

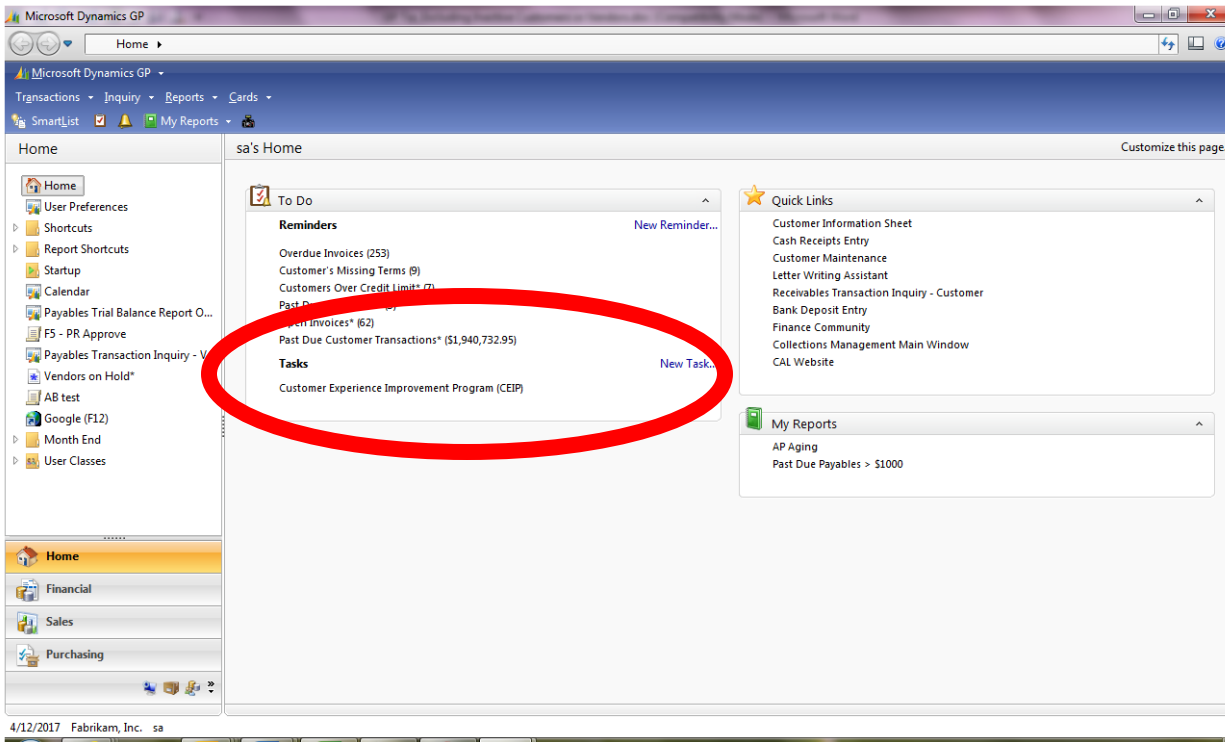


For help with this and other Great Plains Tips and Tricks, contact:

CAL Business Solutions Inc.
200 Birge Park Road
Harwinton, CT 06791-1909
Phone: 860-485-0910 Fax: 860-485-0923
support@calszone.com

Microsoft Dynamics GP Tip: Using Tasks

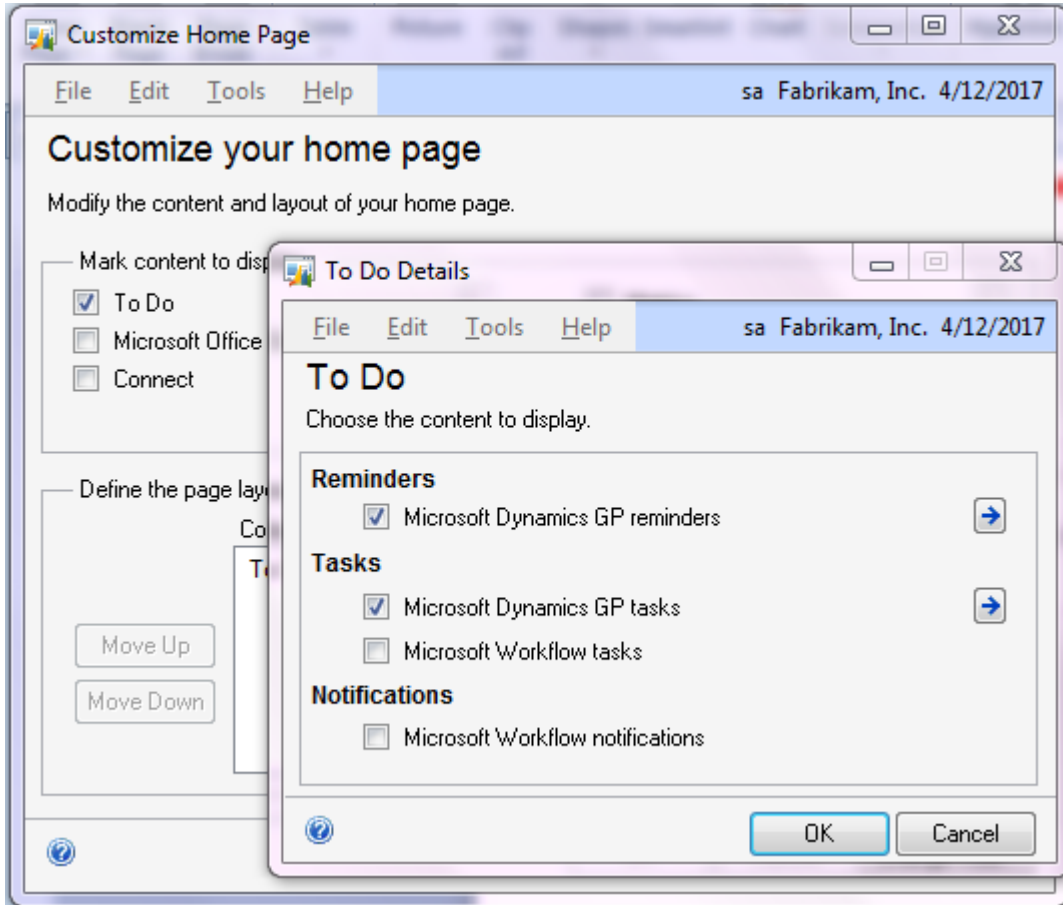
Many people ignore this feature because they are annoyed by the built in Task for the “Customer Improvement Program”



The first thing I do when I work with a user one-on-one is complete this task so that it no longer pops up when they log in.

How to Complete the “Customer Experience Improvement Program Task

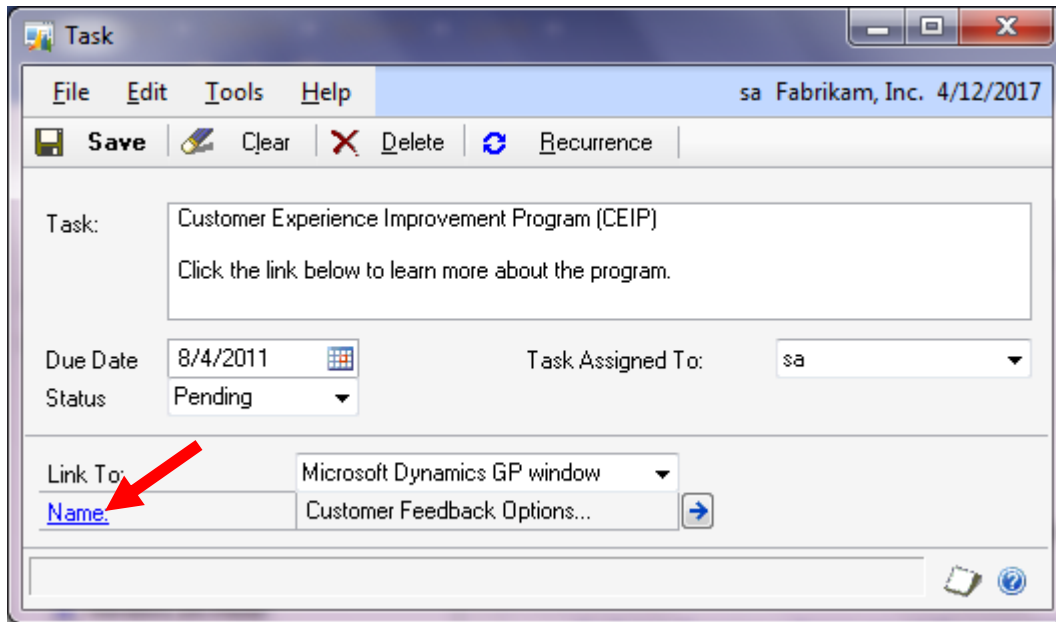
1. If you have turned off this feature from your Homepage, turn it back on.
 - a. Click “Customize this page...” in the upper right corner of your homepage.
 - b. Make sure that the “To Do” option is checked in the “Mark content to display” field. Then click the Blue Arrow next to the To Do section and make sure that “Microsoft Dynamics GP tasks” is checked.



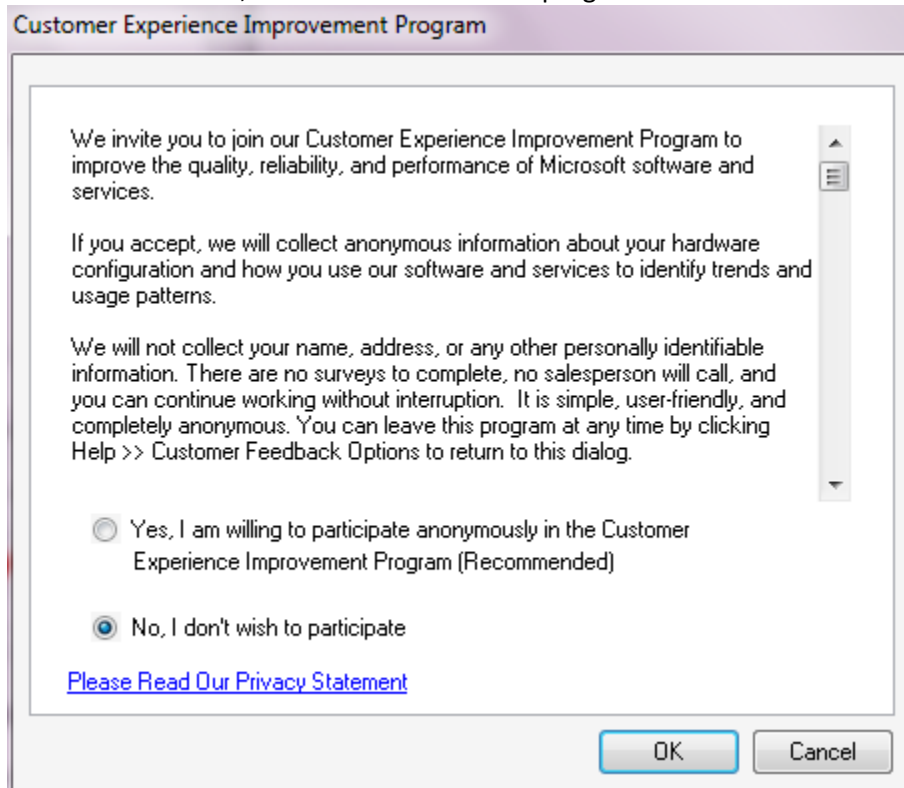
2. Now that the Task is back on your Home Page, click the task



3. This opens the Task window:

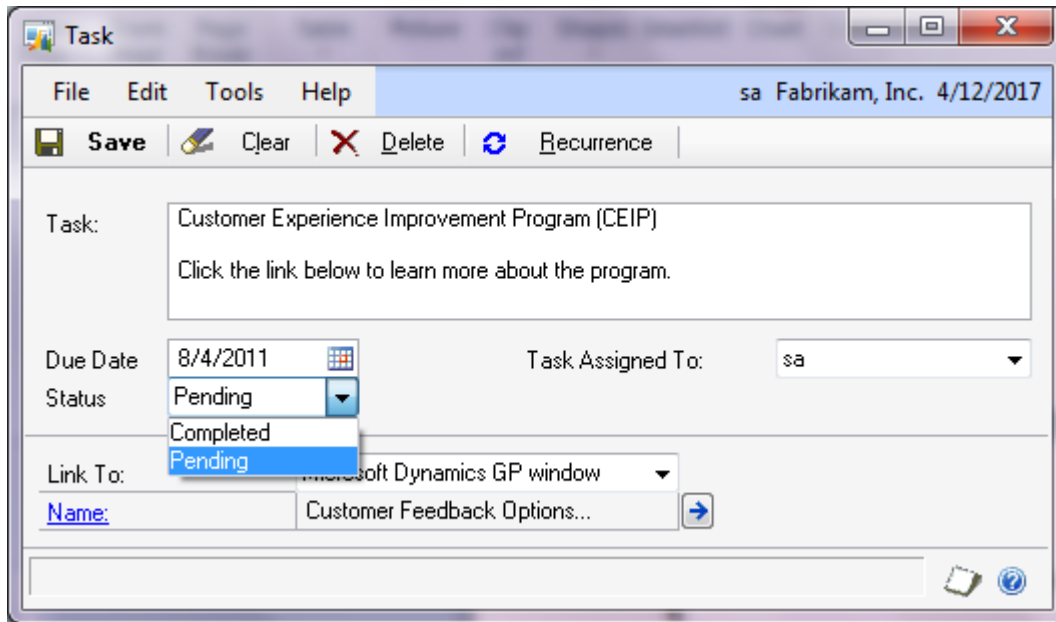


4. Click the blue "Name"
5. In this next window, review the terms of the program and choose "Yes.." or "No..."



6. Click OK

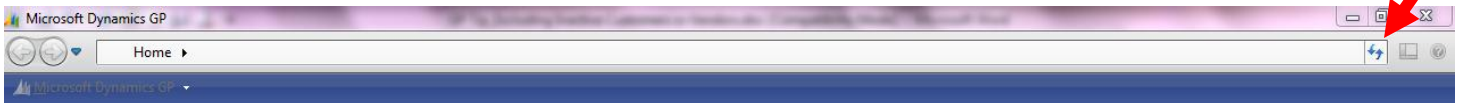
7. You will be back in the main task window, change the status from “Pending” to “Completed”



8. Click Save.

Note: If you just Delete the task, it will keep coming back when you restart GP. This task needs to be completed on each workstation.

9. In the Upper right corner of your screen, click “Refresh” to clear the task off of your homepage.



Creating Custom Tasks

Tasks are a great way to remind you (or someone at your company) to do something.

Note:

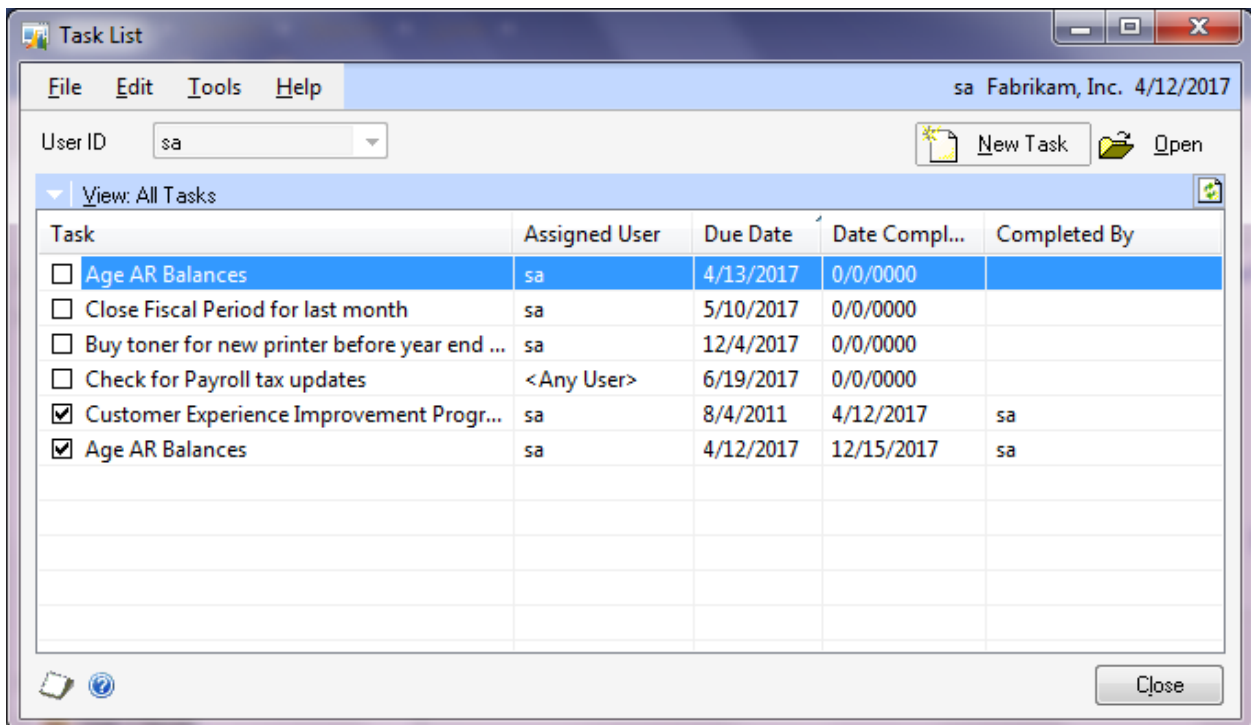
1. These tasks do not integrate with Outlook. So, don't assign something critical to someone via these tasks if they rarely use GP.
2. Once you assign a task to another user, you no longer have control of the task. You won't be able to see it, edit it or delete it.

To create the task:

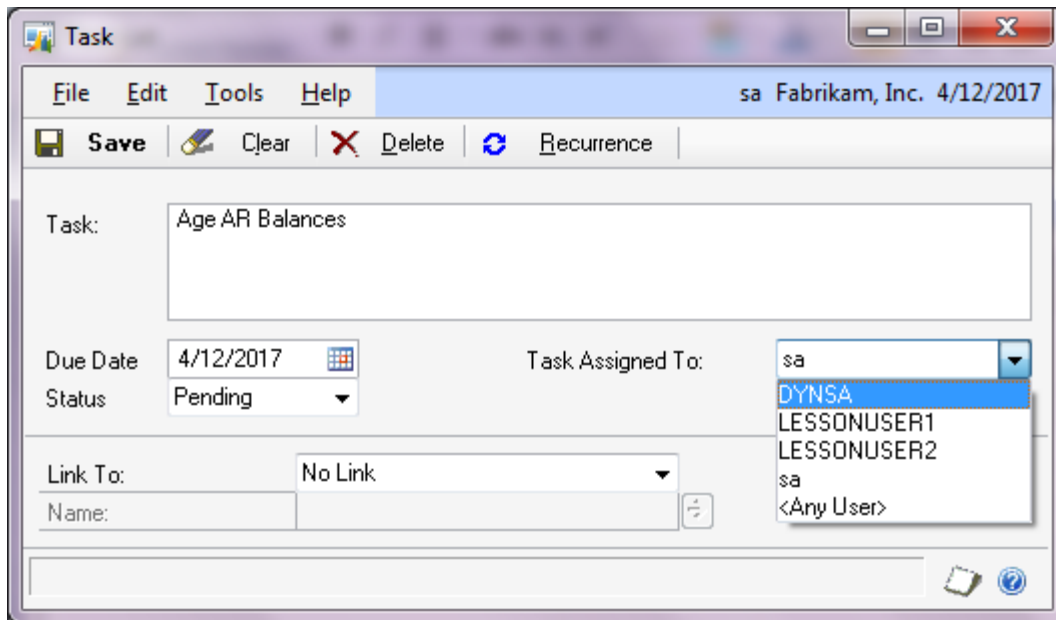
1. On the homepage, click "New Task"



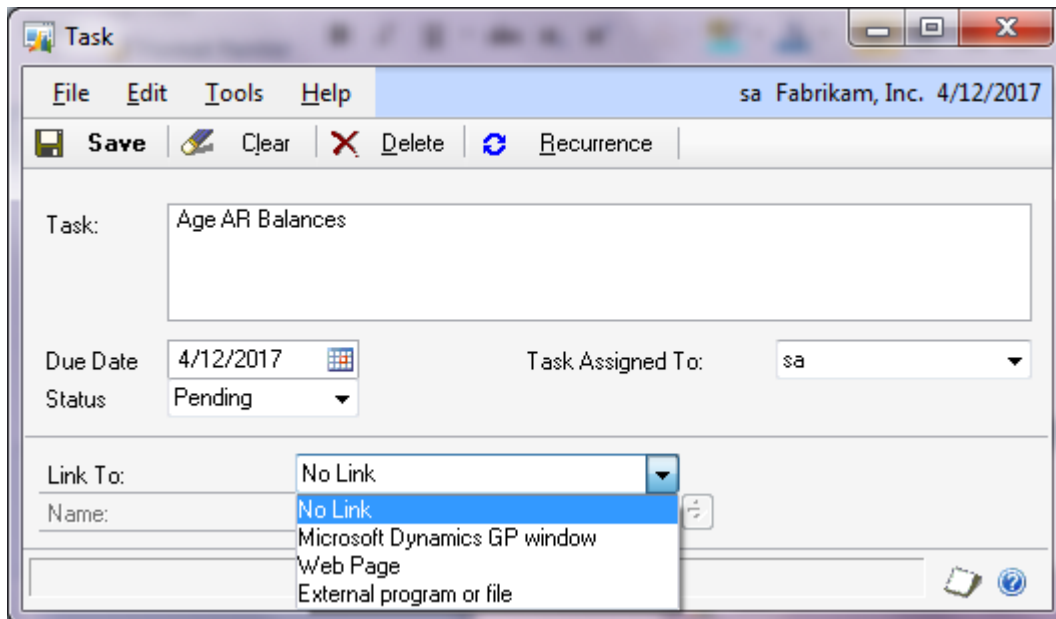
2. Click "New Task" in the Task List window



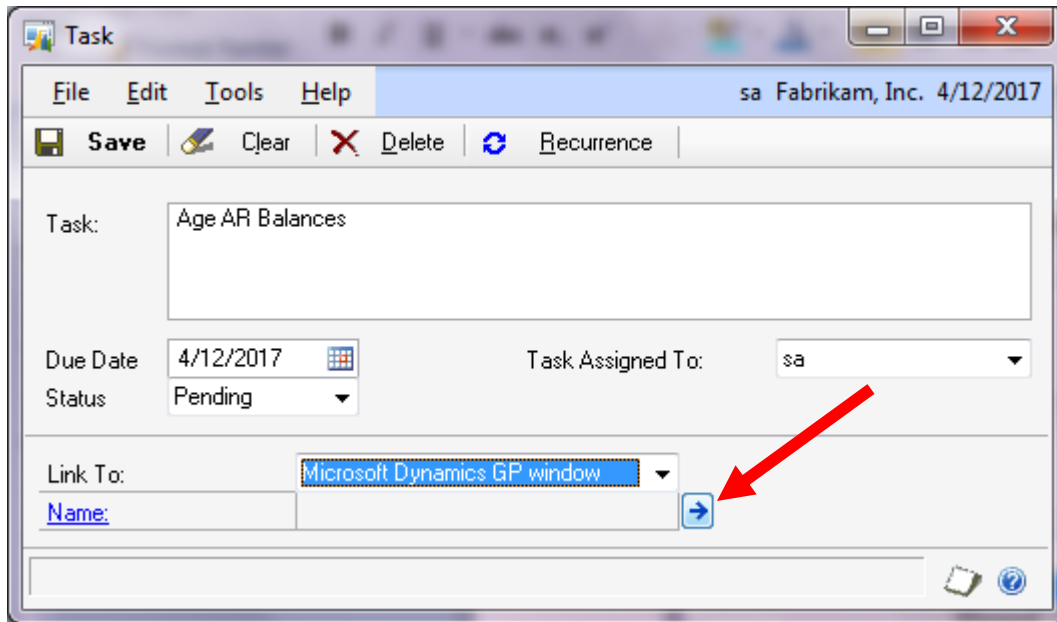
3. Type a description/instructions for the task



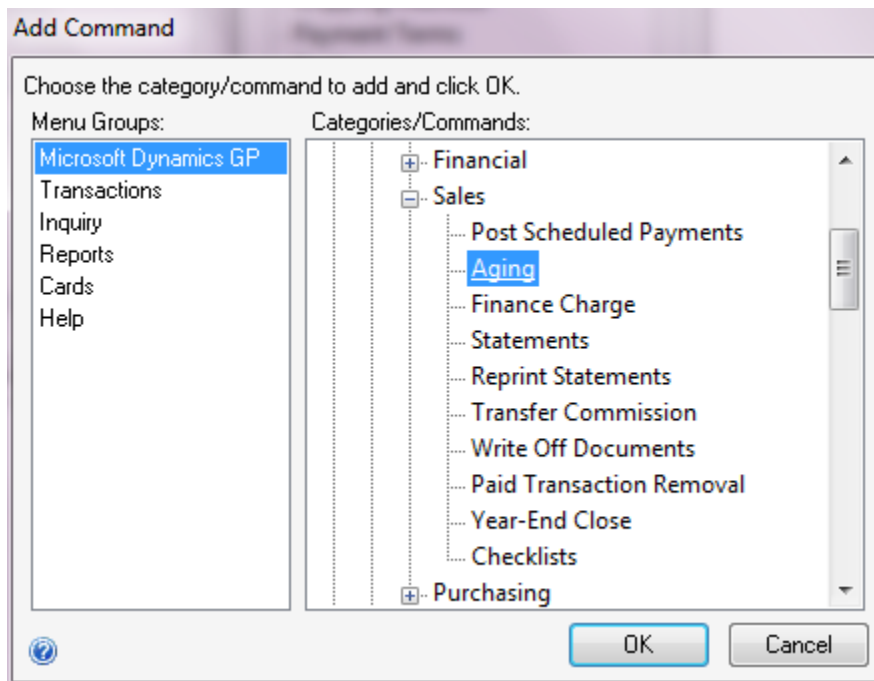
4. Optional: Assign to a different user.
5. Optional: Click the dropdown next to "Link To:". You can link to a GP Window, a Web Page, or an External Program or File.



6. Once you pick the Link To type, click the Blue Arrow to attach the link

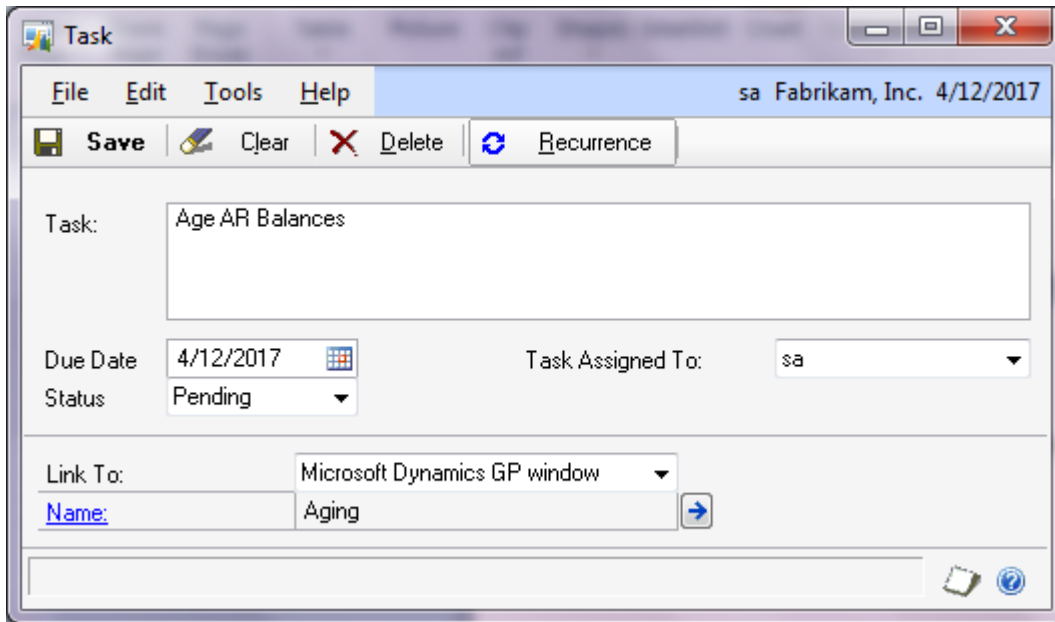


7. If you are linking to a GP Window, navigate to it in the next screen:

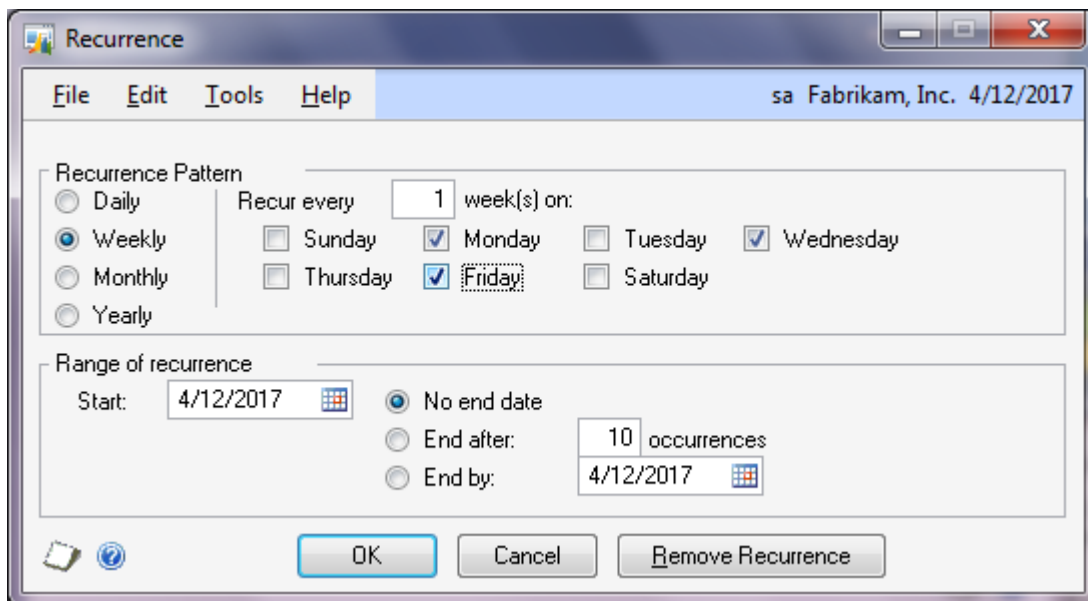


8. Click OK

9. Optional: Make the Task recurring



- a. Click Recurrence
- b. Set the Recurrence options



- c. Click OK
- d. Save the Task

NOTE: The task will not show on your Homepage until it is Due. If you complete the task, mark it as complete. If it is recurring, it will pop up again next time it is due.