



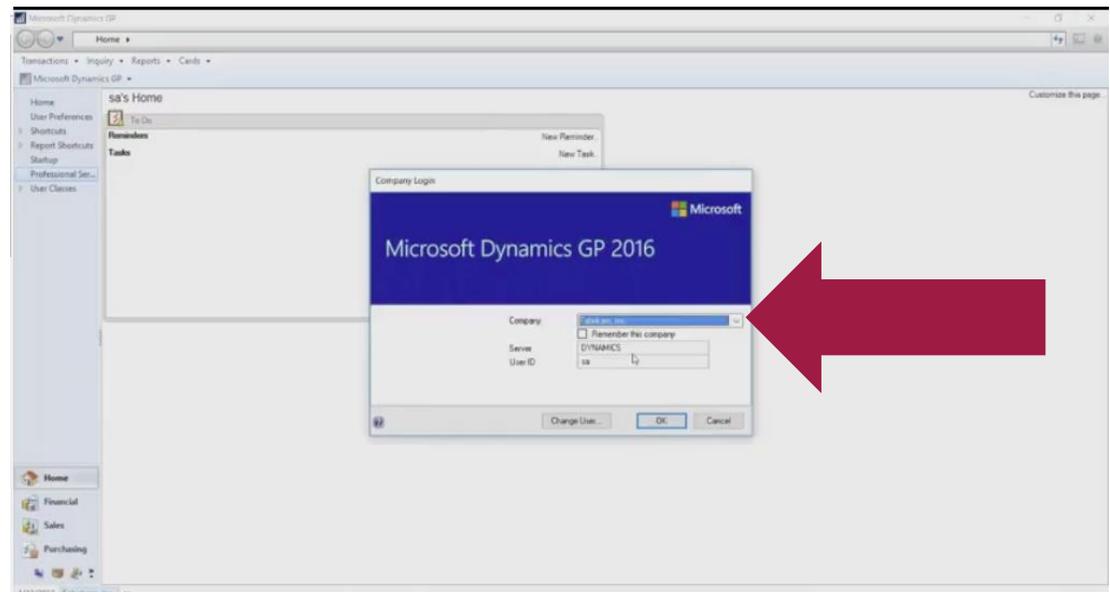
8 Time Saving Tips and Tricks Every Dynamics GP User Should Know

LOGGING INTO DYNAMICS GP

If you have multiple companies in Dynamics GP, you don't have to log out each time you want to switch between them.

How it works:

1. In the bottom left-hand corner of your GP screen, you'll see your current company name.
2. Click on your company name. This will open a new window.
3. On it, click the drop-down menu displayed next to "Company."
4. Select your company.
5. Click OK.



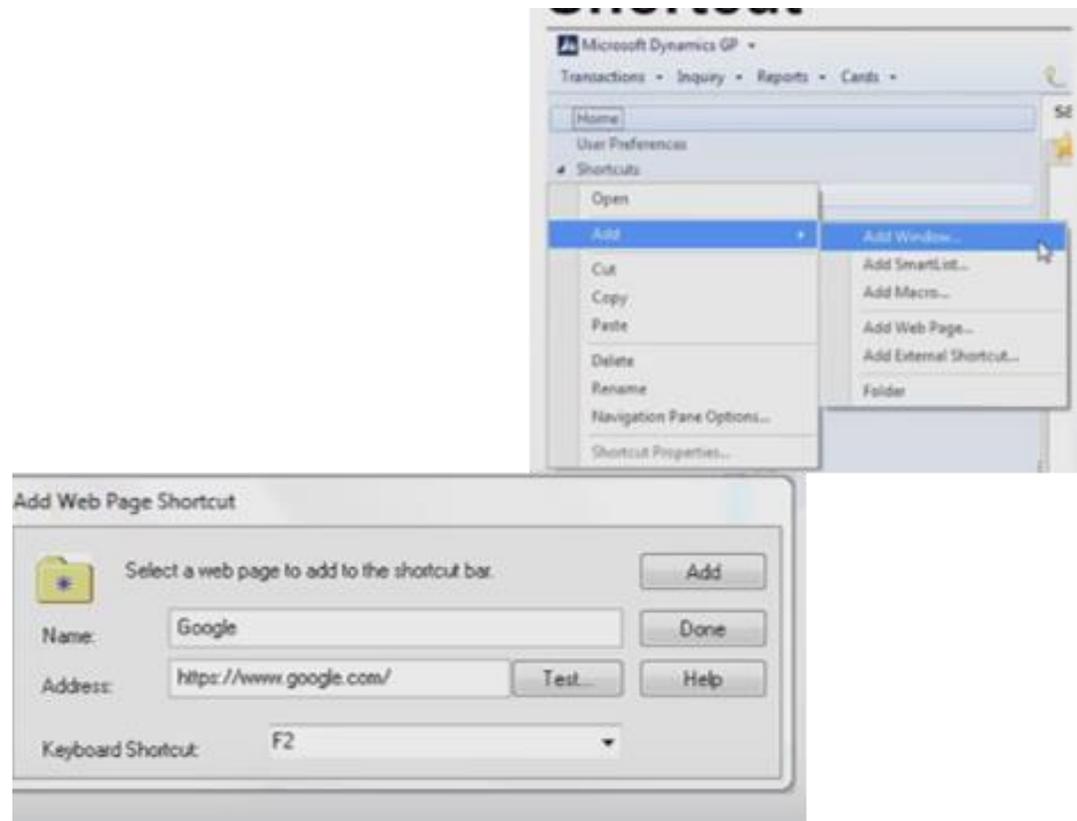
GP SHORTCUTS

These are useful if you need to open a new application but still want to keep GP open. There are a variety of shortcut types available, including external links to websites.

How it works:

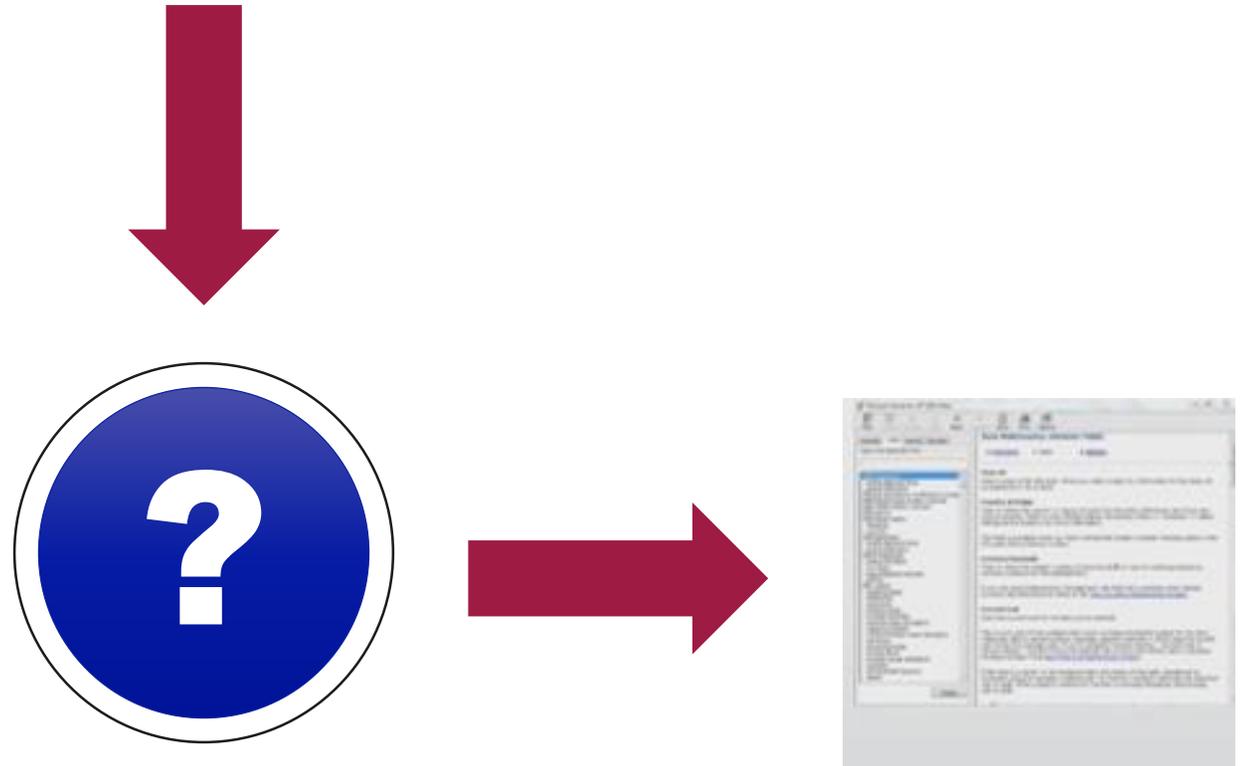
1. Right click the navigation on the left side of your home screen.
2. Select Add > Add External shortcut.
3. A new window will open.
4. Enter a name and URL for the shortcut.

Bonus Tip: Under the “Name” and “Address” field you’ll see an option to set a keyboard shortcut. Use this to access the shortcut at the press of a button.



GETTING HELP IN CURRENT WINDOW

Depending on your software version, either at the top or bottom right corner of every window, you'll find a button that looks like this.



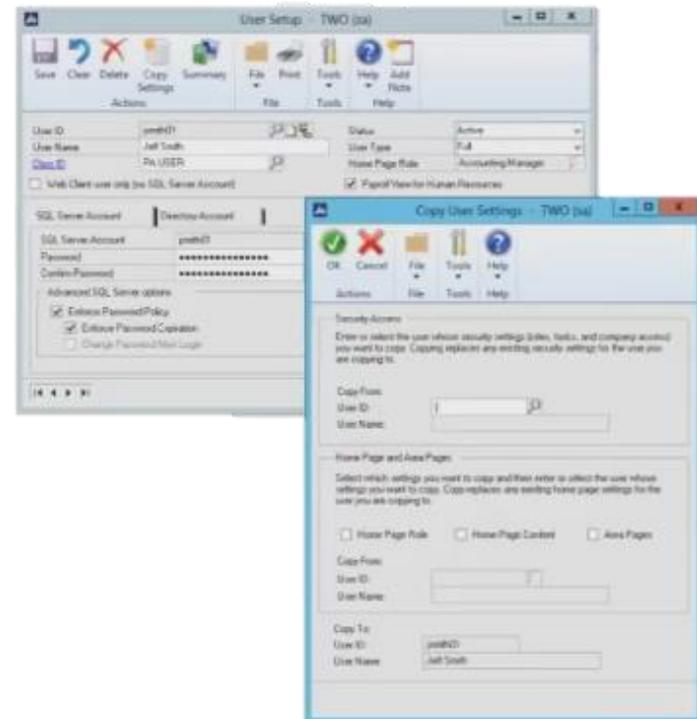
Click it to open the relevant page in the GP index. There you'll see an overview of the window's purpose, field and button definitions.

QUICKLY CREATE NEW USERS

Employees will come and go, and setting up new users can be time consuming. Thankfully, the copy user settings feature introduced with GP 2015, makes this much easier. Instead of creating a Dynamics GP checklist, you can simply copy the home page and area page settings from one user to another.

How it works:

1. Make sure that you're logged in as sa (only sa can create new users).
2. Go to Microsoft Dynamics GP > Tools > Setup > System > User > Copy User Settings



KEYBOARD SHORTCUTS FOR COPY AND PASTE

If you're a long time Microsoft Office user, you're probably familiar with the keyboard commands to copy and paste information from one place to another. But, did you know those same keyboard shortcuts also work in Dynamics GP?

This is a simple feature, but one that can save you a lot of time and help you avoid data entry mistakes.

How it works:

CTRL + C = Copy

CTRL + V = Paste

ALLOW/ PREVENT ACCOUNT ENTRY

Keeping your GL and sub ledgers in sync is key if you want to minimize your reconciliation time. So, you may want to prevent users from posting journal entries directly to your control account.

The screenshot shows the 'Account Maintenance' window for account 000-2100-00. The account description is 'Accounts Payable-00' and the alias is 'AP'. The 'Allow Account Entry' checkbox is currently unchecked and is highlighted with a red box. A yellow arrow points to this checkbox from the right. Other fields include 'Posting Type' (Balance Sheet selected), 'Level of Posting from Series' (Sales, Inventory Control, Purchasing, Payroll all set to Detail), and 'Include in Lookup' (Sales, Inventory Control, Purchasing, Payroll). The window title is 'Account Maintenance - TWO (jsmith01)'.

To do this, simply unmark the “Allow Account Entry” option on the Dynamics GP GL account card..

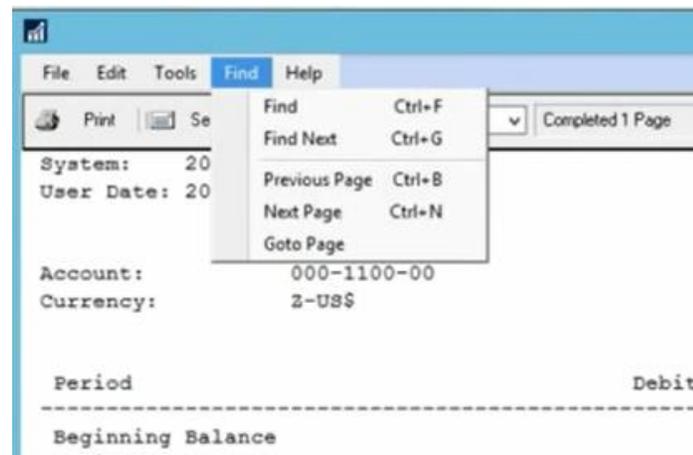
'FIND' IN REPORTS

Sometimes GP reports can get quite large and it becomes difficult to find exactly what you're looking for. Don't search blindly for that needle in a haystack. Instead, use the "Find" feature.

If you're familiar with Microsoft Word, the Find feature in Dynamics GP is very similar.

How it works:

1. Print your report to the screen.
2. Press Ctrl + F on your keyboard or go to Find > "Find" or "Find Next" (depending on how you want to search).
3. Type your search term in the box that opens (this must be an exact string match)*
4. Press Enter



* For example, searching for "General" would not find "GENERAL" and entering "1000.00" would not find "1,000.00."

DEFAULT PRINTER LOCATION

Do you prefer to view your reports on the screen instead of the printer?
Are you tired of changing the default printer settings every time you view a report?

You can globally set your default printer destination for reports to be screen.*

How this works:

1. Navigate to your GP home screen
2. Click user preferences
3. In the window that opens, you will see an option to set your default printer. Check screen and uncheck printer.

* The settings you define here will affect all reports **EXCEPT** posting reports. Those have their own destination setups in Posting setup.

