Dynamics GP Tips and Tricks
Educational and Informative Advice

Diamond Software

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EASY DATE CREATION IN ANY GP WINDOW

Save time with these date entry tips:

- Clicking (+) or (-) keys on date fields in Dynamics GP increases or decreases the date by one day.

- Keying in the day number in date field will cause Dynamics GP to fill in the current month and year. For example, keying "10" in the date field on 5/3/17 will automatically input the date 5/10/17 in the date box.

CREATE CUSTOMIZED REPORTS WITH THE NAVIGATION PANE

There's an easy way to create customized trial balances and other reports for GL, AR, and AP in the navigation pane. This powerful feature makes it easy to provide specific information to managers almost immediately. Examples include trial balances for selected GL accounts, specific vendors, or specific customers. You can also save the report options for future use. This customization feature is also available for the other GP modules.

In this example, I created a general ledger trial balance that includes all accounts with "Receivable" in their title.

- Choose the Accounts list in the Financial navigation pane.
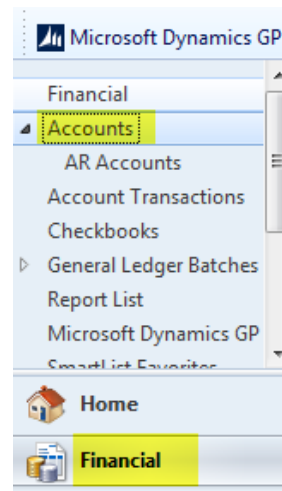
- Add a filter where the description contains "Receivable". Then click on the arrow. Click to select all. Note that can also remove items in the list.
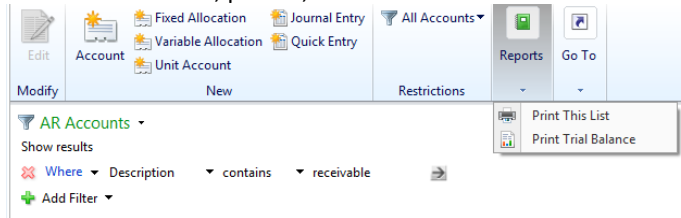
zoom....

- Next click on Accounts (read only) and save with a new name. In this example I used the name "Receivables Accounts".
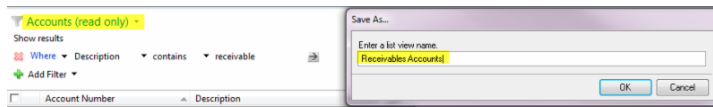
zoom....

- Select Reports, and then chose to either print a trial balance or the list. You will then have the options to print to the screen, printer, or send to a file.

zoom....

zoom....

This is just one example of what you can produce with the navigation pane. We encourage you to explore the possibilities and let us know if you need more information on this powerful GP tool.

FIX AUTO-COMPLETE ERRORS

The auto-complete function is great for saving time until you misspell a word and are stuck with it forever! To get rid of an auto-complete error, start typing until the error shows up in auto-complete, then right click and select "Remove" from list.
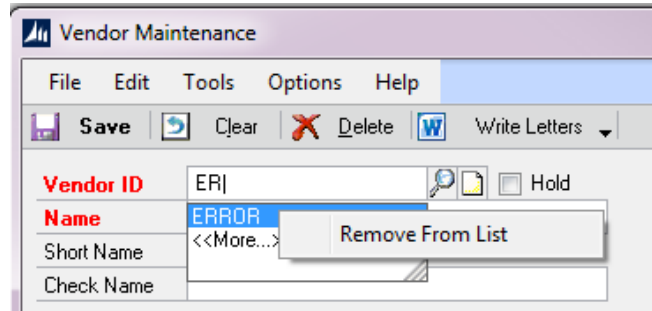
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