Dynamics GP Tips and Tricks
Educational and Informative Advice

Diamond Software

In This Issue

SPEED UP CASH RECEIPTS ENTRY WHEN THE CUSTOMER ID ISN'T AVAILABLE

Sometimes the customer ID isn't readily known when cash receipts are entered, but it's easy to use the invoice number to find the customer ID - just type it in first.

Select Sales > Transactions > Cash Receipts, and click into the document field. Then enter the invoice number.
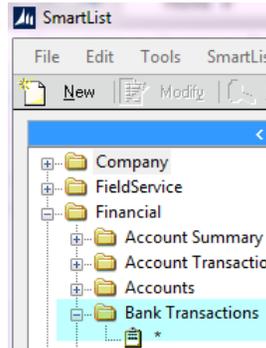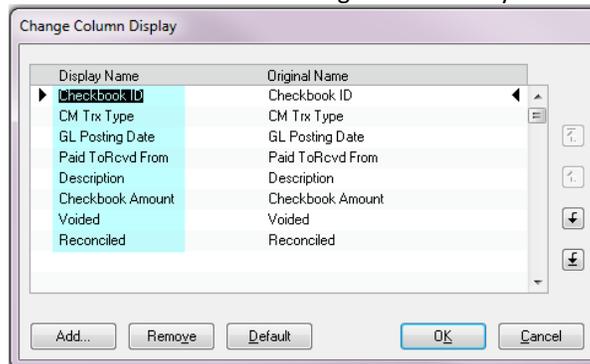
zoom....

The system will find the customer associated with

CREATE A SMARTLIST FAVORITE TO SHOW UNRECONCILED BANK TRANSACTIONS

Select Microsoft Dynamics GP>SmartList. Then click on the Bank Transactions folder under Financial>Bank Transactions.

Click "Columns" and add the following columns if any are missing:

zoom....

Click Search and add filters to exclude reconciled and voided items. You can also limit the report to a specific account if you have more than one Checkbook.

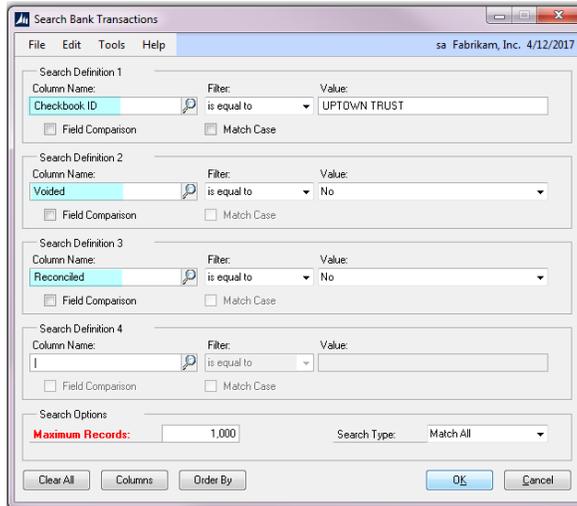the invoice and fill it into the Customer ID field.

GP 2013 SUPPORT ENDS IN APRIL 2018

If you are currently on Dynamics GP 2013 or another unsupported version of GP, now is the time to start planning to upgrade. Here are the options available:
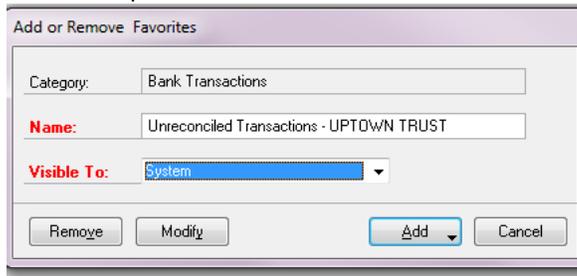
- You can upgrade to GP2015, GP2016, or GP2016R2 which are all still on mainstream support for the next 3 to 5 years.

- The second option is to wait until the new release of GP2018 which is scheduled for December 2017. We suggest waiting about 8 weeks after a new release to upgrade. Note that GP 2018 on Windows 7 will not be supported.

Your decision should be based on technical and hardware specifications and expenses related to upgrading. If you would like to schedule us to look at

Click Favorites, and change the name to something that makes sense for you. If you have more than one account, include the name in the description:

Here's an example of what will display:

Fast. Accurate. Anywhere.

We are frequently asked by our customers, how do we easily create the reports we need and can we try the solution out for free?

The answer is Jet Express and yes, it's free.

Jet Express for Excel with Dynamics

This extension is **included** with Microsoft Dynamics GP to give users a simple way to create basic reports and business queries inside of Excel.

your server, prepare, estimate and schedule your upgrade, please let us know when would be convenient.

Download easy-to-modify pre-built reports.

Pre-Built Reports

From financial statements and sales queries, to inventory counts and AP details, the fastest way to success with Jet Express is using the pre-built report library with the Report Player.

Quick Start Training

Watch how-to videos for a quick start.

GET STARTED NOW
https://www.jetreports.com/jet-express/jet-express-for-gp/#

For additional information contact your Diamond Software by email at tommytb@diamond-soft.com.