THE *ULTIMATE* TIME SAVING TIPS

FOR MICROSOFT DYNAMICS GP

***4 things** you need to start doing to maximize your time spent in Dynamics GP*

THE TIME IS NOW

You spend all day working in your Dynamics GP system. Now it's time to reduce clicks, eliminate double entry, and simplify routine processes.

Sometimes the smallest adjustment has the the biggest impact. This is especially true when it comes to monotonous tasks within Dynamics GP. Most of us stare at the screen day in and day out, clicking the same buttons, copying the same lines of information, simply because that's how we've always done it. It's time to try something new, something that will save you time! Implement these four time saving tips, and you'll notice that you have more time to attend to tasks that actually matter...or maybe even get you out of the office five minutes early instead of five minutes late!

- **Turn off/on posting reports**
- **Using the copy feature for SOP**
- **Price List Wizard**
- **Utilize User Preferences**

These time saving tips are courtesy of the Rockton Software Support team. Rockton Software is a Microsoft Dynamics GP add-on provider, helping GP users work simpler & easier® for over 18 years. Learn how our products: Auditor, Dynamics GP Toolbox, Dynamics Report Manager, Omni Price, and SmartFill can save you even more time in your Dynamics GP system today!

rockton SOFTWARE

www.rocktonsoftware.com

TURN OFF/ON POSTING REPORTS

Do you find yourself canceling out of a bunch of posting reports during the posting process? Instead of canceling out of the report, you can save time by selecting the reports for which to be prompted and for which default destination they are set. This will ensure the user is printing the correct posting reports by setting which reports should print during each specific posting process.

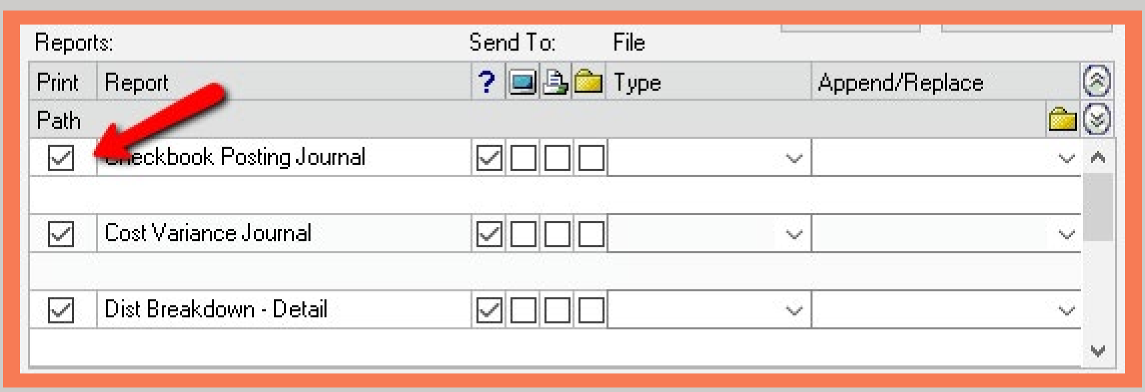
How To:

1) Navigate to the Posting Setup window by going to **Microsoft Dynamics GP | Tools | Setup| Posting**.

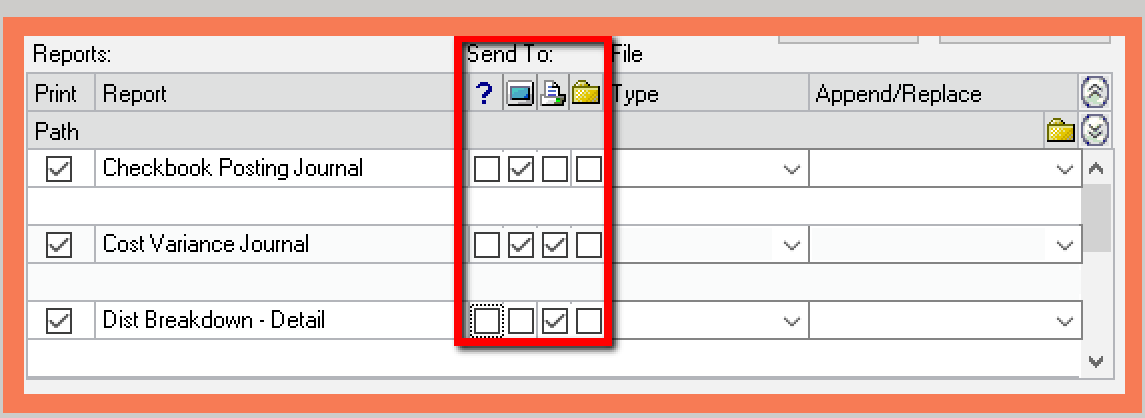
2) Select the specific **Series** you would like to assign settings (e.g., Financials, Purchasing Sales, Inventory, Payroll, or Project).

3) Use the **Origin** dropdown field to select the transaction entry window for which you want to set the report options.

4) After the **Series** and **Origin** have been selected, the reports for that combination will appear in the grid at the bottom of the window. Mark which **reports** you would like to bring during the posting process by checking the box to the left of the report name.



5) In the **'Send To'** section, for each report you've selected, indicate the report destination (e.g., Ask, Screen, Printer and/or File). *NOTE: You can select multiple destinations (e.g., Screen and Printer).*



6) Click **Save** and then click **OK** to save your changes.

USING THE COPY FEATURE FOR SOP

Stop spending extra time entering each line on a Sales Order Processing (SOP) or Purchase Order Processing (POP) transaction! Save time by copying SOP or POP transactions from existing documents to another document. In the following example, learn how to copy transaction lines from one document to a new document. You can also copy transaction lines from and to existing documents.

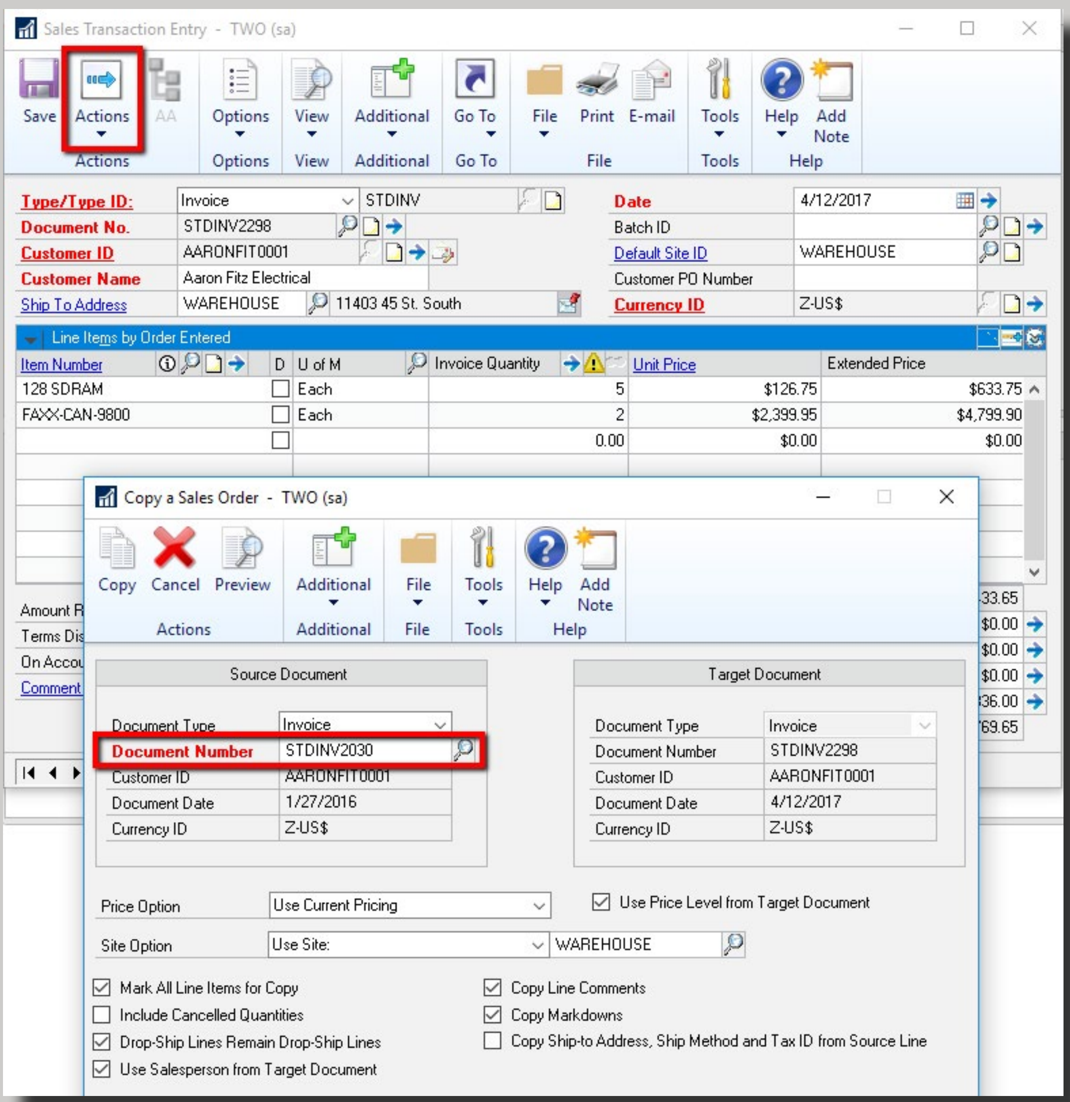
How To:

1) Navigate to **Microsoft Dynamics GP | Sales | Transaction | Sales Transaction Entry**.

2) Create a new document by selecting a **Type** and **Type ID**, entering a new **Document No.**, and then selecting a **Customer ID**, and a **Currency ID**.

3) Click on the **Actions** button and then click **Copy** to open the **Copy a Sales Order** window.

4) Enter or select the SOP **Document Number** which contains the information to copy to the newly created document.



5) Click the **Preview** button in the **Copy a Sales Order** window to review, mark/unmark, or modify the item(s) before copying them over.

6) Click **Copy** to add the item(s) to your SOP Transaction.

PRICE LIST WIZARD

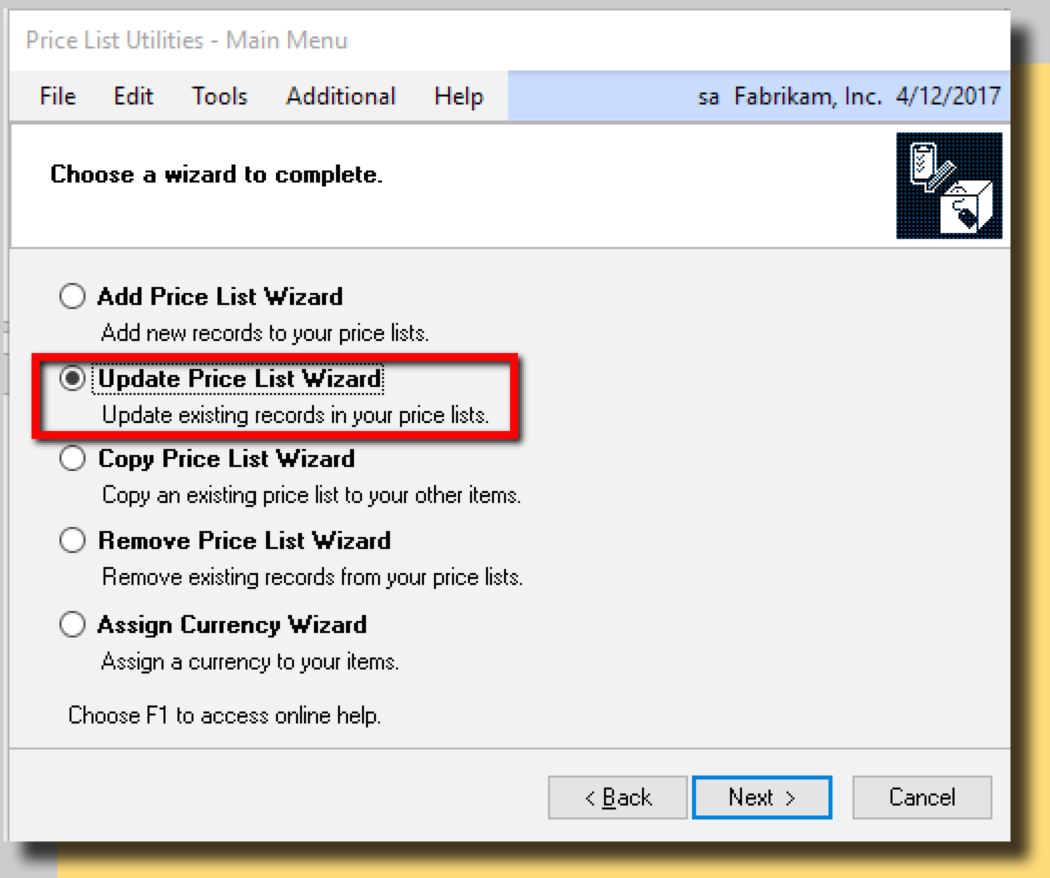
Who has the time to update individual prices? If you are using Standard Pricing, the Price List Wizard utility is a major timesaver when it comes to updating, copying, and generally managing price lists. The wizard will guide you through the process each step of the way.

In our example, we are going to use the Price List Wizard utility to update a price list for several items at once. To update a group of items simultaneously, they need to share a common price method, and the combination of currency, price level, unit of measure, and quantity breaks must already exist in each item's price list.

The wizard will walk you through the process:

1) Navigate to **Microsoft Dynamics GP | Tools | Utilities | Inventory | Price List Utilities** to open the wizard.

2) For this example, select **Update Price List Wizard** and then click **Next**.



3) Select the **Price Method** you want to update and then click **Next**.

4) Select the update **Type** (Percentage or Fixed Amount) and enter the amount to increase the current value by and then click **Next**.

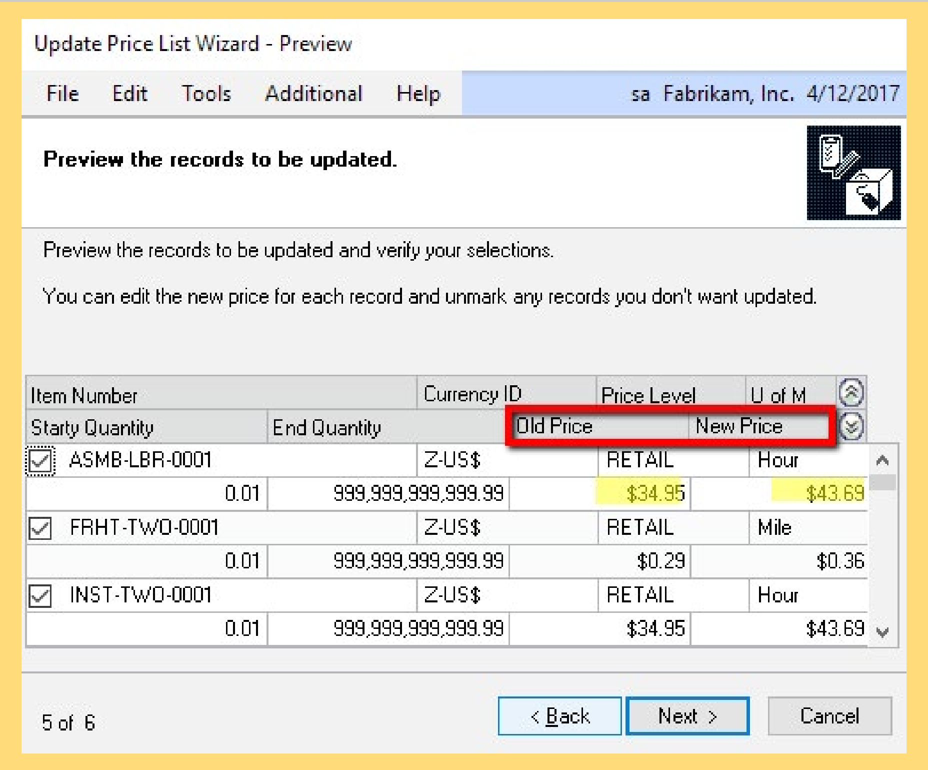
5) Select and enter **rounding** information and then click **Next**.

6) Select a **restriction** to limit which price list records will be updated (Examples to choose from: Item Number, Description, Price Group, Price List, etc.) and then click **Next**.

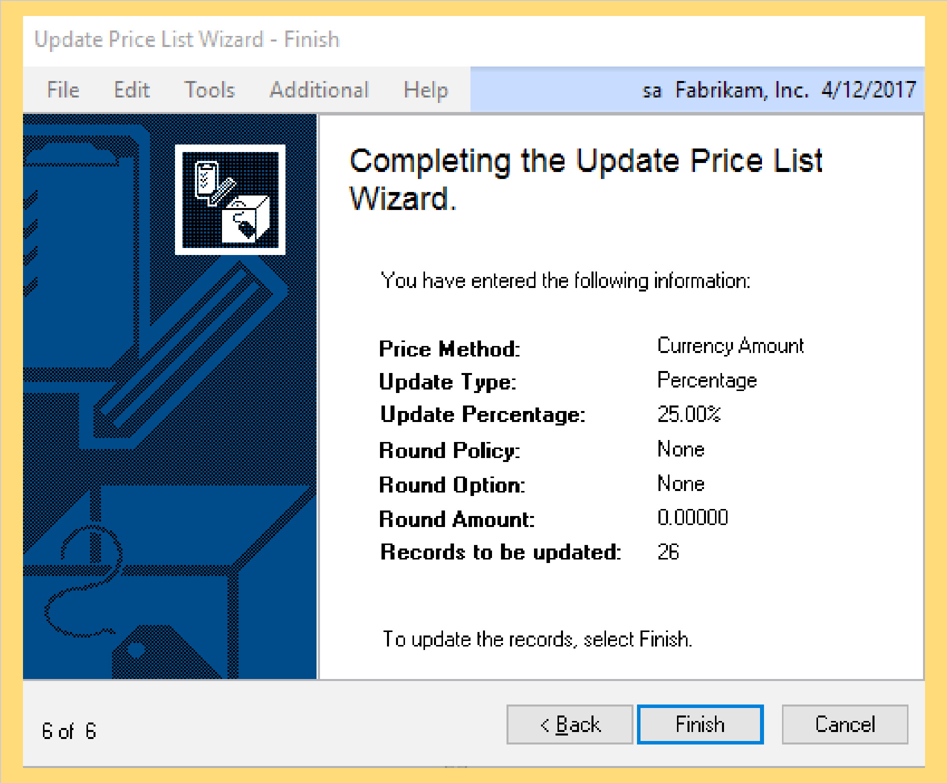
Steps continued on next page...

PRICE LIST WIZARD *CONTINUED*

7) Review the records prior to updating them in the '**Preview the records to be updated**' screen and then click **Next**.



8) Click **Finish** in the **Complete the Update Price List Wizard** window to update the Price Lists with the new rates.



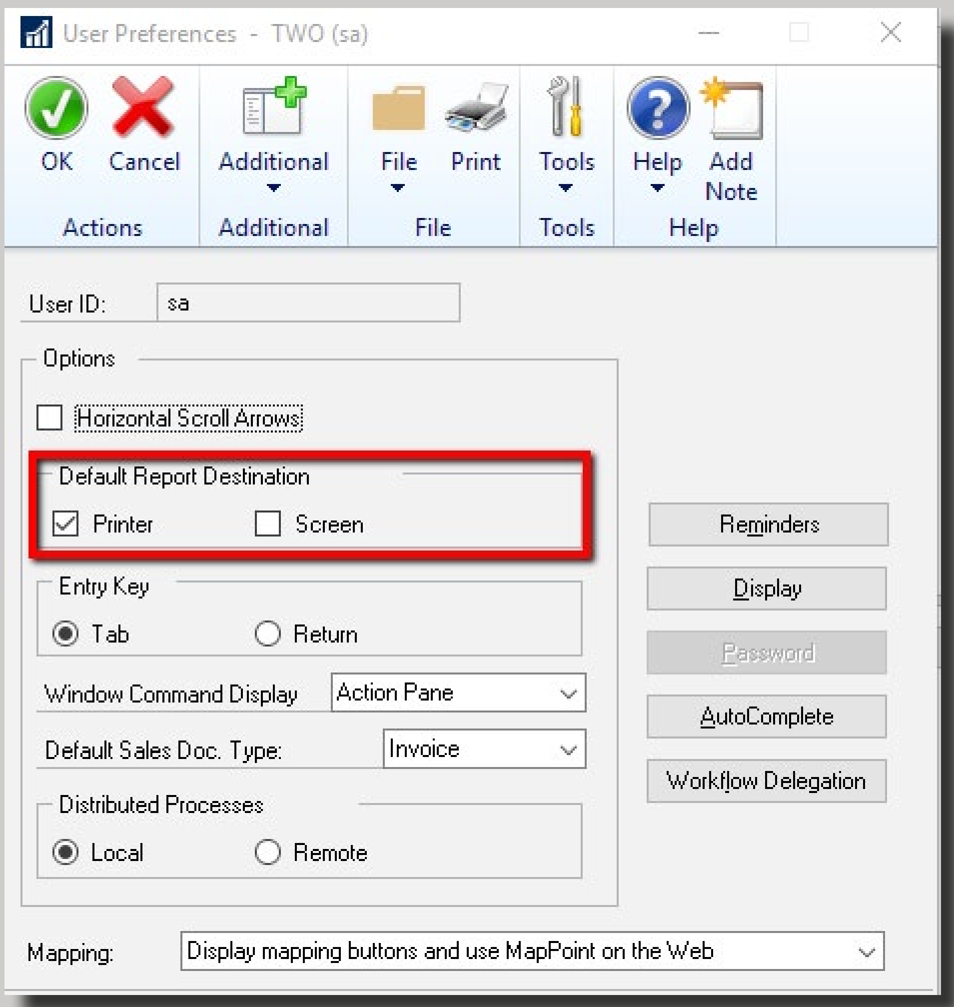
NOTE: You will be prompted to print an **Update Price List Audit Report** *once the process is completed.*

USER PREFERENCES

The User Preferences window contains some time saving gems that are often over looked. But not anymore! Navigate to these shortcuts by simply clicking the **Microsoft Dynamics GP** drop-down menu and select **User Preferences**. The following timesavers are our favorites!

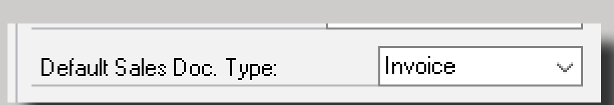
Default Report Destination

Instead of using the system defaults, have the user determine which printing default destination they would like to use for their Reports. Simply select between **Printer** or **Screen** under the Default Report Destination.



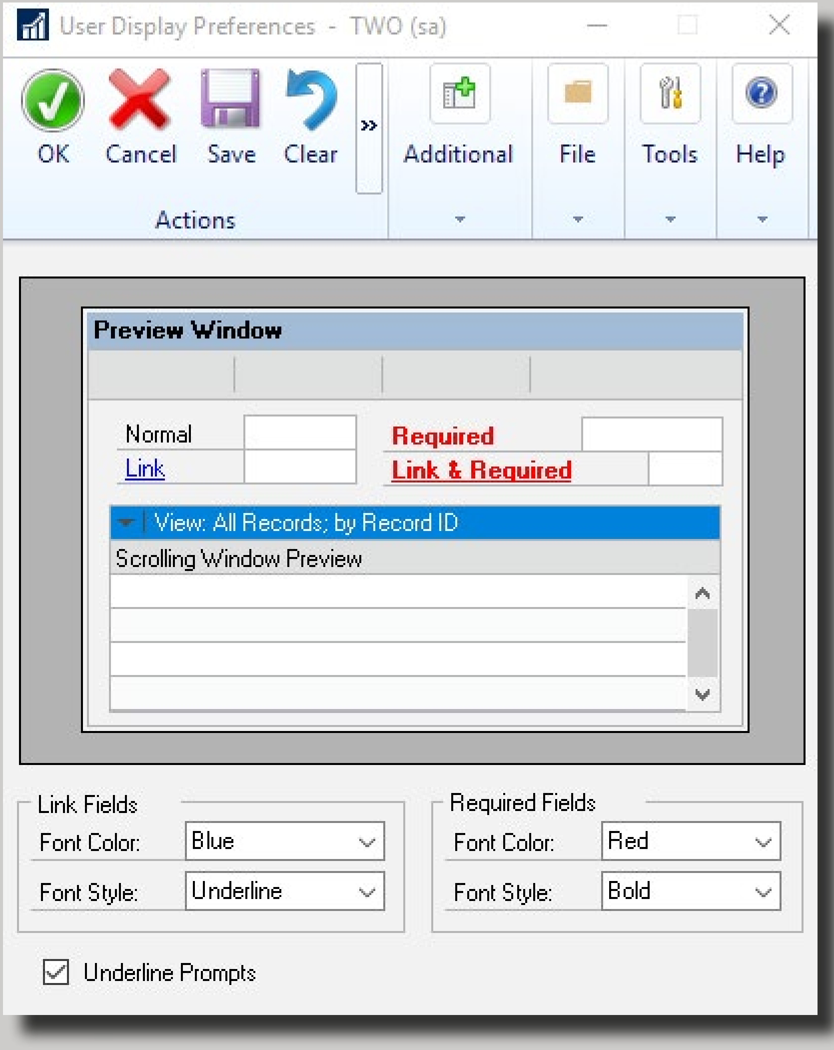
Default Sales Doc Type

Every little bit helps. Have the user update the Default Sales Doc Type field to the document type they use the most. It will save them one extra click each time they enter Sales Order Processing Transactions.



User Display Preferences

Simply change the font color and style, and you can quickly and easily identify **Link** and **Required** Fields.



AutoComplete Setup

Speed up data entry time by simply marking the Show AutoComplete Suggestions in the Auto Complete Setup window (**Microsoft Dynamics GP | User Preferences | AutoComplete**).