



MICROSOFT DYNAMICS GP TIPS AND TRICKS!

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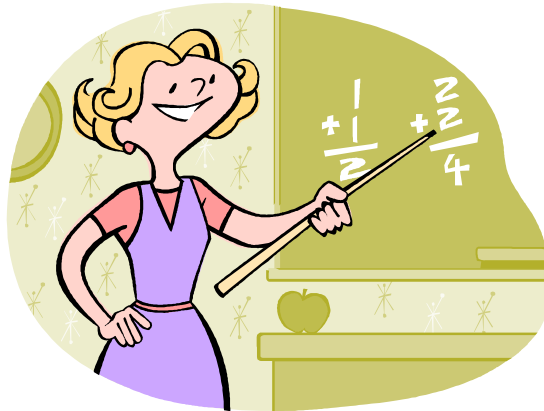
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GENERAL HOUSEKEEPING

- Tip 1 - Cleanup your Homepage!!
 - Click “Customize this page”
 - GP2013 allows customization of module “Area Pages”
- Tip 2 - Cleanup the “Checklists”
 - Create valuable Month-End Checklists
 - Under “Routines” for each module



MANUALS AND ONLINE TRAINING



- Tip 3 - Contact CAL to access CustomerSource!
- Tip 4 - Download current user guides!
- Tip 5 - Setup training plan using eLearning Catalog

CAL TIPS & TRICKS BLOG

The screenshot shows the CAL website homepage. At the top, there is a browser address bar with the URL <http://www.calszone.com/>. Below the browser, there is a navigation menu with links for Home, About Us, Software, Dynamics GP, Industries, Pricing, Quick Quote, Client Center, Free Resources, Videos, and Support. A quote from a customer is displayed: "The support is excellent. I am very happy with the system." – VNA of Central CT. A group photo of CAL staff is featured in the center. Below the photo, text describes Microsoft Dynamics GP (formerly Great Plains) as ERP/accounting software. A sidebar on the right contains links for GP Quick Quote, Online Support, Contact Us / Blog, and 860-485-0910. A search bar and social media icons are also visible.

- Tip 6 - Download Step-By-Step Tips!!
 - Submit Suggestions for new tips!
 - Get NEW tips on the CAL Newsletter!!



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FIND RECORDS AND TRANSACTIONS

- Tip 7 - Update the Default Lookup View
 - Sort by Name vs. ID and “Set as Default View”
- Tip 8 - Setup “Advanced Lookup”
 - Administration>>Setup>>Company>>Advanced Lookup
- Tip 9 - Use Navigation List
 - Example 1 - Lookup by Customer PO Number
 - Example 2 – Vendor Name “contains”
- Tip 10 - Rockton Software – Product Plug!!

TIP #11: INSTALL THE SUPPORT DEBUGGING TOOL

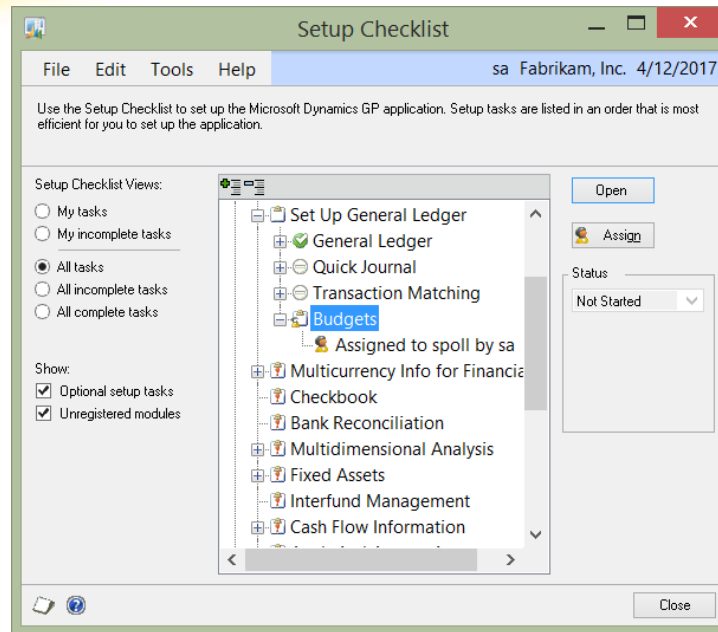
- “Resource Information”
 - Review/Update Security
 - Tables Used for Report Building
- Color Code Companies
- Capture Screenshots

Call CAL to schedule installation! The software is FREE, we can give a quote for the installation.

TIP #12: GL ACCOUNT MAINTENANCE

- What in the world is the Alias field for???
- What does “Show in Lookup” mean?
- Why should I change the “Browse by” option?
- What does “Allow Account Entry” mean?

TIP #13: REVIEW THE SETUP CHECKLIST



- Call CAL to schedule a review of your current system. Are there features that you are not using?

TIP 14: PROFESSIONAL SERVICES TOOLS LIBRARY

- Automatically installs with GP2013
- Free software for GP2010. Call CAL for a quote for installing. (Or call for a quote to UPGRADE!!)
- Demo of Popular Tools
 - DocDateVerify
 - Combiner/Changer – Call CAL if you have any 3rd party products before using this tool. (i.e. SalesPad, etc.)

WARNING!! – These are POWERFUL tools!! Always do a FULL backup before using. Do not rely on your nightly backup.

EXCEL TIPS

- Tip 15 - World's quickest pivot table demo
- Tip 16 - Cool formulas
 - =LEFT()
 - =UPPER()
 - =LEN()
- Tip 17 - Concatenate
- Tip 18 - Text to Columns
- Tip 19 - Format as Table
- Tip 20 - Autofill
 - Formulas
 - Dates
 - Patterned List

Please Fill Out Your Evaluation Cards

