

JANUARY 2020 NEWSLETTER

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### Electronic Payment Processing

Add credit card and ACH processing to Microsoft Dynamics GP Sales Order Processing and Receivables Management with Electronic Payment Processing. With Electronic Payment Processing, merchants have an efficient, embedded credit card capability that may be fully integrated for both back office and web site entered orders. The elimination of a third-party gateway can also reduce credit card fees.

Electronic Payment Processing features:

- Support for pre-authorization, sale/capture,

## VIEW SUMMARIZED GL DATA WITH ACCOUNT ROLLUPS

Period	Budget	Actual	Variance
Beginning Balance	\$0.00	\$0.00	\$0.00
Period 1	\$0.00	\$0,000.00	\$0,000.00
Period 2	\$0.00	\$1,000.00	\$1,000.00
Period 3	\$10,000.00	\$10,000.00	\$0.00
Period 4	\$10,000.00	\$75,000.00	\$65,000.00
Period 5	\$10,000.00	\$10,000.00	\$0.00
Period 6	\$10,000.00	\$10,000.00	\$0.00
Period 7	\$10,000.00	\$40,000.00	\$30,000.00
Period 8	\$10,000.00	\$10,000.00	\$0.00
Period 9	\$10,000.00	\$10,000.00	\$0.00
Period 10	\$10,000.00	\$10,000.00	\$0.00
Period 11	\$10,000.00	\$10,000.00	\$0.00
Period 12	\$10,000.00	\$10,000.00	\$0.00
Total	\$10,000.00	\$100,000.00	\$90,000.00

[zoom....](#)

The Account Rollup Inquiry is a nice companion feature to use with accounts that are rolled up on your Financial Reports. Rolled up accounts can be compared to your budget and can also show budget variances.

[Click here](#) for instructions from CAL Business Solutions on how to set up account rollups.

## EASY WAY TO UPDATE TAX DETAILS

Since sales and use tax rates frequently change, you may need to update them in GP to ensure that you collect and pay the correct tax amounts.

The easy way to do this is to go to Administration > Setup > Company > Tax Details. Depending on your security setup, this may need to be done by an administrator or power user.

- adjust, returns, voids, voice authorization
- Address, ZIP, and CVV2 verification
- Ability to store multiple credit cards per customer, default cards by customer or customer location
- Allows multiple credit cards per sales document
- Tokenization provides straightforward method for integration of pre-authorization and capture of funds for web site transactions
- Support for batch/bulk processing
- Integrates with Blue Moon's SOP Auto Invoice
- Level 3 support

[Click here to learn more.](#)

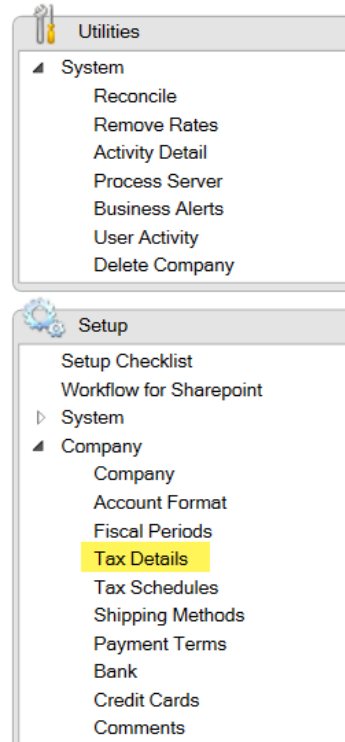
For pricing and additional information, please contact Tommy Tastet at 985-892-2710 or email [tommyt@diamond-soft.com](mailto:tommyt@diamond-soft.com).

## SHOW REQUIRED FIELDS IN GP WINDOWS AND SPEED UP DATA ENTRY

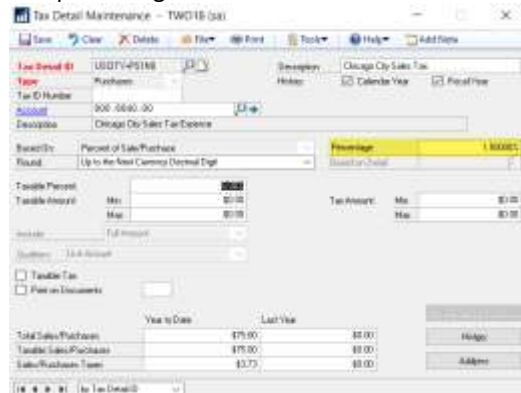
Do you ever get this message when trying to post or save an entry in GP: "Not all required fields have been entered"?

To make is easy to see required fields, you can change this setting in the User Preferences window, and make the fields red and bold (or italic).

## Administration



Choose the tax detail that has changed and enter the correct percentage. Click Save.



[zoom...](#)

In this example, I've changed the tax rate for the Chicago City Sales Tax Expense to 1.5%.

No changes are needed to the GP Tax Schedules since they use settings from the Tax Details window.



## PAYROLL STATE TAX UPDATE RELEASED BY MICROSOFT ON 1/14/2020

State income taxes have changed for the following states: Colorado, Idaho, Maryland, Massachusetts, Mississippi, New Mexico, New York & Yonkers, Oregon, Rhode Island, & Vermont.

We recommend you install this payroll tax update as soon as you can if you have employees in these states. Please [contact us](#) if you need assistance.