Dynamics GP Tips and Tricks
Educational and Informative Advice

Diamond Software

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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.

USER-DEFINED FIELDS LET YOU GET MORE INFORMATION FROM GP WINDOWS

Throughout Dynamics GP, maintenance cards typically include at least two user-defined fields, and they can be renamed in the setup screen for the related module. This provides a great mechanism to add in special information. Here's an example of the steps to rename a user-defined field in the Customer Master.

USE THE RECONCILE TO GL ROUTINE TO BALANCE SUB-LEDGERS

[zoom....](#)

Use the Reconcile to GL Routine to find transactions that cause differences between the general ledger and your sub-ledger balances.

This routine matches general ledger and sub-ledger transactions for accounts payable, accounts receivable, inventory, and bank reconciliation. An Excel spreadsheet will be produced that finds distinct matches and highlights those items where a possible match exists.

Most importantly, the spreadsheet lists all items where no match exists, allowing users to research and make corrections to either the general ledger or the sub-ledger.

[This document](#) gives step-by-step instructions on how to use the Reconcile to GL routine.

- From the Navigation pane select Sales>Setup>Receivables> Options. In the User-Defined 1 field type Region and click OK to close each window.

zoom....

- Back on the Sales area page, click Customer under the Cards area. On the bottom left above User-Defined 2 is the newly named Region field (formerly User-Defined 1), ready to be filled in.
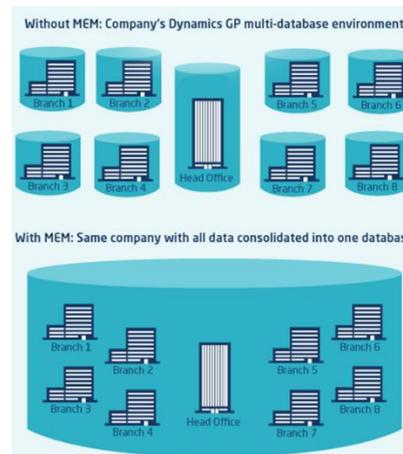

zoom....

User-defined fields like this are present for customers, vendors, accounts, sales orders, fixed assets, inventory items, and purchase receipts among others. They can each be renamed in their respective setup screens.

User-Defined 1 has special features inside Dynamics GP. Most of the built-in reports inside of Dynamics GP allow sorting and selection with the User-Defined 1 field. These options aren't provided for User-Defined 2. Consequently, administrators should carefully consider what information belongs in User-Defined 1 before

WORKING WITH MULTIPLE COMPANIES IN GP?

Do you ever spend time wondering how your company is really performing but don't have the information at your fingertips? Would you like to gain real-time insight into your corporate performance, with rolled-up financial reports across all of your divisions - all without resorting to time-consuming spreadsheets or expensive external reporting systems? If so, take a look at **Multi-Entity Management** (MEM) from Binary Stream.

zoom....

MEM can provide relief from so many conditions that plague GP users with multiple companies. For example, MEM can eliminate time spent switching between databases, and let you streamline your vendor/customer records, with just one copy that can be shared across the entire enterprise. Additionally, MEM will dramatically reduce the time and effort consumed by manually entering the due-to/due-froms associated with intercompany transactions. As a kicker, since you will have fewer databases, your ongoing support and upgrade costs should decrease as well! For details on how we accomplish all this and more, please watch this MEM overview video and contact us if you have any questions.

changing its name since the effects of
this selection will be felt throughout
the system.