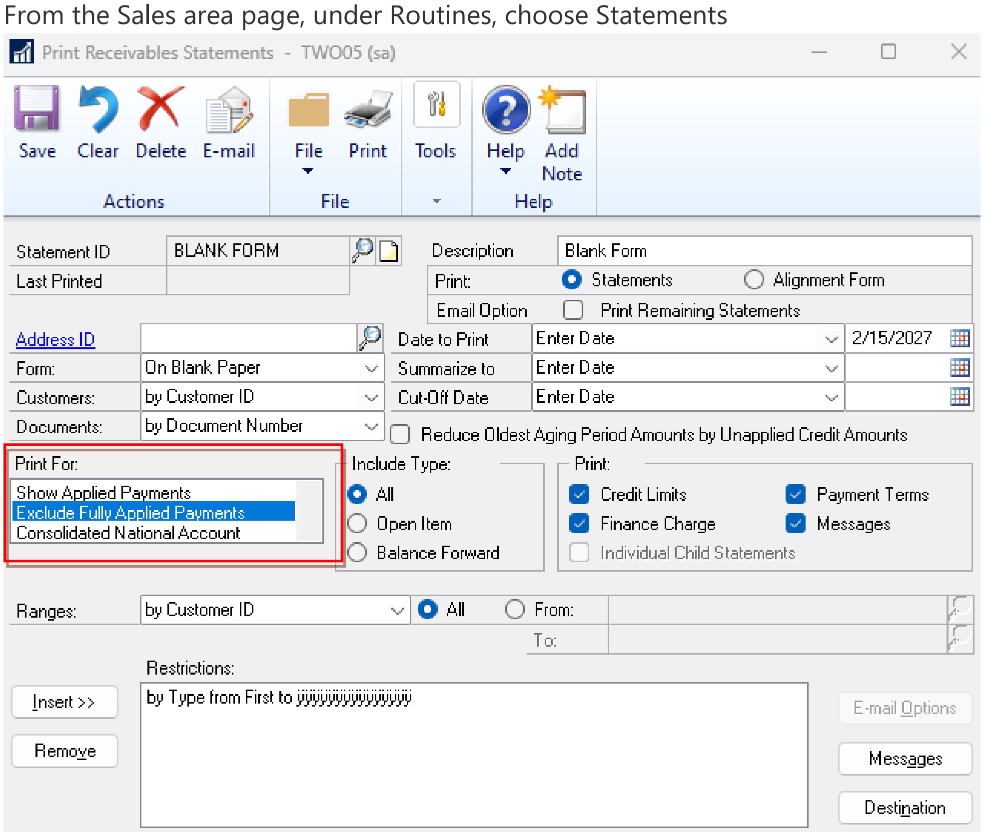
Prior to 18.6, if you use the option for 'exclude fully paid PAYMENTS', then it only drops off the payment, but the invoice is still listed (but with a zero balance). The RM statement pulls ALL documents from the RM20101 OPEN trx table.

Prior to 18.6

Document No.	Date	Code	Description	Amount	Balance
PYMNT000000710810	4/12/2027	PMT			$0.00
SALES00000001409	4/12/2027	SLS		$100.00	$100.00
PYMNT000000710810	4/12/2027	PMT	Applied: SALES00000001409	($100.00)	$0.00
SALES00000001410	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



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

S T A T E M E N T

Fabrikam, Inc.

Date:	4/30/2027
Account:	ADAMPARK0001

Amount Paid:

ADAM PARK RESORT
ROBERTA MASOURAS
SUITE 9876
321 CHESTNUT DRIVE
INDIANAPOLIS IN 46206-1391

Credit Limit: $40,000.00
Payment Terms: Net 30
Finance Charge APR: 18.00%
Deposits Received: $0.00

*^Please return this portion with your payment^*

Document No.	Date	Code	Description	Amount	Balance
RMA003001	8/31/2027	SLS	RMA003001	$933.58	$933.58
SALES00000001006	3/15/2027	SLS		$153.01	$1,086.59
SLS13014	1/23/2024	SLS		$8,500.00	$9,586.59
SLS13015	1/29/2024	SLS		$5,470.19	$15,031.78
SLS3004	11/23/2023	SLS		$2,535.76	$17,423.12
STDINV2225	4/12/2027	SLS	STDINV2225	$96.25	$17,519.37
STDINV2229	4/12/2027	SLS	STDINV2229	$2,567.95	$20,087.32
STDINV2250	4/12/2027	SLS	STDINV2250	$31.95	$20,119.27

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.

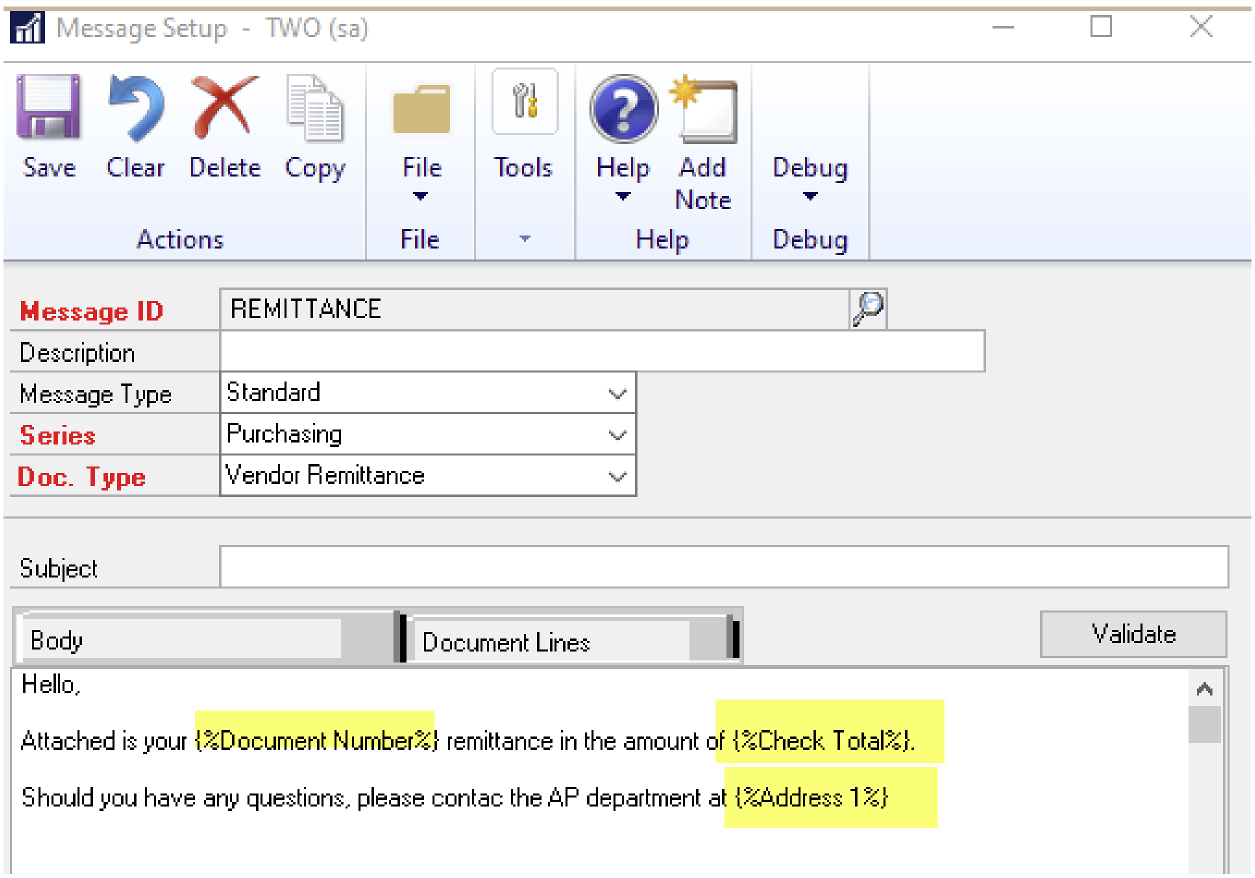
With this new feature, it is still important to use the Paid Transaction Removal routinely, you may be able to get away with not running it as frequently as you used to on prior Dynamics GP versions.

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.



ALL Payables 1099 forms print with LINES.

With the 18.5 release, we were really excited to have the feature [which allowed you to print a 1099-NEC 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 ([About Form 1099-NEC, Nonemployee Compensation | Internal Revenue Service (irs.gov)]()). Usually, customers will submit the forms electronically to the IRS vs a printed copy.

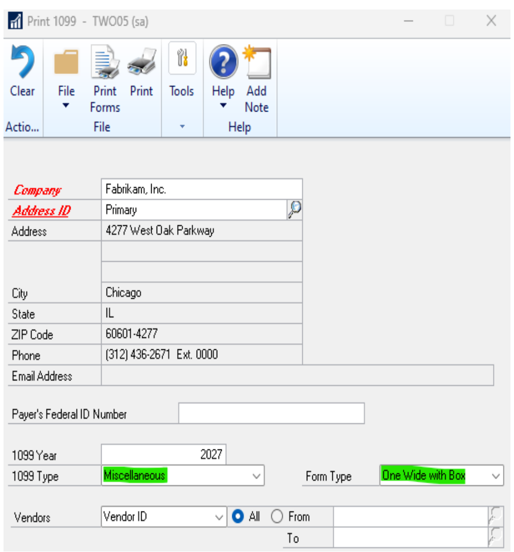
To print the 1099 forms with boxes follow these instructions:

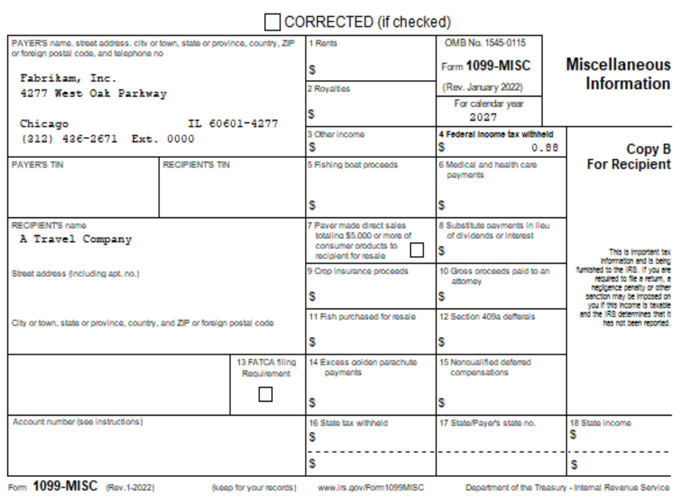
Go to Purchasing >> Routines >> Print 1099

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"



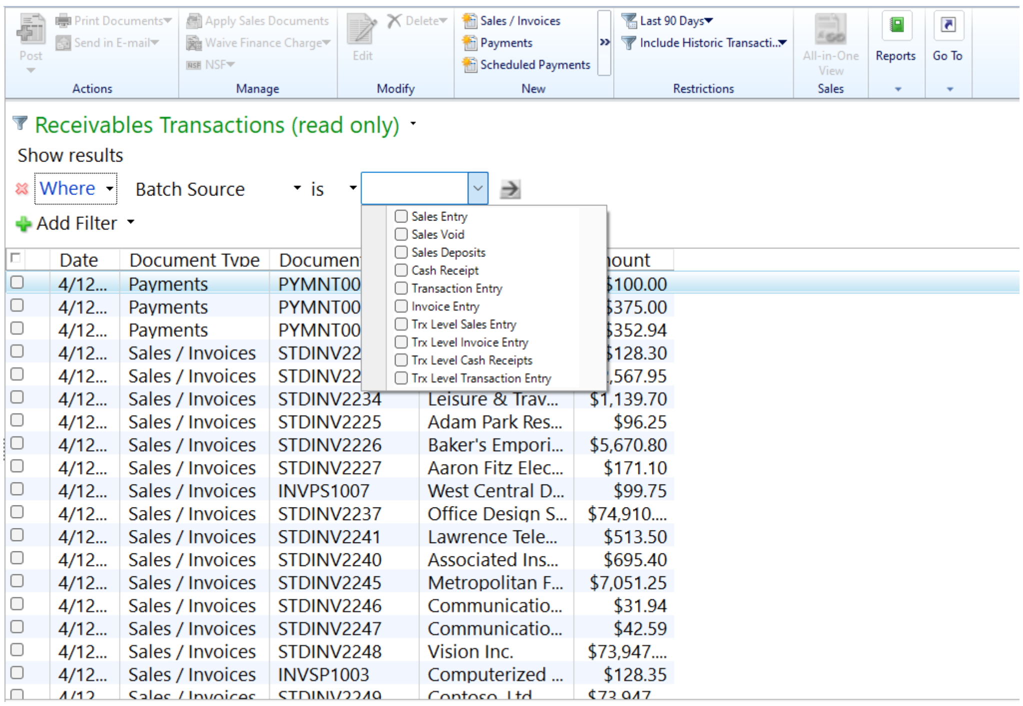


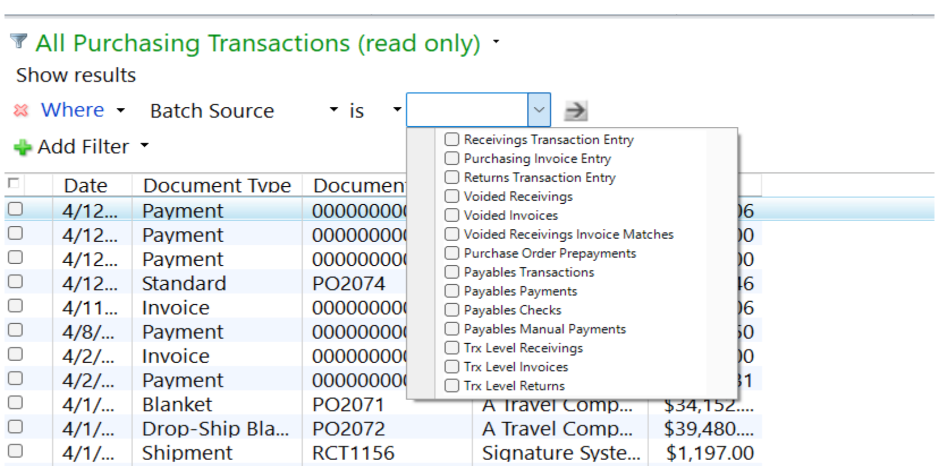
Note: With the 2022 Year-End form changes from IRS the "For calendar year" field is now blank. In prior years it was populated/printed with a year. On this new form, the year is printed from the "1099 Year" field in the above Print 1099 window.

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 Batch Number and Batch Source added to Navigation lists was a HUGE hit in GP 18.5. 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.





Print and Email Cash Receipts

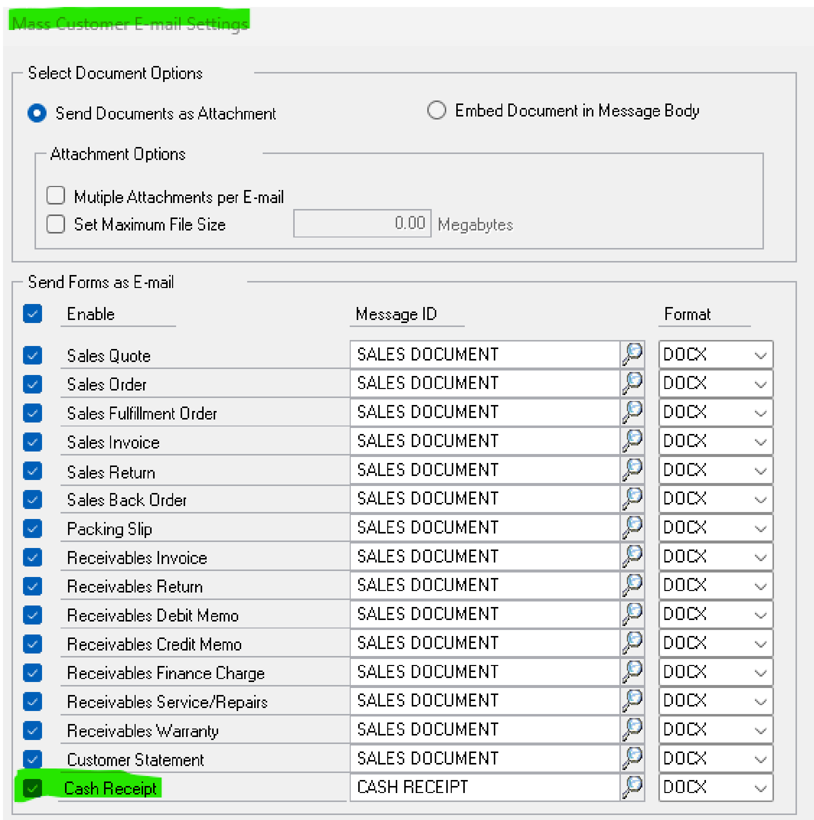
With the release of 18.5 (2022) we added the [functionality to print out a copy of your Customer's Cash Receipts or email a copy of the Customer's payment with a new word template](#).

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.



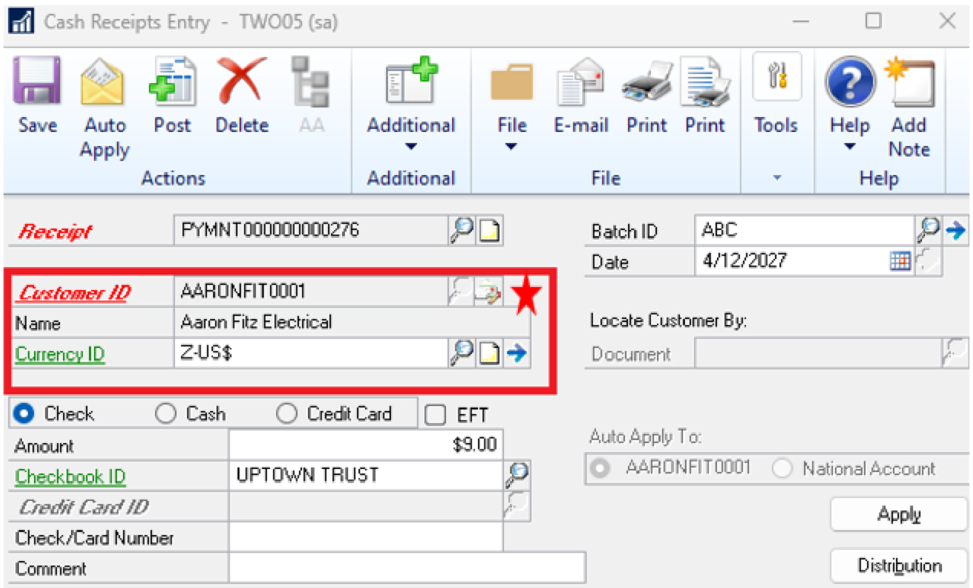
The following areas added the email detail icons to cash receipts entry/inquiry windows.

Transactions--> Sales --> Cash Receipts Entry

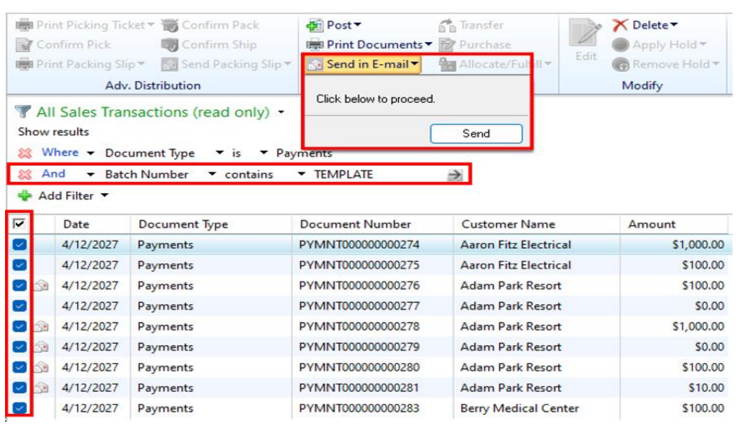
Transactions--> Sales --> Cash Receipts Entry --> E-mail Detail Entry

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

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

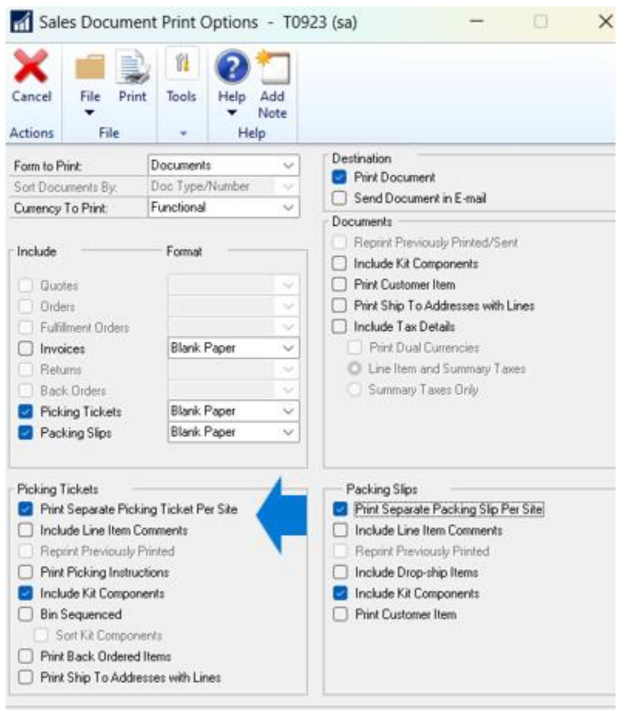


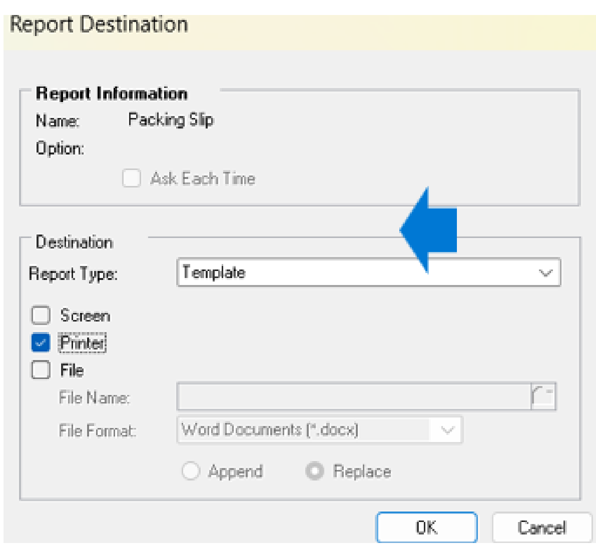
You cannot bulk print or email from the Receivables Batches window, only from the All-Sales-Transactions Navigation List. If you are going to use the Batch Number Filter, best practice would be to use unique batch IDs or also add a date filter also so that you do not process Payments from previous Batches 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.



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.





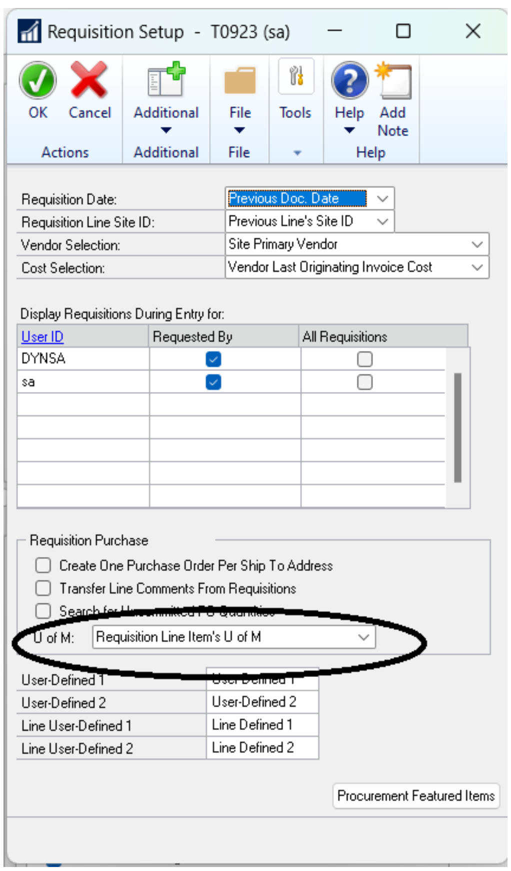
Set Unit of Measure from the PO Requisition to the Purchase Order

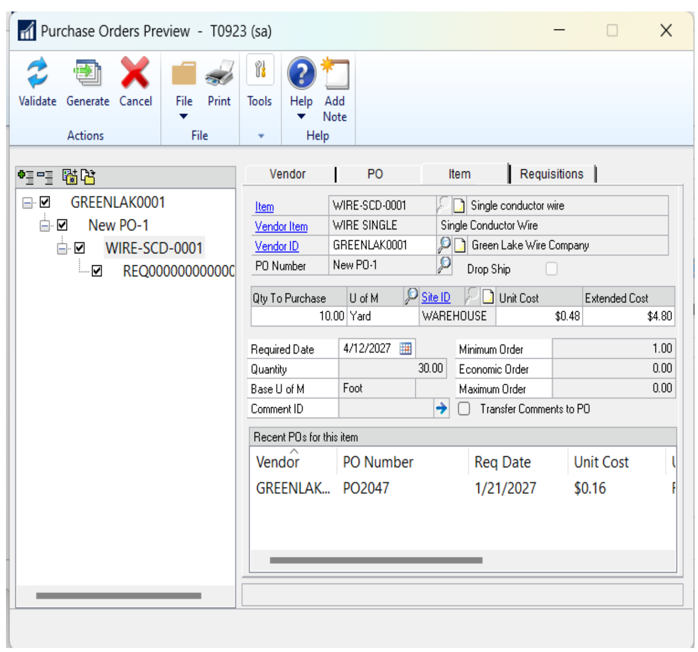
In the 18.6 release a set up option was added to the Requisition Setup window for the user to choose the Unit of Measure. A similar feature is available when creating a Purchase order from Sales Order, but cannot find a similar configuration available for Purchasing module.
On the 18.6 release, when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





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:

```
You have been assigned a task for the New workflow step step in the Sales Transaction workflow for Order ORDST2234.

Task Deadline: 9/15/2023 4:52:00 PM
Edit or view the document: ORDST2234

Approve
Reject


Type: Order
Document Number: ORDST2234
Customer: AARONFIT0001
Document Date: 4/12/2027
Document Amount: 365.15000
Subtotal: 365.15000
```

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

```
You have been assigned a task for the Sep 1 step in the Sales Transaction workflow for Order ORDST2233.

Task Deadline: 9/15/2023 4:50:00 PM
Edit or view the document: ORDST2233

E-mail actions for workflow are not enabled.

Type: Order
Document Number: ORDST2233
Customer: AARONFIT0001
Document Date: 4/12/2027
Document Amount: 365.15
Subtotal: 365.15
```

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:

```
You have been assigned a task for the Step 1 step in the Purchase Requisition Approval workflow for Purchase Requisition REQ00000000000022.

Task Deadline: 9/15/2023 1:46:00 PM
Edit or view the document: REQ00000000000022

Approve
Reject
Delegate


Company: Fabrikam, Inc.
Document Type: Purchase Requisition
Requisition Number: REQ00000000000022
Requested By: sa
Required Date: 4/12/2027
Document Date: 4/12/2027
Document Amount: 10.20000
```

Item Number	Quantity Ordered	Unit Cost
THING	1.00000	10.20000

You have been assigned a task for the Step 1 step in the Purchase Requisition Approval workflow for Purchase Requisition REQ00000000000003.

Task Deadline: 9/15/2023 1:50:00 PM
Edit or view the document: REQ00000000000003

E-mail actions for workflow are not enabled.

Company: Fabrikam, Inc.
Document Type: Purchase Requisition
Requisition Number: REQ00000000000003
Requested By: sa
Required Date: 4/12/2027
Document Date: 4/12/2027
Document Amount: 10.2

Item Number	Quantity Ordered	Unit Cost
128 SDRAM	1	10.2

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

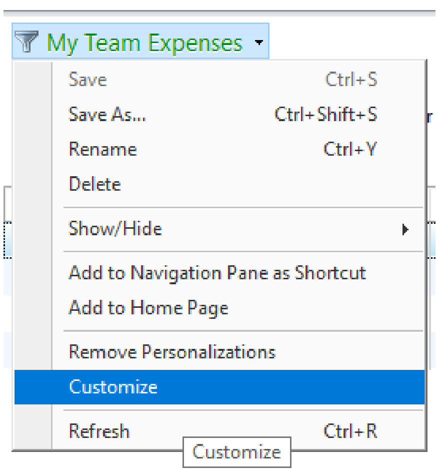
We have added 2 new Navigation Lists for Project Time & Expense specific to Expenses that are designed to help you filter down the clutter and focus on Expenses that involve you and your team if you are a manager or are set up as a delegate for others. These new lists are labeled as My Expenses and My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

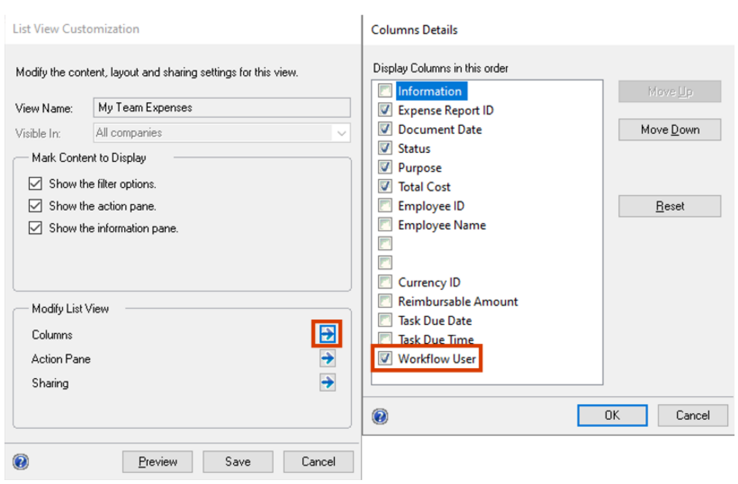
My Team Expenses list – Displays your Expenses, Expenses submitted by users that you are a delegate for (your team), and any expenses that are pending your approval.

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.

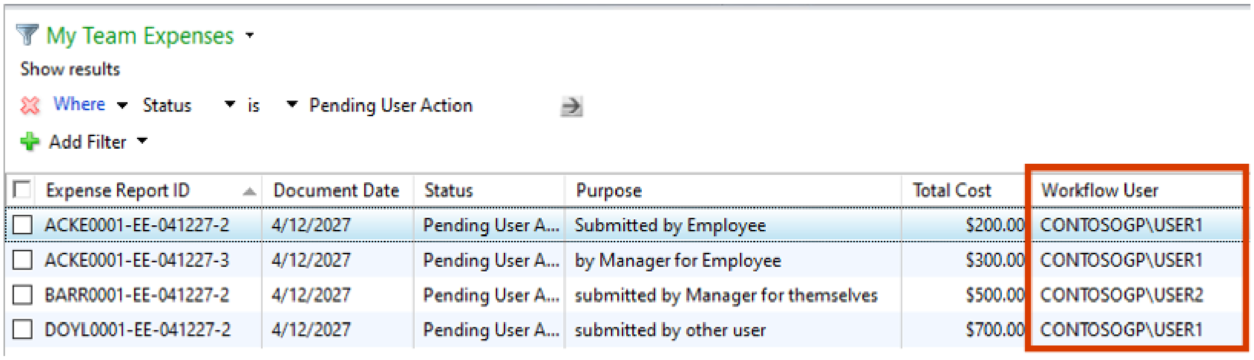
Select the Customize option under the My Team Expenses Drop Down List.



Click Columns and Mark Workflow User under Column Details.



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

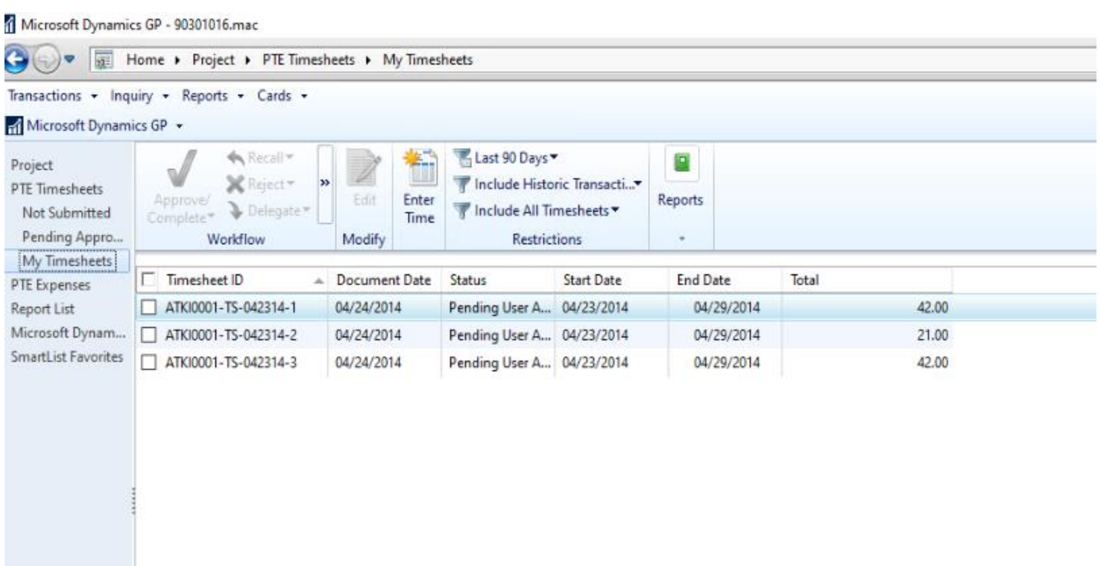


NOTE: This process can be repeated for the My Expenses List and the My Timesheets List as well.

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.



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 Rate:                 6.20000%
FICA Soc Sec Wage Limit:             160,200.00
FICA Medicare Tax Rate:                1.45000%
EIC Maximum Withholding:                   0.00

Ranges:
   Reporting Year:  2027
   Employee ID:     Beginning - End

Sort by:           MQGE / Employee ID

---------------------------------------------------------------------------------------------------------------------------------------
Employee ID:  13                                   Wages,Tips,Other Comp.:   40000000.00 Federal Income Tax Withheld:     12000097.66
13456789                    12345678923456789234 Social Security Wages:       40000.00 Social Security Tax Withheld:       2480.00
abc                                               Medicare Wages & Tips:       40000.00 Medicare Tax Withheld:               580.00
                                                  Social Security Tips:            0.00 Allocated Tips:                       0.00
                                                  Advance EIC Payments:            0.00 Dependent Care Benefits:              0.00
aneta, ND 592222                                  Nonqualified Plans:              0.00
```

18.6 Release

```
-------------------------------------------------------------------------------------------------------------------
Employee ID:  TERRY                          Wages,Tips,Other Comp.:  10,987,634.55 Federal Income Tax Withheld:          0.01
JULIE                     JOHNSON            Social Security Wages:      160,200.00 Social Security Tax Withheld:         5.00
ABC                                          Medicare Wages & Tips:      200,000.00 Medicare Tax Withheld:               10.00
                                             Social Security Tips:             0.00 Allocated Tips:                       0.00
                                             Advance EIC Payments:             0.00 Dependent Care Benefits:              0.00
ANETA, ND 58212                              Nonqualified Plans:               0.00


Employee SSN: 496-69-9885

Employment Type: Regular non-MQGE
Department:      ACCT

W-2 Check Boxes:
   Statutory Employee       Retirement Plan


Number of Employees:                      29
Wages, Tips, Other Comp:       11,382,607.95        Federal Income Tax Withheld:        44,391.45
Social Security Wages:            567,130.83        Social Security Tax Withheld:       25,234.72
Medicare Wages & Tips:            606,930.83        Medicare Tax Withheld:               5,910.50
Social Security Tips:                   0.00        Allocated Tips:                          0.00
Advance EIC Payment:                    0.00        Dependent Care Benefits:                 0.00
Nonqualified Plans:                     0.00

Special Items Box:                                  Other Items Box:
                                                         401K                           598.01

State                  Wages          Tax           Locality             Wages           Tax
   IL             219,368.89     5,518.87
   IN              40,279.03     1,315.11
   WI              18,114.84     1,000.39
   NE              40,991.74     1,669.75
   MI              18,758.50       687.41
   IA              17,778.80       752.00
   MN              23,316.92       929.50
   MO              16,364.68       448.00
```

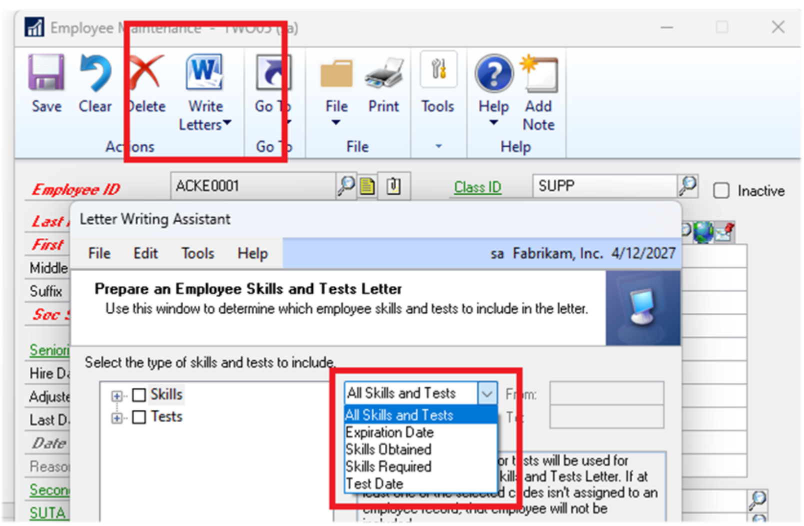
Looks really nice for the bottom totals too.

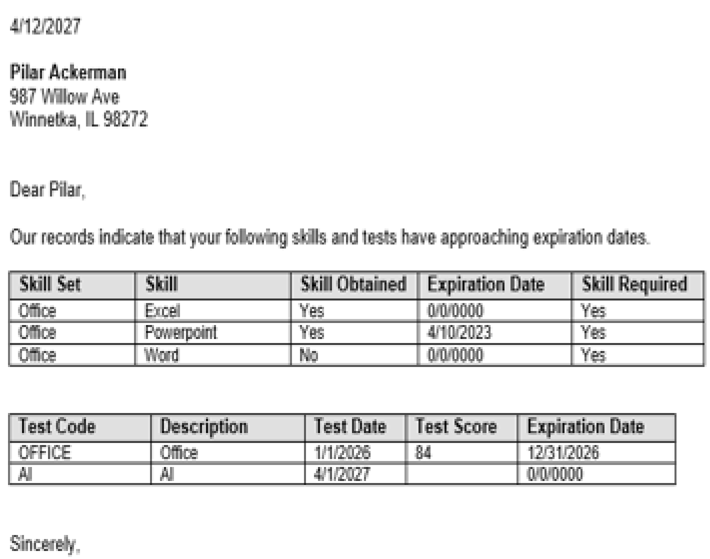
Letter Writing Assistant Expiring Test in Human Resources

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

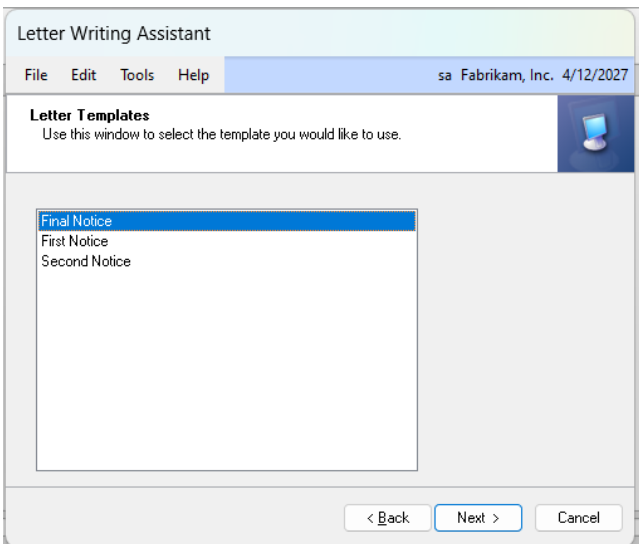
Sincerely,

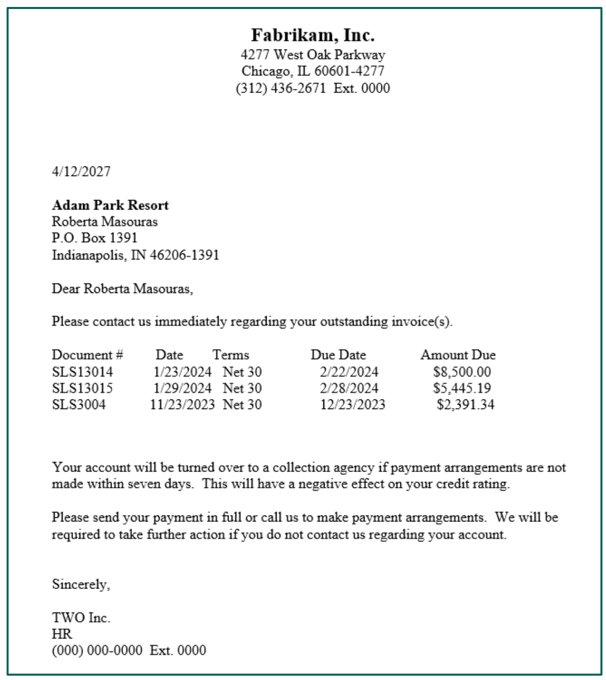
Letter Writing Assistant Final Notice Collection Letter

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.





Fabrikam, Inc.
4277 West Oak Parkway
Chicago, IL 60601-4277
(312) 436-2671 Ext. 0000

4/12/2027

Adam Park Resort
Roberta Masouras
P.O. Box 1391
Indianapolis, IN 46206-1391

Dear Roberta Masouras,

Please contact us immediately regarding your outstanding invoice(s).

Document #	Date	Terms	Due Date	Amount Due
SLS13014	1/23/2024	Net 30	2/22/2024	$8,500.00
SLS13015	1/29/2024	Net 30	2/28/2024	$5,445.19
SLS3004	11/23/2023	Net 30	12/23/2023	$2,391.34

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

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

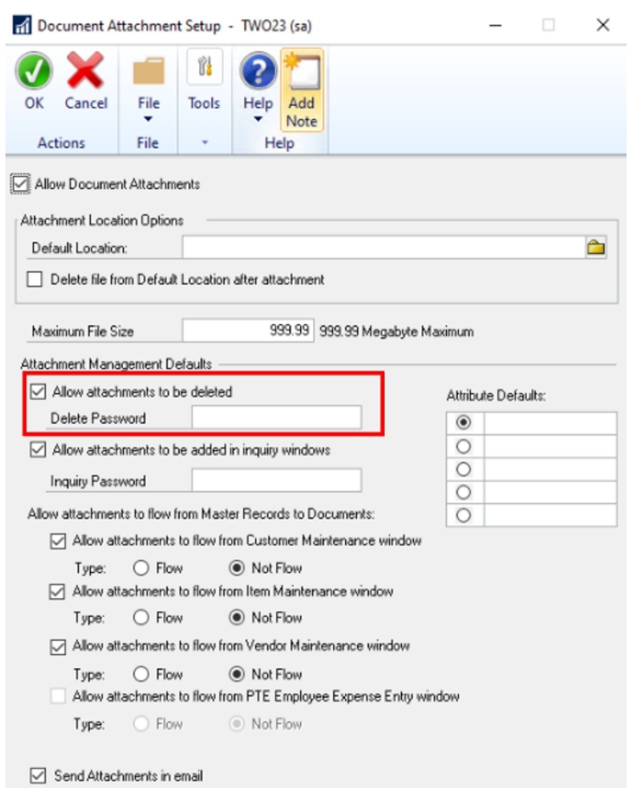
After this lesson you will be able to:

- 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."



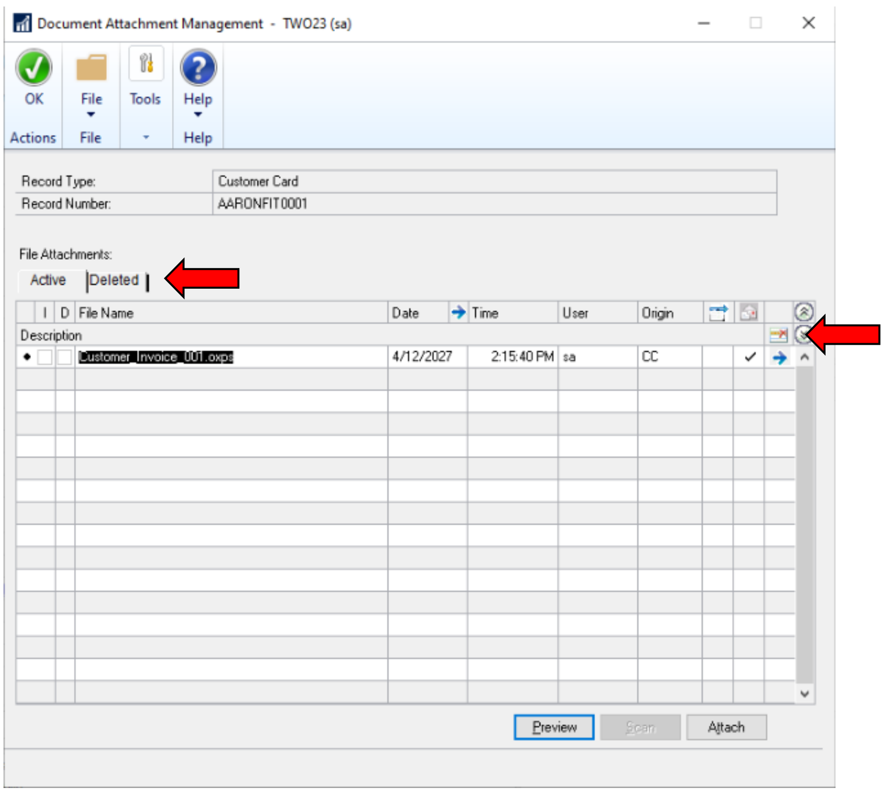
When you want to delete an attachment the user's process would then be:

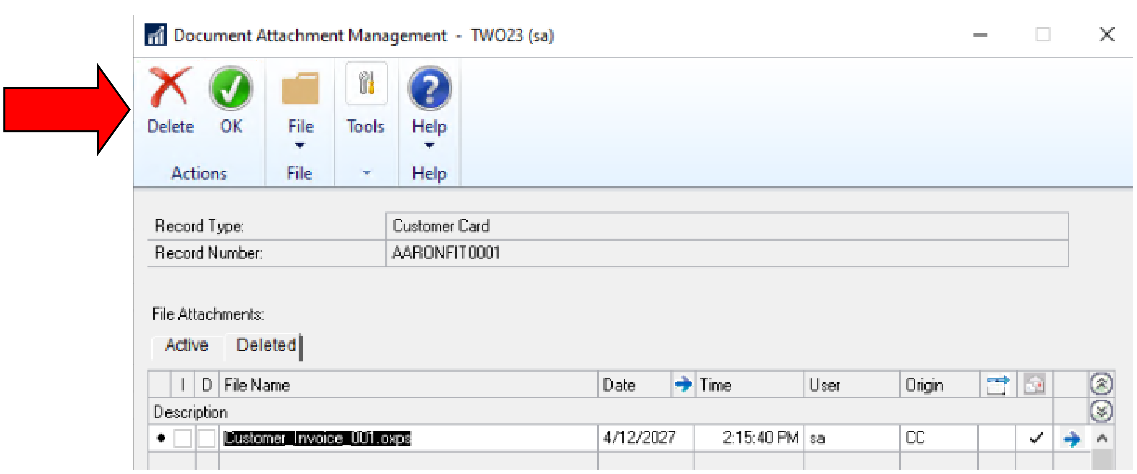
1) Pull up the Document Attachment Management window that contains the attachment you want to delete

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.





Shared Mailbox with Multi-Factor Authentication(MFA)

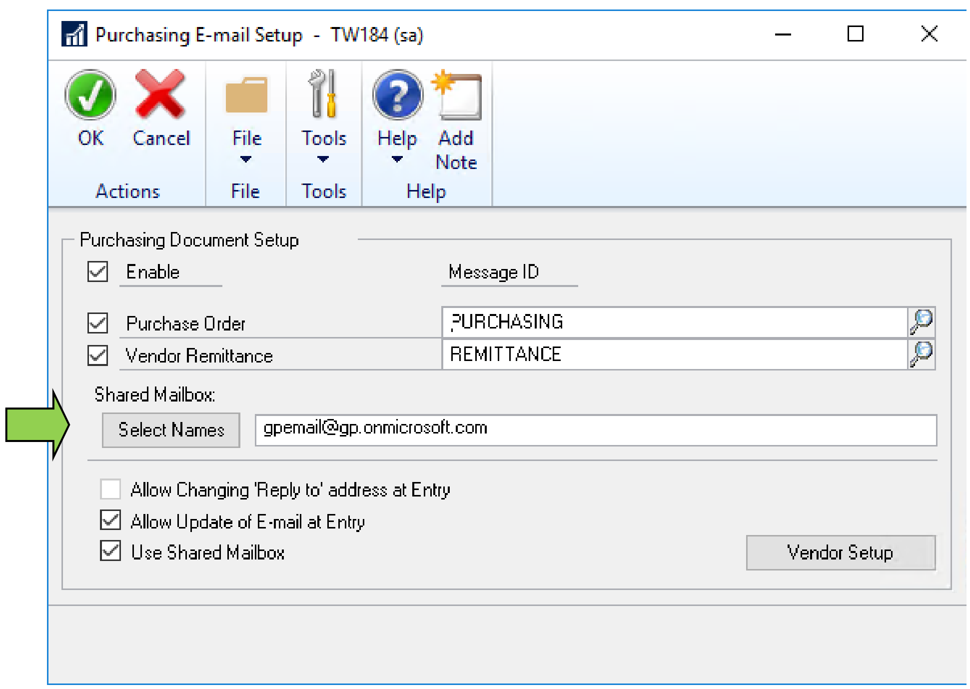
One of the exciting new features in the Dynamics GP October 2023 release is another request that comes directly from customer feedback. You are now able to set up the Sales and Purchasing series to use a shared mailbox for sending email.

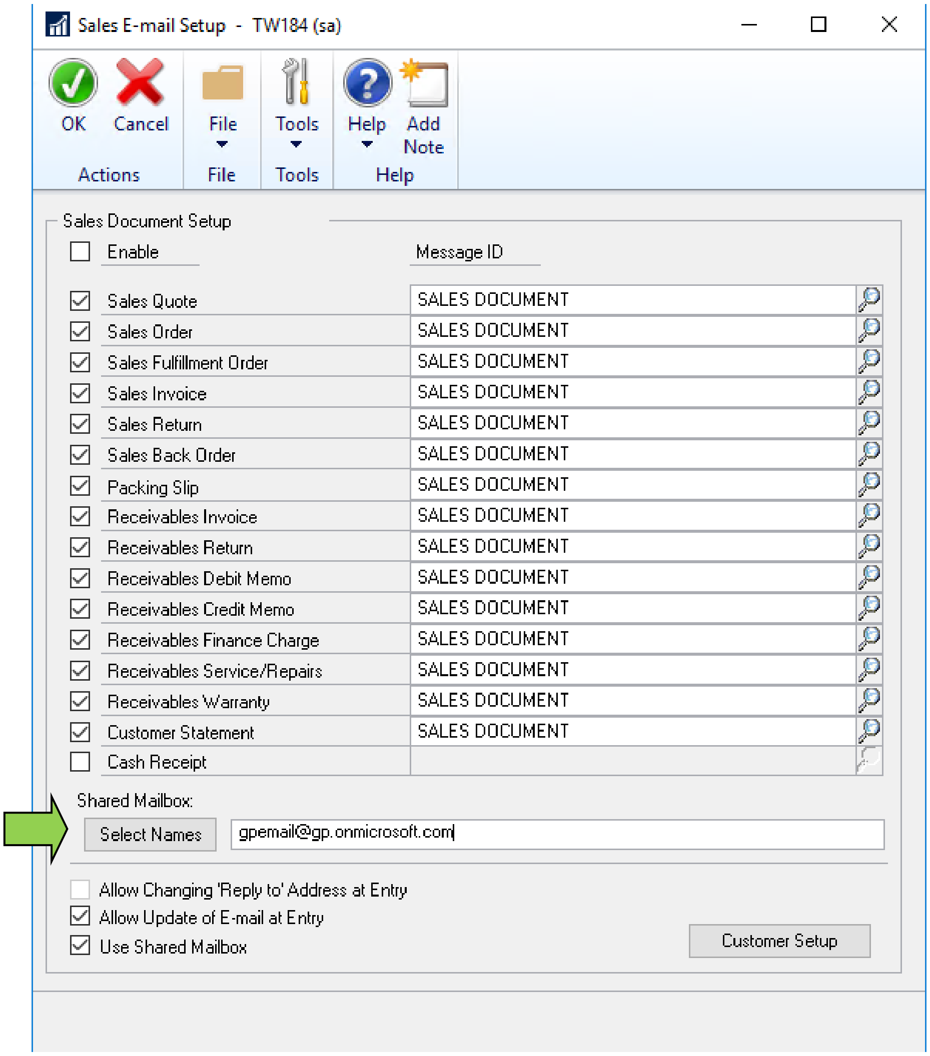
With all the work we have done around Modern Authentication (MFA) and customers using it heavily, Shared Mailbox was something customers found they needed.

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,





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

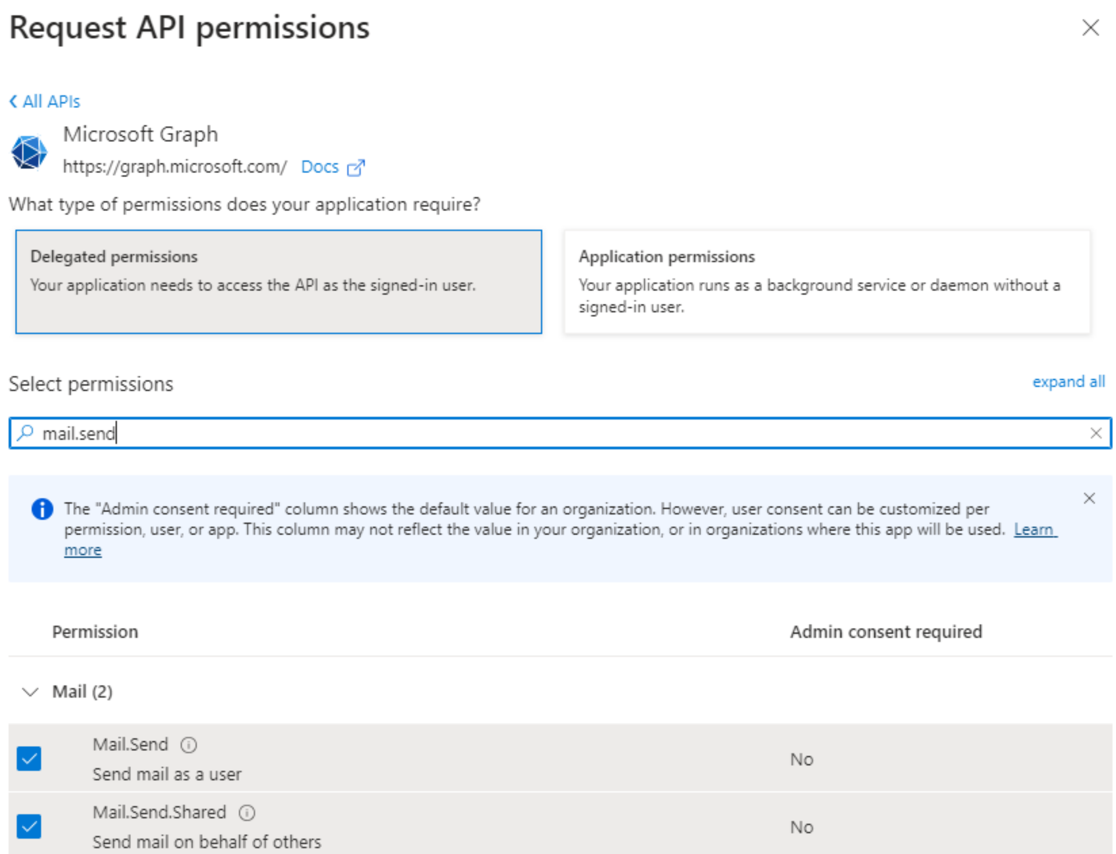
5) Click on Add a permissions

6) In the window pane that opens click Microsoft Graph

7) Select Delegated permissions

8) In the search box type Mail.Send

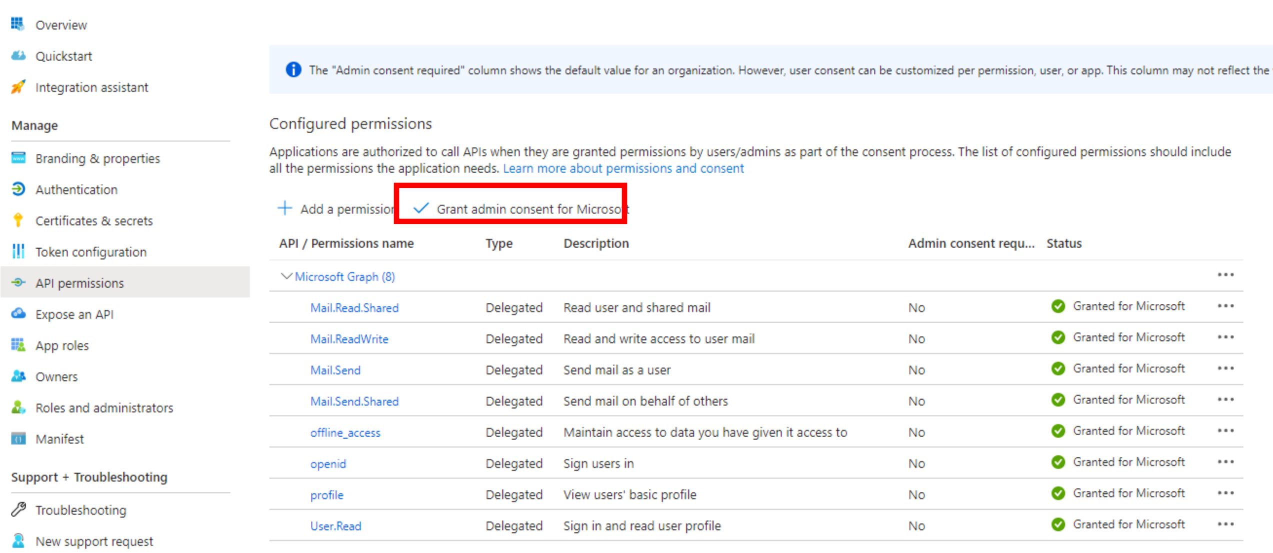
9) In the items that are returned you should already have "Mail.Send" marked. You will need to mark "Mail.Send.Shared" for the new feature



10) Click the Add permissions button

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

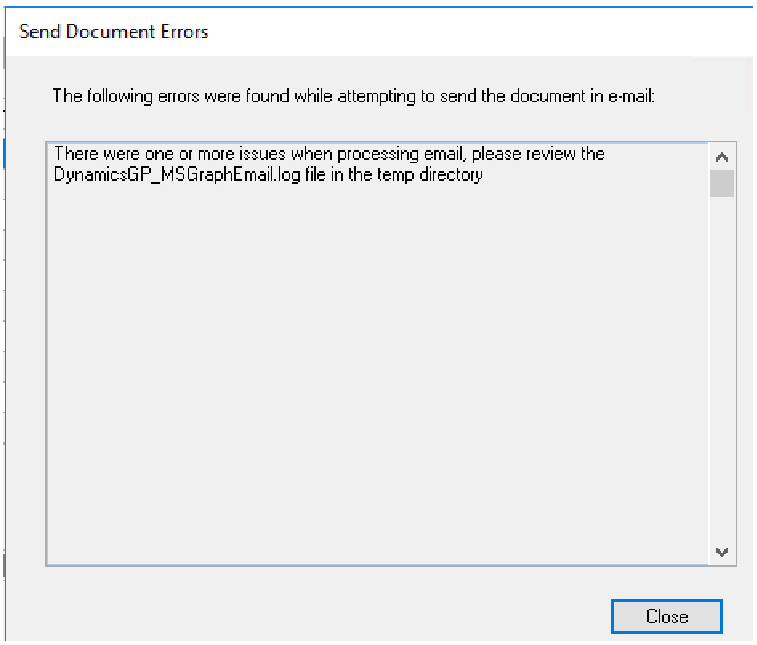
All permissions in the list should have a green checkmark in the Status column when this is completed.



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:



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

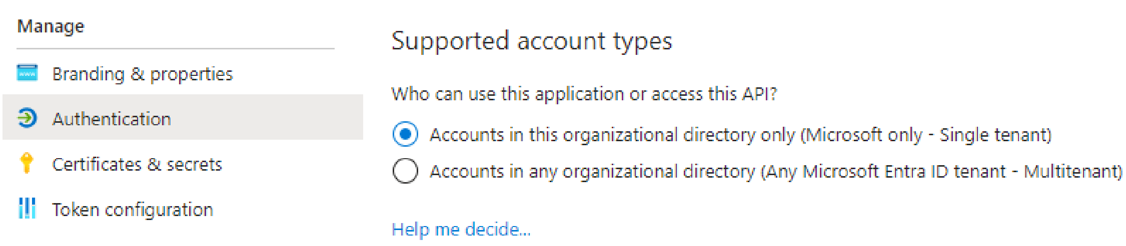
Modern Authentication - Single Tenant App Registration

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.

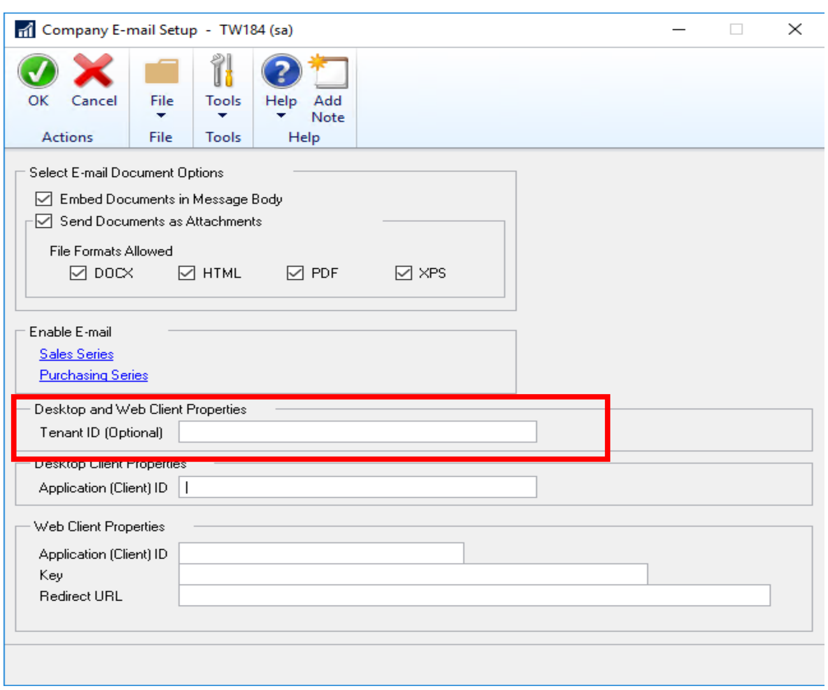
There are more security-minded customers that require the multi-tenant authentication option in the Azure App Registration. Prior to 18.6 release, if you select the single-tenant option, the Modern Auth window in Dynamics GP will give "Unknown error".

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:



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:



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