



# Microsoft Dynamics GP **Technical Airlift 2013**

Know the Latest: Native Business  
Intelligence (BI) for Microsoft  
Dynamics GP 2013

**Belinda Allen**

Microsoft MVP

Partner, Smith & Allen Consulting, NYC

# Agenda

- Experiment
- Belinda-ism: What is BI?
- “I need BI, but I do not know what I want to see”
- 3 Types of BI Tools
- Native tools not to be forgotten (passive examples)
- My favorite native tool (active examples)



# Experiment



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# POLL

What were you doing during the experiment?

- A) Watching because I wanted a ball
- B) Watching because I did not want to get hit
- C) I was not watching



# Belinda-ism: What is BI?

Making informed business decisions based on timely and accurate information.

## in·tel·li·gence

/in'telijəns/

*noun*

1. the ability to acquire and apply knowledge and skills.  
"an eminent man of great intelligence"  
*synonyms:* intellectual capacity, mental capacity, [intellect](#), [mind](#), [brain\(s\)](#), [IQ](#), [brainpower](#), [judgment](#), [reasoning](#), [understanding](#), [comprehension](#); [More](#)
2. the collection of information of military or political value.  
"the chief of military intelligence"  
*synonyms:* information gathering, [surveillance](#), [observation](#), [reconnaissance](#), [spying](#), [espionage](#), [infiltration](#), [ELINT](#), [humint](#); [More](#)



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# Belinda-ism: What is BI?

Business Intelligence is NOT:

- ~~Report~~
- ~~Dashboard~~
- ~~Tool~~

It is not these things, it comes from these things!



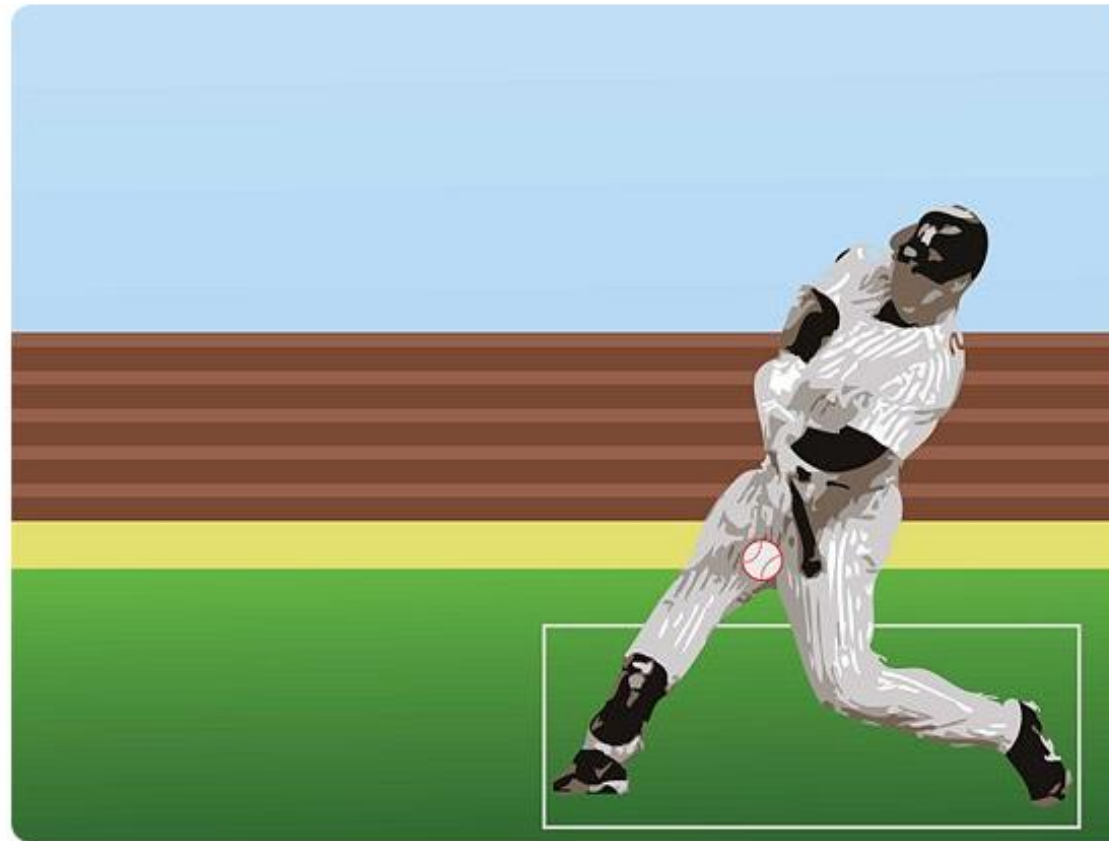
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# Timely and Accurate

5

Hit the ball when it dips at a certain angle. This angle should be at about 42 degrees.



- To easily remember what that dip would look like, take hold of a baseball. Take the baseball from your hand with your other hand and keep that shape of the baseball in your hand. That's the angle at which you want to hit the ball.

<http://www.wikihow.com/Hit-a-Home-Run> - 7 steps



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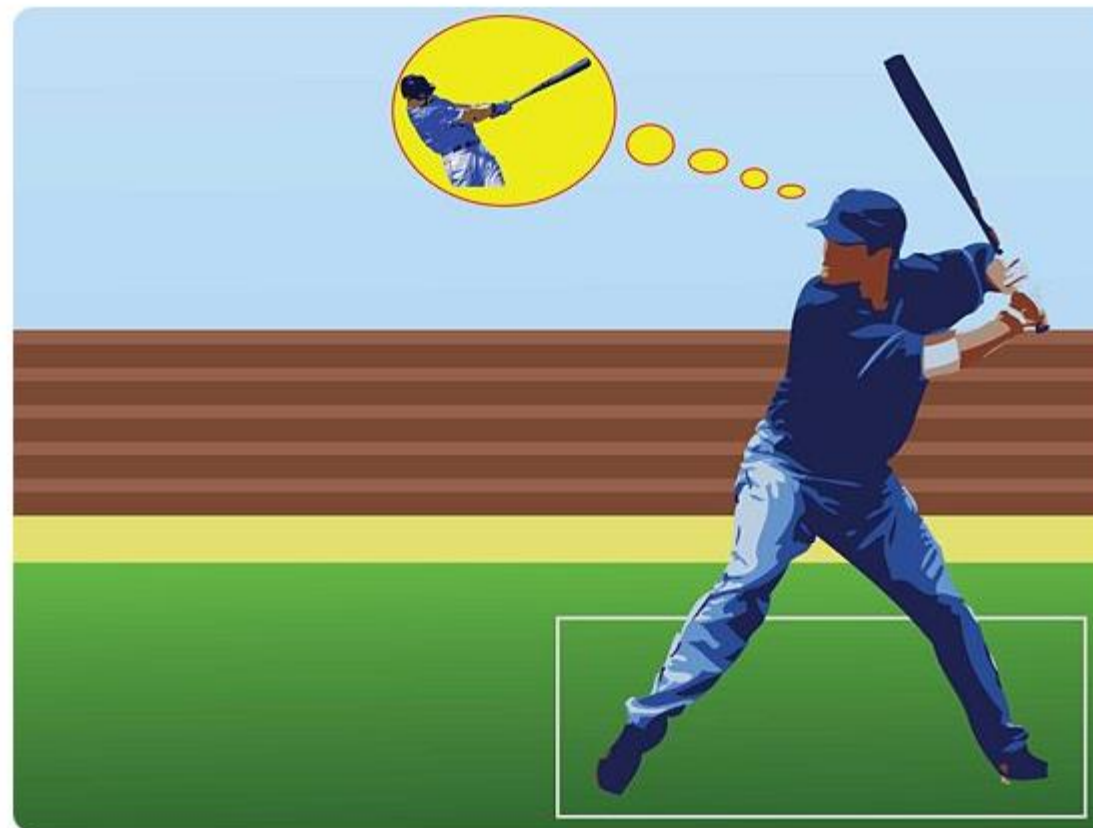
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# Baseball is not always the perfect analogy

“My Competition will disappear and I will become rich beyond my wildest dreams!”

- 7 **Convince yourself that you can hit a home run.** This is a commonly known strategy known as reverse psychology. When you keep saying it, your brain sends a message to your adrenaline to challenge yourself, thereby helping you to concentrate on hitting the ball properly.



<http://www.wikihow.com/Hit-a-Home-Run> - 7 steps



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# 5 MLB Analytics Practices That Work For Businesses - InformationWeek

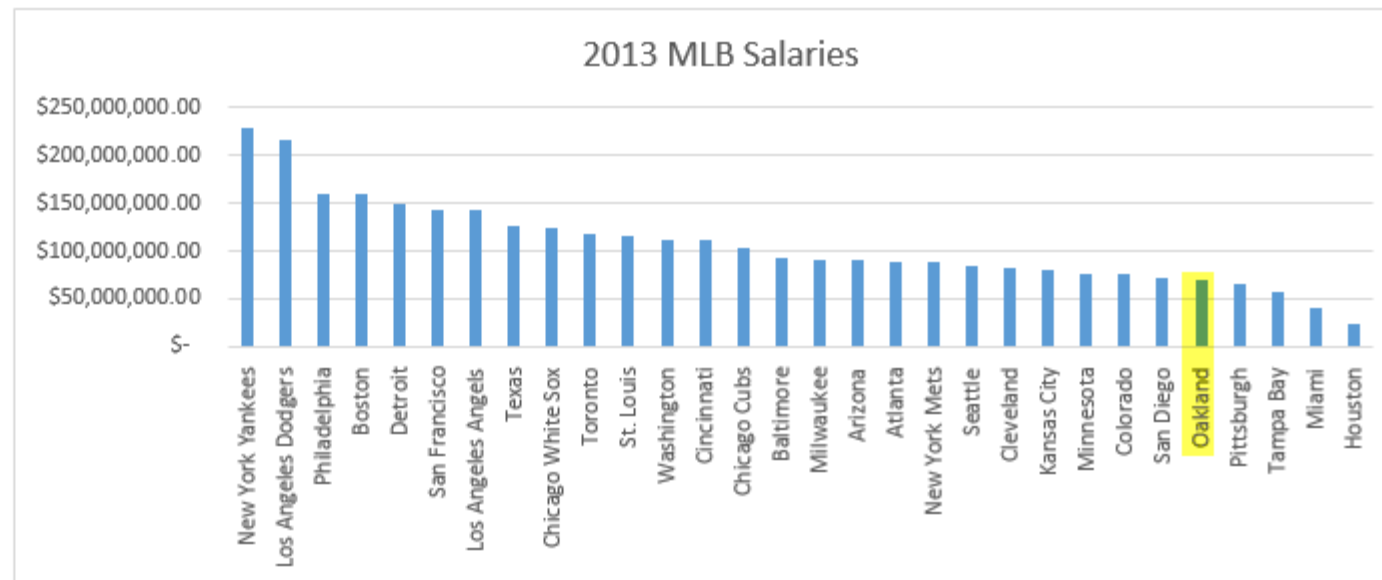
1. Value Data Over Intuition
2. Embrace New Metrics
3. Consider Context
4. Make Predictions
5. Declare WAR



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# MLB Salaries - 2013

<b>New York Yankees</b>	\$ 228,995,945.00
<b>Los Angeles Dodgers</b>	\$ 216,302,909.00
<b>Philadelphia</b>	\$ 159,578,214.00
<b>Boston</b>	\$ 158,967,286.00
<b>Detroit</b>	\$ 149,046,844.00
<b>San Francisco</b>	\$ 142,180,333.00
<b>Los Angeles Angels</b>	\$ 142,165,250.00
<b>Texas</b>	\$ 127,197,575.00
<b>Chicago White Sox</b>	\$ 124,065,277.00
<b>Toronto</b>	\$ 118,244,039.00
<b>St. Louis</b>	\$ 116,702,085.00
<b>Washington</b>	\$ 112,431,770.00
<b>Cincinnati</b>	\$ 110,565,728.00
<b>Chicago Cubs</b>	\$ 104,150,726.00
<b>Baltimore</b>	\$ 91,793,333.00
<b>Milwaukee</b>	\$ 91,003,366.00
<b>Arizona</b>	\$ 90,158,500.00
<b>Atlanta</b>	\$ 89,288,193.00
<b>New York Mets</b>	\$ 88,877,033.00
<b>Seattle</b>	\$ 84,295,952.00
<b>Cleveland</b>	\$ 82,517,300.00
<b>Kansas City</b>	\$ 80,491,725.00
<b>Minnesota</b>	\$ 75,562,500.00
<b>Colorado</b>	\$ 75,449,071.00
<b>San Diego</b>	\$ 71,689,900.00
<b>Oakland</b>	\$ 68,577,000.00
<b>Pittsburgh</b>	\$ 66,289,524.00
<b>Tampa Bay</b>	\$ 57,030,272.00
<b>Miami</b>	\$ 39,621,900.00
<b>Houston</b>	\$ 24,328,538.00



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Technical Airlift 2013**

# MLB Salaries - 2013

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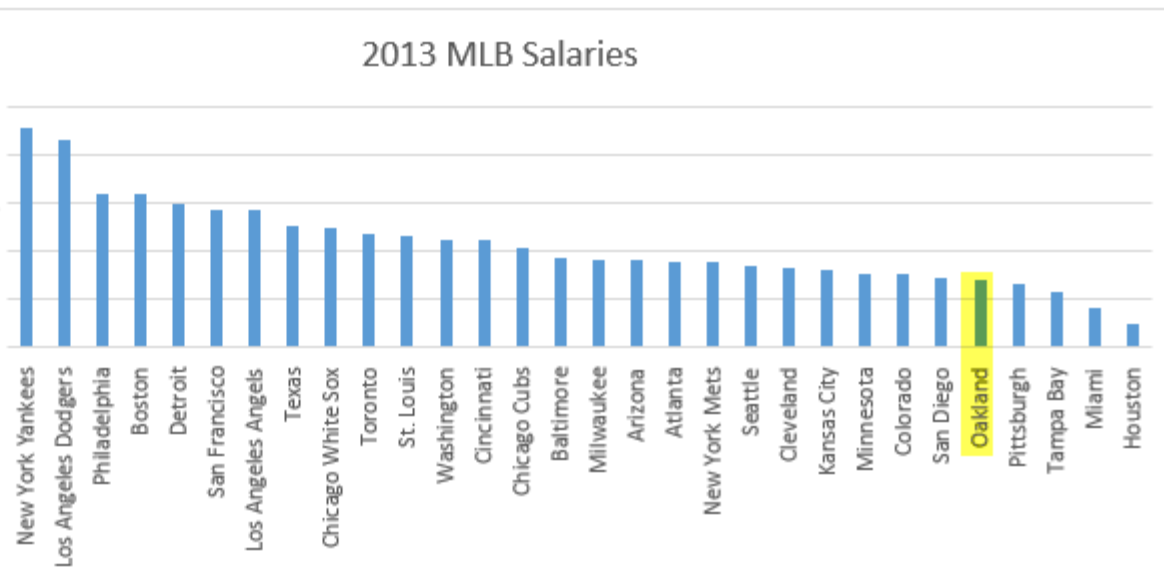
# MLB Salaries - 2013

**Major League Baseball Standings**

**As of 9/5/13**

**MLB American League**

AL East	W	L	PCT	GB	HOME	AWAY	L10	STR
Red Sox	84	57	.596	-	47-25	37-32	8-2	W3
Rays	77	61	.558	5.5	44-26	33-35	3-7	W2
Yankees	75	64	.540	8.0	43-28	32-36	7-3	W1
Orioles	73	65	.529	9.5	38-29	35-36	4-6	L1
Blue Jays	64	76	.457	19.5	35-34	29-42	7-3	L1
AL Central	W	L	PCT	GB	HOME	AWAY	L10	STR
Tigers	81	59	.579	-	44-27	37-32	4-6	L2
Indians	74	65	.532	6.5	42-27	32-38	4-6	W2
Royals	72	67	.518	8.5	37-34	35-33	7-3	L1
Twins	61	77	.442	19.0	28-36	33-41	4-6	L1
White Sox	56	82	.406	24.0	32-34	24-48	3-7	L6
AL West	W	L	PCT	GB	HOME	AWAY	L10	STR
Athletics	80	59	.576	-	44-26	36-33	8-2	W1
Rangers	80	59	.576	-	39-29	41-30	5-5	L1
Angels	64	74	.464	15.5	32-39	32-35	7-3	L2
Mariners	63	76	.453	17.0	31-38	32-38	4-6	W1



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“I need BI, but I  
do not know  
what I want to  
see”



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# I need BI...

## Where to start

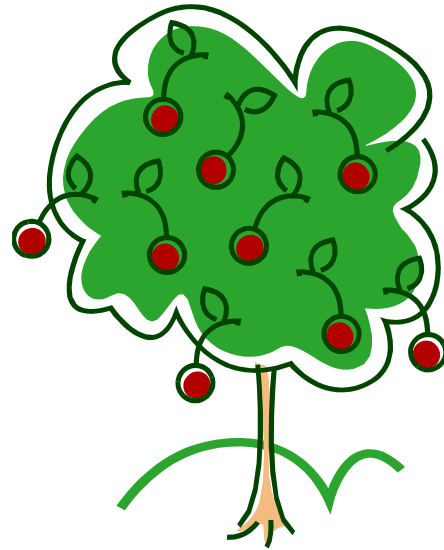
- What information would make it easier for you to create or achieve goals
- What problems you have and what information would help solve or prevent them from happening again.
- Areas you would have done something different had you known an additional piece of data.



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# Best place to start?



## Grab the low hanging fruit first!



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# 3 Types of BI Tools

***Past*** is experience,

***Present*** is experiment and

***Future*** is expectation.

Use your experience in your  
experiments to achieve your  
expectations.

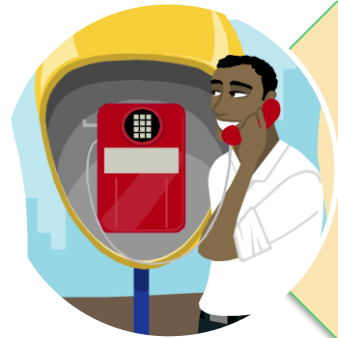
- *Unknown*



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# Understand 3 types of BI



Past - Tactical



Present -  
Operational



Future -  
Strategic



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# 3 Types of BI Tools

## Past BI – Tactical

- Management Reporter
- FRx
- Advanced Financial Analysis

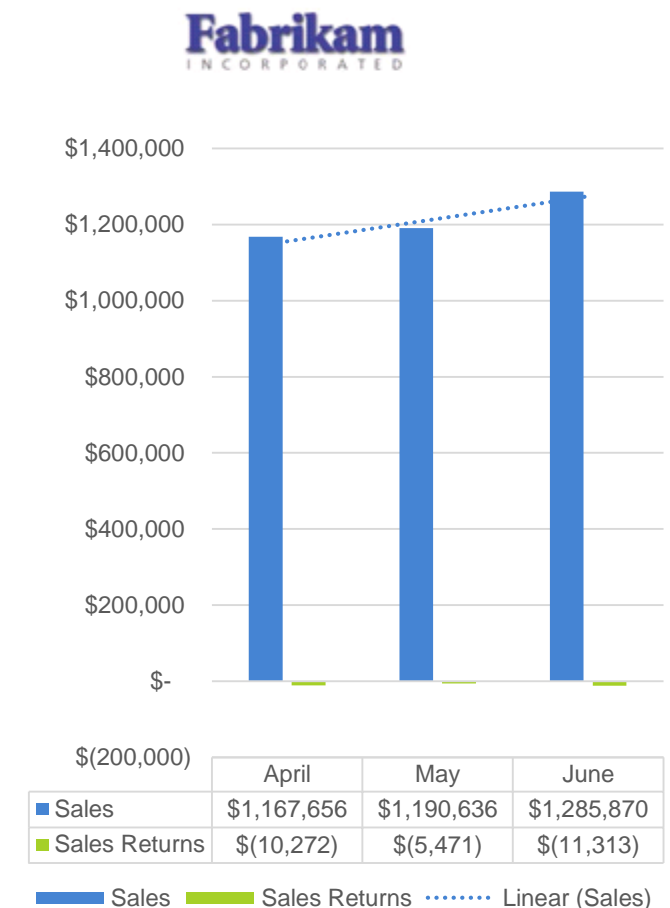


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# Native tools not to be forgotten

## Past BI – Tactical

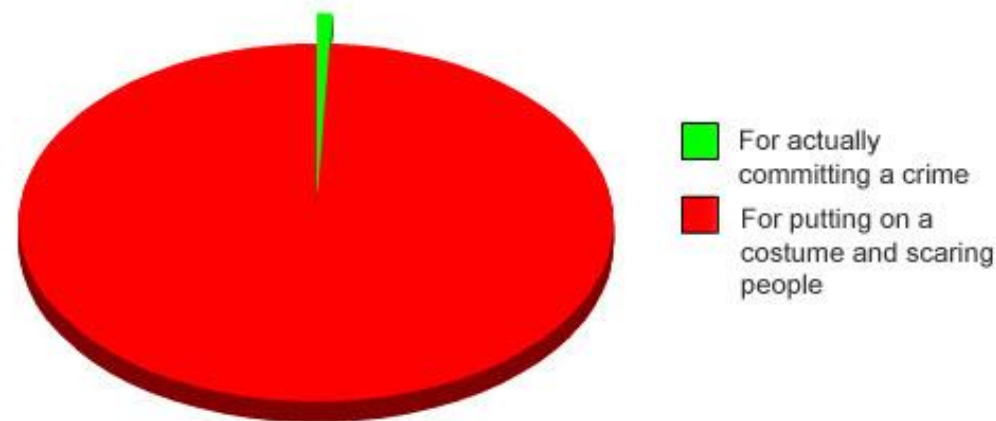
<b>Fabrikam, Inc.</b> <b>Income Statement</b> <b>Fabrikam Works</b> <b>For the Six Months Ending Thursday, June 30, 2011</b>					
Current Month			YTD		
April	May	June		2011	
<b>Revenue</b>					
1,167,656	1,190,636	1,285,870	Sales	5,246,705	
10,272	5,471	11,313	Sales Returns	51,892	
34,235	34,910	37,702	Sales Discounts	205,179	
<b>1,123,148</b>	<b>1,150,256</b>	<b>1,236,856</b>	<b>Net Sales</b>	<b>4,989,634</b>	
822,289	838,488	905,567	Cost of Goods Sold	4,010,401	
<b>300,859</b>	<b>311,768</b>	<b>331,288</b>	<b>Gross Margin</b>	<b>979,233</b>	
<b>Operating Expenses</b>					
92,314	93,736	100,698	Salaries and Wages	556,260	
4,727	4,820	5,205	Office Expense	28,406	
20,956	30,657	23,079	Supplies Expense	108,803	
11,340	11,564	12,489	Rent Expense	68,393	
7,204	7,346	7,933	Travel Expense	43,427	
<b>136,541</b>	<b>148,123</b>	<b>149,404</b>	<b>Total Operating Expenses</b>	<b>805,289</b>	
<b>164,319</b>	<b>163,645</b>	<b>181,884</b>	<b>Income From Operations</b>	<b>173,944</b>	
<b>164,319</b>	<b>163,645</b>	<b>181,884</b>	<b>Income Before Income Taxes</b>	<b>173,944</b>	
<b>\$164,319</b>	<b>\$163,645</b>	<b>\$181,884</b>	<b>Net Income</b>	<b>\$173,944</b>	



# 3 Types of BI Tools

## Past BI – Tactical

### Why Villains In Scooby Doo Are Arrested



GraphJam.com

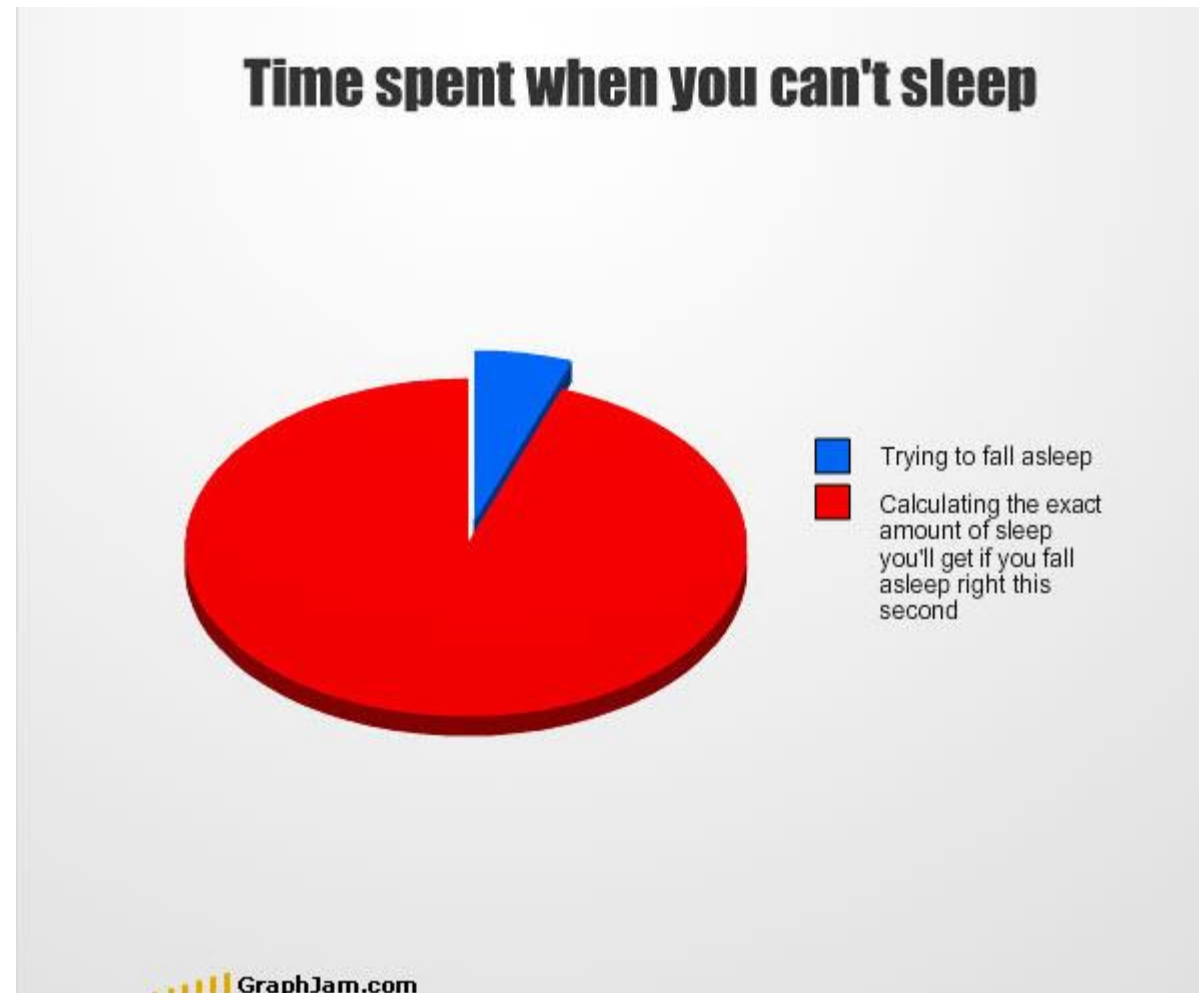


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# 3 Types of BI Tools

## Past BI – Tactical



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# 3 Types of BI Tools

## Future BI - Strategic

- GP Budgets
- Excel Budgeting Wizard
- FRx Forecaster



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# Native tools not to be forgotten

## Future BI - Strategic

**Budget Wizard for Excel**  
File Edit Tools Help sa Fabrikam, Inc. 4/12/2017

**Budget Calculation Method**  
Which budget calculation method do you want to use?

Select a budget calculation method which will be used to create default budget amounts in Excel.

- Open Year Percent
- Other Budget Percent
- Historical Year Percent
- Blank Budget

**Open Year Percent**  
Calculates a new budget on the actual balances of any year that hasn't been closed by increasing or decreasing the open-year balances by a certain percentage.

< Back Next > Cancel

**Budget Wizard for Excel**  
File Edit Tools Help sa Fabrikam, Inc. 4/12/2017

**Open Year Percent**  
Which open year do you want to use as the basis for your new budget?

Select an open year.  
2016

Select the type of change and enter a percent.

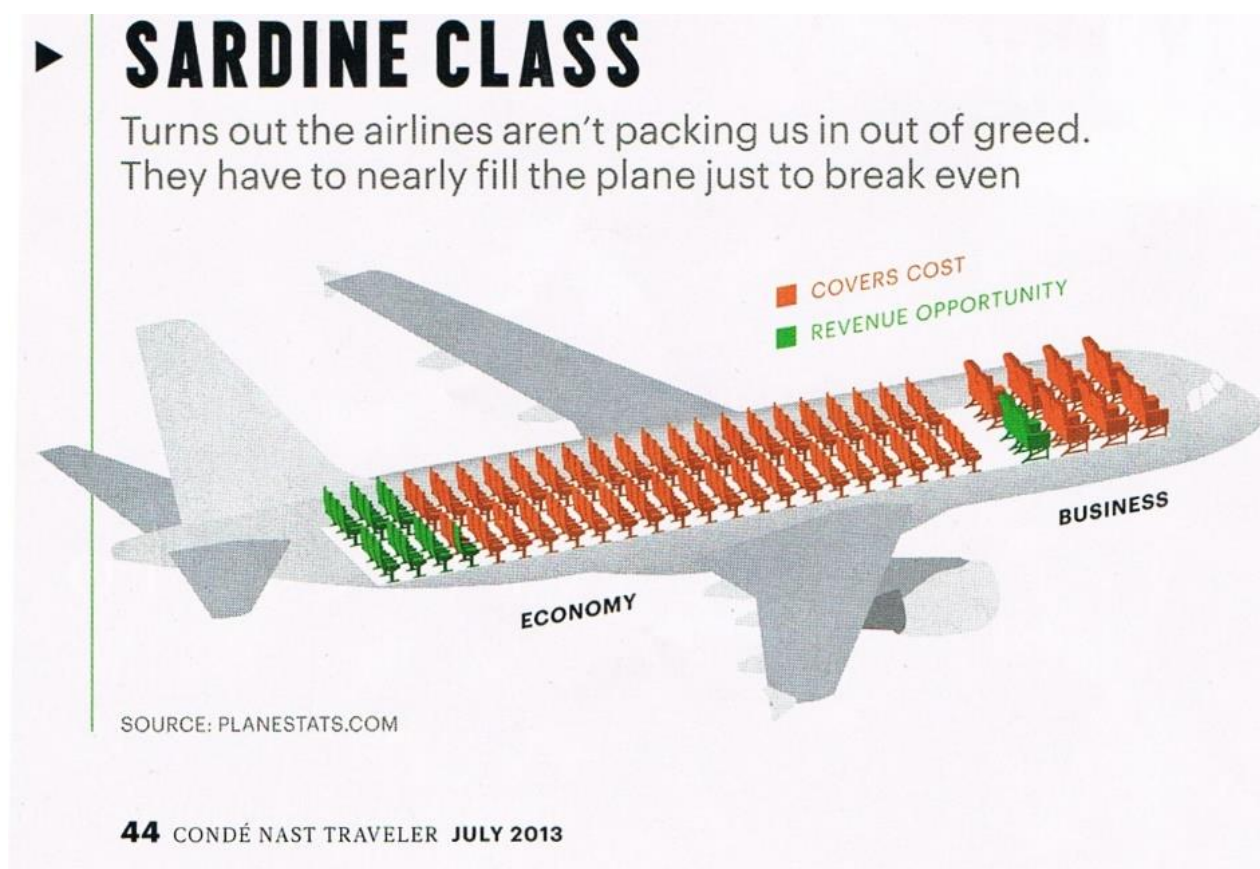
- ☒ Increase by 1.00%
- ☐ Decrease by 0.00%
- ☐ No change

< Back Next > Cancel

Goal: To Improve Performance

# 3 Types of BI Tools

## Future BI - Strategic

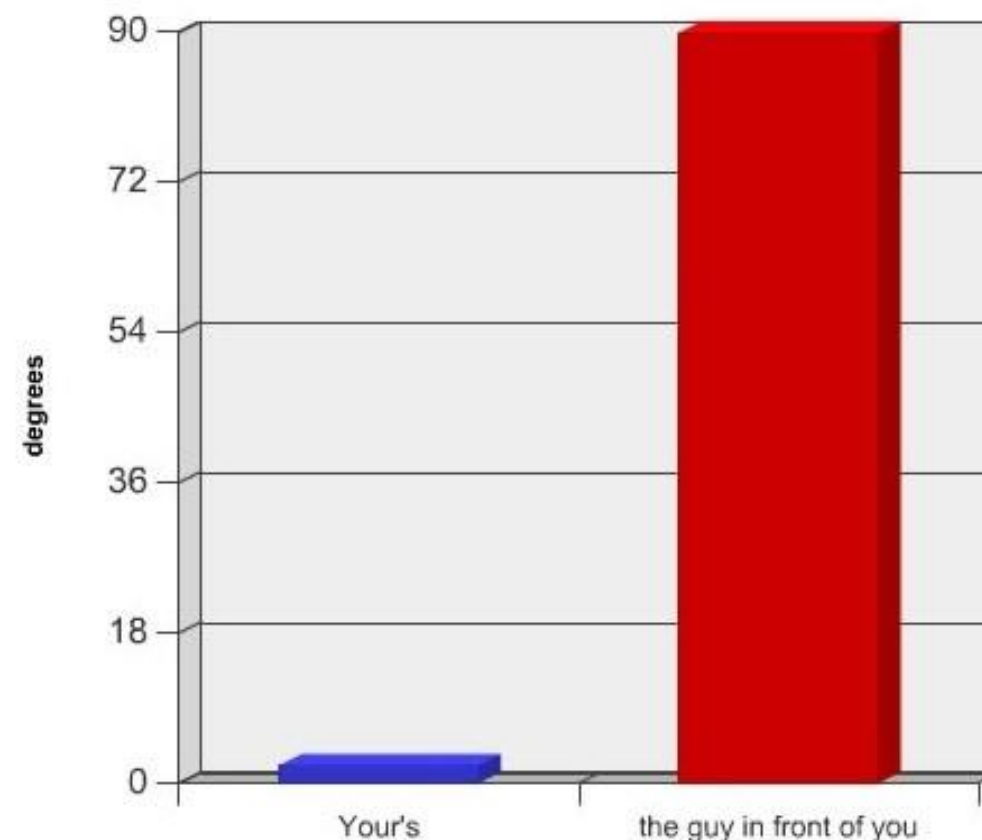


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# 3 Types of BI Tools

## Future BI - Strategic

How far back your seat tilts on an airplane



GraphJam.com

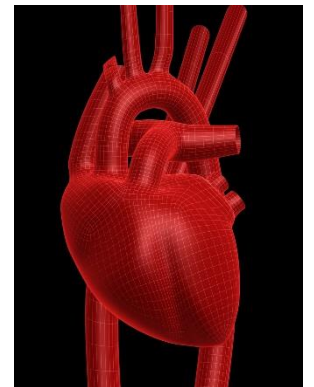


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# 3 Types of BI Tools

## Present BI - Operational

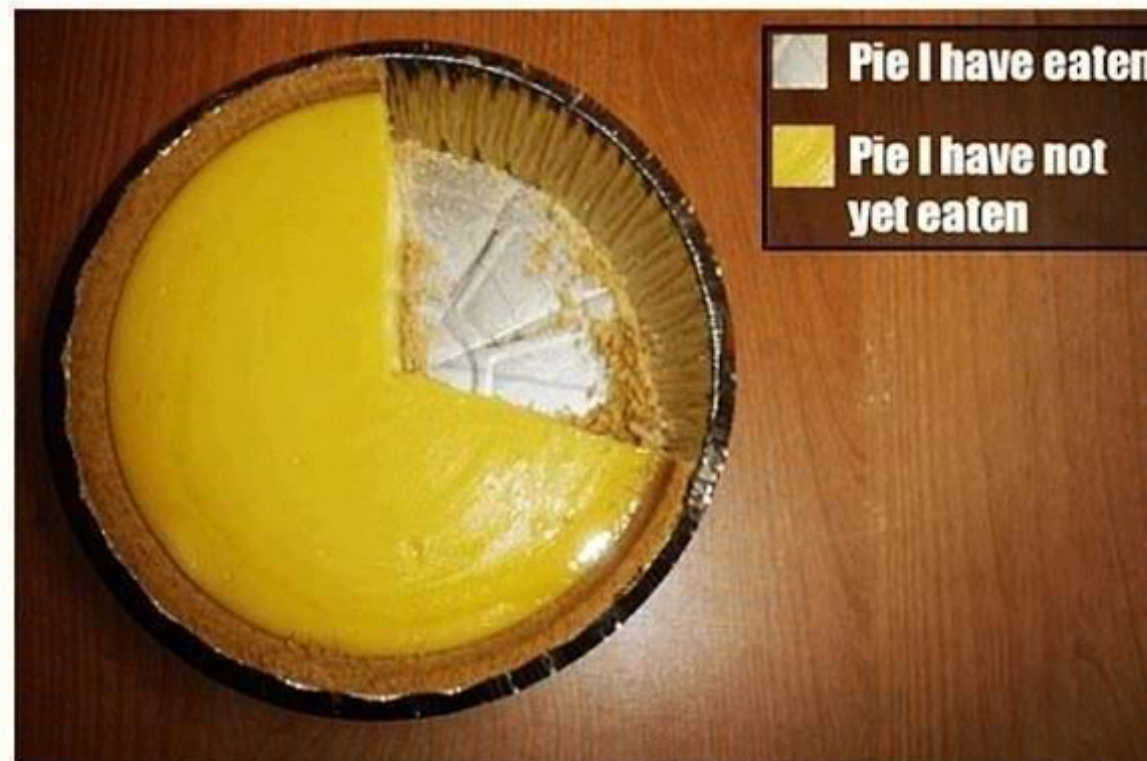
Operational – Monitor and Optimize Operational Processes, for managers and front line employees alike.



# 3 Types of BI Tools

## Present BI - Operational

### World's Most Accurate Pie Chart



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# 3 Types of BI Tools

## Present BI - Operational

A Thanksgiving Funny

Happy Thanksgiving



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# Native tools not to be forgotten

## Present BI - Operational

### GP Reports & Inquiries

System: 9/11/2013 1:05:59 PM  
User Date: 4/12/2017

AGED TRIAL BALANCE WITH OPTIONS - DETAIL  
Fabrikam, Inc.  
Receivables Management

Page: 1  
User ID: sa

Ranges:  
Customer ID: First - Last  
Customer Class: First - Last  
Salesperson ID: First - Last  
Sales Territory: First - Last

Type: Customer Name: First - Last  
Short Name: First - Last  
Posting Date: First - Last

ZIP Code: First - Last  
State: First - Last  
Telephone: First - Last

Account Type: All  
Customer: by Customer ID  
Document: by Document Number  
Print Currency In: Functional (Z-US\$)  
Exclude: Zero Balance, No Activity, Fully Paid Documents, Unposted Applied Credit Documents, Multicurrency Info

\* - Indicates an unposted credit document that has been applied.

Customer: AARONFIT0001      Name: Aaron Fitz Electrical      Account Type: Open Item      Aged As of: 4/12/2017

Type: Contact: Phone:      Retail: Bob Fitz (425) 555-0101 Ext. 0000      Salesperson: PAUL W. TERRITORY 1 Net 30      Credit: \$35,000.00

Document Number	Type	Date	Amount	Discount	Writeoff	Current	31 - 60 Days	61 - 90 Days	91 - 120 Days
DM20005	DR	1/27/2014	\$2,500.00						
FC20010	FIN	1/23/2014	\$20.00						
INVS3008	SLS	9/6/2018	\$938.93			\$938.93			
RTN20015	RTN	1/23/2014	(\$2,568.00)			(\$2,568.00)			
SLS11012	SLS	1/21/2014	\$5,872.41						
PMT11001		1/16/2014							
SLS11015	SLS	1/27/2014	\$833.33						
SLS11016	SLS	1/30/2014	\$5,000.00						
SLS20000	SLS	1/27/2014	\$2,481.00						
STDINV2227	SLS	4/12/2017	\$171.10			\$171.10			
STDINV2228	SLS	4/12/2017	\$128.30			\$128.30			
STDINV2252	SLS	4/12/2017	\$5,702.89			\$5,702.89			
SVC1000	SVC	6/12/2013	\$4,322.98						
CM1000.1		6/15/2013							
PMT1000.2		9/8/2013							
PMT11007		1/12/2014							
SVC1001	SVC	10/7/2013	\$2,155.79						
SVC11004	SVC	1/12/2014	\$1,859.83						
SVC11013	SVC	1/28/2014	\$2,358.89						
Totals:						\$4,373.02	\$0.00	\$0.00	\$0.00

Customer Payment Summary Inquiry  
sa Fabrikam, Inc. 4/12/2017

File Edit Tools Help

OK

Customer ID: AARONFIT0001  
Name: Aaron Fitz Electrical  
Aged As Of: 4/12/2017

Period	Amount
Current	\$4,373.02
31 - 60 Days	\$0.00
61 - 90 Days	\$0.00
91 - 120 Days	\$0.00
121 - 150 Days	\$0.00
151 - 180 Days	\$0.00
Balance	\$24,272.06

Unpaid Finance Chgs: \$20.00  
Credit Limit: \$35,000.00  
Min Payment Due: \$0.00  
Unposted Sales: \$53.50  
Trade Discount: 0.00%  
Payment Terms: Net 30  
Discount Grace Period: 0  
Due Date Grace Period: 0  
Deposits Received:

NSF: Number Amount  
Year-to-Date  
Life-to-Date

Last Check Date:

	Date	Amount
Last Invoice	9/6/2018	\$938.93
Last Payment	4/29/2017	\$609.75
Last Statement	2/15/2017	\$25,613.13

by Customer ID



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# Native tools not to be forgotten

## Present BI - Operational

### SmartList & SmartList Designer (with Reminders, Word & Excel)

The image displays two screenshots of Microsoft Dynamics GP software. The left screenshot shows the SmartList application with a tree view on the left and a table of suggested items. The right screenshot shows the SmartList Designer application with various configuration options and a preview of the results.

**SmartList Screenshot:**

Item Number	Suggest_Item_Number	Suggest_Item_Description	Suggest_Quantity	Location Code
OM08610	3-B3813A	Keyboard	1.00000	WAREHOUSE
OM08610	3-D2094A	Printer	1.00000	WAREHOUSE
OM08610	M1700	17" Monitor	1.00000	WAREHOUSE
OM08610	M2100	21" Monitor	1.00000	WAREHOUSE
OM08610	SCAN100F	Scanner	1.00000	WAREHOUSE

**SmartList Designer Screenshot:**

List Name: Suggested Items Product: Microsoft Dynamics GP Series: Inventory

**Database View:**

- ☐ Item Price List Details
- ☐ Item Price List Options
- ☐ Item Project Phase Opt
- ☐ Item Purchasing
- ☒ Item Quantity Master
  - ☐ Item Number
  - ☒ Location Code
  - ☐ Bin Number
  - ☒ Record Type
  - ☐ Primary Vendor
  - ☐ Item Freeze Flag
  - ☐ Beginning QTY
  - ☐ Last ORD QTY
  - ☐ Last RCPT QTY
  - ☐ Last ORD Date
  - ☐ Last ORD Vendor
  - ☐ Last RCPT Date
  - ☐ QTY Requisitioned
  - ☐ QTY On Order

**Selected Fields:**

- Item Quantity Master.Location Code
- Item Quantity Master.QTY On Hand
- Item Quantity Master.QTY Allocated
- Item Quantity Master.QTY Back Ordered
- Calc.Quantity Available
- Item Quantity Master.Record Type

**Relationship:**

TableName	FieldName	Join	TableName2	FieldName2
Item Quantity Mastr	Item Number	Inner Join	Suggest Sales Item	Item Number
Suggest Sales Item	Item Number	Inner Join	Item Quantity Mastr	Item Number

**Filter:**

Field Name	Condition	Value
Item Quantity Master.Record Type	Is	2

**Result's Preview:**

Item Number	Suggest_Item_Number	Suggest_Item_Description	Suggest_Quantity	Location Code	QTY On Hand	QTY Allocated
OM08610	3-B3813A	Keyboard	1.00000	WAREHOUSE	.00000	.00000
OM08610	3-D2094A	Printer	1.00000	WAREHOUSE	.00000	.00000
OM08610	M1700	17" Monitor	1.00000	WAREHOUSE	.00000	.00000

# Native tools not to be forgotten

## Present BI - Operational

### Analysis Cubes & Business Alerts

The screenshot shows the 'Create PivotTable Reports' window. The 'Definition ID' is 'FINANCIALS\_ACCTS', 'Description' is 'Financial accounts', 'Server' is 'fndchristd600', 'ULAP Database' is 'analysisisservicesdatabase2', and 'Cube' is 'Financials'. The 'PivotTable Field List' on the left shows a tree structure with 'Fiscal Year' selected. The 'PivotTable Report Filters' section contains '[Accounts].[Accounts by Acct No]'. The 'PivotTable Report Columns' section contains '[Accounts].[Acct Segment 1]', '[Accounts].[Acct Segment 2]', '[Accounts].[Acct Segment 3]', and '[Accounts].[Acct Segment 4]'. The 'PivotTable Report Rows' section contains '[Fiscal Periods].[Fiscal Year]'. The 'PivotTable Report Values' section contains 'Debit Amt - GL Trans' and 'Credit Amt - GL Trans'. At the bottom, there is a checkbox for 'Save To Business Portal'.

The screenshot shows the 'Alert Notification' window. The title bar indicates 'sa Fabrikam, Inc. 4/12/2017'. The 'Alert Notification' section has a sub-header 'Select the people who should be notified when the alert conditions are met.' Below this, there are radio buttons for 'Send To' (E-mail, User ID) and 'Send' (Message Only, Message and Report). The 'To...' button is next to a text box. The 'Alert Recipients' section has 'Insert >>', 'Remove', and 'Remove All' buttons next to a list box. The 'Message Text' section contains the text 'The attached checkbook balances have fallen below \$0.00' and a 'Test Mail' button. At the bottom, there are '<< Back', 'Next >>', and 'Cancel' buttons.

# Native tools not to be forgotten

## Present BI - Operational

### Business Analyzer

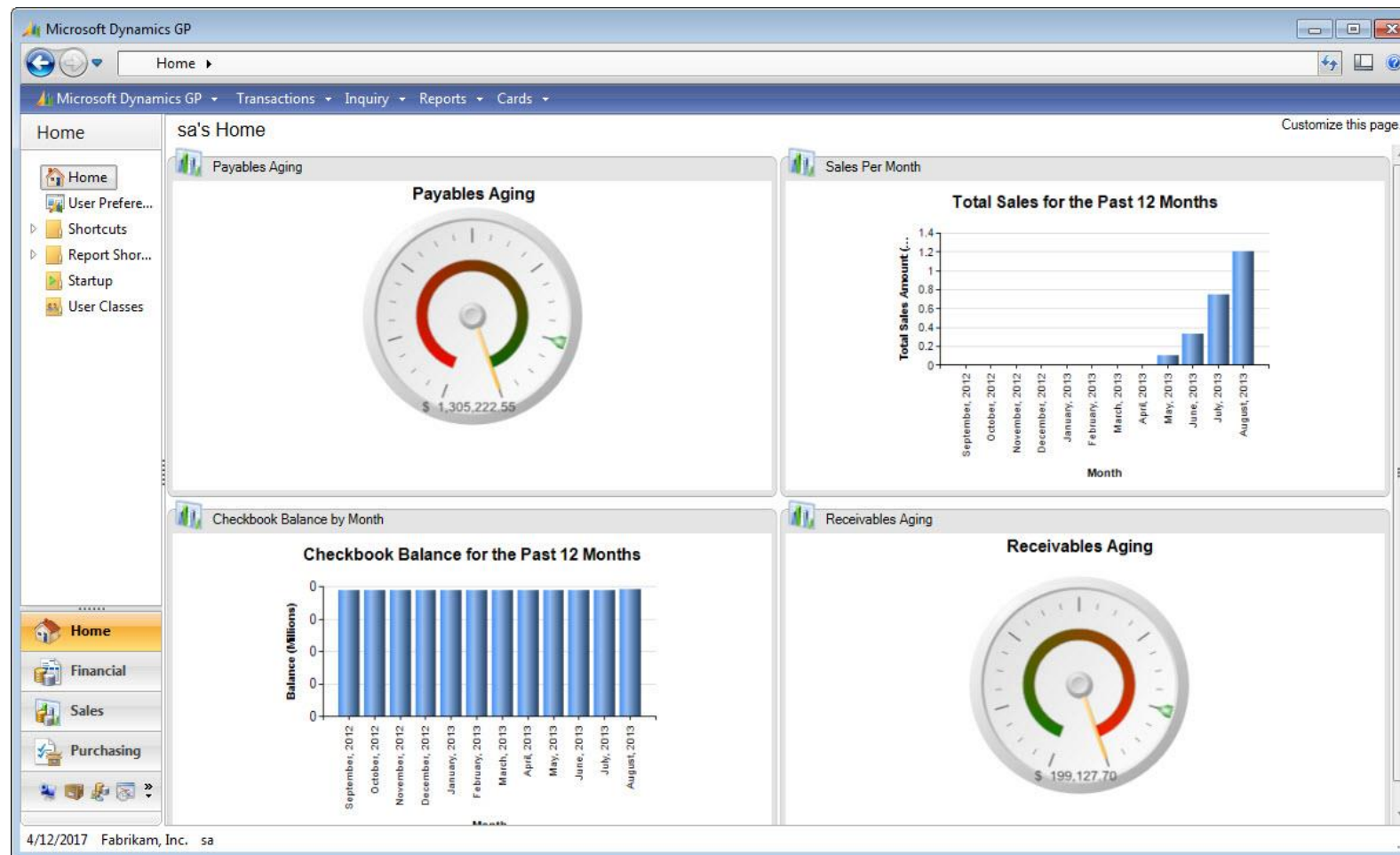


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# Native tools not to be forgotten

## Present BI - Operational

### Home Page



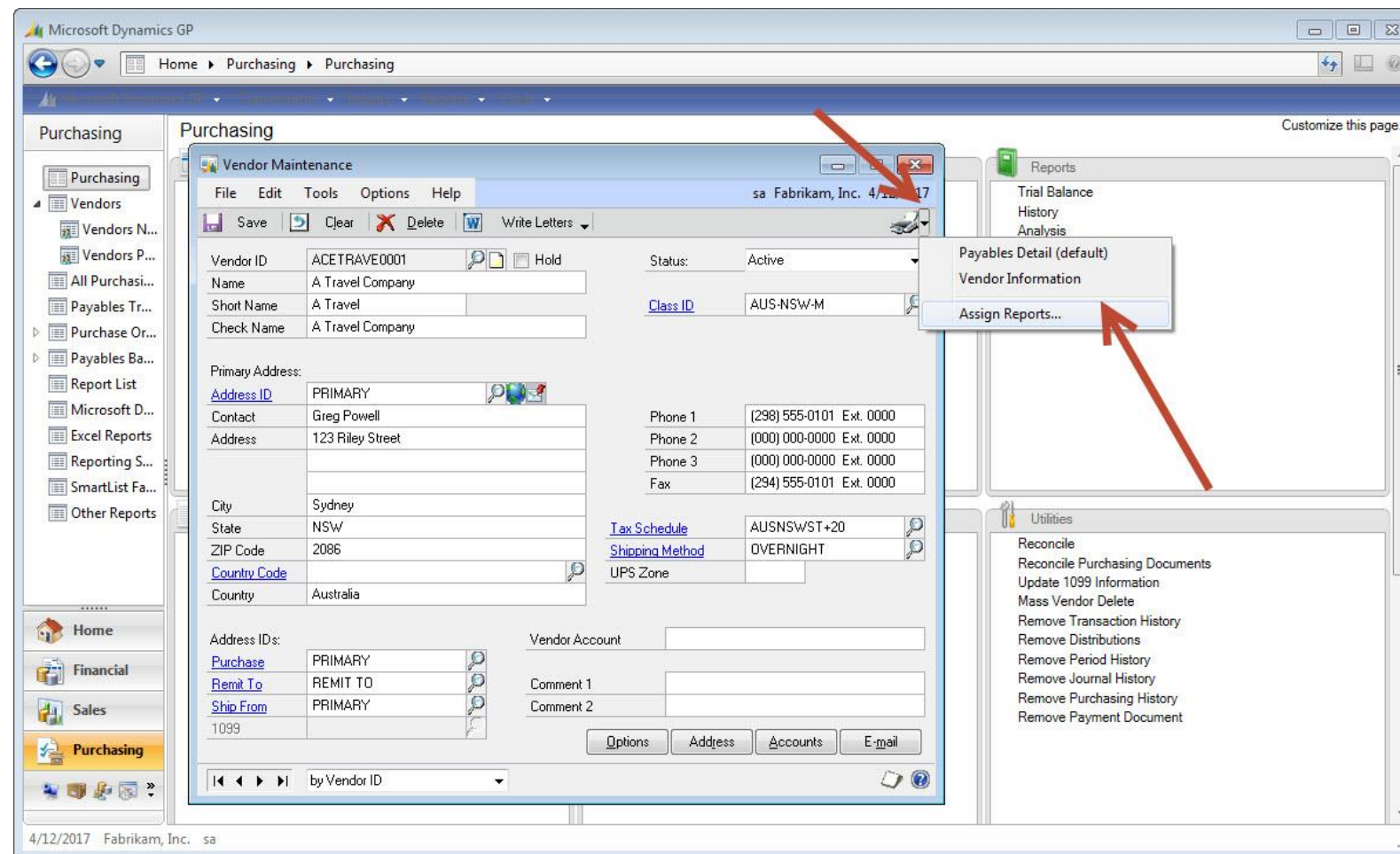
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# Native tools not to be forgotten

## Present BI - Operational

Master Records SQL Reports



# Native tools not to be forgotten

## Present BI - Operational

### Navigation Lists

The screenshot shows the Microsoft Dynamics GP interface. The main window displays a list of vendors under the 'Vendors (read only)' tab. A red arrow points from the 'Vendors' list to the 'Payables Aging by Vendor' chart on the right. Below the chart, a detailed view for 'ACETRAVE0001 : A Travel Company' is shown, including contact information and financial data.

Vendor Name	Vendor ID	Phone Number	Contact
A Travel Company	ACETRAVE0001	(298) 555-0101 Ext. 0000	Greg Powell
Advanced Office Systems	ADVANCED0001	(618) 555-0102 Ext. 0000	Janice Berman
Allenson Properties	ALLENSON0001	(312) 555-0103 Ext. 0000	Doug Allen
AmericaCharge	AMERICAN0001	(312) 555-0104 Ext. 0000	Dan Martin
Associated Insurance Inc.	ASSOCIAT0001	(800) 555-0107 Ext. 0000	Wade Tonnesson
Attractive Telephone Co.	ATTRACT0001	(312) 555-0105 Ext. 0000	Ford Marks
AUSTRALIA	AUSTRALIA	(000) 000-0000 Ext. 0000	
Auto Financing	AUTOFINA0001	(616) 555-0138 Ext. 0000	Lindsey Guidera
Beaumont Construction	BEAUMONT0001	(312) 555-0109 Ext. 0000	Phil Beaumont
Bergeron Communications Sol.	BERGERON0001	(514) 555-0110 Ext. 0000	Francine M. Gergeron
Bloomington County	BLOOMING0001	(312) 555-0111 Ext. 0000	County Treasurer
Burnett Travel Associates	BURNETT0001	(935) 555-0112 Ext. 0000	Pamela Owen
Business Equipment Center	BUSINESS0001	(416) 555-0113 Ext. 0000	Beverly Gates
Business Magazine	BUSINESS MAG	(000) 000-0000 Ext. 0000	
Capital Printed Circuits	CAPITAL P0001	(604) 555-0114 Ext. 0000	Wayne Baunstead

**ACETRAVE0001 : A Travel Company**

Contact : Greg Powell  
Address : 123 Riley Street  
Sydney, NSW 2086  
Australia

Current Balance : \$6,713.27  
Last Check Amount : \$50.00  
Last Check Date : 2/15/2017  
Payment Terms : Net 30  
Payment Priority : 1

On Order Amount : \$0.00  
Amount Billed YTD : \$8,163.27  
Amount Billed Last Year : \$0.00  
Amount Paid YTD : \$1,450.00

# Native tools not to be forgotten

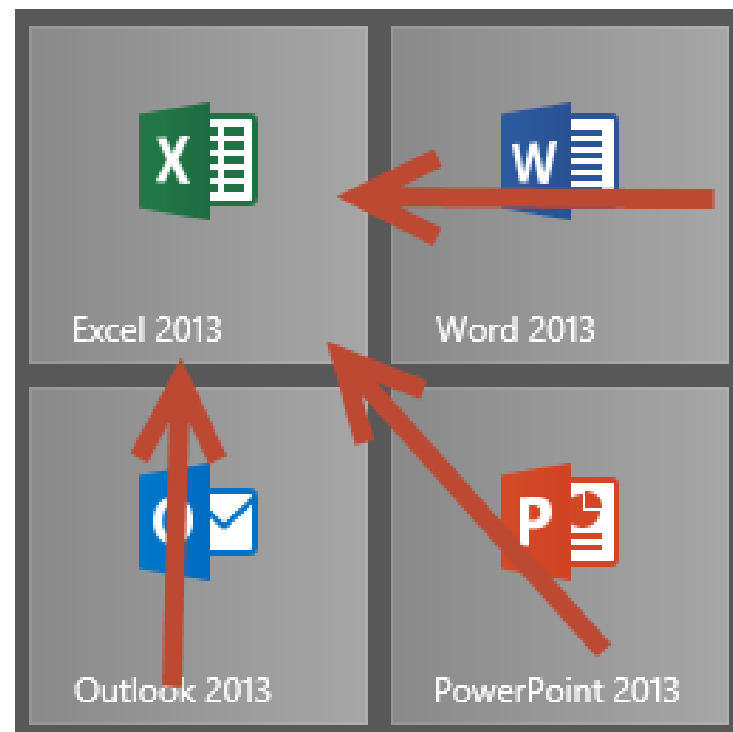
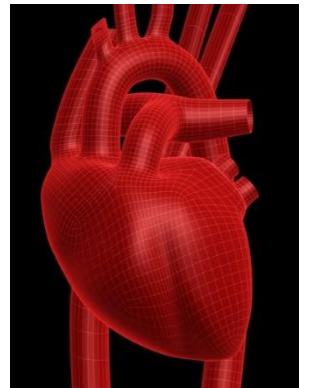
## SQL Report Builder

- GP Reports & Inquiries
- SmartList & SmartList Designer (with Reminders, Word & Excel)
- Analysis Cubes & Business Alerts
- Navigation Lists
- Business Analyzer
- Home Page & Master Records SQL Reports Management Reporter
- Dynamics GP Budgeting Wizard

 Microsoft Dynamics GP  
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# My favorite native tool



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A2		Sum of Extended Price	Sum of Gross Margin	Sum of Extended Price	Sum of Gross Margin										
A Travel Company															
Row Labels		Sum of Current	Sum of 31_to_60_Days	Sum of 61_to_90_Days	Sum of 91_and_Over										
A Travel Company		\$211.49	\$0.00	\$0.00	\$0.00										
1000 - Invoice - 06/26/13 MEALS/ENT-SERVICE		\$57.68	\$0.00	\$0.00	\$0.00										
1001 - Invoice - 07/09/13 MEALS/ENT-SERVICE		\$153.81	\$0.00	\$0.00	\$0.00										
Grand Total															



FabriKam, Inc.  
Accounts Payable Aged Trial Balance  
7/24/2013

**Due\_Date**

7/26/2013

8/8/2013

1/1/1900

**Vendor\_Class**

CAN-ALL-C

CAN-ALL-I

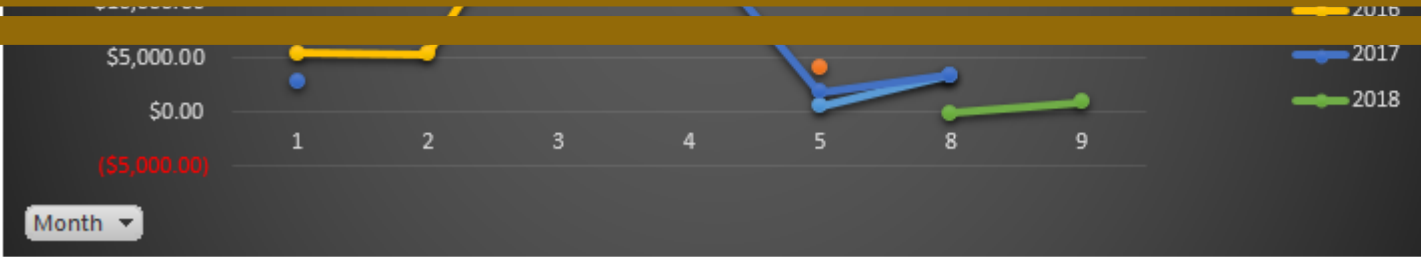
CAN-ALL-M

**Vendor\_Hold**

On Hold

**Transaction\_Hold**

On Hold



- BIGBEE
- BOXY
- WINDOW8



# Microsoft Dynamics GP Technical Airlift 2013

# BI Live Demo

- Problem with monitoring AP Vendors on Hold
- Problem with monitoring AP Invoices on Hold
- So many outstanding invoices, it's too hard to manage by Due date so we just pay all our vendors either on the 15<sup>th</sup> or the 30th

```

SELECT VM.vendorid          AS Vendor_ID,
       VM.vendname          AS Vendor_Name,
       CASE VM.hold
         WHEN 0 THEN ' '
         WHEN 1 THEN 'On Hold'
       END                  AS Vendor_Hold,
       VM.vndclsid          AS Vendor_Class,
       VM.pytmtrmid         AS Vendor_Terms,
       CASE P.doctype
         WHEN 1 THEN 'Invoice'
         WHEN 2 THEN 'Finance Charge'
         WHEN 3 THEN 'Misc Charge'
         WHEN 4 THEN 'Return'
         WHEN 5 THEN 'Credit Memo'
         WHEN 6 THEN 'Payment'
       END                  AS Document_Type,
       P.docnumbr           AS Document_Number,
       CASE P.hold
         WHEN 0 THEN ' '
         WHEN 1 THEN 'On Hold'
       END                  AS Transaction_Hold,
       P.docdate            AS Document_Date,
       P.pstgdate           AS GL_Posting_Date,
       P.duedate            AS Due Date

```

**Do not try to read this,  
I have it in the notes section  
on the download.**

```

ELSE 0
END
CASE
  WHEN Datediff(d, P.duedate, Getdate()) > 90
    AND P.doctype < 4 THEN P.curtrxam
  WHEN Datediff(d, P.docdate, Getdate()) > 90
    AND P.doctype > 3 THEN P.curtrxam * -1
  ELSE 0
END
AS [91_and_over],
Rtrim(P.docnumbr) + ' - ' + ( CASE P.doctype
  WHEN 1 THEN 'Invoice'
  WHEN 2 THEN 'Finance Charge'
  WHEN 3 THEN 'Misc Charge'
  WHEN 4 THEN 'Return'
  WHEN 5 THEN 'Credit Memo'
  WHEN 6 THEN 'Payment'
END ) + ' - ' +
CONVERT(VARCHAR, P.docdate, 1) +
' ' + Rtrim(P.trxdscrn) AS Details
FROM   dbo.pm00200 AS VM
INNER JOIN dbo.pm20000 AS P
        ON P.vendorid = VM.vendorid
WHERE  ( P.curtrxam <> 0 )
AND    ( P.voided = 0 )

```

The view above is an edited version of the view my friend and fellow Microsoft Dynamics GP MVP, Victoria Yudin has posted on her Blog. Victoria has written many excellent views and shares them with all us GP users and partners. This one is located at:

<http://victoriayudin.com/2013/04/24/sql-view-for-current-payables-aging-detail-in-dynamics-gp/>



**Microsoft Dynamics GP  
Technical Airlift 2013**

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# Native tools in Microsoft Dynamics GP 2013

- Excel Refreshable Reports 
- GP Reports & Inquiries
- SmartList & SmartList Designer (with Reminders, Word & Excel)
- Analysis Cubes & Business Alerts
- Navigation Lists
- Business Analyzer
- Home Page & Master Records SQL Reports
- Management Reporter
- Dynamics GP Budgeting Wizard

# Microsoft Dynamics GP 2013 BI Challenge

Pick a customer to delight. Implement (1) Excel Report you think they need to provide them with BI. They'll either get more reports from you or (at least) you'll have a BI reference for your website.

This topic continues tomorrow:

10am – Jared Hall “Building Dashboards for Microsoft Dynamics GP”

2:45pm – Belinda Allen “Advanced Excel Techniques: How to be your Customer’s “Excel Hero””



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**Little things are big.**  
*Yogi Berra*



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# Thanks for Attending

**Belinda Allen**

**Smith & Allen Consulting, Inc.**

**New York, NY**

**MCP, MCT**

**Microsoft MVP, 2 Years**

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