



POWERED BY  DUG

**DYNAMICS CON**

**LIVE**

**MAY 2024**

# How to leverage the Microsoft Stack to enhance your Dynamics GP experience





[linkedin.com/in/paulgj1](https://www.linkedin.com/in/paulgj1)

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# About me

- Over 17 years working in the GP space as a consultant.
- Provide assistance to customers on the technical and functional side of GP
- Live in Winnipeg, Canada.



# Why Data Gateway

- We need to connect on prem system (sql database) to cloud based modern Microsoft products such as Power BI, Power Apps, Power automate, PVA
- Data gateway is a conduit that is installed typically on a server and provides a fully secured exchange of data between your on prem server and Microsoft cloud using https
- Data is typically queried by the cloud product and typically not stored in the cloud (power apps, power automate).

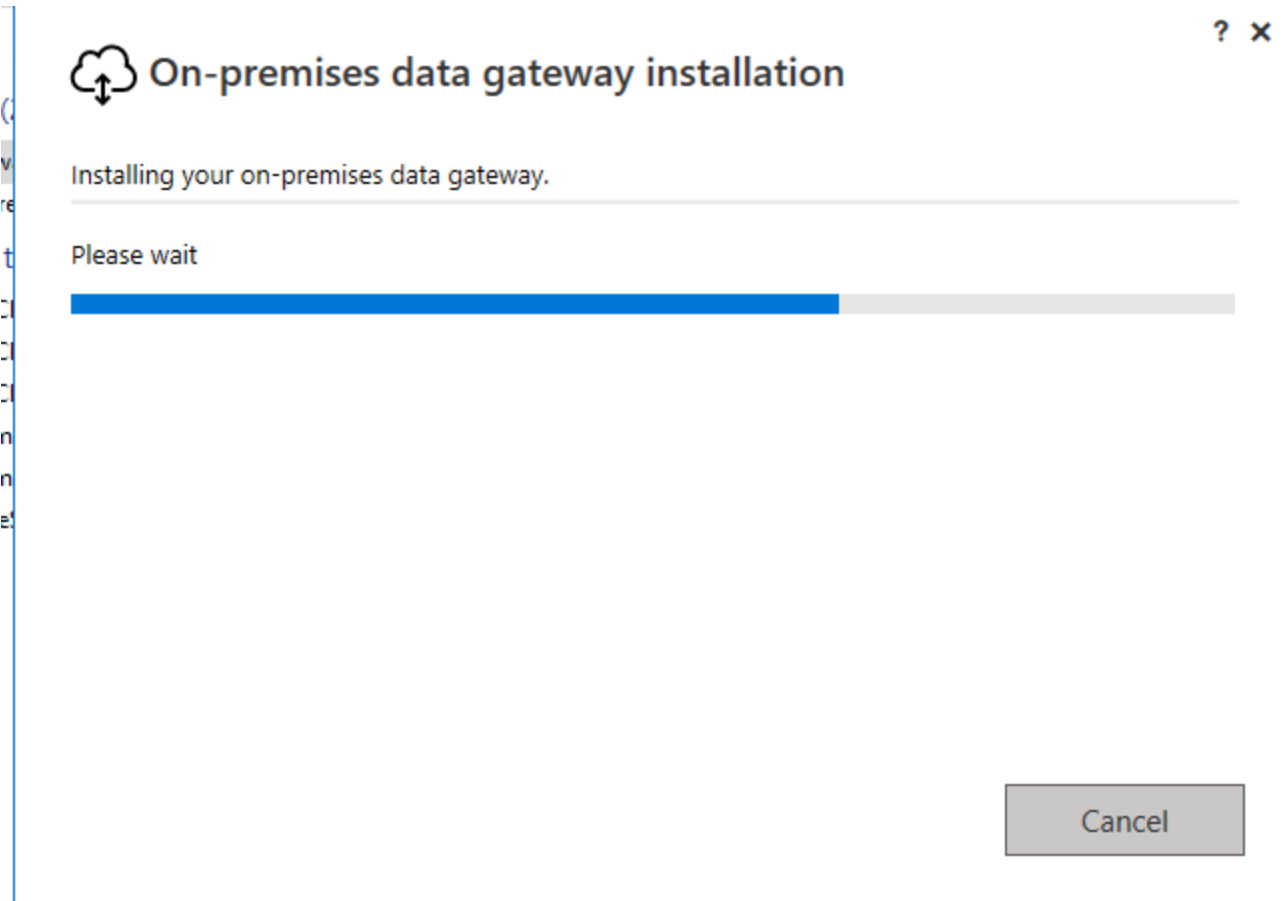


# Data Gateway Setup Demo:

- Download from <https://learn.microsoft.com/en-us/data-integration/gateway/service-gateway-install#download-and-install-a-standard-gateway>



# Data Gateway Setup Demo:



# Data Gateway Setup Demo:

## On-premises data gateway ? ×

Almost done.

Installation was successful!

Email address to use with this gateway\*

Next, you need to sign in to register your gateway.

[Sign in options](#)

Sign in

Cancel





# Data Gateway Setup Demo:



## On-premises data gateway



You are signed in as youremail@contoso.com and are ready to register the gateway.

New on-premises data gateway name \*

Add to an existing gateway cluster [Learn more](#)

Recovery key (8 character minimum) \*

This key is needed to restore the gateway and can't be changed. Record it in a safe place.

Confirm recovery key \*

We'll use this region to connect the gateway to cloud services: West Central US [Change Region](#)

[Provide relay details \(optional\)](#) By default, Azure Relays are automatically provisioned

<< Back

Configure



# Data Gateway Setup Demo:

On-premises data gateway

**Status**

Service Settings

Diagnostics

Network

Connectors

Recovery Keys

✓ The gateway paulsDynConGateway is online and ready to be used.

Gateway version number: 3000.218.9 (April 2024)

Help us improve the on-premises data gateway by sending usage information to Microsoft.  
[Read the privacy statement online](#)

**Logic Apps, Azure Analysis Services** [Create a gateway in Azure](#)  
Canada Central

**Power Apps, Power Automate** ✓ Ready  
Canada Central

**Microsoft Fabric** ✓ Ready  
Default environment

Close



# Data Gateway Security

The screenshot shows the SQL Server Enterprise Manager interface for a server named 'PAULJOHNSON (SQL Server 16.0.1000.6 - sa)'. The left-hand tree view is expanded to 'Security > Logins', where the 'gatewayproxy' login is selected. The 'Login Properties - gatewayproxy' dialog box is open, displaying the following information:

**Select a page:** General, Server Roles, User Mapping, Securables, Status

**Users mapped to this login:**

Map	Database	User	Default Schema
<input checked="" type="checkbox"/>	DYNAMICS	gatewayproxy	dbo
<input type="checkbox"/>	ManagementReporter		
<input type="checkbox"/>	master		
<input type="checkbox"/>	model		
<input type="checkbox"/>	msdb		
<input type="checkbox"/>	ReportServer		
<input type="checkbox"/>	ReportServerTempDB		
<input type="checkbox"/>	tempdb		
<input checked="" type="checkbox"/>	TWO	gatewayproxy	dbo

**Database role membership for: TWO**

- DYNGRP
- DYNWORKFLOWGRP
- public
- RAPIDGRP
- rpt\_accounting manager
- rpt\_accounts payable coordinator
- rpt\_accounts receivable coordinator
- rpt\_bookkeeper
- rpt\_certified accountant
- rpt\_collections manager
- rpt\_customer service rep

**Connection:** Server: PaulJohnson, Connection: sa

**Progress:** Ready

Buttons: OK, Cancel











# Creating a SQL connection

- Used in Power apps and Automate
- Go to <https://make.Powerapps.com>
- Sign in with your M365 Account. Sql connection is a premium connection.
- 



# Creating a SQL connection

Connections > New connection

Name	Type	
 SQL Server Microsoft <span>Premium</span>	Standard	+
 SharePoint Microsoft	Standard	+
 OneDrive for Business Microsoft	Standard	+
 Dynamics 365 (deprecated) Microsoft <span>Premium</span>	Standard	+
 Salesforce Microsoft <span>Premium</span>	Standard	+
 OneDrive Microsoft	Standard	+
 Dropbox Microsoft	Standard	+
 10to8 Appointment Scheduling (preview) Microsoft	Standard	+



# Creating a SQL connection



## SQL Server

Premium

Microsoft SQL Server is a relational database management system developed by Microsoft. Connect to SQL Server to manage data. You can perform various actions such as create, update, get, and delete on rows in a table. [Learn more](#)

Authentication type

SQL Server Authentication

How do you want to connect to your data?

- Connect directly (cloud services)
- Connect using on-premises data gateway

SQL server name \*

PAULJOHNSON

SQL database name \*

TWO

Username \*

gatewayproxy

Password \*

.....

Choose a gateway \*

paulsDynConGateway

Refresh gateway list

If you don't see a gateway, or want a new one, you can install one now.

To see recently installed gateways, refresh this list.

[Install a gateway](#)

\* Required field

Create





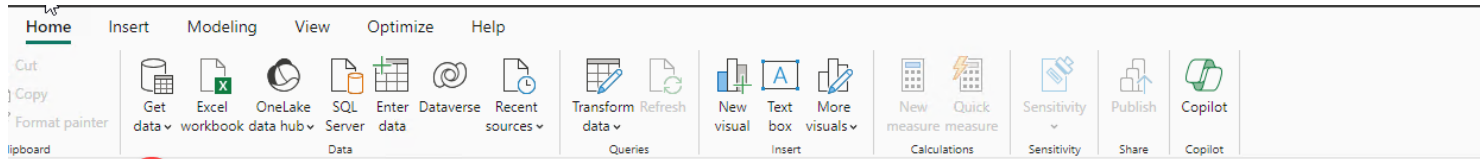
# Power BI and GP Demo:

- Download Power BI desktop
- Need at a minimum pro license to be able to share reports with other users.
- Build in desktop and then publish to the power BI service.





# Power BI Demo



1

**SQL Server database** [X]

Server [ ]

Database (optional) [ ]

Data Connectivity mode [ ]

Import

DirectQuery

Advanced options [ ]

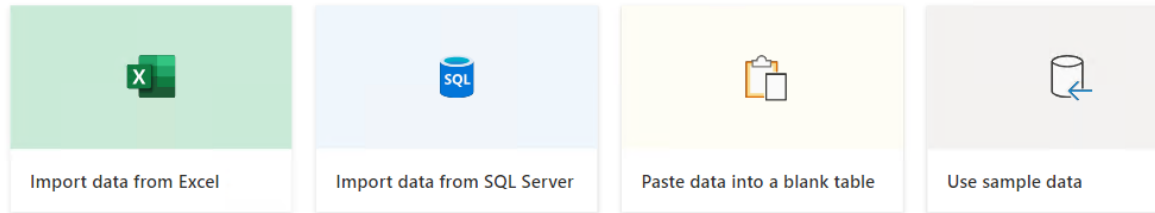
OK Cancel

2

3

4

report  
in the Data pane.



Get data from another source →



# Power BI Demo

### SQL Server database

Server ⓘ  
PAULJOHNSON

Database (optional)  
TWO

Data Connectivity mode ⓘ  
 Import  
 DirectQuery

Advanced options

Command timeout in minutes (optional)

SQL statement (optional, requires database)

Include relationship columns  
 Navigate using full hierarchy



# Power BI Demo

PAULJOHNSON: TWO

SOP Type	SOP Number	Document Date	Customer Number	Customer Name	Customer PO Number	Primary Shipto Address C
Order	ORDST2225	5/23/2027 12:00:00 AM	CENTRALD0001	Central Distributing		WAREHOUSE
Back Order	BKO1005	4/21/2027 12:00:00 AM	BREAKTHR0001	Breakthrough Telemarketing		PRIMARY
Invoice	STDINV2256	5/23/2027 12:00:00 AM	FRANCHIS0001	Franchise Office Machines		WAREHOUSE
Invoice	STDINV2255	5/23/2027 12:00:00 AM	LASERMES0001	Laser Messenger Service		PRIMARY
Return	STDINV2257	3/5/2027 12:00:00 AM	ADAMPARK0001	Adam Park Resort		PRIMARY
Invoice	INVSP1005	4/21/2027 12:00:00 AM	ASTORSUI0001	Astor Suites		SERVICE
Back Order	BKO1006	4/21/2027 12:00:00 AM	ADAMPARK0001	Adam Park Resort		PRIMARY
Quote	QTTEST1022	3/5/2027 12:00:00 AM	AARONFIT0001	Aaron Fitz Electrical		WAREHOUSE

Load

Transform Data

Cancel



# Power BI Demo

The screenshot displays the Power Query Editor interface. The main window shows a data table with columns: **SOP Type**, **SOP Number**, and **Document Date**. The data includes various order types such as Order, Back Order, Invoice, Return, Quote, and Fulfillment Order, along with their respective numbers and dates.

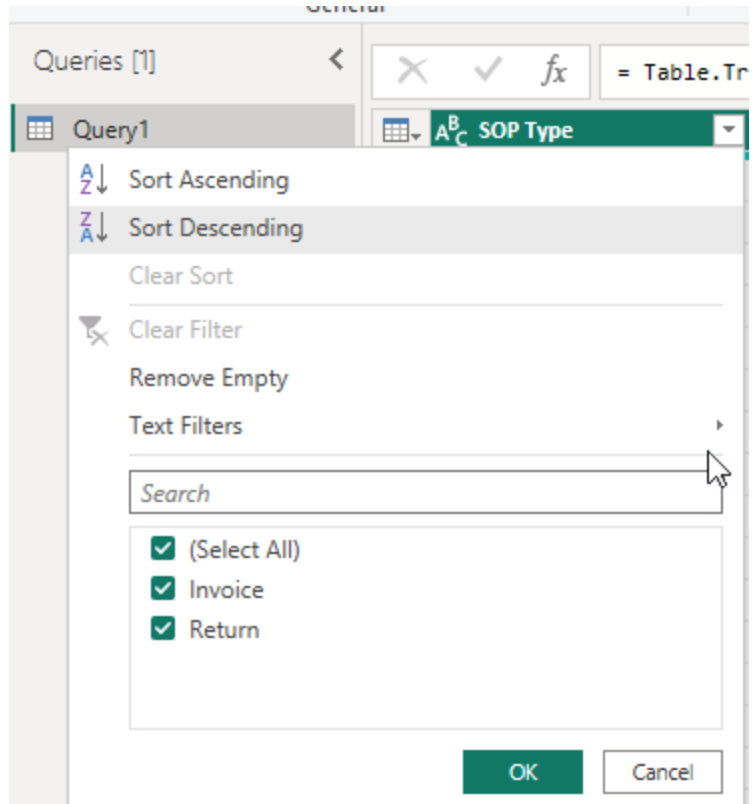
A **Choose Columns** dialog box is open, allowing the user to select which columns to keep. The dialog lists the following columns with their selection status:

- (Select All Columns)
- SOP Type
- SOP Number
- Document Date
- Customer Number
- Customer Name
- Customer PO Number
- Primary Shipto Address Code
- Sales Document Status
- Document Amount
- Account Amount
- Accounts Receivable Account Number
- Actual Ship Date
- Address 1
- Address 1 from Customer Master
- Address 2
- Address 2 from Customer Master
- Address 3
- Address 3 from Customer Master
- Address Code from Customer Master

The dialog also shows a preview of the selected columns on the right side of the window.



# Power BI Demo



# Power BI Demo

## Custom Column

Add a column that is computed from the other columns.

New column name

Custom column formula ⓘ

```
= if [SOP Type]="Return" then -[Document Amount] else  
[Document Amount]
```

Available columns

- SOP Type
- SOP Number
- Document Date
- Customer Number
- Customer Name
- Document Amount
- Salesperson ID

<< Insert

[Learn about Power Query formulas](#)

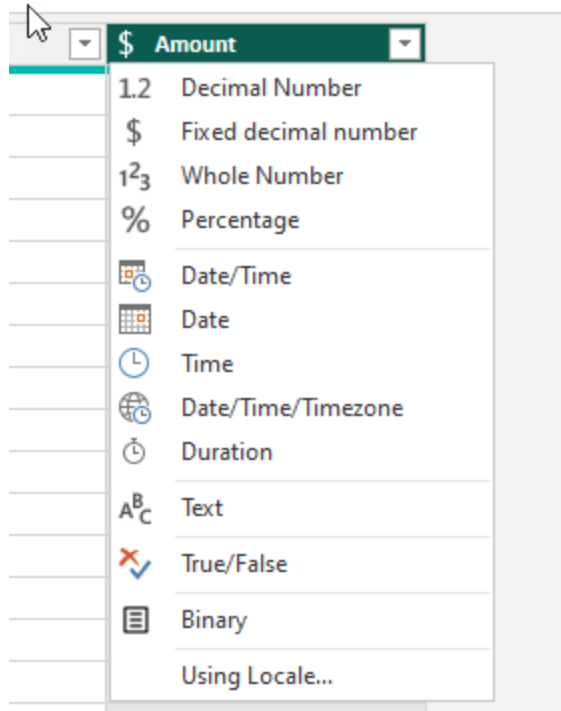
✓ No syntax errors have been detected.

OK

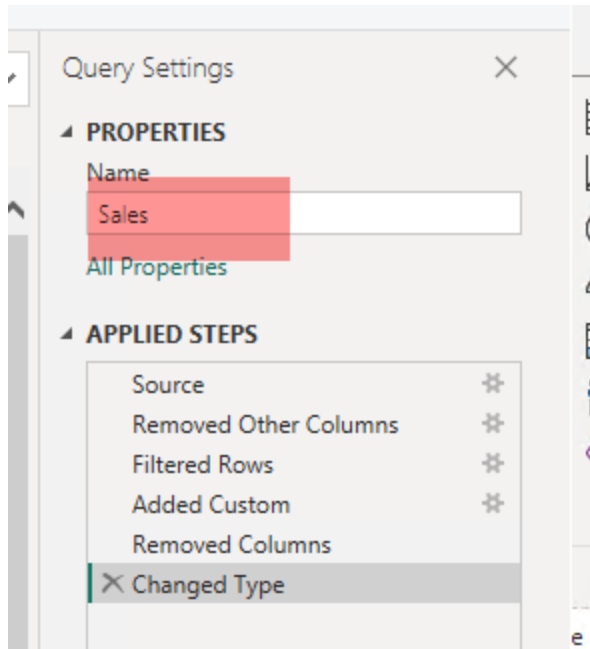
Cancel



# Power BI Demo



# Power BI Demo





# Power BI Demo

The screenshot displays the Microsoft Power BI interface. At the top is a ribbon with tabs for File, Home, Insert, Modeling, View, Optimize, and Help. The Home tab is active, showing various icons for data sources (Get data, Excel, OneLake, SQL Server, Enter Data, Dataverse, Recent sources), transformations (Transform data, Refresh data), visual creation (New visual, Text box, More visuals), calculations (New measure, Quick measure), and sharing (Sensitivity, Publish, Copilot). On the left is a vertical navigation pane with icons for Home, Reports, Datasets, and Dataflows. The central area is a large report canvas. On the right is a task pane with two main sections: 'Visualizations' and 'Data'. The 'Visualizations' section includes a 'Build visual' dropdown and a grid of visualization icons. The 'Data' section has a search bar and a list of fields under a 'Sales' table, including Amount, Customer Name, Customer Num., Document Date, Salesperson ID, SOP Number, and SOP Type. Below the 'Data' list are sections for 'Values' (with an 'Add data fields here' box), 'Drill through' (with 'Cross-report' and 'Keep all filters' toggles), and 'Add drill-through fields here'.

Build visuals with your data

Select or drag fields from the Data pane onto the report canvas.



# Power BI Demo

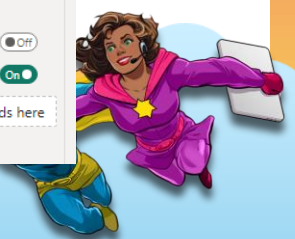
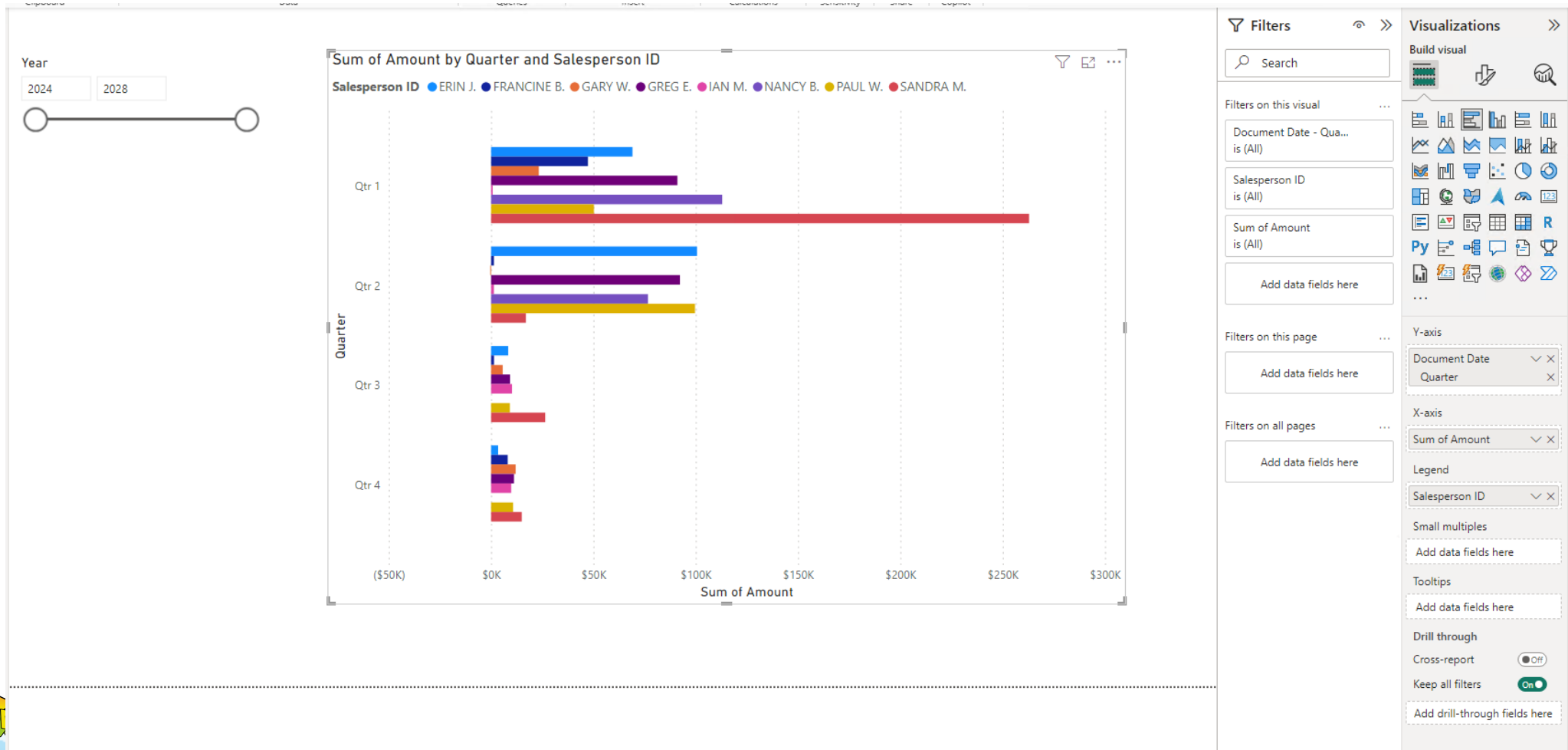
Salesperson ID	Sum of Amount
ERIN J.	\$181,475.39
FRANCINE B.	\$58,149.69
GARY W.	\$40,863.74
GREG E.	\$203,693.32
IAN M.	\$22,145.83
NANCY B.	\$189,537.25
PAUL W.	\$169,741.61
SANDRA M.	\$321,188.51
<b>Total</b>	<b>\$1,186,795.34</b>

The screenshot displays the Power BI interface with the following components:

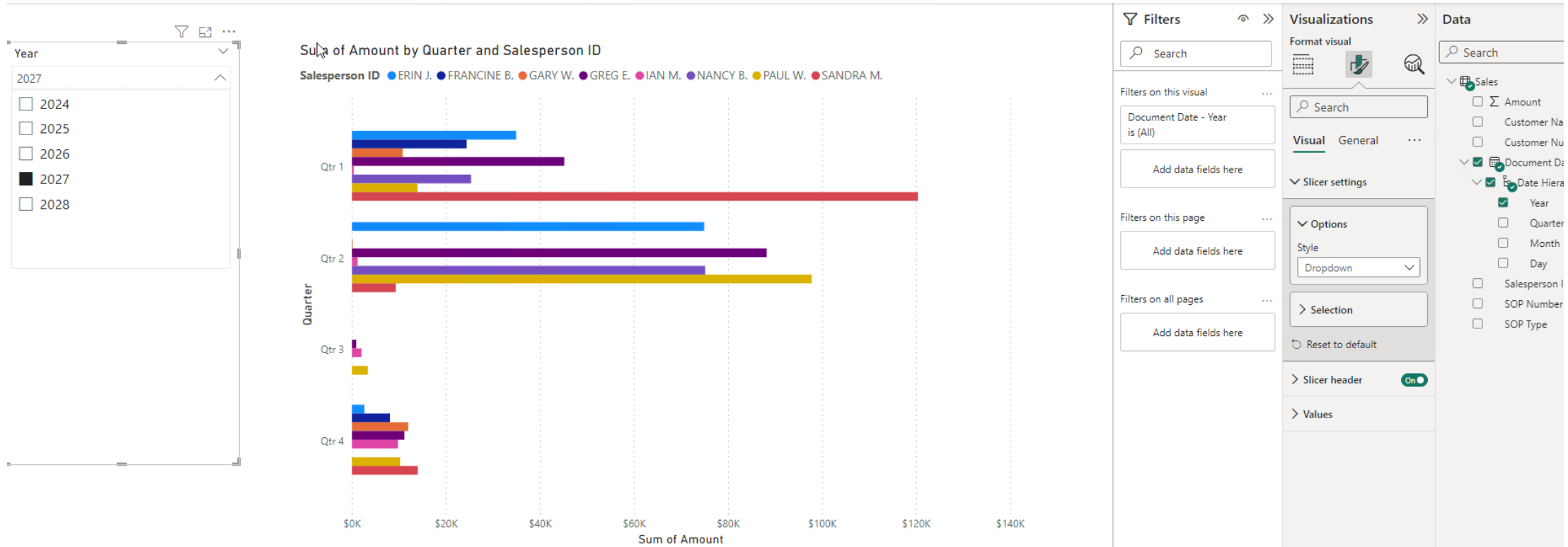
- Filters Pane:** Contains a search bar and three filter sections: "Filters on this visual" (Salesperson ID is (All), Sum of Amount is (All)), "Filters on this page", and "Filters on all pages". Each section has an "Add data fields here" button.
- Visualizations Pane:** Features a "Build visual" search bar, a grid of visualization icons, and a "Columns" section with "Salesperson ID" and "Sum of Amount" selected. It also includes a "Drill through" section with "Cross-report" (Off) and "Keep all filters" (On) toggle switches, and an "Add drill-through fields here" button.



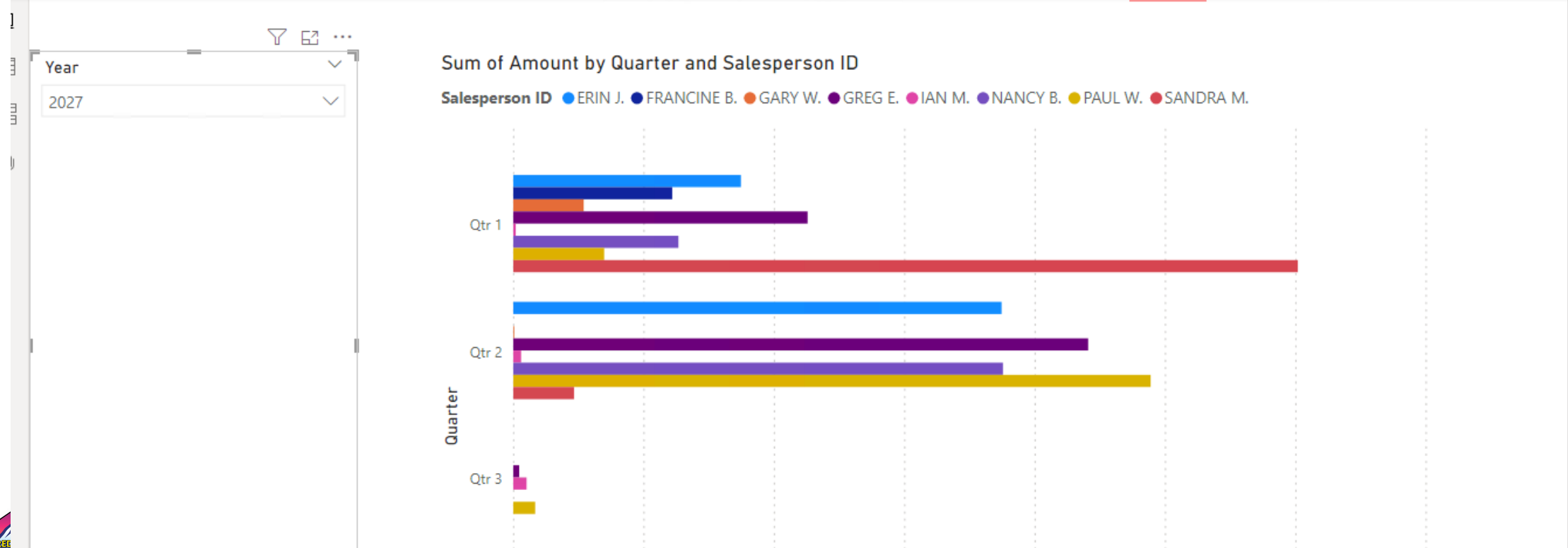
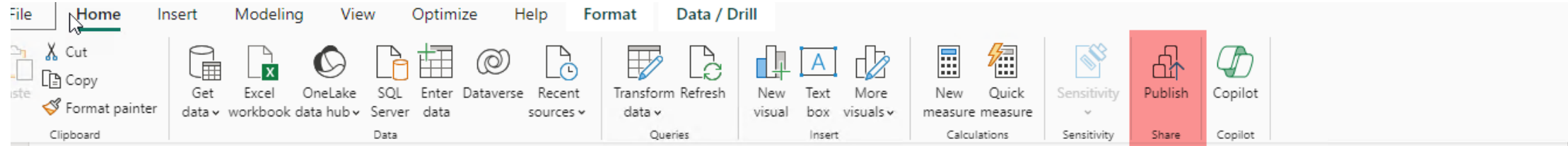
# Power BI Demo



# Power BI Demo



# Power BI Demo



# Power BI Demo

✕

## Your file was published, but disconnected

'dynamicsconV2.pbix' is not connected to one or more data sources. To connect, go to dataset settings or ask the dataset owner for help. [Learn more](#)

Open 'dynamicsconV2.pbix' in Power BI [Open dataset settings](#)



# Power BI Demo

Power BI DynamicsCon Search

General Dashboards **Semantic models** Workbooks Dataflows App

dynamicsconV2  
power bi dynamicsCon2024

### Settings for dynamicsconV2

[View semantic model](#)

This semantic model has been configured by [admin@pauldev1.onmicrosoft.com](mailto:admin@pauldev1.onmicrosoft.com).

[Refresh history](#)

#### Semantic model description

Describe the contents of this semantic model.

500 characters left

Apply Discard

#### Gateway and cloud connections

To use a data gateway, make sure the computer is online and the data source is added in [Manage Connections and Gateways](#). If you're using an On-premises data gateway (standard mode), please select the corresponding data sources and then click apply.

##### Gateway connections

Use an On-premises or VNet data gateway

On

Gateway	Department	Contact information	Status	Actions
<input type="radio"/> paulsDymConGat...		admin@pauldev1.onm...	Running on <input type="radio"/> PAULJOHNSON, select all datasources to use	

Data sources included in this semantic model:

SqlServer[server:"pauljohnson",database:"two"] Maps to:

##### Cloud connections

No cloud connections

Apply Discard



# Power BI Demo

▷ Data source credentials

▷ Parameters

◀ Refresh

Configure a refresh schedule

Define a data refresh schedule to import data from the data source into the semantic model. [Learn more](#)

On

Refresh frequency

Daily ▾

Time zone

(UTC) Coordinated Universal Time ▾

Time

2 ▾ 00 ▾ PM ▾ ×

4 ▾ 00 ▾ PM ▾ ×

[Add another time](#)

Send refresh failure notifications to

Semantic model owner

These contacts:

Enter email addresses

Apply

Discard





# Power BI Demo

https://app.powerbi.com/groups/51fa0fb4-db9e-4e73-b752-249ea96899da/list?experience=power-bi

Power BI DynamicsCon

Search

DynamicsCon

+ New Upload Create app Manage access Workspace settings

Name	Type	Owner	Refreshed	Next refresh
dynamicsconV2	Report	DynamicsCon	5/14/24, 7:47:27 PM	—
dynamicsconV2	Semantic model	DynamicsCon	5/14/24, 7:47:27 PM	5/15/24, 2:00:00 PM
power bi dynamicsCon2024	Report	DynamicsCon	5/14/24, 7:09:05 AM	—
power bi dynamicsCon2024	Semantic model	DynamicsCon	5/14/24, 7:09:05 AM	5/15/24, 7:00:00 AM





# Power Apps and GP Demo:

**Power Apps** Search Environment: pauldev1 (default)

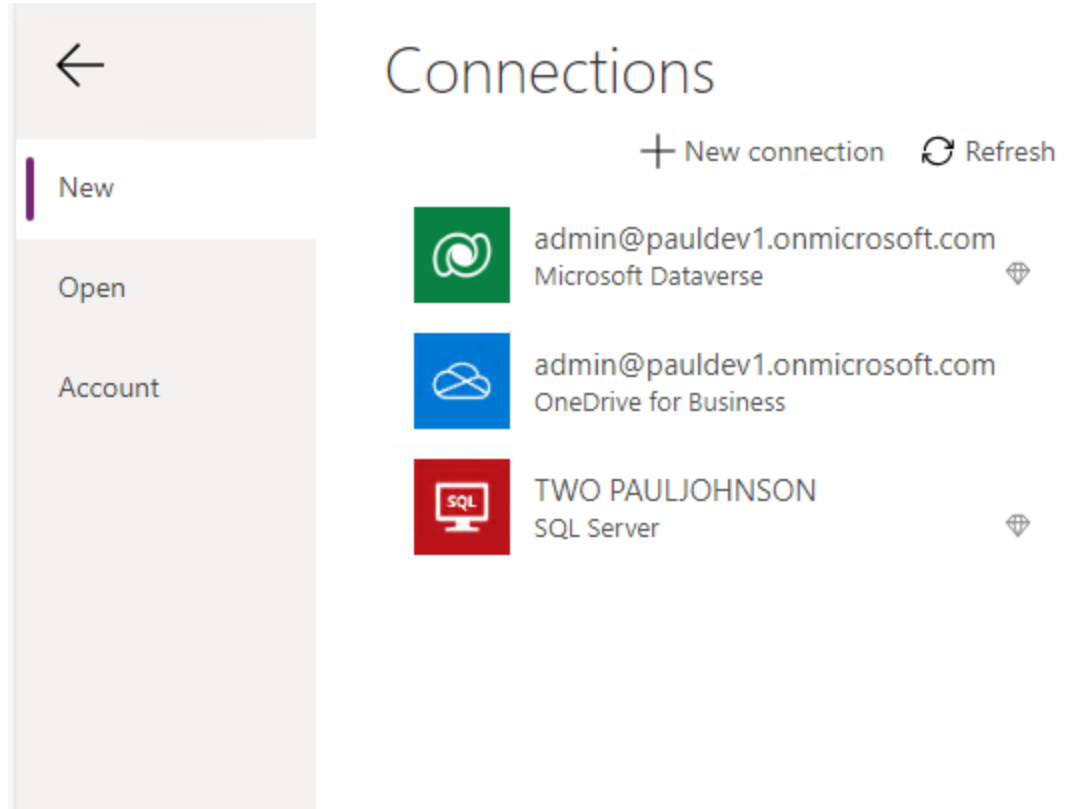
**Create your app**

**Start from**

- Blank app**  
Create an app from scratch and then add your data  
[Watch video](#)
- Dataverse**  
Start from a Dataverse table to create a three-screen app  
[Watch video](#)
- SharePoint**  
Start from a SharePoint list to create a three-screen app  
[Watch video](#)
- Excel**  
Start from an Excel file to create a three-screen app  
[Watch video](#)
- SQL**  
Start from a SQL data source to create a three-screen-app  
[Watch video](#)
- Image**  
Upload an image of an app or form and we'll convert it into an app
- Figma**  
Start from our Figma UI kit and convert it into an app



# Power Apps and GP Demo:



# Power Apps and GP Demo:

← PAULJOHNSON,TWO

Choose a table

- Accounts
- AccountSummary
- AccountTransactions
- AF00100
- AF10000
- AF40100
- AF40101
- AF40102
- AF40103
- AF40104
- AF40105
- AF40106
- AF40107
- AF40108



# Power Apps and GP Demo:

The screenshot displays the Power Apps canvas editor interface. At the top, the browser address bar shows the URL: `https://make.powerapps.com/e/Default-a1f9ab5c-f842-4533-a0eb-6f55513845e6/canvas/?action=new-data&connector-type=%2Fproviders%2Fmicrosoft.powerapps%2Fapis%2Fshared_sql`. Below the address bar, the header reads "Power Apps | App". The navigation bar includes options like "Back", "Insert", "Add data", "New screen", "Theme", "Background color", "Background image", and "Settings".

The main canvas area shows a search interface with a blue header bar containing the text "[dbo].[IV00101]" and icons for refresh, sort, and add. Below the header is a search input field with the placeholder text "Search items".

On the left side, the "Tree view" pane is open, showing a hierarchical structure of the app. The "Screens" tab is selected, and the tree view shows the following components:

- App
  - BrowseScreen1
    - BrowseGallery1
    - Rectangle11
    - SearchIcon1
    - TextSearchBox1
    - IconNewItem1
    - IconSortUpDown1
    - IconRefresh1
    - LblAppName1
    - RectQuickActionBar1
  - DetailScreen1
  - EditScreen1



# Power Apps and GP Demo:

The screenshot displays the Microsoft Power Apps environment. At the top, the title bar reads "Power Apps | App" and the user is identified as "pauldev1 (default)". The ribbon menu includes options like "Back", "Insert", "Add data", "Edit fields", "Layout", "Background color", and "Settings". The main canvas shows a gallery control with the following formula: `SortByColumns(Search(['[dbo].[IV00101]'], TextSearchBox1.Text, ALTITEM1,ALTITEM2,CNTRYORGN), "ALTITEM1", If(SortDescending1, SortOrder.Descending, SortOrder.As`. The gallery is titled "[dbo].[IV00101]" and contains a list of items with columns for ID, description, and a right-pointing arrow. The items listed are:

ID	Description
PHAN-PHN-0001	Standard Phone Package
PHAN-FAX-0001	Fax Machine Package
MISC-TWO-0001	Mileage
MIC100	Microphone
M2100	21" Monitor
M1700	17" Monitor
M1500	15" Monitor
KPA100	Keypad Assembly
KB104	

On the left, the "Tree view" shows the app structure with "BrowseGallery1" selected. On the right, the "Data" pane shows the selected item's fields: "Body1" (CNTRYORGN), "Subtitle1" (ITEMDESC), and "Title1" (ITEMNMBR).



# Power Apps and GP Demo:

The screenshot shows the Power Apps interface with a data table on the left and a 'Format text using examples' dialog box on the right. The data table has a header row with the text '[dbo].[IV00101]' and a search bar below it. The table lists various items with their descriptions and values. The dialog box is titled 'Format text using examples' and contains instructions, a 'Current format' field with the value '27.66', a 'Desired format' dropdown menu with '\$27.66' selected, and a 'Suggestions' section showing the formula 'Text(ThisItem.CURRCOST, "\$0.00", "en-US")'.

[dbo].[IV00101]
27.66
PHAN-FAX-0001 Fax Machine Package 1479.05
MISC-TWO-0001 Mileage 0
MIC100 Microphone 4
M2100 21" Monitor 810
M1700 17" Monitor 198
M1500 15" Monitor 108
KPA100 Keypad Assembly 3.88

**Format text using examples**

Enter examples of how you want to format the selected item and we'll suggest an expression that will change it throughout.

Current format: 27.66

Desired format: \$27.66

+ Add examples

**Suggestions**

**CURRCOST**

Text(ThisItem.CURRCOST, "\$0.00", "en-US")

AI-generated content may be incorrect




**Resources**


Give feedback to Microsoft














# Power Apps and GP Demo:



Item cost lookup   

 Search items

<b>PHAN-PHN-0001</b> Standard Phone Package \$27.66	
<b>PHAN-FAX-0001</b> Fax Machine Package \$1479.05	
<b>MISC-TWO-0001</b> Mileage \$0.00	
<b>MIC100</b> Microphone \$4.00	
<b>M2100</b> 21" Monitor \$810.00	
<b>M1700</b> 17" Monitor \$198.00	
<b>M1500</b> 15" Monitor \$108.00	
<b>KPA100</b> Keypad Assembly \$3.88	
<b>KB104</b>	



# Power Apps and GP Demo:

< Item Detail  

**ITEMNMBR**  
PHAN-PHN-0001

**ABCCODE**  
1

**ITMCLSCD**  
RETAIL

**ITMTSHID**  
ALL DETAILS



# Power Apps and GP Demo:

The screenshot displays the Microsoft Power Apps development environment. At the top, a navigation bar includes options like 'Back', 'Insert', 'Add data', 'Edit fields', 'Layout', 'Background color', and 'Settings'. Below this, a formula bar shows the following formula for the 'Items' property of a gallery:

```
SortByColumns([Search([@'dbo].[IV00101]'], TextSearchBox1.Text, ITEMNMBR, ITEMDESC), "ITEMNMBR", If(SortDescending1, "ITEMNMBR" = ITEMNMBR, Data type: text
```

The left-hand 'Tree view' pane shows the application structure, including 'Screens' and 'Components'. The 'BrowseGallery1' screen is selected, showing a list of components like 'Rectangle1', 'Separator1', 'NextArrow1', 'Body1', 'Subtitle1', 'Title1', etc.

The main canvas area shows a preview of the 'Item cost lookup' app. It features a search bar at the top with the text 'Search items'. Below the search bar is a gallery of items, each with a circular refresh icon, a text label, a description, a price, and a green arrow icon. The items listed are:

Item ID	Description	Price
A3261A	Multi-Core Processor	\$16000.00
1-A3483A	SIMM EDO 72	\$6500.00
100XLG	Green Phone	\$28.46
128 SDRAM	128 meg SDRAM	\$152.10
1GPROC	1 Ghz Processor	\$120.00
2-A3284A	Dual Core Server	\$64000.00
24X IDE	24x CD-ROM	\$45.00
256 SDRAM	256 meg SDRAM	\$247.50
2GPROC		



# Power Apps and GP Demo:

Item cost lookup

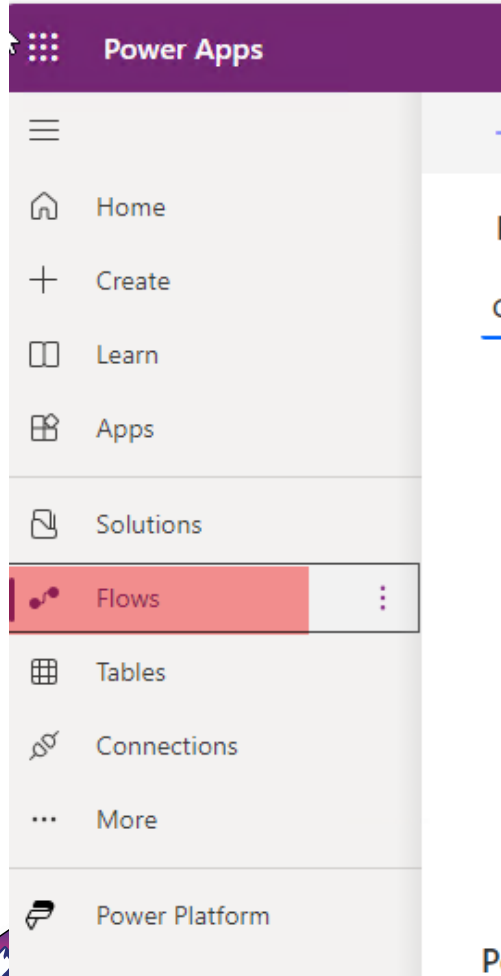
green

<b>100XLG</b> Green Phone \$28.46	>
<b>CORDG</b> Green Cord \$0.67	>
<b>COV100G</b> Green Cover \$1.00	>
<b>HA100G</b> Green Hand Assembly \$11.65	>





# Power Automate and GP Demo:



# Power Automate and GP Demo:

**Build an instant cloud flow**

Flow name: DynamicsCon

Choose how to trigger this flow \*

- Manually trigger a flow  
Flow button for mobile
- Power Apps (V2)  
Power Apps
- Run a flow from Copilot  
Skills
- When Power Virtual Agents calls a fl...  
Power Virtual Agents
- When a flow step is run from a busin...  
Microsoft Dataverse
- For a selected message (V2)  
Microsoft Teams
- From the compose box (V2)

Triggers manually from any device, easy-to-share instant flows automate tasks so you don't have to repeat yourself.

Examples:

- Get an automatic mobile alert whenever a VIP client emails you
- Save all your email attachments to a folder automatically

Skip Create Cancel



# Power Automate and GP Demo:

The screenshot displays a Power Automate flow canvas. At the top, there is a step titled "Manually trigger a flow". Below it, a step titled "Execute stored procedure (V2)" is highlighted with a red border. This step has three configuration fields:

- \* Server name: Use connection settings (PAULJOHNSON)
- \* Database name: Use connection settings (TWO)
- \* Procedure name: ta

A dropdown menu is open under the "Procedure name" field, listing the following stored procedures:

- taGetTrxSourceNumber
- taGetUPRNextCheckNumber
- taGetUPRNextComputerTrxNumber
- taGetUPRNextManualTrxNumber
- taGetUPRNextPayAdjNumber
- taGLAssignUpdate
- taGLTransactionHeaderInsert
- taGLTransactionHeaderInsertPost
- taGLTransactionHeaderInsertPre
- taGLTransactionLineInsert





# Power Automate and GP Demo:

Manually trigger a flow

Execute stored procedure (V2)

* Server name	Use connection settings (PAULJOHNSON)
* Database name	Use connection settings (TWO)
* Procedure name	taGLTransactionHeaderInsert
L_vBACHNUMB	
L_vJRNENTRY	
L_vREFERENCE	
L_vTRXDATE	
L_vRVRSNGDT	
L_vTRXTYPE	
L_vSQNCLINE	
L_vSERIES	
L_vCURRENCYID	
L_vXCHGRATE	
L_vRATEPID	
L_vEXPNDATE	
L_vEXCHDATE	
L_vEXGTBDSC	
L_vEXTBLSRC	
L_vRATEEXPR	
L_vDYSTINCR	
L_vRATEVARC	
L_vTRXDDEF	
L_vRTCLCMDT	
L_vPRVDSLMT	



# Power Automate and GP Demo:

```
dynconwrappersqlms01n.tvw (sa (64))  SQLQuery01.sql - P...N30N.TWO (sa (66))
Create proc taUpdateCreateCustomerRcdDynCon
(
    @I_vCUSTNMBR varchar(15),
    @I_vCUSTNAME varchar(64)
)
as
DECLARE
    @return_value int,
    @O_iErrorState int,
    @oErrString varchar(255)
EXEC @return_value = [dbo].[taUpdateCreateCustomerRcd]
    @I_vCUSTNMBR,
    @I_vCUSTNAME,
    @O_iErrorState = @O_iErrorState OUTPUT,
    @oErrString = @oErrString OUTPUT

GRANT EXECUTE ON taUpdateCreateCustomerRcdDynCon TO DYNGRP
```



# Power Automate and GP Demo:

The screenshot displays a Power Automate flow configuration. The first step is 'Manually trigger a flow', which is connected to the second step, 'Execute stored procedure (V2)'. The 'Execute stored procedure (V2)' step is configured with the following fields:

* Server name	Use connection settings (PAULJOHNSON)
* Database name	Use connection settings (TWO)
* Procedure name	taUpdateCreateCustomerRcdDynCon
return_value	
O_iErrorState	
oErrString	
I_vCUSTNMBR	
I_vCUSTNAME	

At the bottom of the configuration area, there are two buttons: '+ New step' and 'Save'.



# Power Automate and GP Demo:

The screenshot displays a Power Automate flow configuration interface. The first step is 'Manually trigger a flow', which includes two input fields: 'CustomerNum' (mapped to 'Customer Number') and 'CustName' (mapped to 'Customer Name'). Below these is a '+ Add an input' button. The second step is 'Execute stored procedure (V2)', which is configured with the following settings:

- \* Server name: Use connection settings (PAULJOHNSON)
- \* Database name: Use connection settings (TWO)
- \* Procedure name: taUpdateCreateCustomerRcdDynCon
- I\_vCUSTNMBR: CustomerNum
- I\_vCUSTNAME: CustName

At the bottom of the configuration area are buttons for '+ New step' and 'Save'.





# Dynamics GP Roadmap

- GP is supported through 2028 and Beyond
- As of April 1, 2026 no new sales of GP to new customer
- Existing customer will still be able to purchase new licenses and modules beyond 2026
- GP on modern lifecycle
  - Predictable release schedule (June, Oct, and Dec)
  - Bug fixes and latest tax updates
- Extended support for GP 2015 end April 8 2025 and GP 2016 extended support end July 14, 2026



# Existing on prem environment for GP

- Domain controller server – Physical or virtual server
- Server hosting GP, MR, SSRS databases. (running sql instance)
- Local workstation installs, or a server setup for RDS – combination of the two
- May also have a webserver and running GP web client.



# Cost of staying on Prem

- Capital Expenses
  - Hardware costs
  - Licensing costs
- Operating Expenses
  - IT personnel
  - Cost to patch OS monthly
  - Physical security for your servers (room and access to servers)
  - Time it takes to purchase, update and configure a server
  - Other hardware needed to keep servers up and running. (switches, ups, etc)
  - Depreciation of existing servers. Server may be able to last 5 years but the OS on there may no longer be supported by year 5, etc





# Why move to Azure:

- Uptime(99.95%) guarantee and not affected by local power outages.
- Less risk associated with azure then managing on prem servers
- Upgrades and patches to OS can be done in less time and automated.
- Flexible – If you need more resources at certain times of the year or need to increase data storage or increase users you can do it quickly
- Cost effective as you only pay for consumption



# Why move to azure

- Scalable, WFH and remote growth
- Modern platform enablement
- More secure with Identity management model and role based access
  - with Entra



# What does moving to azure look like?

- A couple of different scenarios
- Hybrid solution where you keep your Domain controller on prem
  - Move SQL server, hosting and accessing GP to Azure
  - You need to setup a virtual gateway to put your local network and azure network on the same network
  - When you then use SSRS or MR for example it will use your existing on prem domain user to authenticate.
  - Also good to setup secondary domain controller VM in azure as backup in cases something happens to your existing on prem domain



# What does moving to azure look like?

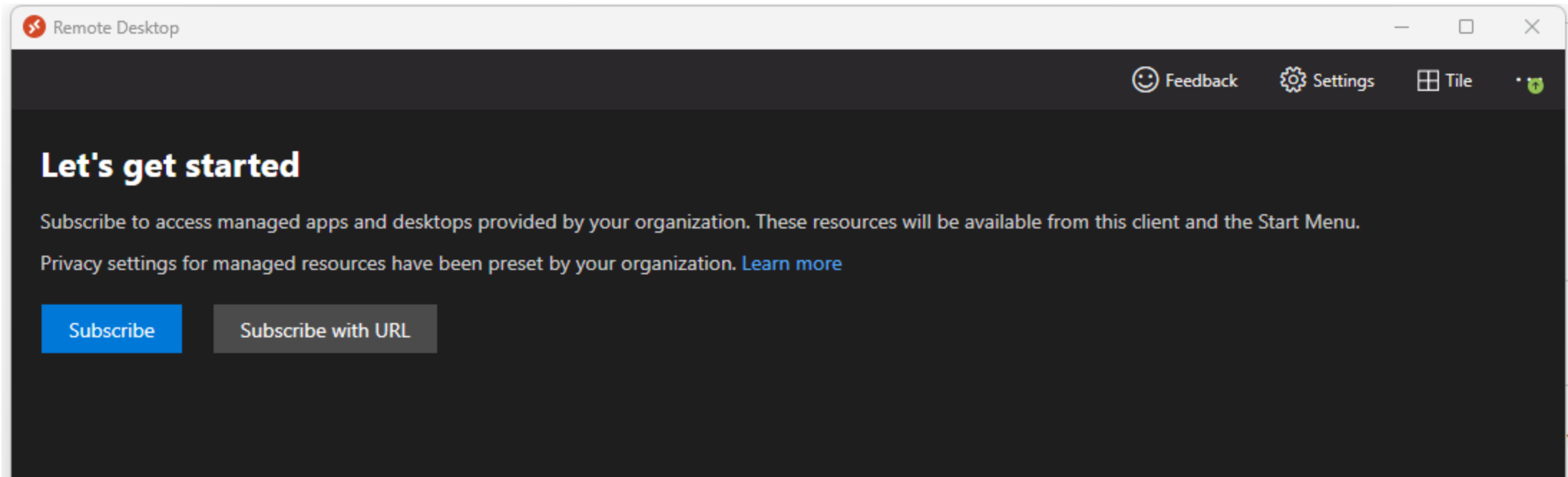
- Scenario 2
- Move everything to Azure
  - Users log into their workstation using M365 account
  - Use Azure active directory domain services
  - Virtual machine for SQL
  - Use Azure virtual desktop services for users to access GP and other applications

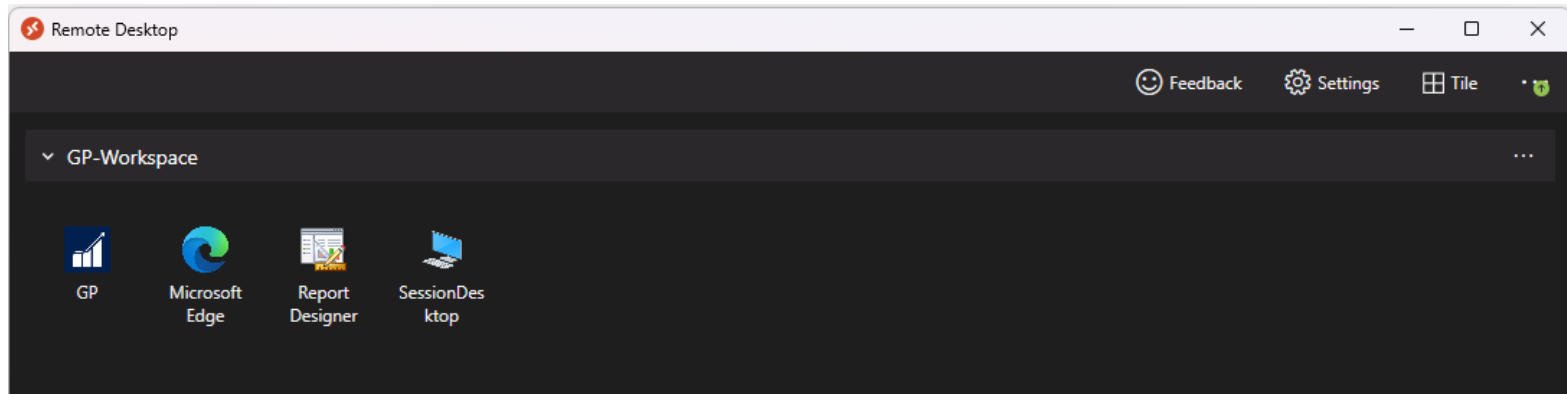


# Azure Virtual desktop

- Service that is used so we can access our apps (GP, MR, SSRS, etc)
- Allows for full desktop or access as a remote app
- Windows 10 or 11 and can be multi-session to reduce costs
- VM sizing and scaling policies
- Images, app, and profile management.
- Remote app streaming – low latency, high-performance user experience from virtually anywhere on any device.
- Use remote desktop app to sign in







# Modern Authentication in GP

## Azure services



Create a resource



Subscriptions



App registrations



Microsoft Entra ID



Storage accounts



Resource groups



Quickstart Center



Azure AI services



Kubernetes services



More services

## Resources





# Modern Authentication in GP

[Home](#) > [App registrations](#) >

## Register an application

### \* Name

The user-facing display name for this application (this can be changed later).

### Supported account types

Who can use this application or access this API?

- Accounts in this organizational directory only (pauldev1 only - Single tenant)
- Accounts in any organizational directory (Any Microsoft Entra ID tenant - Multitenant)
- Accounts in any organizational directory (Any Microsoft Entra ID tenant - Multitenant) and personal Microsoft accounts (Xbox)
- Personal Microsoft accounts only

[Help me choose...](#)

### Redirect URI (optional)

We'll return the authentication response to this URI after successfully authenticating the user. Providing this now changed later, but a value is required for most authentication scenarios.

Register an app you're working on here. Integrate gallery apps and other apps from outside your organization by:

By proceeding, you agree to the [Microsoft Platform Policies](#)

Register



# Modern Authentication in GP

Home > App registrations > GPAPP

GPAPP | API permissions

Search

Refresh

Got feedback?

Overview

Quickstart

Integration assistant

Manage

Branding & properties

Authentication

Certificates & secrets

Token configuration

API permissions

Expose an API

App roles

Owners

Roles and administrators

Manifest

Support + Troubleshooting

Troubleshooting

New support request

Granting tenant-wide consent may revoke permissions that have already been granted tenant-wide for that application. Permissions that u

The "Admin consent required" column shows the default value for an organization. However, user consent can be customized per permissi

## Configured permissions

Applications are authorized to call APIs when they are granted permissions by users/admins as part of the consent process. The list of c all the permissions the application needs. [Learn more about permissions and consent](#)

+ Add a permission  Grant admin consent for pauldev1

API / Permissions name	Type	Description	Admin consent req
Microsoft Graph (1)			
User.Read	Delegated	Sign in and read user profile	No

To view and manage consented permissions for individual apps, as well as your tenant's consent settings, try [Enterprise applications](#).

## Request API permissions

Select an API

Microsoft APIs

APIs my organization uses

My APIs

Commonly used Microsoft APIs



### Microsoft Graph

Take advantage of the tremendous amount of data in Office 365, Access Microsoft Entra ID, Excel, Intune, Outlook/Exchange, One through a single endpoint.



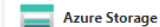
### Azure Communication Services

Rich communication experiences with the same secure CPaaS platform used by Microsoft Teams



### Azure Rights Management Services

Allow validated users to read and protected content



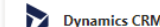
### Azure Storage

Secure, massively scalable object and data lake storage for unstructured and semi-structured data



### Data Export Service for Microsoft Dynamics 365

Export data from Microsoft Dyna CRM organization to an external destination



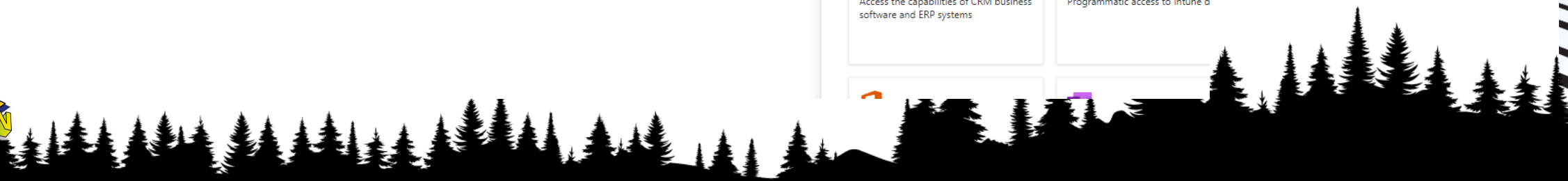
### Dynamics CRM

Access the capabilities of CRM business software and ERP systems



### Intune

Programmatic access to Intune d



# Modern Authentication in GP

## Request API permissions



[← All APIs](#)



Microsoft Graph

<https://graph.microsoft.com/> [Docs](#)

What type of permissions does your application require?

### Delegated permissions

Your application needs to access the API as the signed-in user.

### Application permissions

Your application runs as a background service or daemon without a signed-in user.



# Modern Authentication in GP

Request API permissions

Select permissions

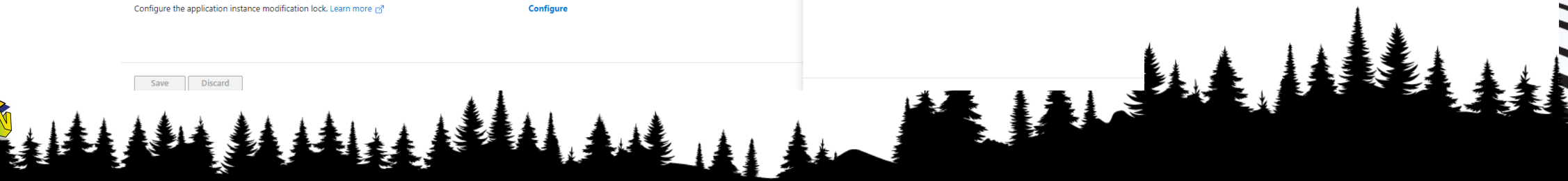
**i** The "Admin consent required" column shows the default value for an organization. However, user consent can be customized per permission, user, or app. This column may not reflect the value in your organization, or in organizations where this app will be used. [more](#)

Permission	Admin consent required
OpenId permissions	
<input type="checkbox"/> email ⓘ View users' email address	No
> MailboxSettings	
Mail (2)	
<input type="checkbox"/> Mail.Read ⓘ Read user mail	No
<input type="checkbox"/> Mail.Read.Shared ⓘ Read user and shared mail	No
<input type="checkbox"/> Mail.ReadBasic ⓘ Read user basic mail	No
<input type="checkbox"/> Mail.ReadBasic.Shared ⓘ Read user and shared basic mail	No
<input type="checkbox"/> Mail.ReadWrite ⓘ Read and write access to user mail	No
<input type="checkbox"/> Mail.ReadWrite.Shared ⓘ Read and write user and shared mail	No
<input checked="" type="checkbox"/> Mail.Send ⓘ Send mail as a user	No
<input checked="" type="checkbox"/> Mail.Send.Shared ⓘ Send mail on behalf of others	No



# Modern Authentication in GP

The screenshot displays the Microsoft Azure portal interface for configuring a GPAPP | Authentication application. The top navigation bar shows the user is logged in as admin@pauldev1.onmicrosoft.com. The main content area is titled 'GPAPP | Authentication' and includes a search bar and a 'Got feedback?' link. The left-hand navigation pane lists various management options such as Overview, Quickstart, Integration assistant, Manage (Branding & properties, Authentication, Certificates & secrets, etc.), and Support + Troubleshooting. The main content area is divided into several sections: 'Platform configurations' with an 'Add a platform' button; 'Supported account types' where 'Accounts in any organizational directory (Any Microsoft Entra ID tenant - Multitenant)' is selected; 'Advanced settings' where 'Allow public client flows' is set to 'No' and 'App instance property lock' is also set to 'No'; and a 'Configure' button at the bottom right. The right-hand sidebar, titled 'Configure platforms', offers options for 'Web applications' (Web and Single-page application) and 'Mobile and desktop applications' (iOS / macOS, Android, and Mobile and desktop applications). Two warning messages are visible in the main content area regarding personal Microsoft accounts and consent restrictions.



# Modern Authentication in GP

## Configure Desktop + devices

< All platforms

Quickstart

### Redirect URIs

The URIs we will accept as destinations when returning authentication responses (token after successfully authenticating users. The redirect URI you send in the request to the server should match one listed here. Also referred to as reply URLs. [Learn more about Redirect URIs and their restrictions](#)

- <https://login.microsoftonline.com/common/oauth2/nativeclient>
- [https://login.live.com/oauth20\\_desktop.srf](https://login.live.com/oauth20_desktop.srf) (LiveSDK)
- [msal91fe91a7-33e7-4392-baf3-6b496af716ec//auth](https://login.live.com/msal91fe91a7-33e7-4392-baf3-6b496af716ec//auth) (MSAL only)

### Custom redirect URIs

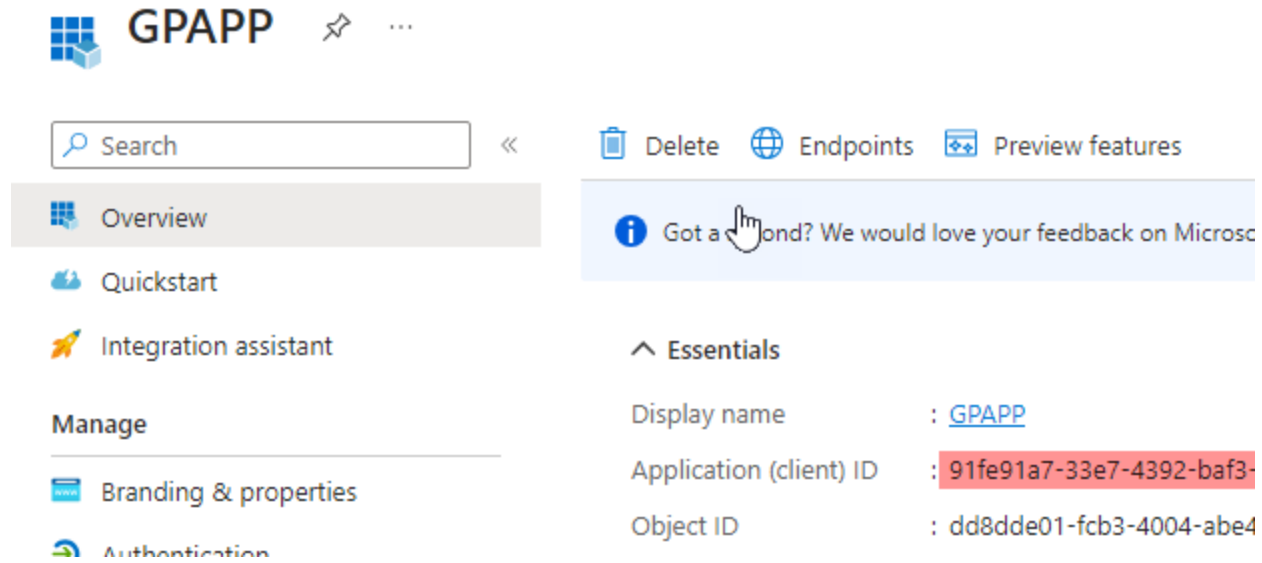
urnietf:wg:oauth:2.0:oob

Configure

Cancel



# Modern Authentication in GP



The screenshot shows the Microsoft Entra ID portal for an application named "GPAPP". The interface includes a search bar, navigation tabs for "Delete", "Endpoints", and "Preview features", and a left-hand navigation menu with options like "Overview", "Quickstart", "Integration assistant", "Manage", "Branding & properties", and "Authentication". The main content area displays the "Essentials" section with the following details:

Display name	: <a href="#">GPAPP</a>
Application (client) ID	: 91fe91a7-33e7-4392-baf3-
Object ID	: dd8dde01-fcb3-4004-abe4



# Modern Authentication in GP

Company E-mail Setup - TWO (sa)

OK Cancel File Tools Help Add Note

Select E-mail Document Options

- Embed Documents in Message Body
- Send Documents as Attachments

File Formats Allowed

- DOCX
- HTML
- PDF
- XPS

Enable E-mail

[Sales Series](#)

[Purchasing Series](#)

Desktop and Web Client Properties

Tenant ID (Optional)

Desktop Client Properties

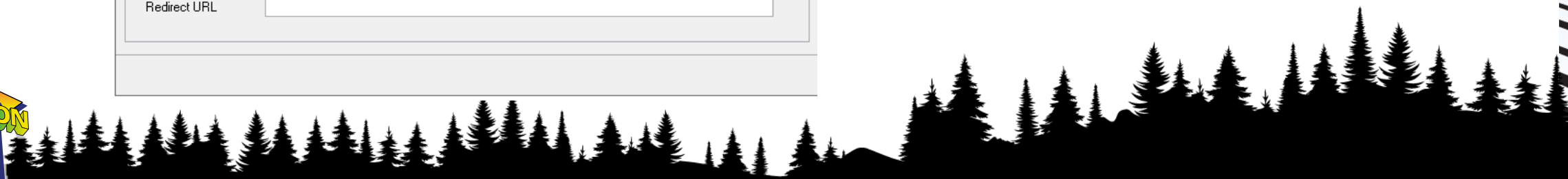
Application (Client) ID

Web Client Properties


Application (Client) ID

Key

Redirect URL







Q&A