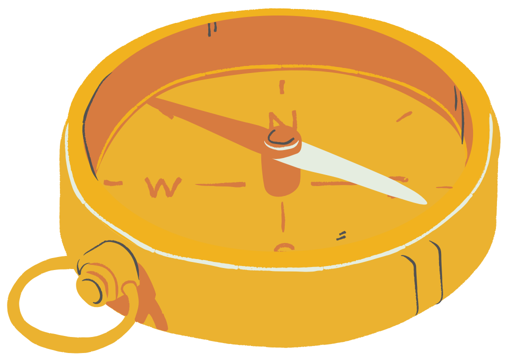


Choose Your Own Adventure

A Dynamics GP Treasure Hunt

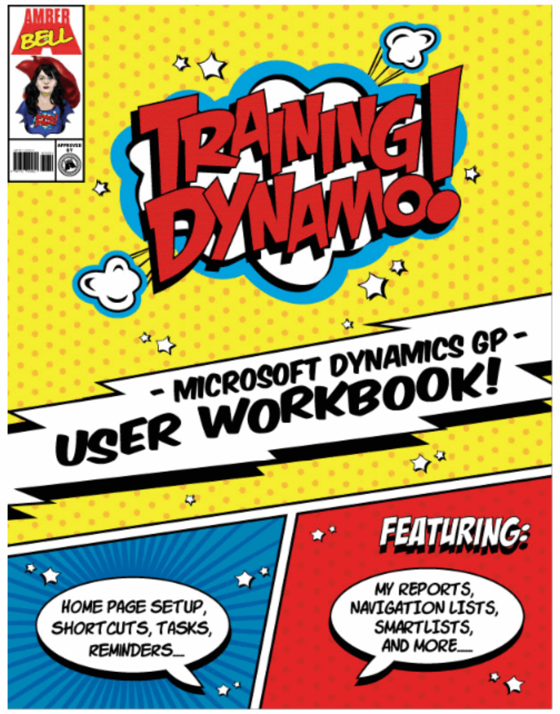
DUG WEBINARS

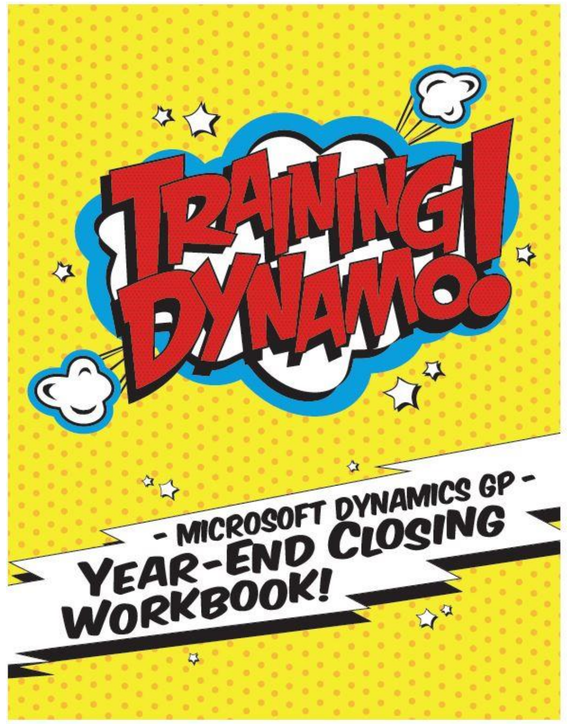
Hosted by MSDW MSDynamicsWorld

AMBER J. BELL

TRAINING DYNAMO, LLC

- Microsoft Dynamics GP consultant for over 20 Years!
- DUG Advisory Board Member
- GPUG All-Star
- **Wrote Microsoft Dynamics GP Year-End Closing Workbook and GP User Workbook!**





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Choose
Your
Own
Adventure

You come to a crossroads…

GO LEFT!

YOU'VE BEEN DOWN THAT ROAD BEFORE…SO NO SURPRISES!

GO RIGHT!

YOUR GUIDE PROMISES IT IS FASTER AND EASIER!

What happens next??

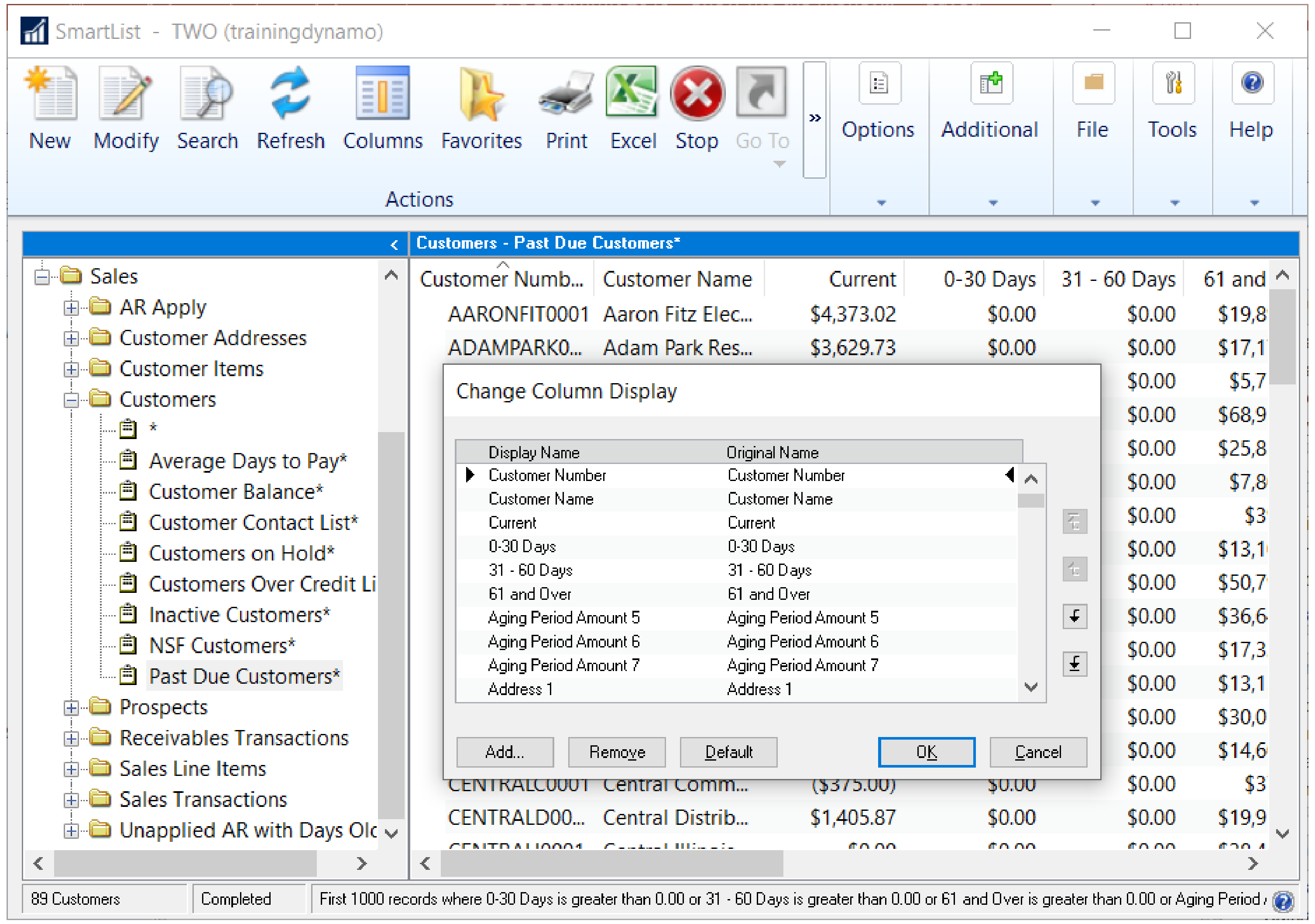
You choose the same old road you are used to…

- You print an AR Aging…and highlight customers that are past due. It works…but you end up staying late and missing Happy Hour with your friends.

You follow your guide and learn a shortcut…

- You use a SmartList to find Past Due customers. You get to Happy Hour on time and your team wins Trivia Night!

SmartList – Past Due Customers*



- Remove
  - Unused Aging Periods.
  - Address Info
- Add
  - Customer Balance
  - Last Payment Date
  - Last Payment Amount
- Save as a Reminder

Choose your destination…

DESERT!

THINGS MIGHT GET TOUGH…BUT WILL YOU FIND A TREASURE?

BEACH!

SEEMS LIKE THE BEST CHOICE…BUT IS IT TOO EASY?

What happens next??

You fill up your favorite water bottles and head to the desert

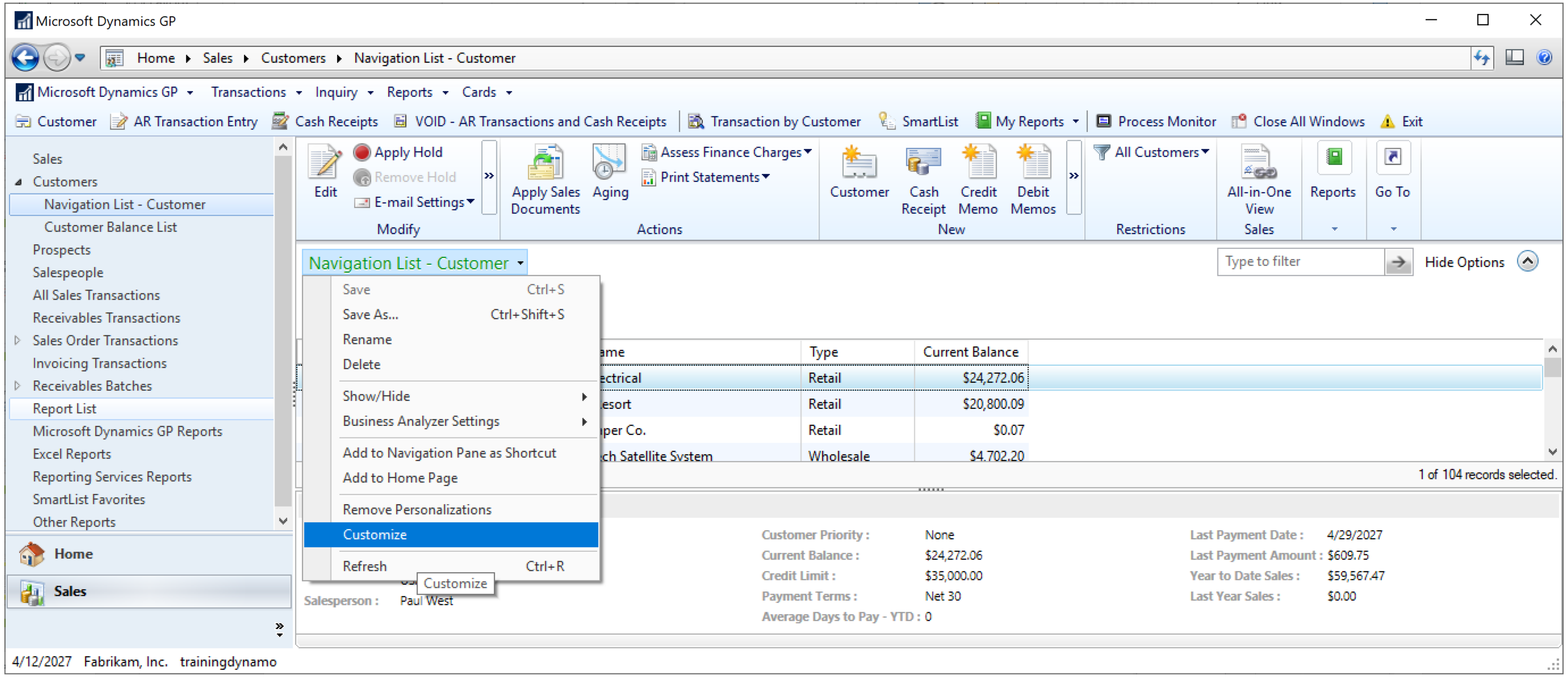
- You learn how to use Navigation Lists to keep on track and find an oasis!

You decide to head to the beach! But you forgot your SPF

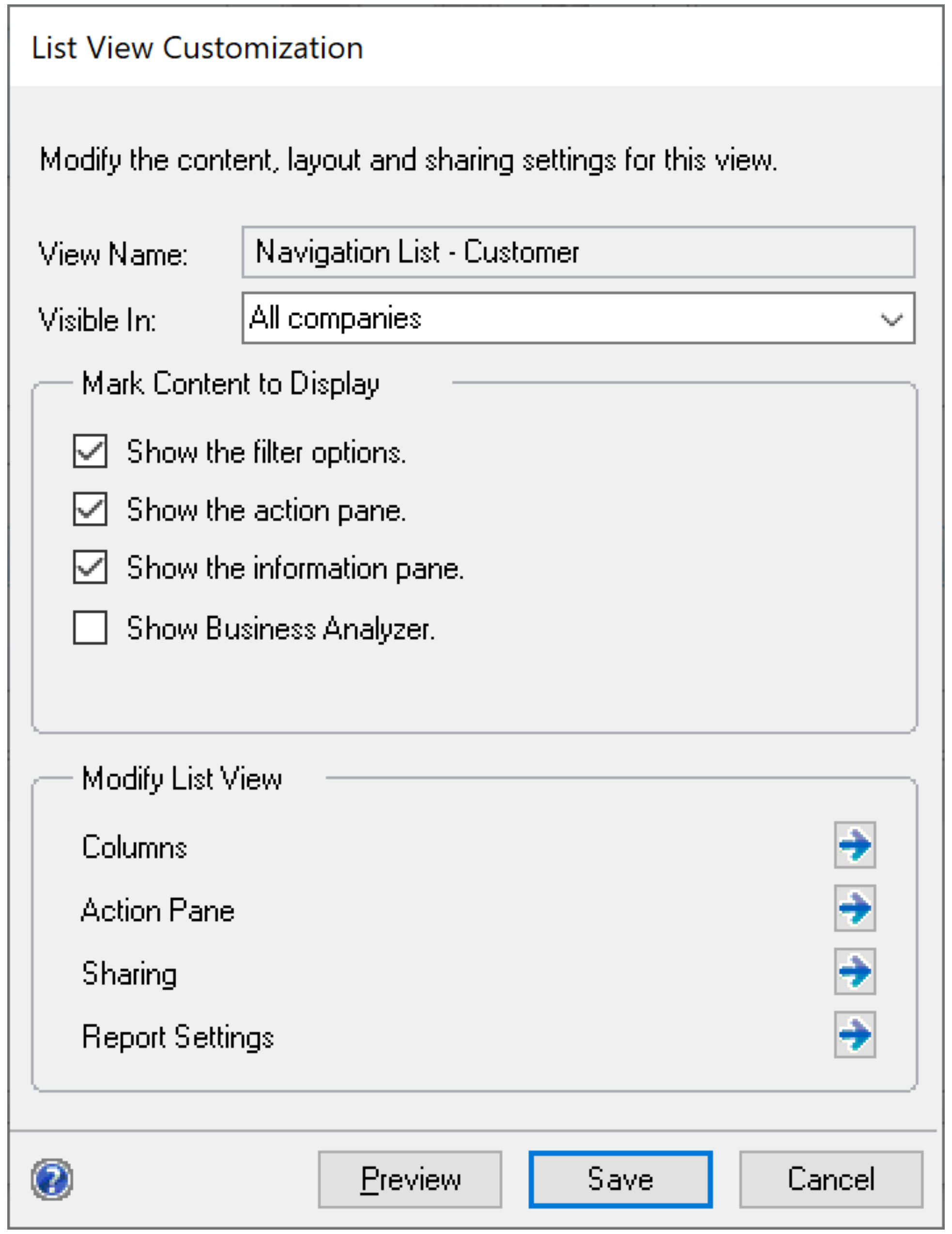
- You ran a Utility without testing or a backup! You got burned! Time to call your partner to help rescue your data!

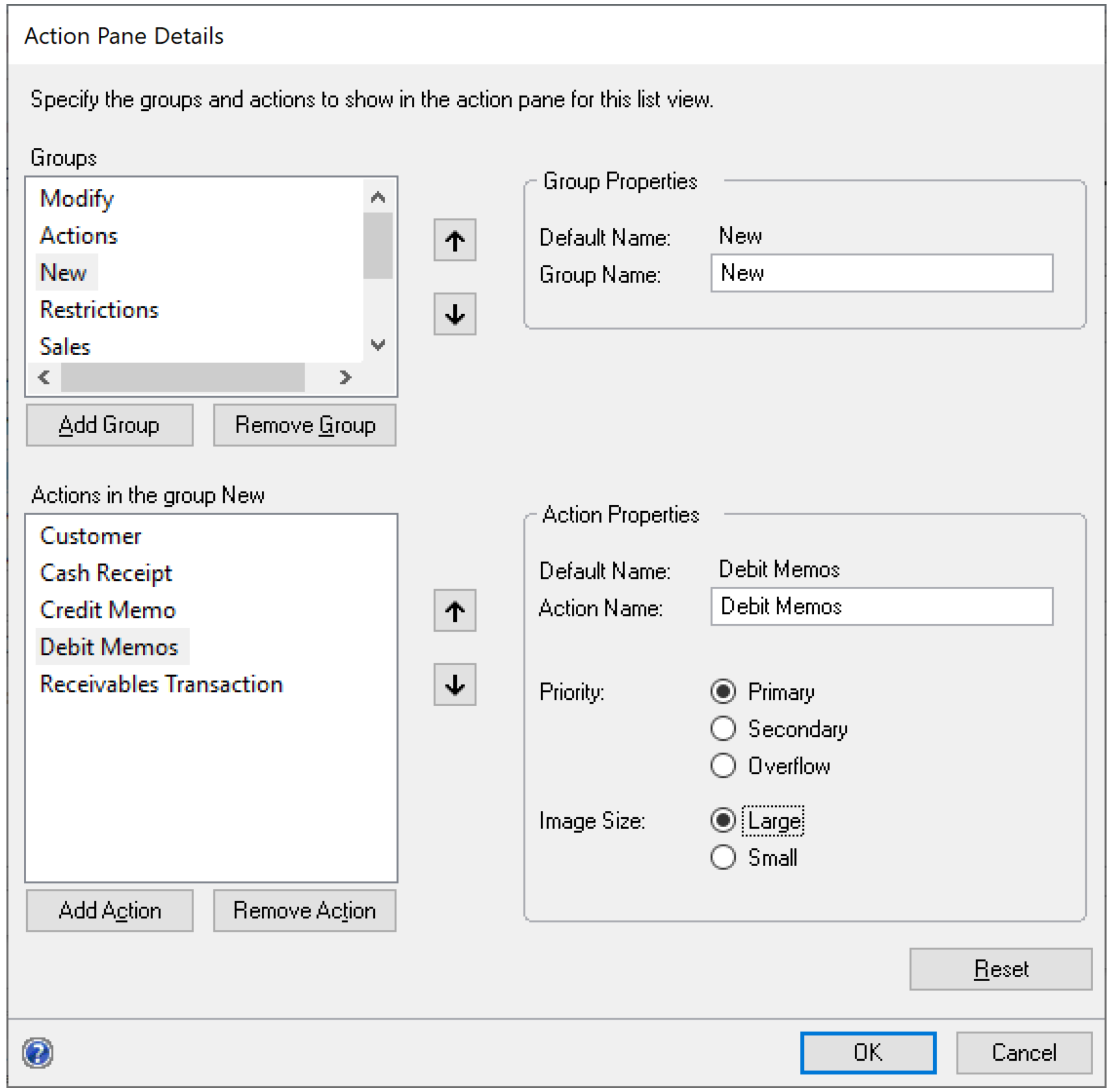
Use/Change your Navigation List!

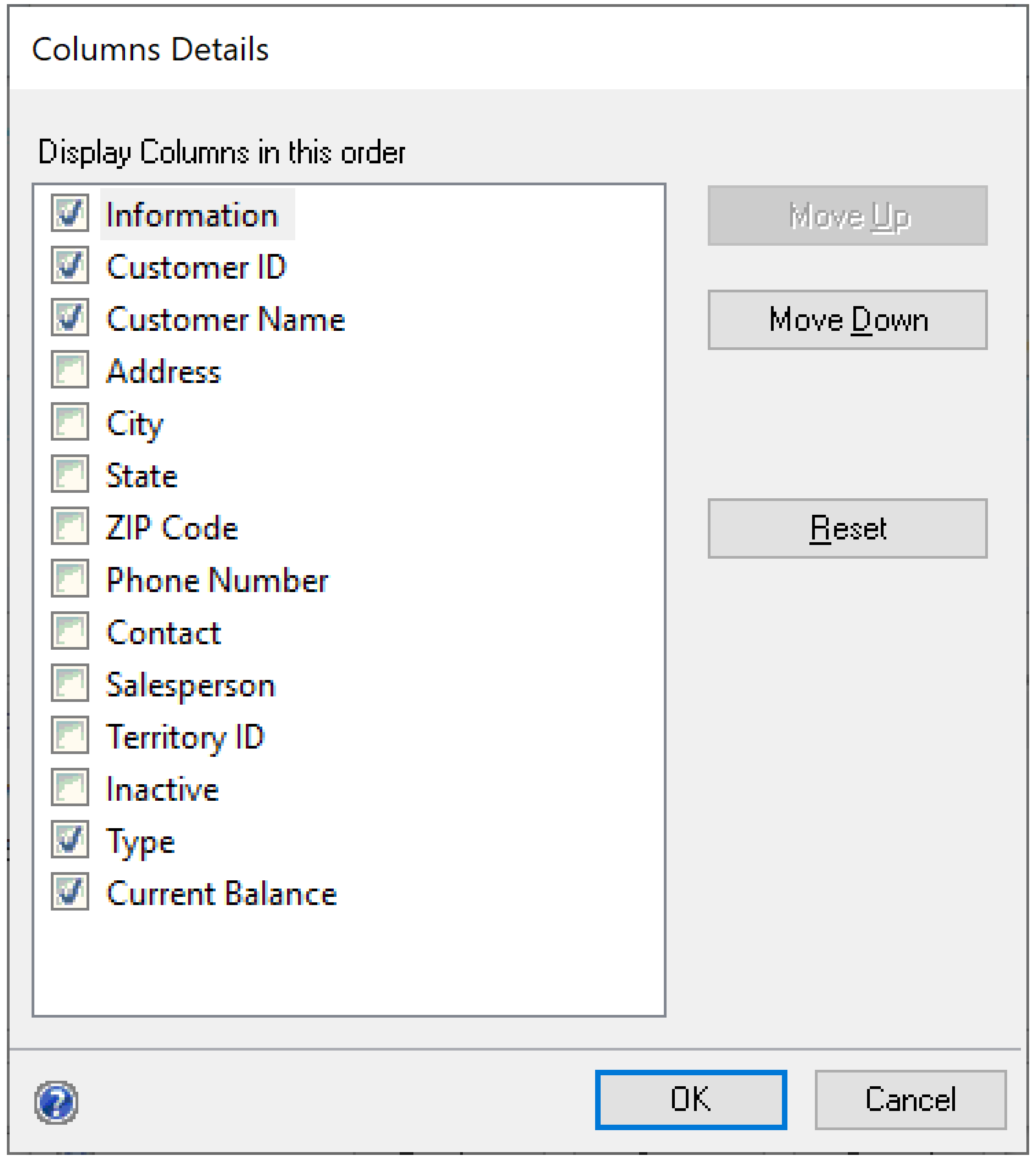
- Save As – Customize
- Modify Columns Listed
- Apply Custom Actions
- Share with Users



Customizing Navigation Lists







Create Customized Navigation List Views

- You must "Save" before you can add columns
- Add Salesperson
- Add Balance
- Remove Unnecessary Columns

Why Use Navigation Lists?

- Preview Pane will show you the last payment date.
- You can check the box by specific Customers to print a filtered Aging Report.
- It's all about the ACTIONS!
    - Manage HOLDS
    - Apply Credits and Payments
    - Create New Transactions
    - Print/Email Statement
    - Reprint/Email Invoices

You see a crowd in the distance...

RUN!

THEY MIGHT TAKE YOUR SUPPLIES!

GET CLOSER!

CHECK THEM OUT...MAYBE THEY CAN HELP...

What happens next??

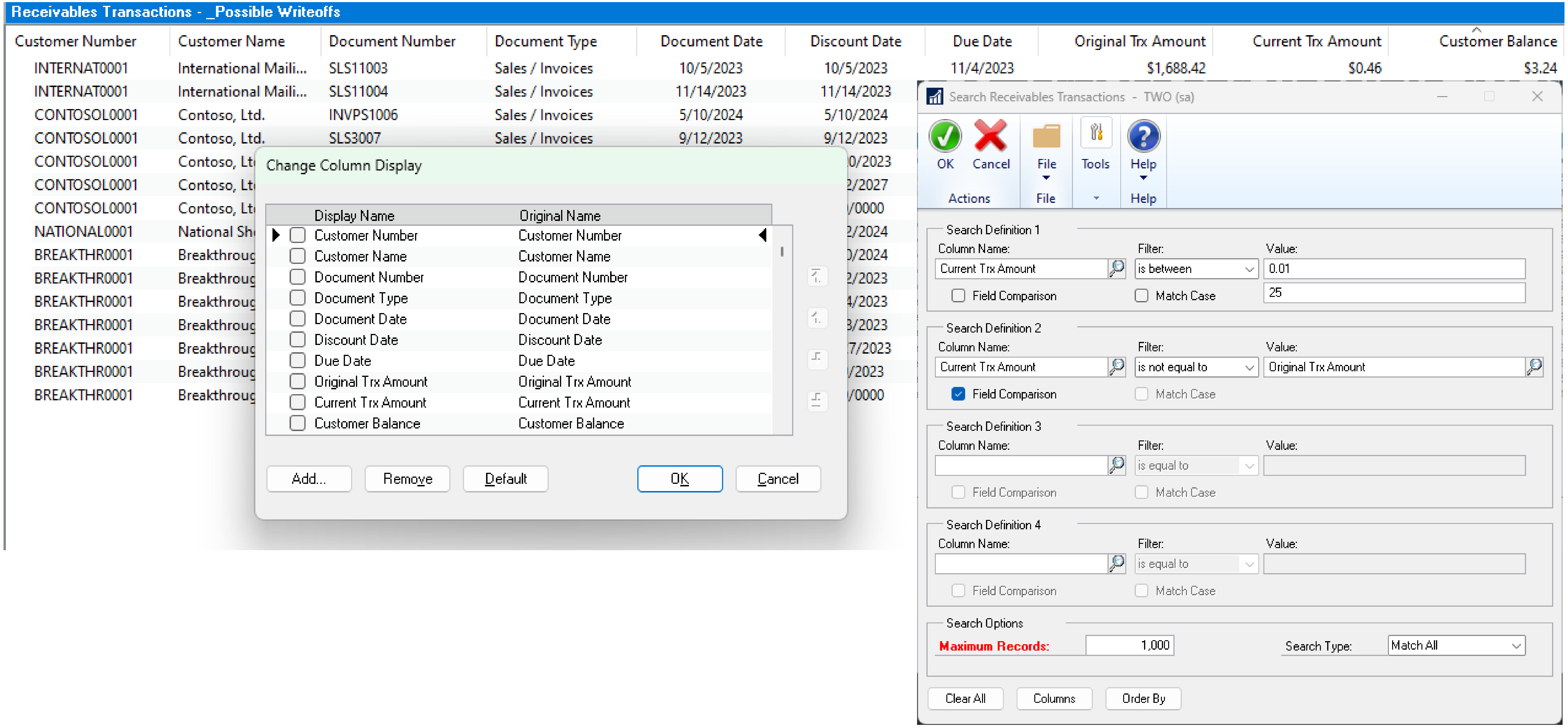
You Run! You trip on a little branch…and sprain your ankle

- If you avoid researching and cleaning up wacky data…one day something small will trip you up and cost way more to fix.

You get a closer look! Turns out it was an optical illusion!

- Research your issues and clean up as much as you can! Writeoff small AR balances so you can concentrate on your real problem customers!

Create SmartList for Possible AR Writeoffs



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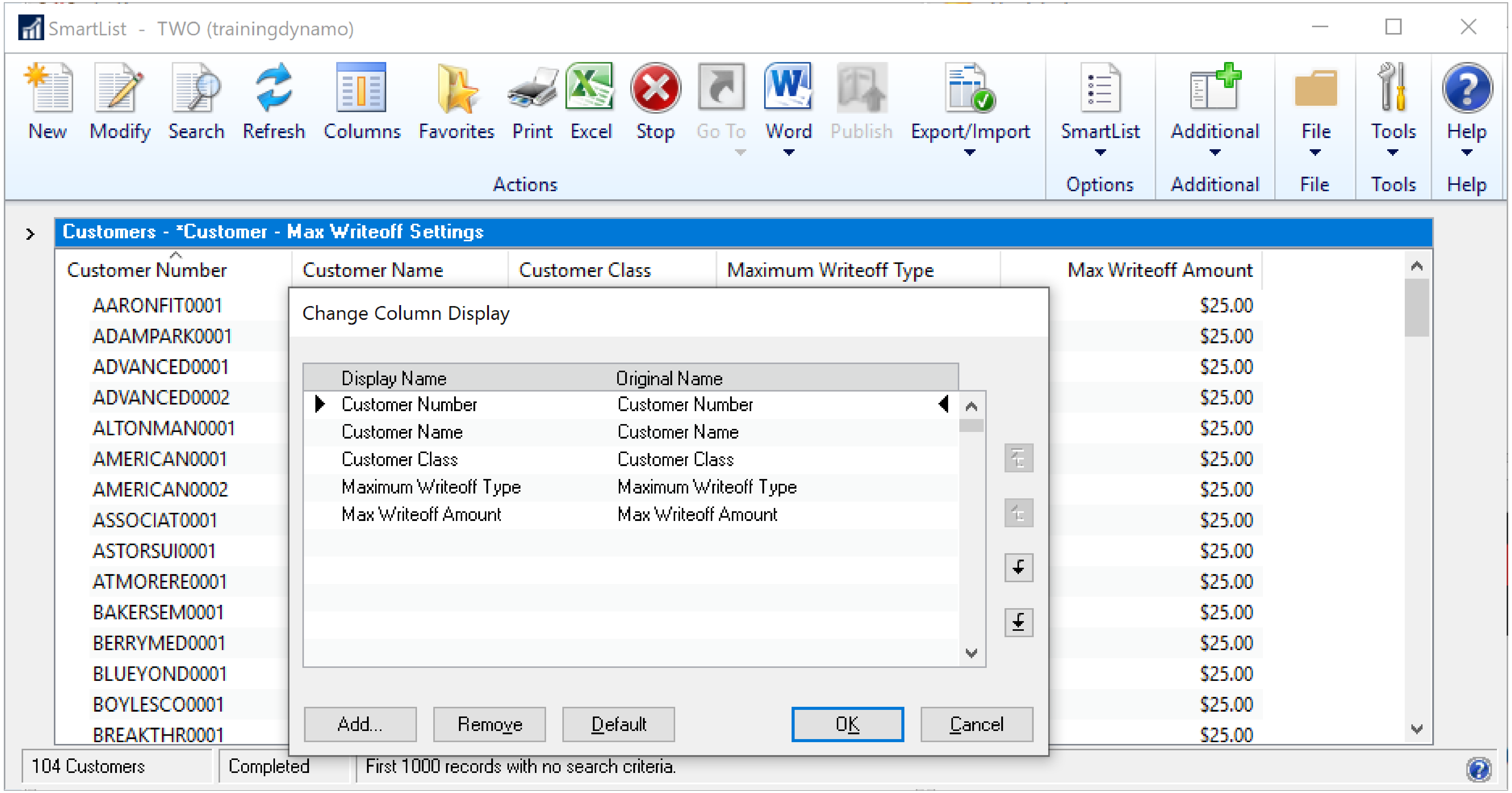
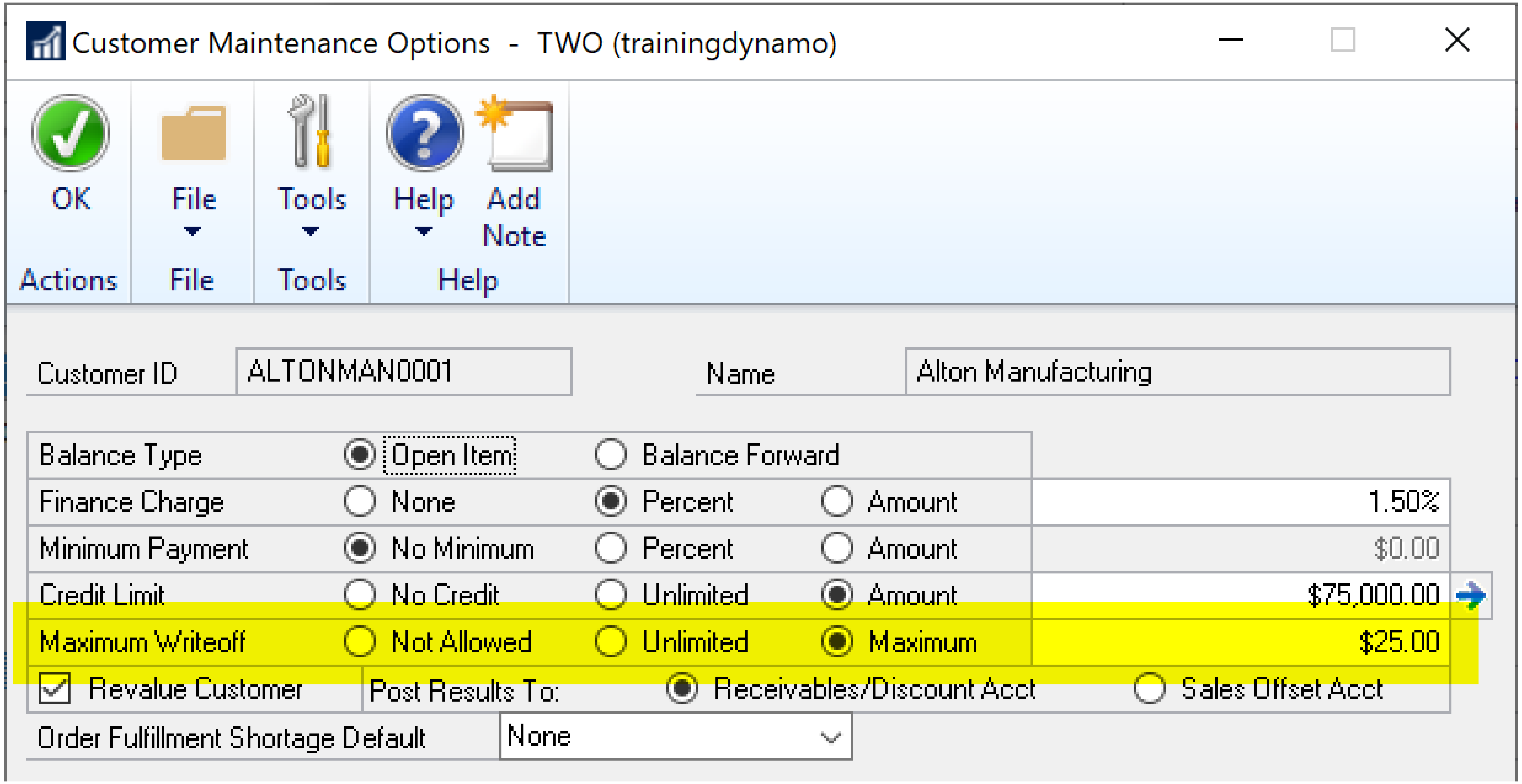
Review Customer Writeoff Settings



Option 1 – Update 1 Customer at a Time



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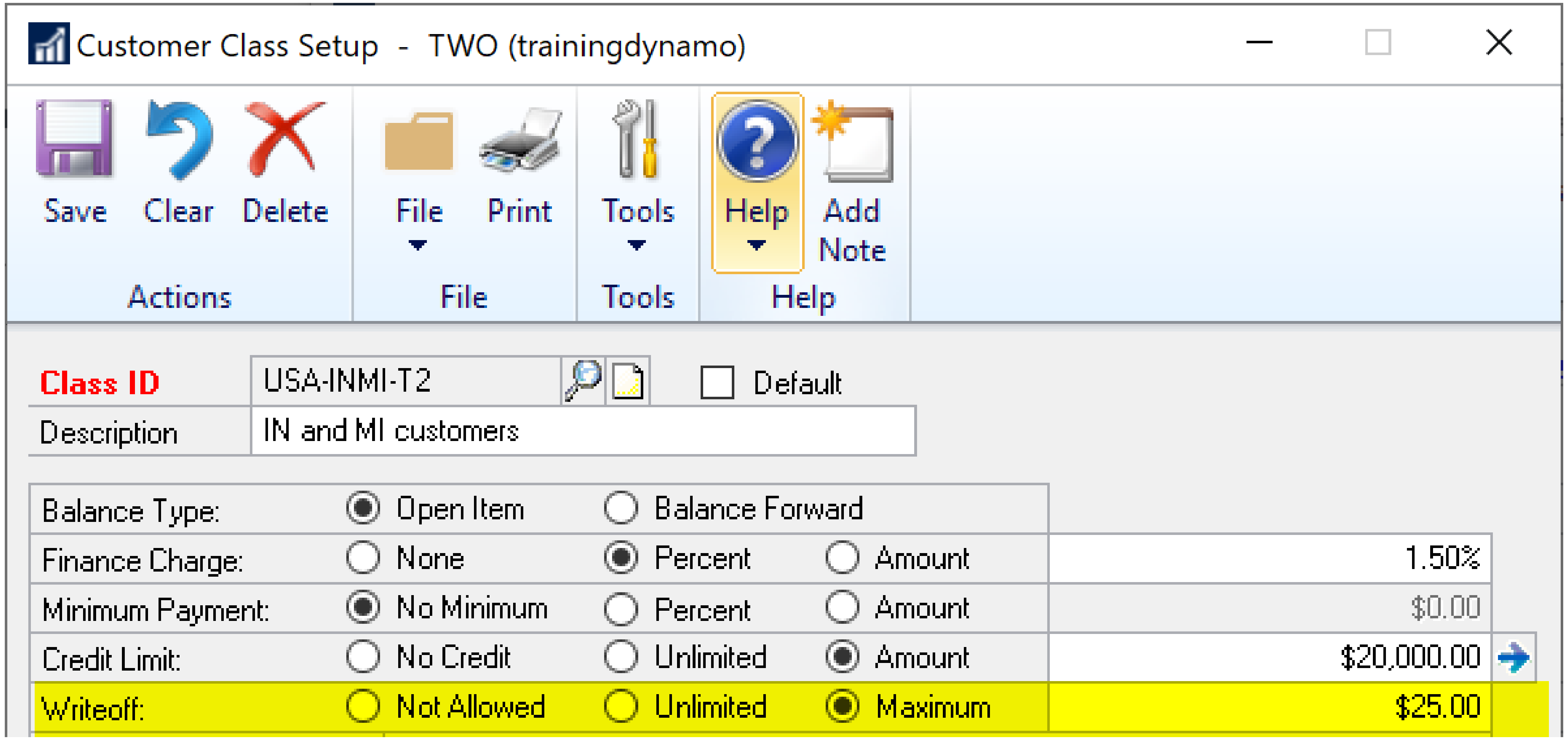
Option 2 – Update Customer Class



Option 3 - Save the Day with Macros!

- Macro Replicator by John Arnold – FREE
  - John presented this at last year's GPUG Summit
  - You can watch a webinar about it here: http://bit.ly/JohnArnoldMacro
  - You can download here: http://www.Rnoldz.com/replicator

AutoSave Off | Replicator.xlsm - Excel | Amber Bell

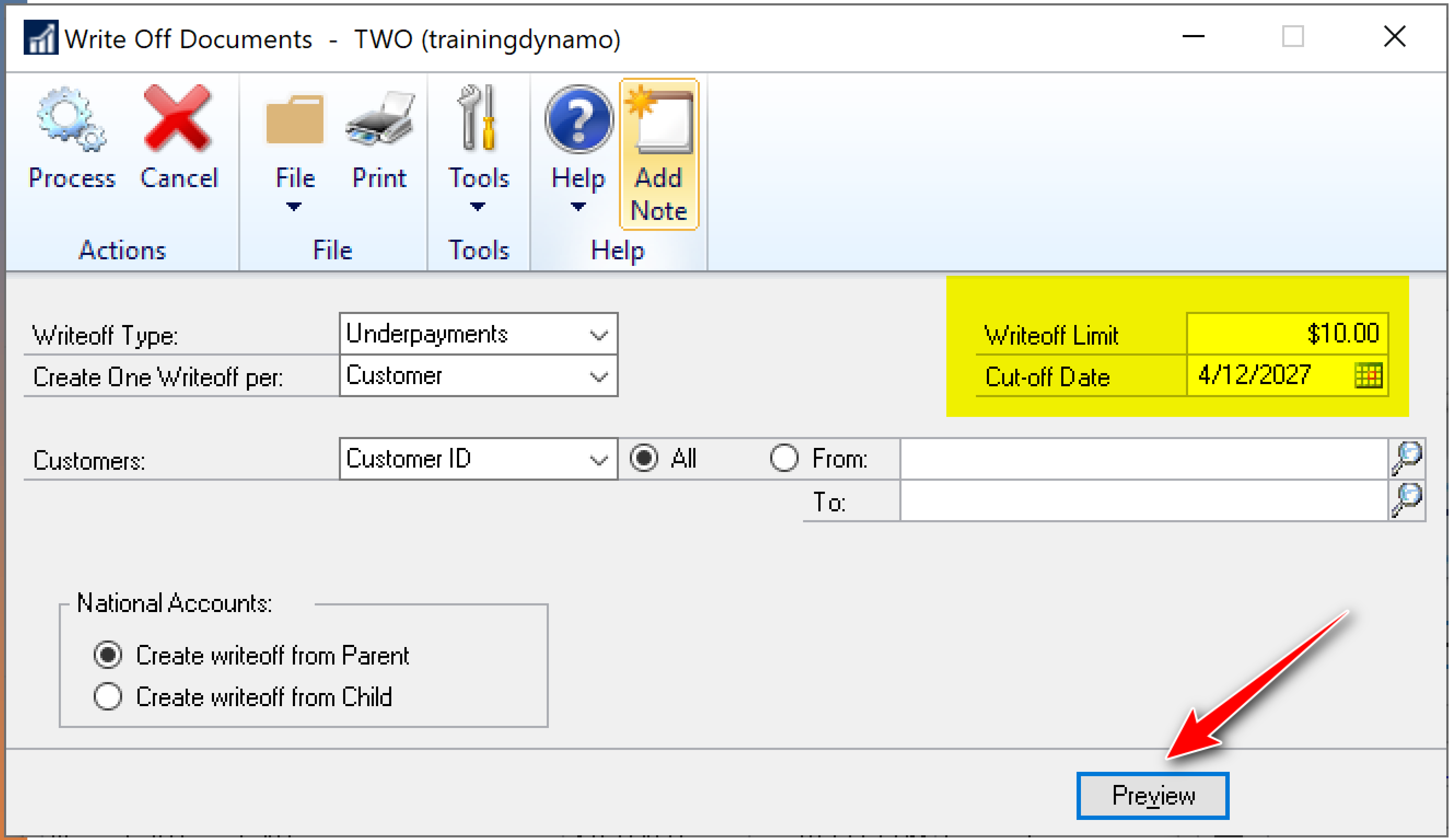
File | Home | Insert | Draw | Page Layout | Formulas | Data | Review | View | Developer | Help | QuickBooks | Table Design | Search | Share | Comments

A18 | TypeTo field 'Max Writeoff Amount' , '1000'

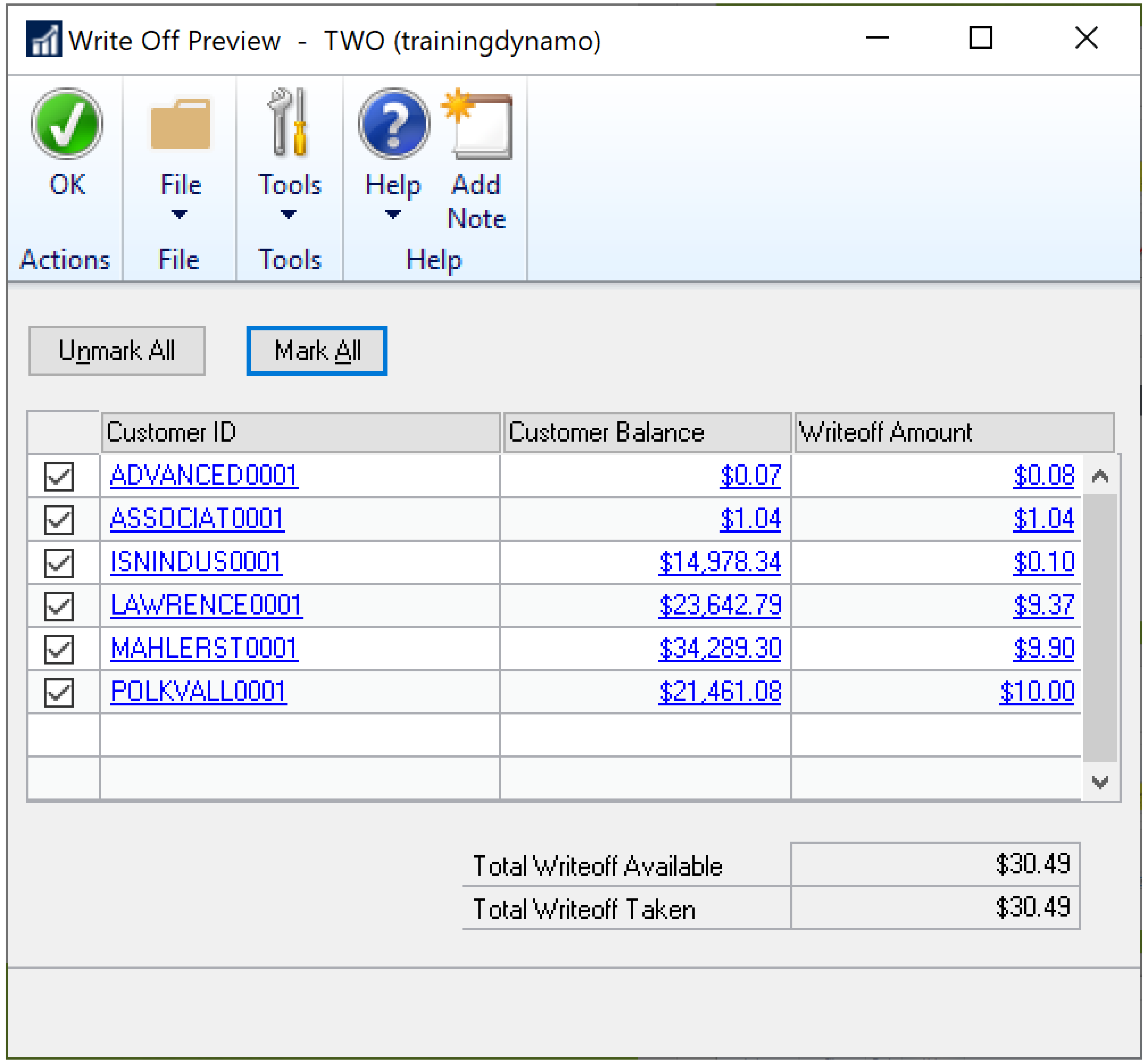
	A	B	C	D	E
1	Import Macro File... / Replicate... / Clear Macro... / Clear Data... / Reset Data... / ?		Header Rows:		The number of rows that should appear only once (at the t
2			Filter Column:		Only rows in this column that are equal to TRUE in the Dat
3			Max {RecordNumber}:	3	Leave blank for no maximum or set to the number of rows
4	Update the text in Macro Lines with {DataColumnName} or {RecordNumber} everywhere data is to be replaced.		Replicated Macro File:	- 2019\CustAutoWriteoff_10.mac	The default filename for the Replicated macro
5	Macro Lines from: C:\Users\Owner\Training Dynamo, LLC Dropbox\Amber Bell\Training Dynamo\GPUG\GPUG Summit -		Replace DataTable...		
6	# DEXVERSION=18.00.0015.000 2 2				
7	CommandExec dictionary 'default' form 'Command_Sales' command 'RM_Customer_Maintenance'		Data Table: The macro will be repeated 24 times.		
8	NewActiveWin dictionary 'default' form 'RM_Customer_Maintenance' window 'RM_Customer_Maintenance'		Customer Number		
9	TypeTo field 'Customer Number' , '{Customer Number}'		ADAMPARK0001		
10	MoveTo field Hold # 'FALSE'		ADVANCED0001		
11	MoveTo field 'Options Button'		ADVANCED0002		
12	ClickHit field 'Options Button'		ALTONMAN0001		
13	NewActiveWin dictionary 'default' form 'RM_Customer_Maintenance' window 'RM_Customer_Options'		AMERICAN0001		
14	MoveTo field 'Maximum Writeoff Type' item 2 # 'Maximum'		AMERICAN0002		
15	ClickHit field 'Maximum Writeoff Type' item 0 # 'Not Allowed'		ASSOCIAT0001		
16	ClickHit field 'Maximum Writeoff Type' item 2 # 'Maximum'		ASTORSUI0001		
17	MoveTo field 'Max Writeoff Amount'		ATMORERE0001		
18	TypeTo field 'Max Writeoff Amount' , '1000'		BAKERSEM0001		
19	CommandExec dictionary 'default' form 'RM_Customer_Maintenance' command 'OK Button_w_RM_Customer_Options_f_RM_Custo		BERRYMED0001		
20	NewActiveWin dictionary 'default' form 'RM_Customer_Maintenance' window 'RM_Customer_Maintenance'		BLUEYOND0001		
21	CommandExec dictionary 'default' form 'RM_Customer_Maintenance' command 'Save Button_w_RM_Customer_Maintenance_f_RM		BOYLESCO0001		
22	CloseWindow dictionary 'default' form 'RM_Customer_Maintenance' window 'RM_Customer_Maintenance'		BREAKTHR0001		
23	NewActiveWin dictionary 'default' form sheLL window sheLL		CASTLEIN0001		
24			CELLULAR0001		
25			CENTERSU0001		
26			CENTRALC0001		
27			CENTRALD0001		
28			CENTRALI0001		
29			COHOWINE0001		
30			COMMUNIC0001		
31			COMMUNIC0002		
32			COMPUTEC0001		

Visit:
http://www.rnoldz.com/replicator/
to download.

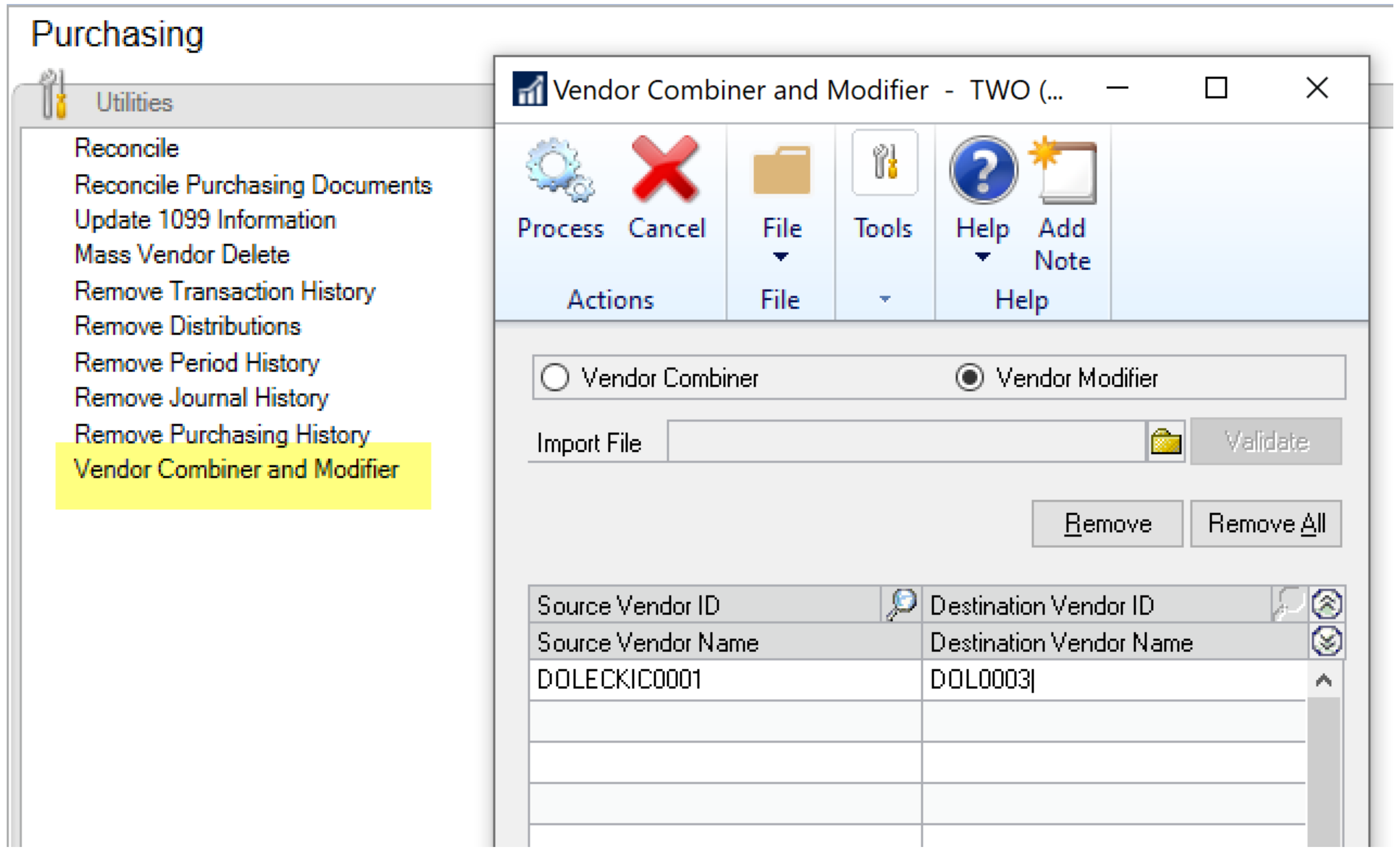
Writeoff Small Balances



Sales > Routines > Write Off Documents



Customer/Vendor Modifier



- Backup first!
- If you have more than a couple, make a list in Excel
  - Column 1 – Original ID
  - Column 2 – Destination ID
- Steps to Import
  - Save as CSV
  - Look up file
  - Click Validate
  - Click Process

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