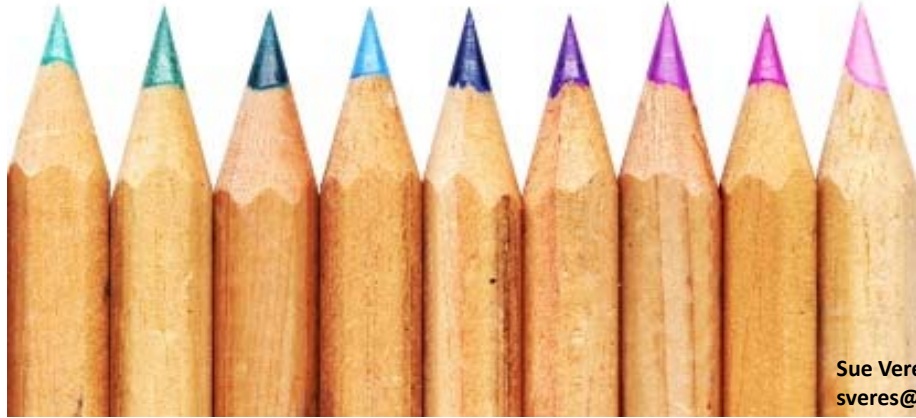




# 50 TIPS IN 50 MINUTES



Sue Veres  
sveres@manersolutions.com

## Navigation/System



## Navigation/System

- 1. Navigate GP with the new action pane
- 2. Adjust the action pane to match the way you work
- 3. Customize Navigation List columns to improve reporting
- 4. Search and filter Navigation Lists to improve analysis
- 5. More fun with dates in Dynamics GP
- 6. Get dates right with DocDateVerify (PSTL)
- 7. Get rid of irritating Type Aheads
- 8. Color your world with free software from Willoware
  - <http://willoware.com/free-software-registration/>
- 9. Sort Order Lookups

## General Ledger



## General Ledger

- ❖ 10. Go back in time by reversing year end close
- ❖ 11. Simplify GL imports with Paste from Excel and text files
- ❖ 12. Merge budgets to improve the budgeting process
- ❖ 13. Lock budgets to keep them from changing

## Banking



## Fixed Assets



## Banking and Fixed Assets

- ❑14. Speed checkbook inquiry by entering dates first
- ❑15. Reconcile bank accounts with no activity
- ❑16. Change checkbooks with checkbook modifier
- ❑17. View fixed asset accounts in a SmartList

## Sales



## Sales

- 18. Automate cash receipts with recurring batches
- 19. RM Auto Apply – Free Tool
  - [https://mbs.microsoft.com/partnersource/northamerica/support/support-news/NOAM\\_PSTL#AdditionalMicrosoftDynamicsGPTools](https://mbs.microsoft.com/partnersource/northamerica/support/support-news/NOAM_PSTL#AdditionalMicrosoftDynamicsGPTools)
- 20. Auto deposit cash receipts



# Inventory

- ✓21. Easily assign items to sites
- ✓22. Understand inventory movement with reason codes
- ✓23. Select multiple serial numbers



## Purchasing

- 24. Display additional Edit Check Batch columns to improve selection
- 25. Understand new Print Icons to avoid problems
- 26. Change 1099 vendor with PSTL tools
- 27. Move POs to history to shorten PO lookup
- 28. Prevent double payments with a PO check during AP entry



PAYROLL

## Payroll

- 29. Payroll Posting Edit List
- 30. Mask SS#
- 31. Detail payroll activity tracking – Free Tool
  - [https://mbs.microsoft.com/partnersource/northamerica/support/support-news/NOAM\\_PSTL#AdditionalMicrosoftDynamicsGPTools](https://mbs.microsoft.com/partnersource/northamerica/support/support-news/NOAM_PSTL#AdditionalMicrosoftDynamicsGPTools)
- 32. Export/import payroll posting accounts



# Module



## Cross-Module

- ❖ 33. Copy/paste intercompany (free tool)  
❖ <https://jamesdlyn.wordpress.com/2015/04/10/gp-paste/>
- ❖ 34. Auto number new customers, vendors, and items (free tool)  
<http://mohdaoud.blogspot.com/2013/10/cards-auto-numbering-for-vendors.html>
- ❖ 35. Keep the family together – All-In-One Viewer



# Reports

- o 36. Go report crazy with non—sequential selections in Navigation Lists
- o 37. Gain reporting room by double clicking SmartList headers
- o 38. Get the right size by increase/decrease SmartLists navigation
- o 39. Go Wild with wild cards in SmartLists
- o 40. GoTo – Set the default of your choice
- o 41. Maximum Record – Adjust the number of records to display
- o 42. Ease reporting by grouping Pivot Table dates
- o 43. Why are my SmartLists not formatted when exported to Excel?
  - There's an undocumented Dex.ini switch that provides limited formatting to Smartlists, thus maintaining export performance:  
**SmartlistEnhancedExcelExport=TRUE**



## Security

- ❑44. Review user status with the User Summary window
- ❑45. Find Unassigned Security Operations with a built in report
- ❑46. Copy home page to simplify setup
- ❑47. Quickly display alt/modified reports



# Support

- 48. Keep Out! – Take company offline
- 49. Warn users that GP is going down for maintenance
- 50. Send users message

