

## Dynamics GP Tips and Tricks

Educational and Informative Advice



SEPTEMBER 2018 NEWSLETTER

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**Do you understand how the new economic nexus rules apply to everyone - not just online sales?**

Get a custom nexus analysis for your business

**Sales and use tax compliance begins with an accurate understanding of your company's nexus footprint.**

If you have nexus, you have to follow the rules, which means registering for a sales and use tax license or permit, collecting tax on your taxable sales, securing appropriate documentation from your customers for tax-exempt sales, and filing tax returns and remitting all taxes due.

### GP 2018 R2 WILL BE RELEASED OCTOBER 1, 2018

This release will be packed with new core features for Dynamics GP users. Here are just a few of them:

- Payroll Paycode start and end dates
- Payroll shared maximums for deductions and benefits (Federal requirement for 401K)
- Payroll check register with FICA totals
- Email PO other template from PO Entry
- New SmartList for Deposits on Unposted Sales Transactions

Also note that the GP 2018 R2 upgrade will be included in the year-end update, so the time to plan is now. Please [contact us](#) for more information and to schedule your upgrade and/or year-end update.

### USE THE EDIT PAYABLE TRANSACTION WINDOW TO MAKE CHANGES TO OPEN PAYABLES TRANSACTIONS

Go to Purchasing>Transactions>Edit Transaction Information, and use this window to edit the following fields:

- Discount Date
- Due Date
- P.O. Number (Note: this does not link to Purchase Order Processing. It only lists the PO as a reference number.)
- Description (You can add to or completely overwrite the original description.)

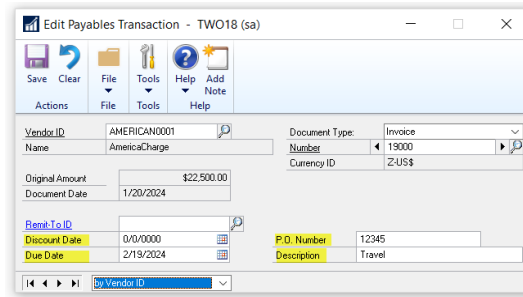
Determining nexus can be tricky. An in-state physical location creates nexus such as a company office, retail store, warehouse, or similar permanent place of business. Often nexus extends to lesser-known in-state activities including home offices, 1099 employees, trade show attendance, inventory temporarily stored at a third-party location (think Amazon fulfillment centers), demo property loaned to customers for evaluation, and rental property.

Most companies don't have sales tax experts on staff who know this nexus stuff by heart. But our partners at Avalara do.

Avalara's Nexus Analysis Service consists of a team of seasoned tax professionals who will:

- Conduct a detailed survey on your company's business activities
- Evaluate these activities against current, state-specific nexus rules and guidelines
- Identify those states where your company has created nexus
- Provide state-specific options to become sales tax compliant

You'll come away with a nexus report customized to your business and its specific activities in each state along with a state-specific analysis of these activities compared to the current nexus rules and policies of each state. Avalara will also provide a history of nexus and how the rules have evolved over the past several years, current developments (including click-through and economic nexus), and recommendations on the path forward to compliance.



[Enlarge...](#)

After you save the changes, all inquiries and reports will reflect the new information.

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## USE A SMARTLIST TO DISPLAY FINANCIAL TRANSACTIONS WHO, WHAT, WHEN INFO

- Open Smartlist.
- Open Financial, then Account Transactions.
- Click Columns, Add, and add the following columns:
  - For Who: User Who Posted
  - For What: Originating Master, ID, Originating Master Name, and Originating Document Number
  - For When: Originating Posting Date

To keep for future use, click Favorites and add.

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## DWIGHT BOUDREAUX RETIRES

Dwight Boudreaux, team member for over 20 years at Diamond Software, retired effective August 2nd. Dwight worked with the vast majority of our clients over the years assisting them with their software enhancement and support renewals. Dwight also assisted many of you with evaluating additional functionality for your Microsoft Dynamics GP software. Dwight enjoyed working with all of you and helping you solve some of your business challenges

We all want to thank Dwight for his contributions while at Diamond Software. We wish for him and his wife

[Click this link](#) and fill out the form to get started today!

Jane, a happy, healthy, and exciting new chapter in their lives.