

MARCH 2017 NEWSLETTER

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**W-2 PHISHING SCAM ALERT**

**Dangerous W-2 Phishing Scam Evolving; Targeting Schools, Restaurants, Hospitals, Tribal Groups and Others**

The Internal Revenue Service, state tax agencies, and the tax industry issued an urgent alert to all employers that the Form W-2 email phishing scam has evolved beyond the corporate world and is spreading to other sectors, including school districts, tribal organizations and nonprofits.

[Read more here....](#)

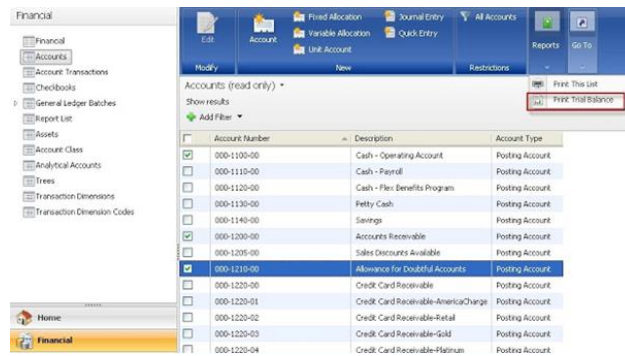
**5 TIPS TO SPEED UP INVENTORY RECONCILE**

Reconciling your inventory can take hours, but here's a list of things you can do to speed it up.

**QUICK WAY TO CREATE A CUSTOMIZED YEAR-TO-DATE TRIAL BALANCE**

If you need to print a *year-to-date* GL Trial Balance that includes non-consecutive account numbers, here are the steps to do it.

- Click on the **Financial** tile in the Navigation Pane, then click on the **Accounts** list.
- In the results pane, place checkmarks in the boxes next to the accounts you want to include in the trial balance.



[enlarge...](#)

- Click the **Reports** button and select **Print Trial Balance**. In the Print Trial Balance window, select the year and whether or not to include details.



- Click the Print button. The standard Print Destination window will open. Click OK to print to your desired printer.

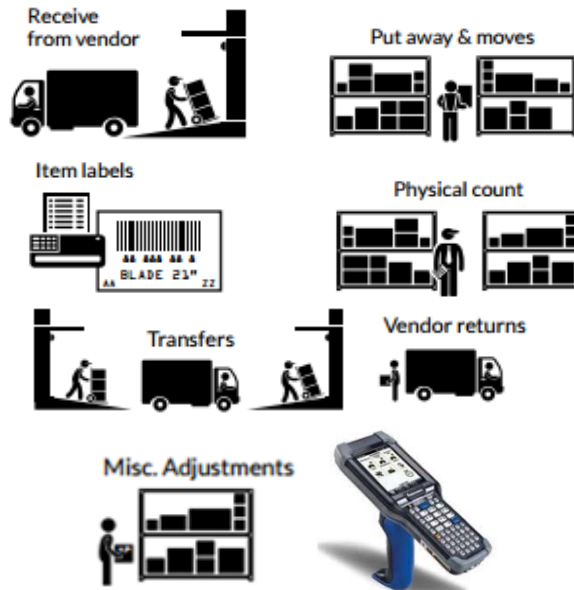
*Note that while you can print a GL Trial Balance from within the Lists view, you can't select a date range as you can in the normal GL Trial Balance Report Definition. You are limited to a year-to-date trial balance for a particular year.*

- The Professional Services Tools Library (PSTL) has its own version of Item Reconcile which is optimized and runs quicker by a factor of at least 5 to 10 times.
- You can limit reconciling to the most recent year's items only.
- You can manually archive old items.
- Another suggestion is to renumber inactive items to ZZZ-"ItemNumber" and only run the reconcile on item numbers ranging from 0 to ZZ.
- Normally there is no need to mark "Include Item History" when reconciling since the objective is to update/correct allocations based on open records. There is no need to go through historical records.



We grow with you!

Regardless of whether you are looking for basic stockroom inventory control or a more complex Warehouse Management System (WMS), PanatrackerGP can be configured to meet your needs. Using Microsoft Dynamics GP as the host database, Panatrack has created an extremely flexible and scalable inventory solution.



Need simple data capture? Panatrak has that covered. Need more robust functionality? Enable what you need when you need it.

Contact [Dwight Boudreaux](#) for more information at 337-296-4837.