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## Getting More Out of Microsoft Dynamics® GP: 50 Tips in 50 Minutes

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### System – User

#### 1. Get quick reminders view with Home Page Cues (GP 2010)

From the Home Page, select New Reminder... in the To Do List. Check one of the Predefined Reminders or configure a Customer Reminder from a SmartList Favorite.

#### 2. Organize Quick Links for efficiency (GP 8+)

Use folders and underscore ( \_\_\_\_\_ ) separators to organize Quick Link shortcuts. (Do not use the dash). Courtesy of Leslie Vail. Details at:

<http://dynamicsconfessions.blogspot.com/2010/05/organize-your-quicklinks-section.html>

#### 3. Change dates fast with + & - keys (GP 6+)

Clicking the Shift & plus (+) or minus (-) keys on date fields in Dynamics GP increases or decreases the date by one day.

#### 4. Speed date entry using only the day (GP 6+)

Keying on the day number in a date field will cause Dynamics GP to fill in the current month and year. For example, keying "23" on 9/5/10 will input the date 9/23/10 in the date box. Keying in "0827" will result in 08/27/10. Thanks to Todd McDaniel for reminding me of this one.

#### 5. Leverage Horizontal Scroll Arrows for long account numbers (GP 6+)

Use Horizontal Scroll Arrows for long account numbers (GP 6+)

Details at: <http://msdynamicsgp.blogspot.com/2010/02/weekly-review-long-account-number.html>

#### 6. Gain control with right click (GP 2010)

GP 2010 adds right click functionality for cut/copy/paste and Insert/Delete Row. Details at:

<http://msdynamicsgp.blogspot.com/2010/02/gp-2010-beta-right-click-functionality.html>

### System – Power User

#### 7. Get the date right on startup (GP 6+)

Control the system date, especially at month end, by adding it to the startup folder. Details here:

<http://msdynamicsgp.blogspot.com/2010/07/weekly-dynamicssystem-date-on-startup.html>

#### 8. Become mission control with Navigation Lists (GP 10+)

Navigation Lists are designed to provide all the information needed to work within a particular functional area of Dynamics GP. Add custom lists with Navigation List Builder part of the SmartList Builder toolset. More information here:

<http://msdynamicsgp.blogspot.com/2010/03/leveraging-navigation-lists-in-gp-v100.html>

#### 9. Rule your data with Navigation List Filters (GP 10+)

Navigation Lists can also provide robust filtering, like SmartLists, making it easy to work with specific data. Share with other users and control who can modify the view. More information here:

<http://msdynamicsgp.blogspot.com/2010/03/leveraging-navigation-lists-in-gp-v100.html>

#### 10. Analyze data with Navigation Lists Exports (GP 10+)

Like SmartLists, Navigation Lists can export to Excel. Details here:

<http://msdynamicsgp.blogspot.com/2010/06/weekly-dynamic-export-navigation-lists.html>



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## System – Rock Star

### 11. Get fine grain control with a list of Dex.ini settings (GP 6+)

Fellow MVP Leslie Vail has compiled a huge list of Dex.ini settings into one easy to use document. Details here: <http://dynamicsconfessions.blogspot.com/2010/07/dexini-switches-now-available-to.html>

### 12. Give users more chances by increasing password tries (GP 6+)

The Dex.ini setting SQLNumLoginTries = number lets you set the number of tries before GP closes. Details at: <http://msdynamicsgp.blogspot.com/2011/01/weekly-dynamic-increase-number-of.html>

### 13. Prevent lock outs by warning on Password Expiration (SQL 2005+)

Michael Johnson provides a free DLL to warn about password expiration when using SQL password controls. Details at: <http://mbsguru.blogspot.com/2011/03/gp-password-expired-mid-day-while-i-was.html>

### 14. Reduce Login errors with consistent ODBC settings (GP 10+)

The ODBC name is used as part of the security encryption hash for users. If the ODBC name is different for different computers it can prevent users from logging in at different locations. This can really be a problem in a Terminal Services or Citrix environment. More information is available at: <http://msdynamicsgp.blogspot.com/2011/01/weekly-dynamic-dynamics-gp-passwords.html>

## GL, FA & Banking – User

### 15. Speed inquiries with quick identification of intercompany transactions (GP 6+)

When inquiring on transactions watch out for the # sign. This indicates an intercompany transaction. Details at <http://msdynamicsgp.blogspot.com/2010/05/weekly-dynamic-identifying-intercompany.html>

### 16. Control recurring batches by clearing GL amounts (GP 2010)

New in GP 2010 is the ability to clear recurring batch amounts providing functionality similar to Quick Journals but with the power and control of batches. Details at: <http://msdynamicsgp.blogspot.com/2010/08/weekly-dynamic-clear-recurring-batch.html>

### 17. Protect budget numbers by locking the budget (GP 8+)

You can password protect budgets so that they don't move around. More information at: <http://gp2themax.blogspot.com/2010/03/gptip42day-lock-that-budget.html>. Thanks to Frank Hamelly.

### 18. Clean lookups by removing inactive accounts (GP 6+)

Removing inactive accounts from lookups helps clean up the look ups and speed account entry. This can be done before year end since the accounts aren't being removed from the system, just from lookups for Sales, Purchasing, Inventory and Payroll. Details at: <http://gp2themax.blogspot.com/2010/04/gptip42day-eliminate-inactive-accounts.html>  
Thanks to Frank Hamelly.

### 19. Improve consistency by copying GL Distribution References (GP 6+)

To easily copy GL distribution references down, enter the first reference. Select CTRL+C to copy. Hit the down arrow to move to the next distribution line. Click CTRL+V to paste. Hit the down arrow and CTRL+V. Repeat. <http://msdynamicsgp.blogspot.com/2010/11/weekly-dynamic-copying-distribution.html>  
FRC also has a customization available which will copy header reference to the distribution lines reference.



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## GL, FA & Banking – Power User

### 20. Improve budgeting with new budget transactions (GP 2010)

GP 2010 adds the ability to formalize the budget and changes with budget transactions. Details here: <http://blogs.msdn.com/b/gp/archive/2010/03/25/feature-of-the-day-general-ledger-budget-transactions.aspx>

### 21. Control closing with Mass Close (GP 6+)

Use Mass Close button in Fiscal Periods to prevent certain types of entries without closing an entire series.

### 22. Expand the GL with Reporting Ledgers (GP 2010)

GP 2010 adds reporting ledgers for better financial reporting control including accounting under IFRS. Details at: <http://blogs.msdn.com/b/gp/archive/2010/04/14/feature-of-the-day-general-ledger-reporting-ledgers.aspx>

### 23. Correct Asset values with Impaired Assets (GP 6+)

A mix of partial retirement and a retirement code can be used to impair assets in GP. Here's how: <http://msdynamicsgp.blogspot.com/2011/01/weekly-dynamic-fixed-asset-impairment.html>

### 24. Fix Errors by Undoing Depreciation (GP 8+)

Depreciation can be backed out for one asset by running depreciation for a single asset and setting the date backwards. Details here:

<http://msdynamicsgp.blogspot.com/2011/02/weekly-dynamic-undo-depreciation.html>. If the entire depreciation run was incorrect, Microsoft has a SQL script to undo the depreciation for all assets.

### 25. Reduce Taxes with Bonus Depreciation (GP 8+)

Bonus tax depreciation can be a boon for companies. GP handles it just fine. Here's how: <http://msdynamicsgp.blogspot.com/2009/05/improve-cash-flow-with-bonus.html>. Use FA Mass Change if a large number of assets need to be updated for this setting. Check with your accountant regarding this depreciation.

## GL, FA & Banking – Rock Star

### 26. Repair missing Fixed Asset GL batches with SQL Code (GP 8+)

We have SQL code to restore a Fixed Asset GL batch that has been deleted prior to posting. Details at: <http://msdynamicsgp.blogspot.com/2011/02/weekly-dynamic-rerun-fa-gl-post-routine.html> *Back up your database prior to running this script.*

### 27. Warn if accounts are over budget with SQL code (GP 8+)

We have SQL Code to show if an account is over budget. This is great for placing behind SmartList Builder or SSRS. Code at: <http://msdynamicsgp.blogspot.com/2010/07/weekly-dynamicaccounts-over-budget-sql.html>

## Purchasing

### 28. Defer expenses via AP (GP 8+)

Dynamics GP can defer AP (or AR) transaction lines directly from the distribution window. In Distributions, select the AP line to defer and pick Additional | Deferrals from the menu. If the recognition date is not known at the time of AP entry, the Retroactive Deferral can be used. Follow up at <http://msdynamicsgp.blogspot.com/2010/09/weekly-dynamic-defer-accounts-payable.html>

### 29. Reconcile AP the easy way (GP 10+)

Use the reconcile to GL routine to reconcile AP (or AR) to GL using Excel. More coverage at <http://rosebizincgp.blogspot.com/2008/02/reconcile-to-gl-easily.html>



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## **30. Control the POP Document Inquiry window with a Macro (GP 6+)**

Often users wish that they could automatically check one or more boxes on the Purchase Order Processing Document Inquiry window. After all, if no boxes are checked, no data shows up. This can easily be done with a macro rather than with a customization. Find out how here:

<http://msdynamicsgp.blogspot.com/2010/12/weekly-dynamic-pop-document-inquiry.html>. Think about using macros for other repetitive tasks.

## **Sales – Power User**

### **31. Improve lookups with new list filters (GP 2010)**

New lookup filters allow restrictions in master record lookups. Also, use SmartList favorites as a filter.

More information here: <http://msdynamicsgp.blogspot.com/2010/03/weekly-review-favorites-in-lookups.html> and here: <http://www.belindathegpcsi.com/2010/07/lookup-lists-too-long.html>

### **32. Control Write Offs with A/R write off vs. credit memo posting (GP 6+)**

Write offs on apply AR payment use the default write off account. Credit memos provide greater accounting flexibility. Details here: <http://www.belindathegpcsi.com/search?q=writeoff> Thanks to Belinda Allen for this tip.

### **33. Move ahead with Date Effective Tax Rates (GP 2010)**

A new add on from Microsoft allows setting effective dates for tax rates. Now rate changes can be set in advance for sales, use and VAT taxes. Details here:

<http://blogs.msdn.com/b/developingfordynamicsgp/archive/2011/01/05/date-effective-tax-feature-for-microsoft-dynamics-gp-2010.aspx>

### **34. Get paid with Scheduled Payments (GP 10+)**

In GP users can setup scheduled payments, with or without interest for regular client payment and interest management (Also available for Payables.) Specifics here:

<http://msdynamicsgp.blogspot.com/2010/03/weekly-dynamic-receivables-scheduled.html>

### **35. Allocate A/R with Control Account Management (GP 2010)**

Control account management is not just for AP anymore. Now A/R can be split among department for reporting at month end then rolled back up for centralized AR management. Details at:

<http://msdynamicsgp.blogspot.com/2010/05/weekly-dynamic-control-account.html>

## **Sales – Rock Star**

### **36. Figure out that Customers who bought x also bought y (GP 6+)**

We have SQL to show related products bought by customers. This is similar to Amazon.com's related products display. SQL Code at:

<http://msdynamicsgp.blogspot.com/2010/06/weekly-dynamic-customers-who-bought-x.html> . Another way is to use Excel based reporting connected to the SQL tables, views or Analysis cubes and create pivot tables.

The Microsoft SQL Server 2008 Data Mining Add-Ins for Office 2007 provides a shopping cart analysis which shows statistics about items that have been bought together. Get details and download at:

<http://office.microsoft.com/en-us/excel-help/data-mining-add-ins-HA010342915.aspx>

### **37. Run AR Aging from SQL (GP 6+)**

Michael Johnson provides a way to run AR Aging from SQL instead from the interface. Specifics at:

<http://mbsguru.blogspot.com/2009/04/automatic-aging-for-gp.html> *Back up your database prior to running this script.*



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## Field Service, Payroll, & Security

### 38. Improve billing with new Field Service Billing Options (GP 2010)

Within Contract Administration of Microsoft Dynamics GP 2010, you can now bill in an unlimited user-defined set of billing frequencies. You can even specify to bill just once. Details at:

<http://blogs.msdn.com/b/gp/archive/2010/02/25/feature-of-the-day-billing-frequency-options-on-contracts.aspx>

### 39. Speed Payroll with Mass Transaction Entry (GP 8+)

Process payroll by ranges with Mass Transaction Entry. Details at:

<http://dynamicsgpland.blogspot.com/2010/07/speedy-speedy-payroll-entry.html> Thanks to Christina Phillips.

### 40. Ease Payroll with recurring batches (GP 8+)

Recurring batches can be used in Payroll too. Details at:

<http://dynamicsgpland.blogspot.com/2010/07/speedy-speedy-payroll-entry.html> Thanks to Christina Phillips.

### 41. Increase security with a Separation of Duties evaluator (GP 6+)

Auditnet.org has a generic separation of duties evaluator available as a free download. This is a great starting point BEFORE figuring out the appropriate roles and tasks in GP security. Search

<http://auditnet.org/> for "segregation of duties.xls".

## Integration and Development

### 42. Skip the CSV middleman. Integrate transactions with Integration Manager & Excel (GP 8+)

Use a simple ODBC source instead of a text file to integrate directly from Excel file and skip the CSV middleman. You'll need to name the range in Excel. Follow up details at

<http://msdynamicsgp.blogspot.com/2010/10/weekly-dynamic-integration-manager-and.html>

### 43. Get Intellisense power in Dexterity with the free DexSense add in (GP 8+)

It's IntelliSense programming shortcuts in Dexterity. It's free. It's called DexSense and you can find out more here: <http://msdynamicsgp.blogspot.com/search?q=dexsense>

## Reporting – Power User

### 44. Improve SmartList search with SQL Search Shortcuts (GP 8+)

You can use SQL search shortcuts in SmartList searches. Details here:

<http://gp2themax.blogspot.com/2010/02/gptip42day-using-sql-wildcards-to.html> Thanks to Frank Hamelly.

### 45. Speed SmartList exports to Excel with a Dex.ini setting... (GP 10+)

Undocumented Dex.ini switch SmartlistEnhancedExcelExport=TRUE dramatically speeds up SmartList exports to Excel. Details here:

<http://blogs.msdn.com/b/developingfordynamicsgp/archive/2010/05/14/smartlist-exports-slowly-to-excel-part-1.aspx>

### 46. ...and Navigation List exports too (GP 10+)

And there is a version for Navigation List exports to Excel too. The switch is:

ListsFastExcelExport=TRUE and details are at:

<http://blogs.msdn.com/b/developingfordynamicsgp/archive/2010/05/28/dynamics-gp-lists-exports-slowly-to-excel.aspx>



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## Reporting – Rock Star

### 47. Turbo charge analysis with PowerPivot (SQL 2008 R2 and Excel 2010)

PowerPivot brings BI to the Power User with the familiarity of Excel and power that Excel has only dreamed of. Details at <http://www.powerpivot.com/>. Be sure to sign up for the FRC's Microsoft Dynamics GP Advanced Reporting in Excel Class. See listing at: <http://www.frankrimerman.com/events.asp>

## Support

### 48. Find GP articles and support with MyGPSearch.com

Search more than a hundred sites for support information on Dynamics GP.

<http://mygpsearch.blogspot.com/p/my-gp-search.html>

### 49. Adjust Dynamics GP with some of the free Professional Service Tools (GP 2010)

Microsoft has been enhanced for GP 2010 adding Update User Date, POP Cost Defaulter, Default AddItem POP/SOP, Doc Date Verify, Decimal Place Tool, Company Copy and Duplicate Customer PO's in SOP. Get details here:

<http://blogs.msdn.com/b/developingfordynamicsgp/archive/2010/08/06/free-tools-added-to-pstl-2010.aspx>

and here:

<http://blogs.msdn.com/b/developingfordynamicsgp/archive/2010/08/13/pstl-2010-duplicate-customer-po-numbers-in-sop-entry.aspx>

### 50. Find out more about GP 2010 with Learning Snacks (GP 2010)

GP has great new short videos on Dynamics GP 2010 called learning snacks. Get details here:

<http://blogs.msdn.com/b/gp/archive/2010/07/02/all-snacks-now-available.aspx>

Thanks to Amy Walsh of I.B.I.S. for her coverage of this.

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