Dynamics GP Tips and Tricks

Educational and Informative Advice

Diamond Software

MAY 2017 NEWSLETTER

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VERIFY YOUR BACKUP PROCEDURE

Backing up your SQL Server databases, running test restore procedures on your backups, and storing copies of backups in a safe, off-site location protects you from potentially catastrophic data loss.

Backing up is the only way to protect your data.

With valid backups of a database, you can recover your data from many failures, such as:

- Media failure
- User errors
- Hardware failures
- Natural disasters

In addition to establishing a backup routine, the next step is to verify your backup by going through a

GP STUDENT TRAINING MATERIALS AVAILABLE ON CUSTOMERSOURCE

GP customers on a current enhancement plan have access to valuable training materials on Microsoft CustomerSource. Downloads are available for the following:

- Introduction to GP
- General Ledger
- Fixed Assets
- Bank Reconciliation
- Receivables Management
- Payables Management
- Inventory
- Purchase Orders
- Sales Orders
- Extender
- Project
- Installation and Configuration

Click here to download. If you don't have a CustomerSource account, this link will take you to CustomerSource Help and How-to Resources.

professional advantage

COLLECTIONS MANAGEMENT

The more efficient your collections system becomes, the greater your profit margin. Collections Management for Microsoft Dynamics GP has the processing power to improve cash flow, diminish collection time and reduce bad debt.

restore procedure. Only after you are assured the restore was successful can you feel confident that you are protected.

Please contact us with any questions or for help verifying your backup routine.

WHY EDIT LISTS ARE IMPORTANT

Most GP users have experienced posting problems caused by lost Internet connections, incorrect distributions, and accidental deletion of transactions. Using batches, reviewing your work prior to posting, and specifically, using edit lists, is an important practice to follow.

**Edit lists can only be used if you post by batch in Dynamics GP instead of posting by transaction.*

In order to protect yourself, we recommend using batches and reviewing your work prior to posting. You should also print edit lists, even if it's to PDF not paper.

Here's a great article by Jen Kuntz about the importance of using GP edit lists.

17% in 2017 Promotion offer valid from May 17th - June 17th on the software cost of one or both products, Collections Management and Company Data Archive.

Attend a webinar and learn more.

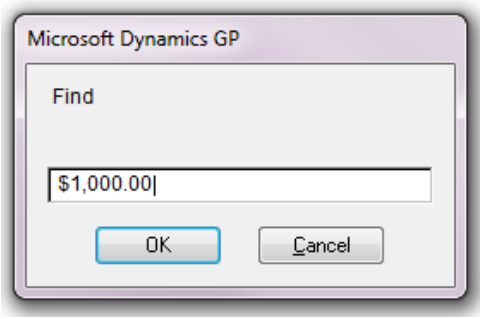
http://www.profad.com/webinars-and-events/

COMPANY DATA ARCHIVE

Company Data Archive (CDA) will move Dynamics GP historical information from your 'live' company to an 'archive' company. The result is a reduction in the size of your live company database and improved system performance while posting, running reports, performing file maintenance, and saved time in the day-to-day use of Dynamics GP.

For additional information contact your Diamond Software sales representative Dwight Boudreaux at 337-296-4837 or by email at dwightb@diamond-soft.com.

USE THE GP FIND FUNCTION



Some GP users don't realize that when you print to the screen, you have the "Find" function available just like you do in other Microsoft programs. If you've printed a long report like a detailed trial balance to the screen and are looking for a specific account number or dollar figure, you can use the "Find" function to search. This is available on the top screen menu or by simply using the Microsoft shortcut of CTRL-F.

NOTE: "Find" is always searching for a specific text string. For example, if you type 1000.00 and are looking for a thousand dollars, and the report is displaying leading dollar signs and/or comma separators, the search will yield no results. In the above example, use $1,000.00 as the search criteria if the numbers were displayed with leading dollar signs and commas.