Planning Ahead: What's Your Microsoft Dynamics GP Roadmap?

September 24, 2024

Microsoft
Partner

forvis
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Global Presence

Top 10
Global Network*

$5bn
Combined Revenue (2023)

100+
Combined Countries & Territories

400+
Combined Offices & Locations

1,800+
Combined Partners

40,000+
Combined Employees

*Source: IAB World Network rankings, based on most recent rankings

2023 revenues: FORVIS $1.7bn (€1.6bn), Mazars (expected) $3bn (€2.8bn)

Forvis Mazars is the brand name for the Forvis Mazars Global network (Forvis Mazars Global Limited) and its two independent members: Forvis Mazars, LLP in the United States and Forvis Mazars Group SC, an internationally integrated partnership operating in over 100 countries and territories.
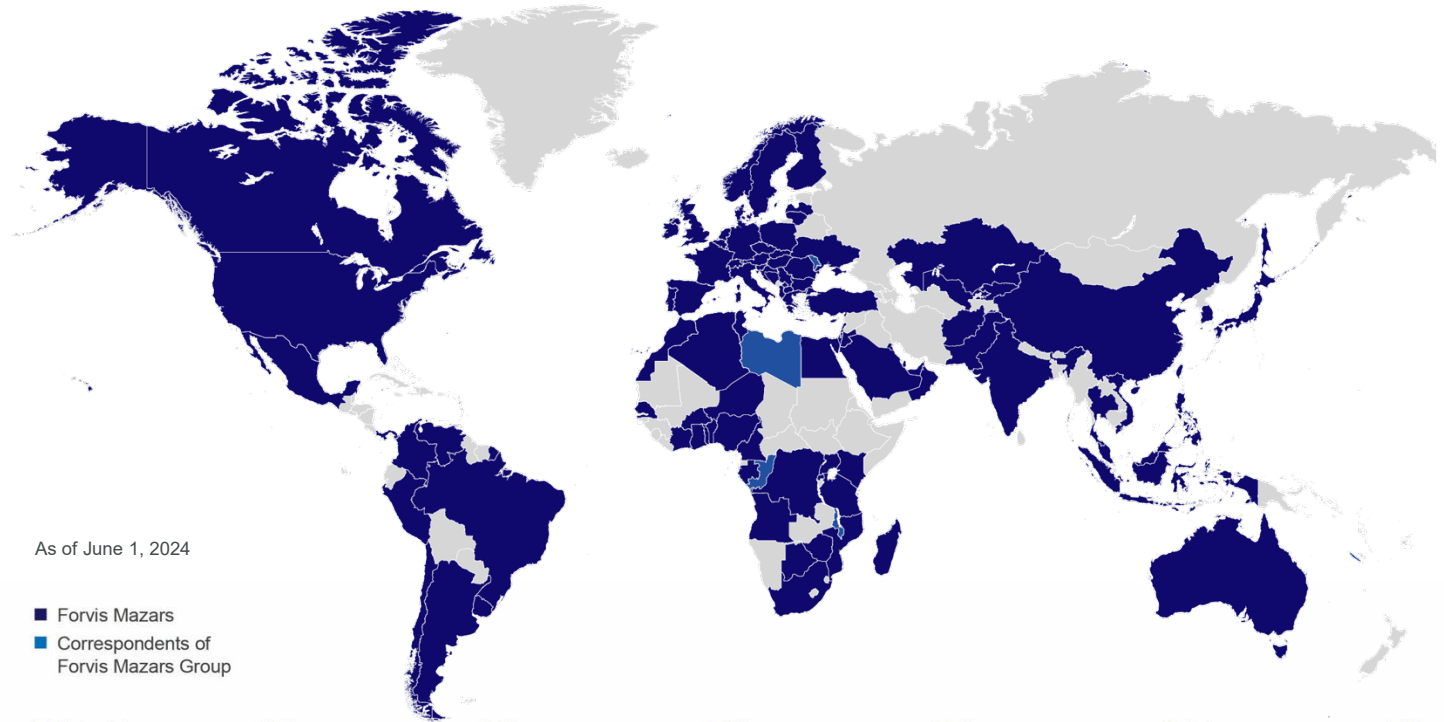
As of June 1, 2024

- Forvis Mazars
- Correspondents of Forvis Mazars Group

Afghanistan	Cameroon	France	Korea	Morocco	Qatar	Togo
Albania	Canada	Gabon	Kosovo	Mozambique	Romania	Tunisia
Algeria	Cayman Islands	Germany	Kuwait	Netherlands	Rwanda	Türkiye
Angola	Chile	Ghana	Kyrgyzstan	New Caledonia	Saudi Arabia	Uganda
Argentina	China	Greece	Latvia	Niger	Senegal	Ukraine
Australia	Colombia	Hong Kong	Lebanon	Nigeria	Serbia	United Arab Emirates
Austria	Congo	Hungary	Libya	North Macedonia	Singapore	United Kingdom
Bahrain	Côte d'Ivoire	India	Lithuania	Norway	Slovakia	United States
Belgium	Croatia	Indonesia	Luxembourg	Oman	Slovenia	Uruguay
Benin	Cyprus	Ireland	Madagascar	Pakistan	South Africa	Uzbekistan
Bermuda	Czech Republic	Israel	Malawi	Palestine	Spain	Venezuela
Bosnia and Herzegovina	Democratic Republic of the Congo (DRC)	Italy	Malaysia	Panama	Sweden	Vietnam
Botswana	Denmark	Japan	Malta	Peru	Switzerland	Zimbabwe
Brazil	Egypt	Jordan	Mauritius	Philippines	Taiwan	
Bulgaria	Finland	Kazakhstan	Mexico	Poland	Tanzania	
Burkina Faso		Kenya	Moldova	Portugal	Thailand	

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Business Technology Services

Forvis Mazars provides enterprise resource planning (ERP) & customer relationship management (CRM) platform analysis, design, implementation, upgrade, training, & support services.

Our end-to-end solutions help clients achieve their digital transformation goals by:

- Creating effective processes & strategies for future operations

- Designing & implementing modern operational systems

- Reviewing new business-facing technologies

- Leveraging existing investments in legacy technologies

- Integrating data solutions

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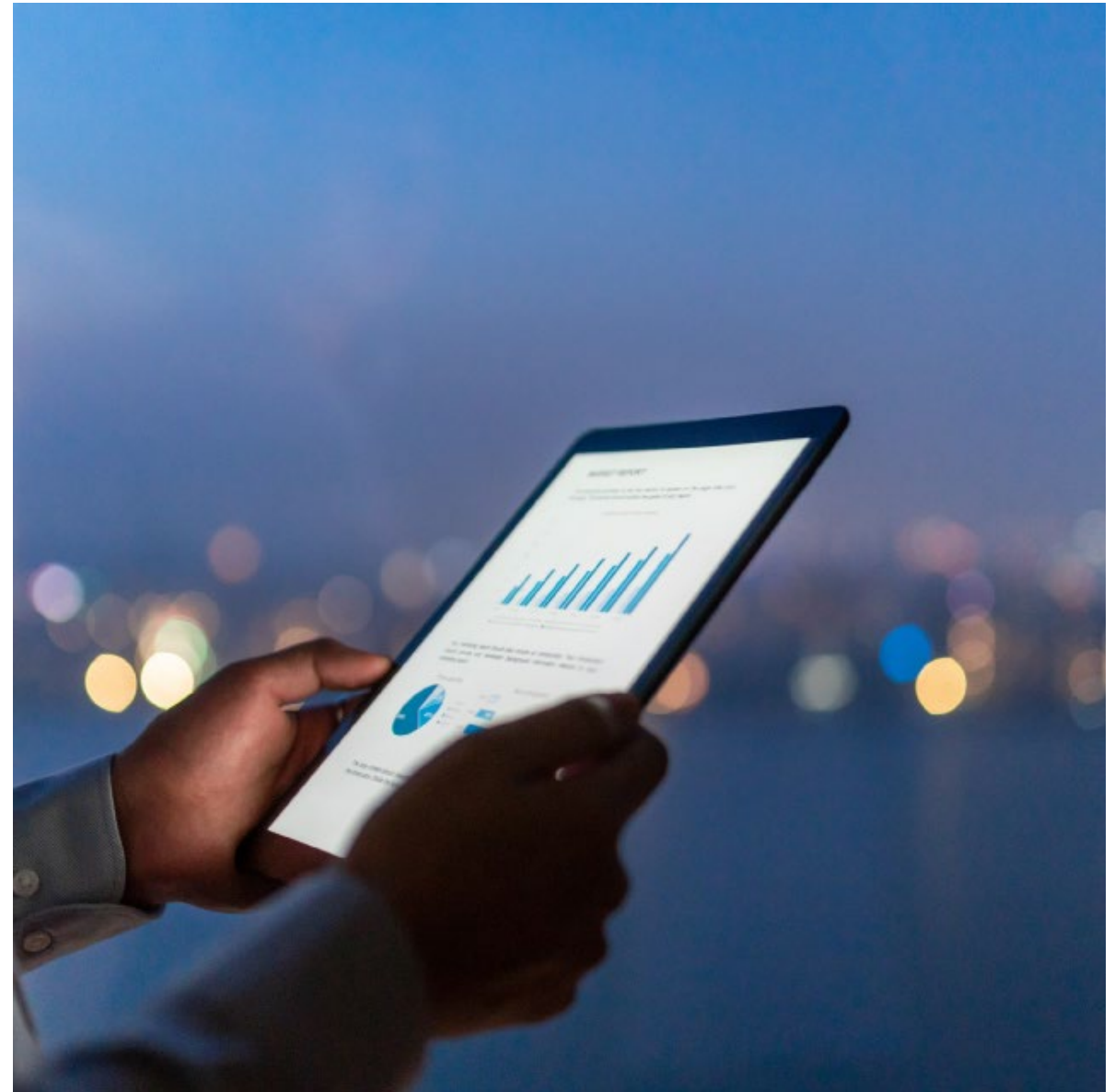
Business Technology Services

ERP

Microsoft Dynamics 365

Finance	Supply Chain
Commerce	Project Operations
Business Central	Dynamics GP

NetSuite

Sage & Sage Intacct

Trimble Viewpoint Spectrum & Vista

CRM

Microsoft Dynamics 365

Sales	Customer Service
Customer Insights	Field Service

Salesforce

Marketing Automation

Advanced Technology

Insights

Microsoft Power BI

Solver Planning & Analysis

Automation

Microsoft Power Platform

Robotic Process Automation (RPA)

App Development

Managed Services for business applications, IT, & cybersecurity support.

Microsoft Partner

ORACLE NETSUITE
Solution Provider

Sage Partner

salesforce PARTNER

solver

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Today's Presenters

Microsoft Practice

"Our team is focused on delivering an Unmatched Client Experience® on every engagement."

– Chad Back, Partner

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Objectives

1. Define how Microsoft's licensing announcement impacts customers

2. Gain insights into Microsoft's Modern Lifecycle Policy for Dynamics GP

3. Discuss best practices for evaluating your organization's licensing needs

4. Identify strategies to navigate the transition seamlessly

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01

Licensing Announcement

What does Microsoft's licensing announcement mean?

Licensing Announcement
Details

Perpetual Licensing

New Sales of GP Perpetual Licenses Will End on April 1, 2025 – New Customer Sales Can Purchase Subscription Licenses

New Sales

New Customer Sales of GP Will End on April 1, 2026 – Existing Customers May Still Purchase Licenses & Modules

Updates

Microsoft Will Provide Tax Updates, Security Updates, & Hotfixes Three Times a Year Until at Least 2028

Support

Customer Support Will Be Provided Under the Microsoft Modern Lifecycle Policy Until at Least 2028

Planning Ahead: What's Your Microsoft Dynamics GP Roadmap?

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Licensing Announcement
License Types

Perpetual

Payment Frequency	Upfront
Cost per Full User	$3,000
Annual Licensing Cost	17% | 19% | 25%
Number of Users	Can Add | No Credit for Reduction
Type of Deployment	On-Premises & Hosted
Access Licenses	Concurrent
Ownership	Outright Ownership
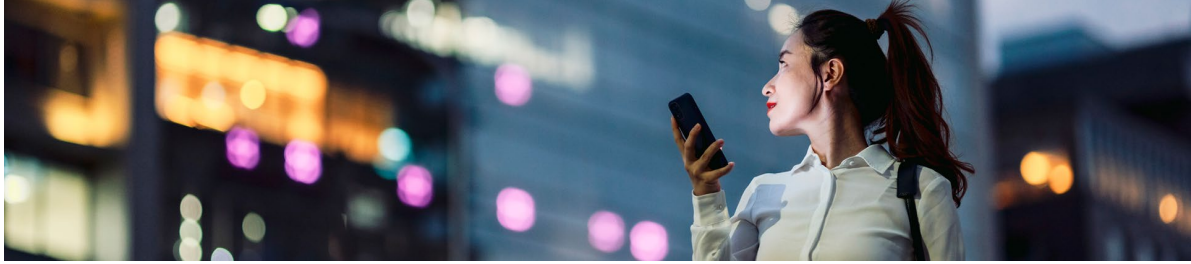
Subscription

Payment Frequency	Monthly or Quarterly
Cost per Full User	Starting at $70 per Month
Annual Licensing Cost	Included in Monthly Cost
Number of Users	Flexibility to Add or Remove Users
Type of Deployment	On-Premises & Hosted
Access Licenses	Named User
Ownership	If You Stop Paying You Lose Access

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Licensing Announcement
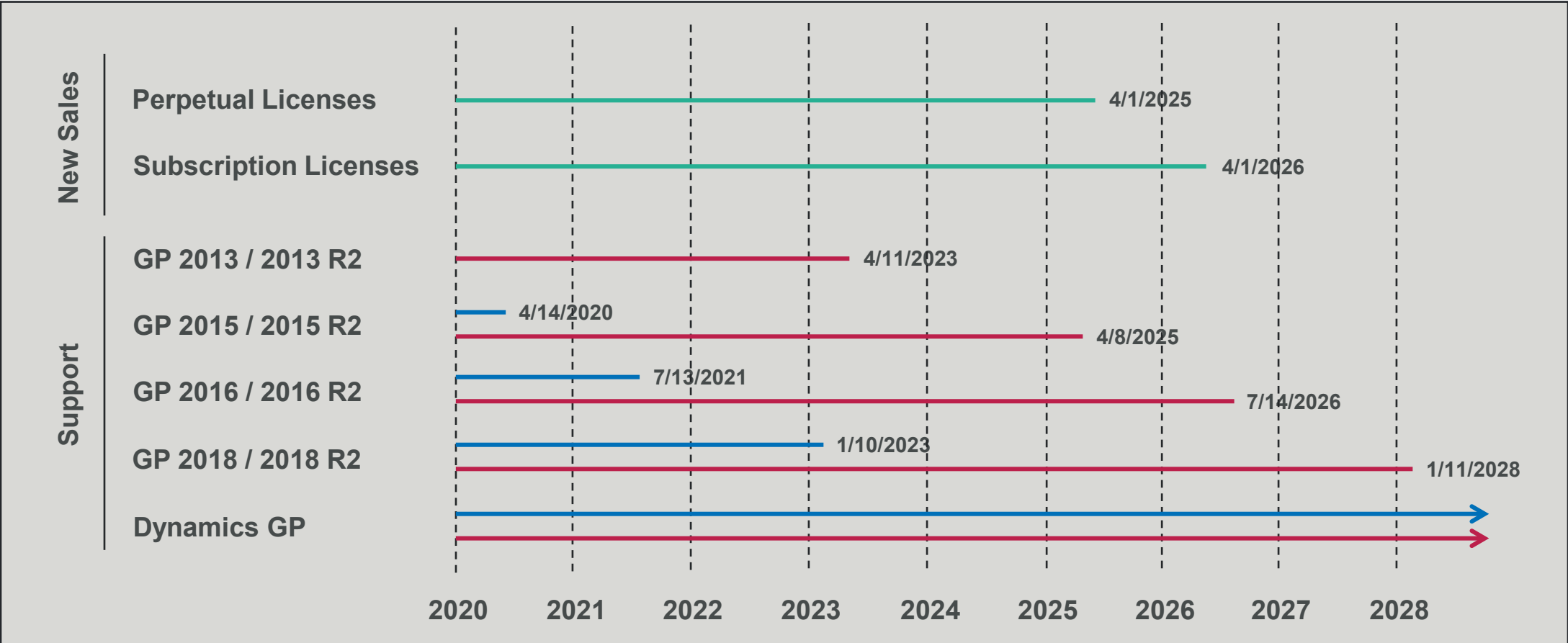## Maintenance Plans

Service Plan	Business Ready Enhancement Plan	Business Ready Advantage Plan	Business Ready Advantage Plus Plan
Annual Cost	17% of Software List Price	19% of Software List Price	25% of Software List Price
Product Releases, Service Packs, Hotfixes, & Tax & Regulatory Updates	X	X	X
CustomerSource Access	X	X	X
Knowledge Base	X	X	X
Unlimited Online Training	X	X	X
Transition Investment Credits	X	X	X
Protected List Price	X	X	X
Support Incidents		3 Hour Response	2 – 8 Hours
24x7 Problem Resolution Support			Severity A Cases
Managed Forums		X	X

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Licensing Announcement
Dynamics GP Roadmap – Sales & Support

New Sales

| Perpetual Licenses | 4/1/2025 |
| Subscription Licenses | 4/1/2026 |

Support

GP 2013 / 2013 R2	4/11/2023
GP 2015 / 2015 R2	4/14/2020 / 4/8/2025
GP 2016 / 2016 R2	7/13/2021 / 7/14/2026
GP 2018 / 2018 R2	1/10/2023 / 1/11/2028
Dynamics GP	

2020 2021 2022 2023 2024 2025 2026 2027 2028

— New License Sales   — Mainstream Support   — Extended Support

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Licensing Announcement
Types of Support

Mainstream Support

Mainstream Support is the first phase of the product lifecycle. At the Support Service Pack Level, Mainstream Support for products & services includes:

- Incident Support
  - No-Charge
  - Paid
  - Time & Material
  - Warranty
- Security Update Support
- Ability to Request Non-Security Updates

Extended Support

The Extended Support phase follows Mainstream Support. At the Support Service Pack Level, Extended Support includes:

- Paid Incident Support
- Security Updates at No Additional Cost

Note:

- Microsoft will not accept request for warranty support, design changes, or new features during the Extended Support phase
- Extended Support is not available for consumer, consumer hardware, or multimedia products
- Enrollment in a paid support program may be required to receive benefits for certain products
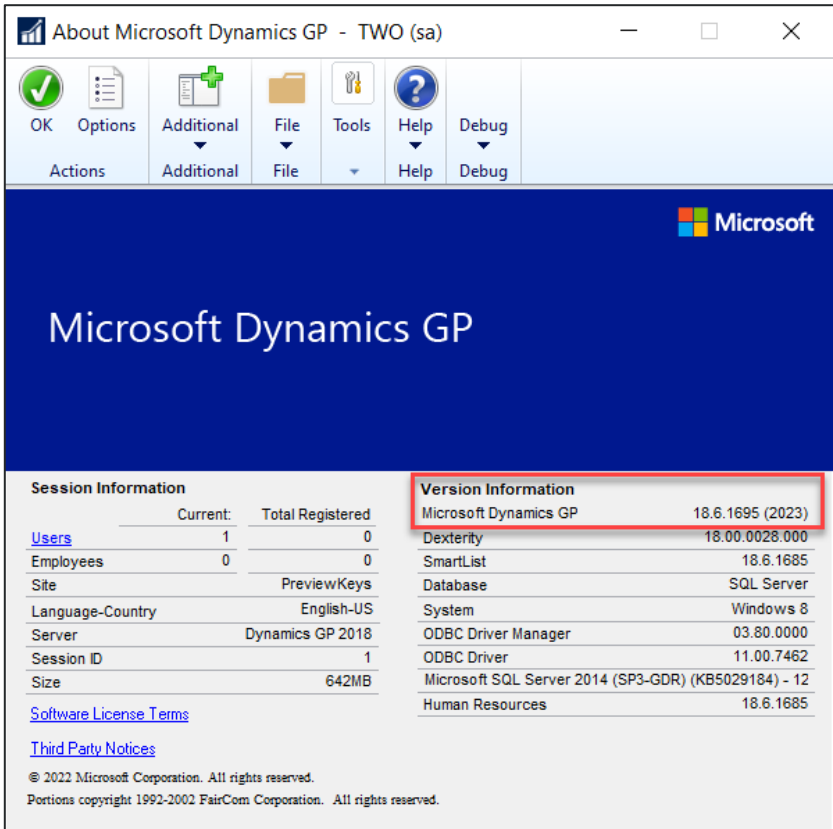
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Licensing Announcement
What Version Are We On?

- Versions May Not Be Related to the Date You Did Your Last Upgrade

- Microsoft Uses Both Year & Release Number Naming Conventions

• V1	• V5	• V9	• 2013	• 2016	• V18.0	• V18.4
• V2	• V6	• V10	• 2013 R2	• 2016 R2	• V18.1	• V18.5
• V3	• V7	• 2010	• 2015	• 2018	• V18.2	• V18.6
• V4	• V8	• 2010 R2	• 2015 R2	• 2018 R2	• V18.3	• V18.7 (October 2024)

- Where Do I Find My Version?

  - Help | About Dynamics GP

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- Where Do I Find My Version?
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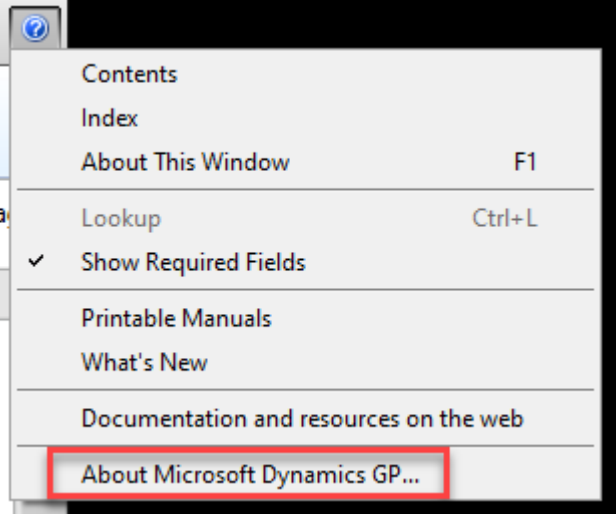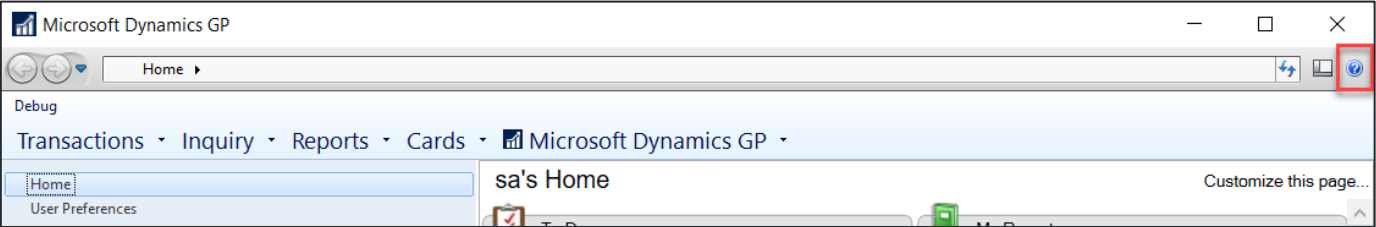
02
Modern Lifecycle Policy

Gain insights into Microsoft's Modern Lifecycle Policy for Dynamics GP.

Modern Lifecycle Policy
Lifecycle Policies

Fixed Lifecycle Policy

- Has Established Support Dates & Product End of Life
- Covers Versions Prior to Dynamics GP (Version 18.0)

Modern Lifecycle Policy

- Offers Continuous Support & Servicing
  - Bug Fixes
  - Payroll Tax Updates
- Covers Versions From Dynamics GP (Version 18.0) & Newer on Service Packs That Are Newer Than 24 Months
- Customers Stay Current by Installing at Least One of the Three Yearly Planned Dynamics GP Releases

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Modern Lifecycle Policy
Lifecycle Policies

Fixed & Modern Lifecycle Differences

- Finite Support vs. Infinite Support
- Upgrades vs. Updates

Long-Term Dynamics GP Maintenance

- Staying Current
- Upgrades
- Year-End Updates
- Migrations

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Modern Lifecycle Policy
Lifecycle Policies

Support During the Modern Lifecycle

- Duration of Service Pack Support Is 24 Months

Version	Release Date	End of Covered Support
Dynamics GP 18.0	09/06/2019	09/05/2021
Dynamics GP 18.1	N/A – Covid Year	N/A – Covid Year
Dynamics GP 18.2	06/23/2020	06/23/2022
Dynamics GP 18.3	06/09/2021	06/09/2023
Dynamics GP 18.4	06/21/2022	06/20/2024
Dynamics GP 18.5	06/12/2023	06/11/2025
Dynamics GP 18.6	01/29/2024	01/28/2026

Note: Release Date is Date of Last Service Pack for Indicated Version

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Modern Lifecycle Policy
Long-Term Dynamics GP Maintenance

Year-End Update

- In lieu of major releases, Microsoft has gone to releasing a year-end update each year
- Typically, there are three updates each year in June, October, & December
- These releases include:
  - Bug Fixes
  - Dynamics GP Customer Requested Feature/Functionality Changes
  - Payroll Tax Updates
  - Security Updates

Upgrade

- Traditional upgrades are still recommended if more than a couple of service packs behind or on GP versions prior to 18.0
- Depending on how many databases, size of databases, & hardware configuration, upgrades can range from a few hours to a full weekend

Migration to New Environment

- For organizations on older systems, it's recommended to upgrade hardware in coordination with a GP upgrade
- To reduce risks, it's recommended to migrate to new hardware instead of upgrading existing hardware

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Modern Lifecycle Policy
Microsoft Dynamics GP Year-End Service Pack

Why Should I Install the Year-End Service Pack?

- 1099 Updates
- Bug Fixes
- New/Modified Reports

- Move to Modern ERP With Ease
- New Feature/Functionality
- Payroll Tax Updates

- Security Updates
- Stay Compliant With Microsoft

What Happens During a Year-End Service Pack Update?

- Database Backups (Before & After)
- Documentation Update
- Reporting (Baseline & Post Update)

- Forms & Reports Backup
- Application Backup
- Apply Service Pack/Update

- Data Validation
- ISV/Customization Updates
- Update Terminal Servers/ Workstations

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Modern Lifecycle Policy
Microsoft Dynamics GP Upgrade

Why Should I Upgrade Dynamics GP?

- 1099 Updates
- Bug Fixes
- New/Modified Reports

- Move to Modern ERP With Ease
- New Feature/Functionality
- Payroll Tax Updates

- Security Updates
- Stay Compliant With Microsoft

What Happens During an Upgrade?

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Modern Lifecycle Policy
Microsoft Dynamics GP Migration

On-Premises

On-premises is the standard way Dynamics GP was installed & deployed, historically. A typical environment includes a SQL server & either terminal servers or user workstations.

Advantages
- Cost
- Familiarity
- Full Control Over Environment

Disadvantages
- How We've Always Done It
- In-House Skillsets
- IT Infrastructure

Cloud Options

There is no true cloud offering like modern ERP systems have. A cloud deployment of Dynamics GP involves hosting your SQL data in a hosted environment and utilizing hosted terminal servers to run the GP application. Azure is commonly used, and a lot of organizations enter a Managed Services arrangement in coordination with a cloud migration.

Advantages
- Control & Security
- Preparation for Modern ERP
- Scalability

Disadvantages
- Adoption
- Cost
- Fear of Data Loss

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Modern Lifecycle Policy
Microsoft Dynamics GP Migration

Why Should I Do a Dynamics GP Migration?

- Keeping software current is only one half of the equation
- Up-to-date hardware is equally as important
- Although hardware costs are less today than they have been in the past, the cost of the hardware is only a small factor in assessing a migration
- Keeping current needs to be done across the board

What Happens During an Upgrade?

- Server Provisioning
- Test Environment Created
- Test Environment Upgraded
- End User Acceptance Testing
- End User Signoff

- Planning for Live Migration
- Production Environment Restricted
- Production Data Migrated
- Production Data Upgraded
- Data Validation

- Production Environment Turned Over to End Users
- Old Production Environment Restricted to Read Only
- Minimum of 1 Month-End Close in New Environment
- Old Production Environment Deprecated
- Project Completion Review

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03

Evaluating Licensing Needs

Understanding licensing to help evaluate your business needs.

Evaluating Licensing Needs
Types of Dynamics GP Licenses

Full User

- Full Users have full read/write access to everything in Dynamics GP. User security controls what actual users can read and/or write in the system
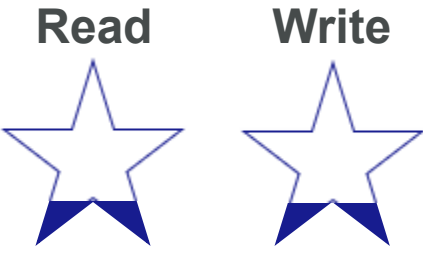
Read **Write**
⭐ ⭐
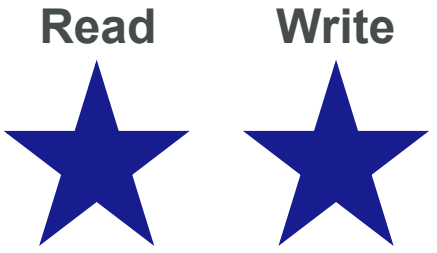
Limited License

- Limited Users are more restricted than Full Users, but Limited Users have full system read access plus:
  - View & edit their employee information
  - Enter Payroll Time
  - Enter Project Time/Expenses/Requisitions

Read **Write**
⭐ ☆
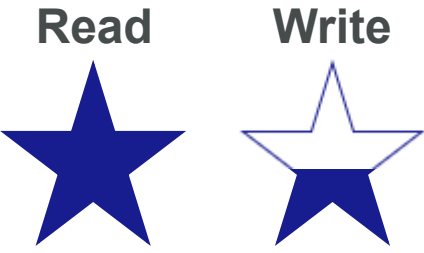
Self-Serve License

- Self-Serve Users are very limited in GP. They can perform the following actions:
  - View & edit their employee information
  - Enter Payroll Time
  - Enter Project Time/Expenses/Requisitions

Read **Write**
☆ ☆

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Evaluating Licensing Needs
How Many Users Do We Have?

- Where Do I Find How Many Registered Users I Have?

  - Help | About Dynamics GP

  - CustomerSource or PartnerSource

Evaluating Licensing Needs
How Many Users Do We Have?

- Where Do I Find How Many Registered Users I Have?
  - Help | About Dynamics GP
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Evaluating Licensing Needs
How Many Users Do We Have?

- Where Do I Find How Many Registered Users I Have?

  - Help | About Dynamics GP

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Evaluating Licensing Needs
How Do We Add or Remove Users?

Add Users

- Place an Order With Your Microsoft Partner

Remove Users

- Notify Your Microsoft Partner
- Your Microsoft Partner Will Provide a Deactivation Request Form

Microsoft Dynamics

Deactivation Request

Request to deactivate a module or remove a number of users from a Microsoft Dynamics license

Please complete the following:

Customer:	
Product:	Microsoft Dynamics GP
VOICE Account Number:	1234567
Name (Licensee):	The World Online
Address:	100 Main St
City:	Youngstown
State/Province:	OH
Postal Code:	44514
Country:	United States

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Evaluating Licensing Needs
How Do We Add or Remove Users?

Add Users

- Place an Order With Your Microsoft Partner

Remove Users

- Notify Your Microsoft Partner
- Your Microsoft Partner Will Provide a Deactivation Request Form

Partner:	
Name:	Forvis Mazars
Partner VOICE Account Number:	1234
Contact Number:	111-222-3333
Contact Name:	Jeremy Adkins-Hill

Please list the modules requested to be deactivated:

Module Name / ID	Module Name / ID

Number of Users to remove

Number of Users to Remove	Module Name / ID
38	Full User CAL (Concurrent User)/ MBS125477616
1	Microsoft SQL CAL/ 127127753

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Evaluating Licensing Needs
How Do We Add or Remove Users?

Add Users

- Place an Order With Your Microsoft Partner

Remove Users

- Notify Your Microsoft Partner
- Your Microsoft Partner Will Provide a Deactivation Request Form

☒The modules/users listed above are not being used. I understand that by deactivating them the registration keys will change to reflect the decreased module/user access and that I will be required to input the new registration keys. Further, I am aware that there is a 100% reactivation fee. This means that if I subsequently wish to reactivate the module(s)/user(s), I agree to pay a fee equivalent to 100% of the current list price of the module(s)/user(s) being reactivated, plus prorated enhancement/support. Modules that are components of a suite or pack or are a prerequisite to another module cannot be deactivated. There is no charge for deactivating modules(s)/user(s).

Note: Product upgrades or transitions may require the repurchase of functionality or users and may vary by product. Please refer to your product specific upgrade or transition policies on PartnerSource for full details.

Contact Name ⸍_____

Customer Title ⸍_____

Date ⸍_____

*Customer Signature ⸍_____

*Signatory must be listed as a Professional in the Customer VOICE account. If not listed in VOICE please work with the company's administrator to have them listed.

Please return this completed form to your Regional Operations Center via your local partner.

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Evaluating Licensing Needs
ISV Solutions

What About ISV Licenses?

- ISV solutions can be licensed a variety of ways

- The most common ways that ISVs license their software are:

  - Concurrent Users

  - Named Users

  - Pricing Tiers (0–10 Users | 11–20 Users | 21–30 Users | Over 30 Users)

  - Full Solution Access

- Discuss ISV solutions with your partner when discussing GP user licensing changes

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04

Transition Strategies

Identify strategies to navigate the transition seamlessly.

Transition Strategies
Keys for a Successful Transition

It's How We've Always Done It

As time passes, advances in technology move faster than most of us like. If we have the mindset that it's how we've always done it, we may lose opportunities to advance. This mindset makes us lose the advantage of growing and advancing steadily over time.

Fortify Your Partnership

If you don't have a strong alliance with your Microsoft Partner, now is the time to develop one. Your Microsoft Partner is there to help you. They should have your best interests in mind. Collaborate with them to navigate the changes Microsoft deploys.

Think Long-Term

Your thought process when it comes to ERP should be 5–10 years—not year to year. There are many changes that have come quickly and many more that will come. Don't get stuck thinking only about the day-to-day.

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Transition Strategies
Keys for a Successful Transition

Embrace Dynamics GP

Dynamics GP is a mature solution. It can handle business needs, either out-of-the-box or with the assistance of an ISV solution. Embrace that! Dynamics GP may not be a modern ERP—but it's incredibly powerful.

Take Ownership of Your System

Prioritize your business needs—no matter if its security, cost, speed, or anything else. Decide what's important to you and work with your Microsoft Partner to prioritize those things. Your system is yours so make sure you understand it and make it what you want.

Think Outside the Box

Modern ERP and advances in technology can make us uncomfortable. Get uncomfortable, real uncomfortable. Find people you trust to help you think outside the box as you plan for the future.

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05

Success Story

Let's recap a recent GP licensing review.

Success Story
Annual Savings

During a recent licensing review, we saw a huge potential for savings by reducing GP users, upgrading, & migrating to a hosting solution for a long-time client.

Savings in GP Users

85%

We helped lower yearly maintenance from $21,000 to $3,000 by removing unneeded licenses.

Savings Due to Migration

83%

We helped lower yearly hosting fees from over $100,000 per year to ~$17,000 per year.

Time Savings Due to Upgraded Functionality

15%

With a GP upgrade, it's estimated we can help save users ~15% of their time each week with functionality they didn't have before an upgrade.

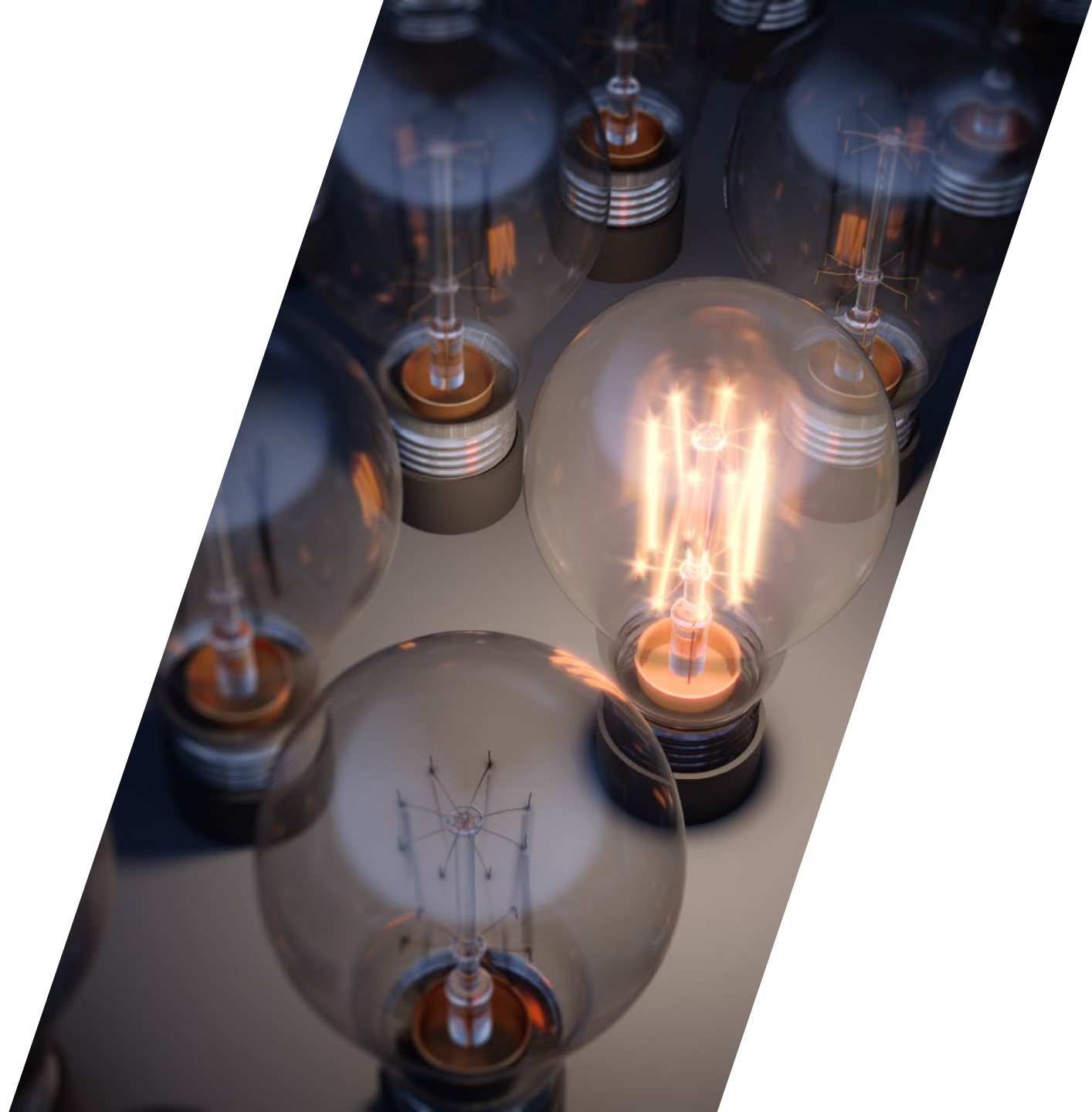### Time Savings for Modern ERP Selection

30%

Prior to the project, we knew the upgrade would be a catalyst for moving the client to a modern ERP. By being on an updated version of GP, migration tools can be used to move to a modern ERP.

Planning Ahead: What's Your Microsoft Dynamics GP Roadmap?

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06
Conclusion

Summarizing what we've covered.

Conclusion
Recap

Licensing Review

Schedule time with your Microsoft Partner to evaluate your GP licensing needs.

Upgrade/Update

Schedule an upgrade or year-end update to stay current with Microsoft to help you be covered by Microsoft Support.

Migration

If you have aging hardware, consider a new environment or a move to the cloud.

Long-Term ERP Plan

Consider getting GP up to date while considering a move to a modern, cloud ERP.

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Q&A

Business Technology Services

Questions?

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Microsoft Partner

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