Dynamics GP Tips and Tricks
Educational and Informative Advice

Diamond Software

MAY 2018 NEWSLETTER

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GPUG Summit is the can't-miss conference for Dynamics GP!

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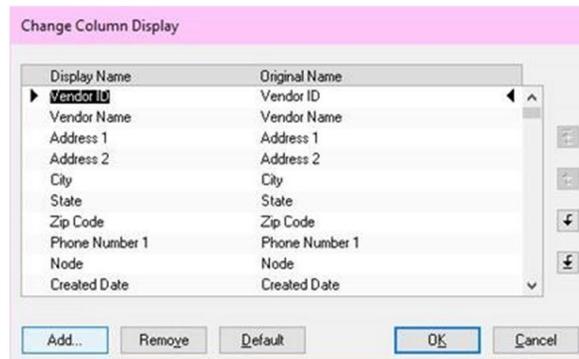
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SmartList Builder

The most popular and the easier way to report on Dynamics GP with over

CREATE A SMARTLIST THAT SHOWS WHEN VENDORS WERE CREATED

Auditors frequently ask for information on new vendors or suppliers that have been added to Dynamics GP within a certain time frame or on a specific date. Thanks to SmartLists that information is easy to generate and supply to the auditors.

Here's how to run a SmartList and easily generate a list of your vendors:

- Go to Microsoft Dynamics GP > SmartList > Purchasing > Vendors.
- Choose the default report - the *.
- Click on the Columns button.
- Click on Add.
- From the list choose Created Date.
- Click on OK.
- Put the created date wherever you want in column order.
- Click on OK.

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- Then back on the SmartList, click on the search button.
- Restrict by the Created Date"is between", and then you can choose to enter the dates or use a default.

15,000 companies benefiting from SmartList Builder every day.

Comprised of three components:

SmartList Builder: Gather any GP data from one or multiple companies to a SmartList. You can also link to data from third-party software or any SQL table.
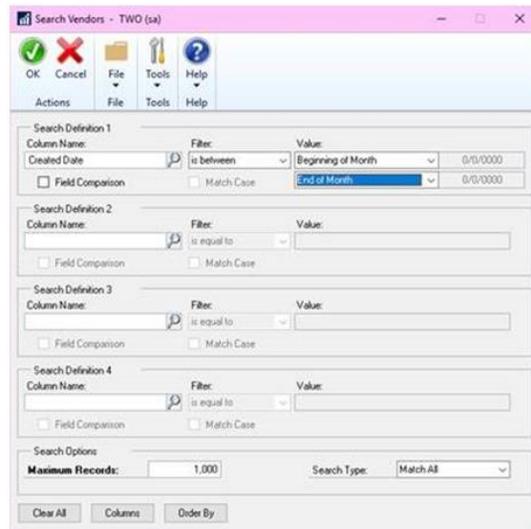
Excel Report Builder: Generates an Excel spreadsheet with a live connection back to GP or any other data you include. Give GP data to anyone in the organization via Excel - without buying new, full-user GP licenses.

Navigation List Builder: You build specific lists for certain role or individuals and then link up all the things that the user needs to do with that data.

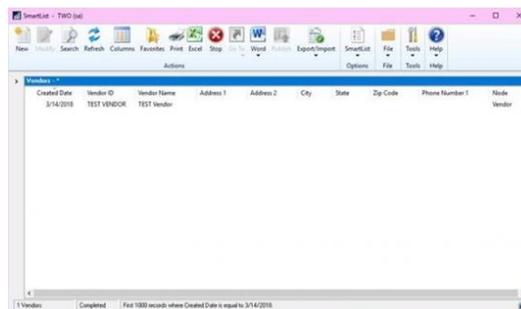**SmartList Builder puts you in charge of your data records.**

Click here for more information about SmartList Builder.

For more information call Dwight Boudreaux at 337-296-4837 or email him at dwightb@diamond-soft.com.

zoom...

- Click on OK.
- Back on the SmartList, click on Refresh to see your vendors created based on the timeframe selected.

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- Click on Favorites.
- Give the SmartList a name and add the SmartList.

This report can then be run immediately whenever you need the information.