

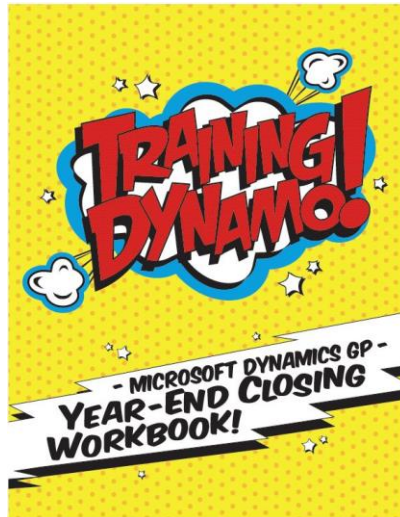
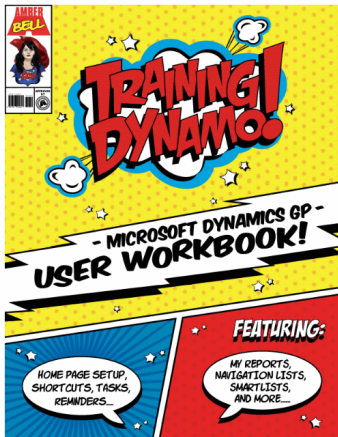
# GP USER TO GP SUPERHERO



# AMBER J. BELL

## TRAINING DYNAMO, LLC

- **Microsoft MVP!**
- Over 20 years of Microsoft Dynamics GP experience with customers across the USA!
- DUG Advisory Board Member
- GPUG All-Star
- **Authored 2 GP Workbooks**





***SmartList Options  
vs.  
Field Level Security***

# What will you choose?

## Field Level Security

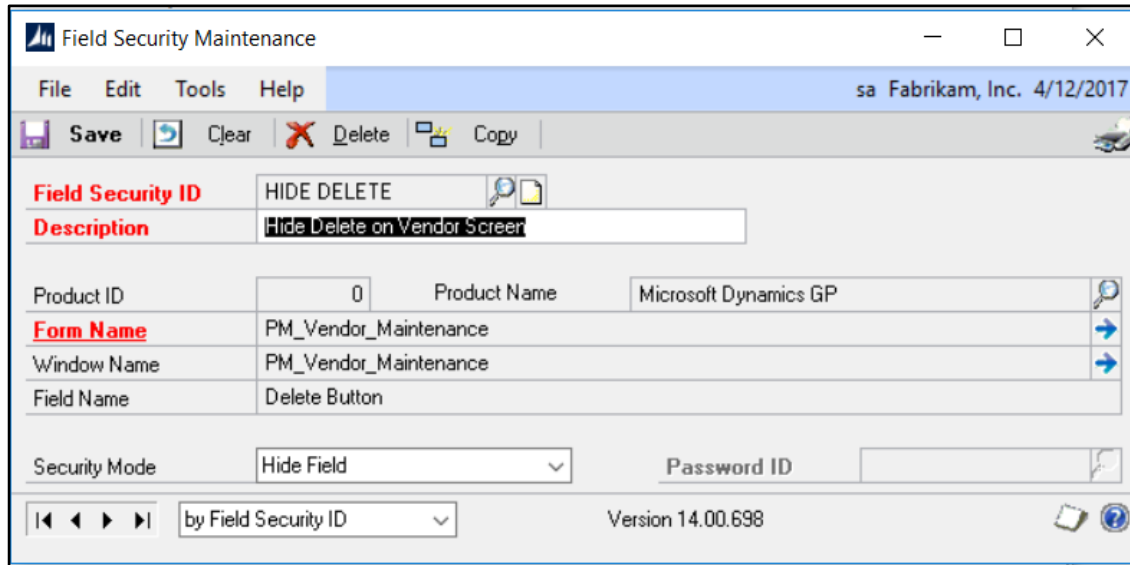
- Hide Fields
- Require password to change
- Disable Fields
- Assigning to Users

## SmartList Options & System Options

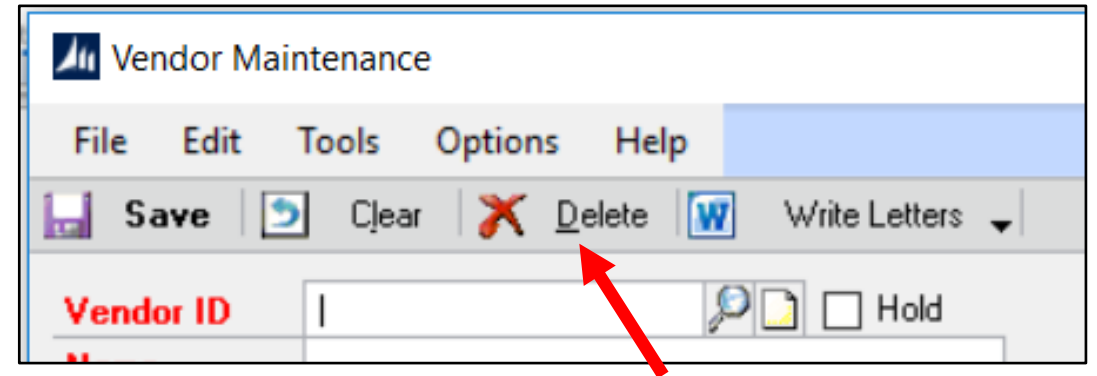
- Default Maximum Records
- Default Columns
- Default “Go To”
- Default Password & Visibility
- Bonus System Settings!



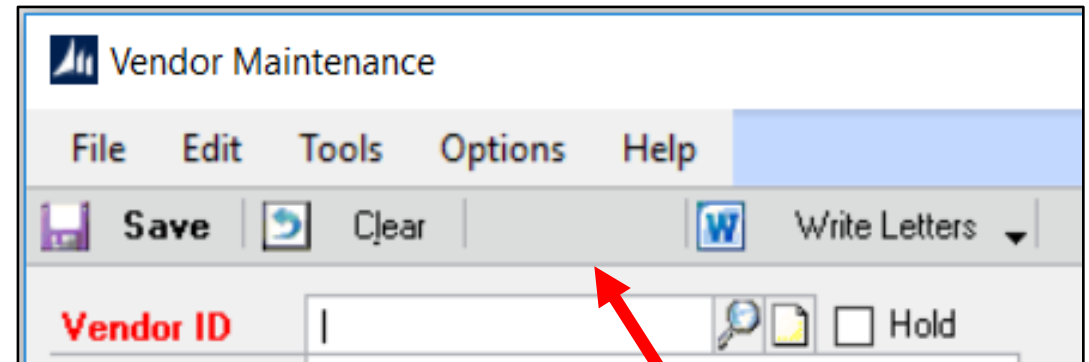
# Field Level Security



Before:



After:



Administration > Setup > System > Field Level Security



# Assign User Classes

<b>User ID</b>	margaret	Status	Active
<b>User Name</b>	Margaret Malloy	User Type	Full
<b>Class ID</b>	AP CLERK		
<input type="checkbox"/> Web Client user only (no SQL Server Account)			
SQL Server Account		Directory Account	
SQL Server Account	margaret		
Password	.....		
Confirm Password	.....		
<input type="checkbox"/> Advanced SQL Server options			

User Class Setup - TWO (sa)						
Save	Delete	Additional	File	Print	Tools	Help
Actions		Additional	File			Help
<b>Class ID</b>	AP CLERK					
<b>Description</b>	Enter Invoices					
<< < > >>						

**SETUP: ADMINISTRATION > SETUP > USER CLASSES**

**ASSIGN: ADMINISTRATION > SETUP > USER**



# Why Use Classes?

- SmartList Favorites can be limited to specific Classes
- Field Level Security can be assigned by class

The screenshot shows a window titled "User Class Setup - TWO (sa)". The menu bar includes: Save, Delete, Additional, File, Print, Tools, Help, and Add Note. Below the menu bar is a data entry form with the following fields:

<b>Class ID</b>	AP CLERK				<input type="checkbox"/>	Default
<b>Description</b>	Enter Invoices					

At the bottom of the window, there are navigation buttons: a vertical bar, a left arrow, a right arrow, and a vertical bar.

# SmartList Options

ADMINISTRATION > SETUP > SYSTEM > SMARTLIST OPTIONS

SmartList Options - TWO (sa)

OK Cancel Additional File Tools Help

Actions Additional File Help

Category Defaults

Category: Accounts

Default Go To: View

Maximum Records: 1,000

Account Number

Account Description

Posting Type

Account Category Number

Main Account Segment

Account Index

Account Alias

Segment1

Segment2

Mark All Unmark All Default

The selections below will impact all SmartList Favorites:

Search Defaults

Mark the Match Case checkbox by default when performing searches.

Enable the Match Case checkbox on the SmartList Search window.

Password

Modify Smartlist Favorite NOPE





# System Preferences

ADMINISTRATION > SETUP > SYSTEM > SYSTEM PREFERENCES

Options

- Load To Do: Reminders by default on Home Page
- Enable Remember User
- Default SmartList Visibility:

Send Users Message

- Enable Notification Message
- Frequency to check for Notification Messages (in Minutes)

Business Analyzer

- Display Business Analyzer on Home page
- Display Business Analyzer on Navigation List pages





***SmartList Export Solutions  
Vs.  
Excel Reports***

# What will you choose?

## SmartList Export Solutions

- Create template in Excel or Word that connects to SmartList Favorites.
- Automatically Format
- Automatically Add Formulas

## Excel Reports

- How to enable Excel Reports
- Accessing Excel Reports
- Creating Pivot Tables
- Adding Slicers

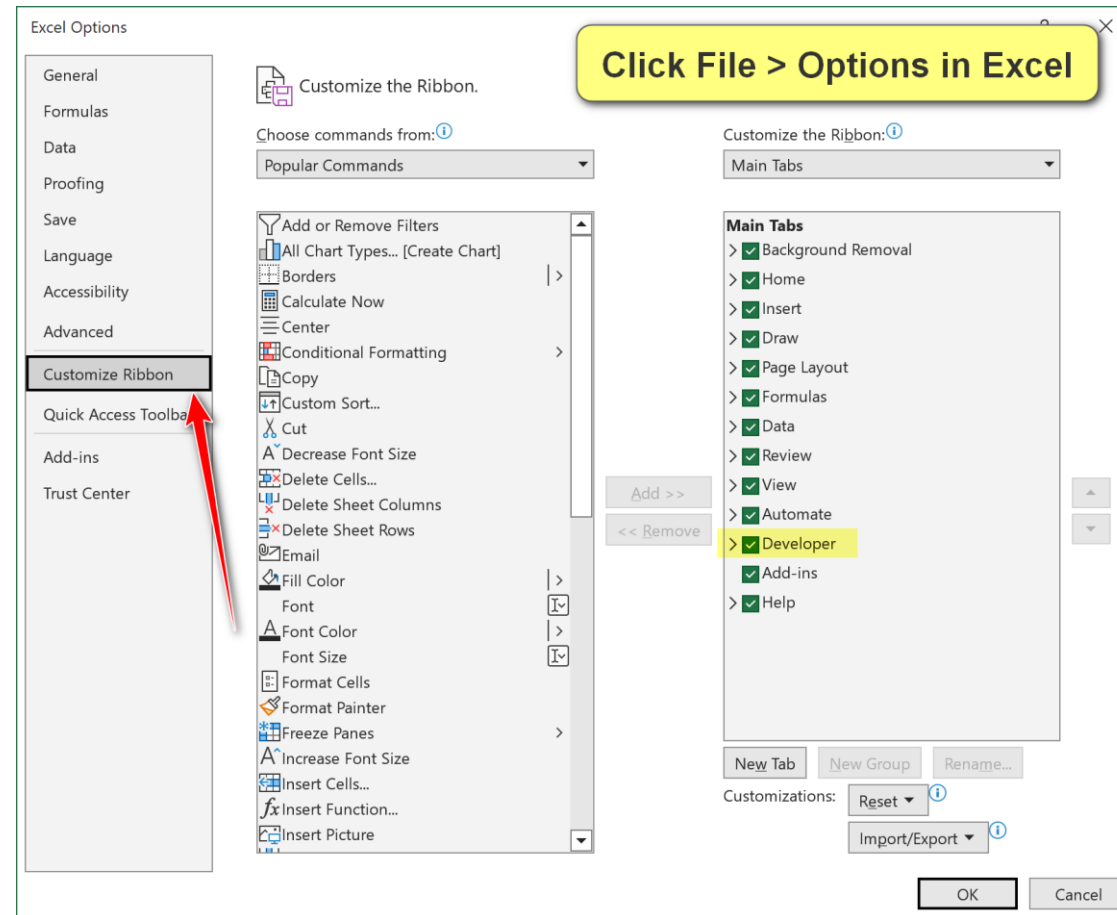


# Creating SmartList Export Solutions

- **In Excel:** *File > Options > Customize Ribbons > Check Developer Ribbon*
- **In GP:**
  - **Create:** SmartList Favorite
  - **Save:** Favorite
  - **Export:** To Excel
- **In Excel:**
  - **Record:** Macro(s)
  - **Save File As:** Macro Enabled Template
    - ✓ **Tip:** If you receive an error *Document Not Found*, the number of characters in the path to your file + the file name is too long. Move the Excel Macro Enabled Template to another folder and/or shorten the name.
- **In GP:** *SmartList > SmartList > Export Solutions*
  - **Assign:** Macros



# Step 1: Enable “Developer” Ribbon in Excel



# Step 2: Export to Excel

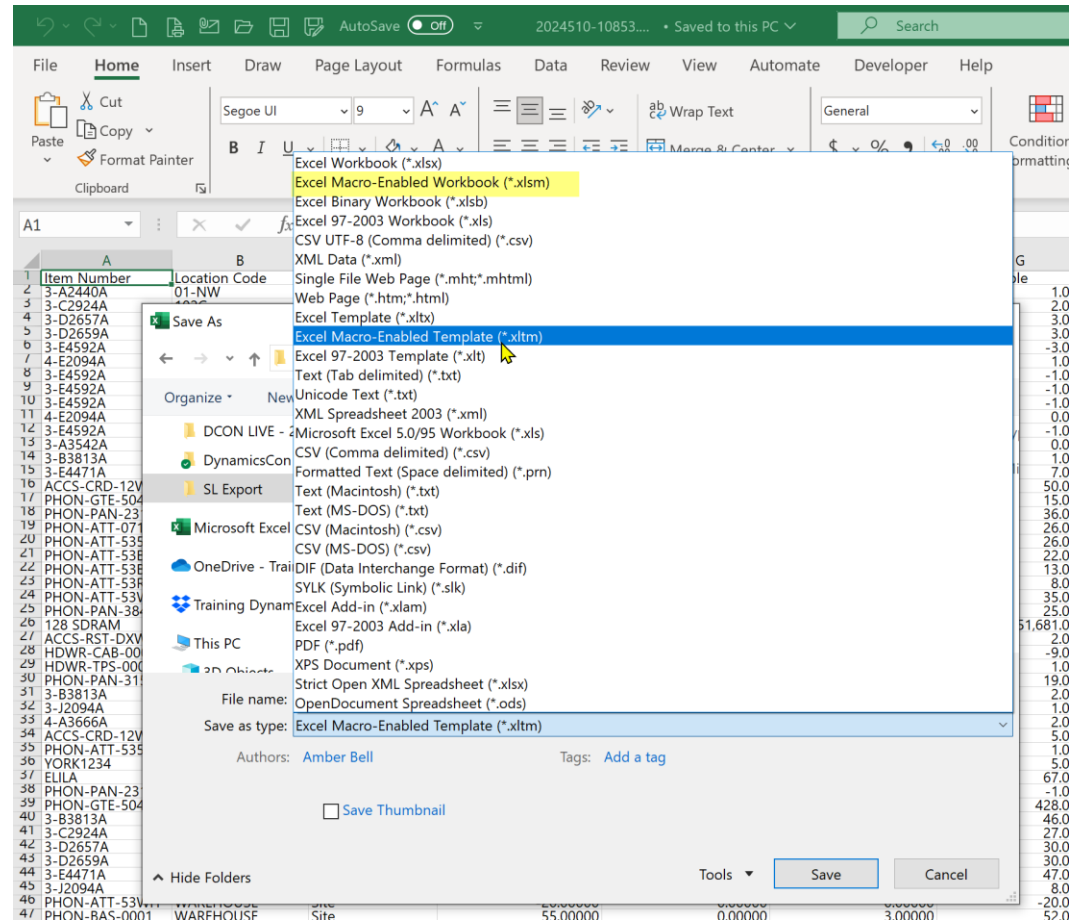
SmartList - TWO (sa)

Actions

Item Number	Location Code	Record Type	QTY On Order	QTY On Hand	QTY Allocated
1-A3261A	01-N	Site	0	0	0
1-A3483A	01-N	Site	0	0	0
100XLG	01-N	Site	0	0	0
128 SDRAM	01-N	Site	0	0	0
1GPROC	01-N	Site	0	0	0
2-A3284A	01-N	Site	0	0	0
24X IDE	01-N	Site	0	0	0



# Step 3: Save as Macro Enabled Template or Workbook



# Record a Macro in Excel

- Add Subtotals
- Format Page
- Add filters

Note: Adding totals vs. using the Subtotal feature requires using VBA





# Recording a Macro

The screenshot shows the Microsoft Excel interface with the Developer tab selected. The Record Macro button is highlighted with a red arrow. The Record Macro dialog box is open, showing the following fields:

- Macro name: Format
- Shortcut key: Ctrl+ [empty]
- Store macro in: This Workbook
- Description: [empty]

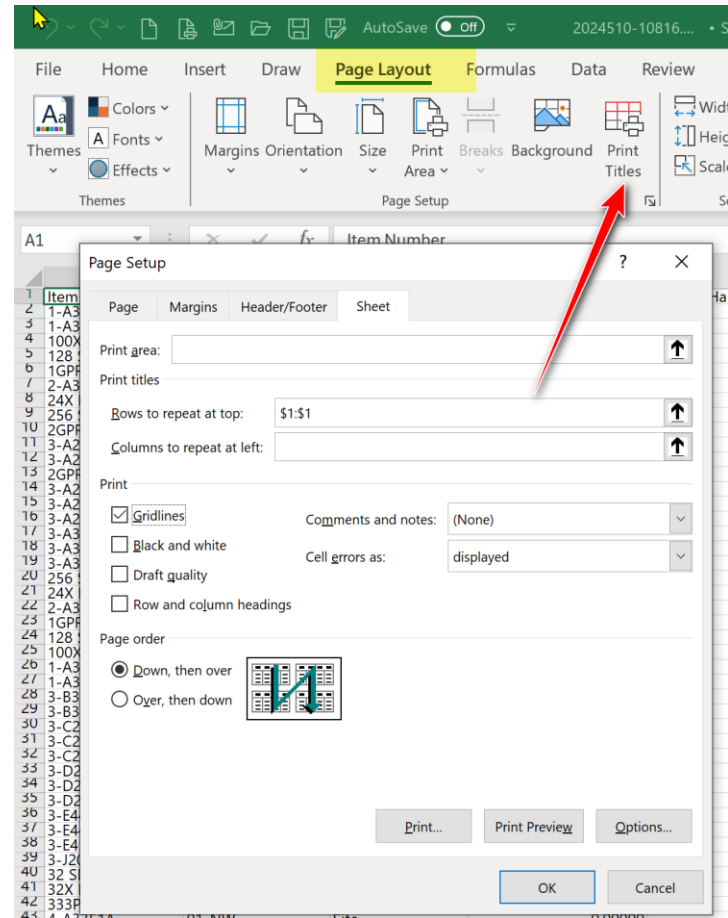
The background spreadsheet contains the following data:

Item Number	Location Code	QTY Allocated	QTY Available	QTY Back Ordered
3-A2440A	01-NW	0.00000	0.00000	1.00000
3-C2924A	102G	0.00000	3.00000	2.00000
3-D2657A	102G	0.00000	2.00000	3.00000
3-D2659A	102G	0.00000	0.00000	0.00000
3-E4592A	107G	0.00000	0.00000	0.00000
4-E2094A	112B	0.00000	0.00000	0.00000
3-E4592A	115G	0.00000	0.00000	0.00000
3-E4592A	122G	0.00000	0.00000	0.00000
3-E4592A	126G	0.00000	0.00000	0.00000
4-E2094A	127B	0.00000	0.00000	0.00000
3-E4592A	127G	0.00000	0.00000	0.00000
3-A3542A	DEPOT	0.00000	0.00000	0.00000
3-B3813A	DEPOT	0.00000	0.00000	0.00000
3-E4471A	DEPOT	0.00000	0.00000	0.00000
ACCS-CRD-12WH	DEPOT	0.00000	0.00000	0.00000
PHON-GTE-5043	NORTH	0.00000	0.00000	0.00000
PHON-PAN-2315	NORTH	0.00000	0.00000	0.00000
PHON-ATT-0712	NORTH	0.00000	0.00000	0.00000
PHON-ATT-5354	NORTH	0.00000	0.00000	0.00000
PHON-ATT-53BK	NORTH	0.00000	0.00000	0.00000
PHON-ATT-53BL	NORTH	0.00000	0.00000	0.00000
PHON-ATT-53RD	NORTH	0.00000	0.00000	0.00000
PHON-ATT-53WH	NORTH	0.00000	0.00000	0.00000
PHON-PAN-3848	NORTH	0.00000	0.00000	0.00000
128 SDRAM	NORTH	0.00000	0.00000	0.00000
Site		25.00000		
Site		51,681.00000		

Write down the name(s) of the macros you record.  
Tip: Name Macro #1 "Format"



# Format Data and Page Setup



# Create the Export Solution

SmartList - TWO (sa)

New Modify Search Refresh Columns Favorites Print Excel Word Stop Go To Publish Export/Import SmartList Additional File Tools Help

Actions

> Item Quantities - \_Item Quantities (On Hand)

Item Number	Location Code	Record Type	QTY On Hand	QTY On Order	QTY Back Ordered
3-A2440A	01-NW	Site	1	0	
3-C2924A	102G	Site	5	0	
3-D2657A	102G	Site	5	0	
3-D2659A	102G	Site	5	0	
3-E4592A	107G	Site	(3)	0	
4-E2094A	112B	Site	2	0	
3-E4592A	115G	Site	(1)	0	
3-E4592A	122G	Site	(1)	0	
3-E4592A	126G	Site	(1)	0	
4-E2094A	127B	Site	1	0	
3-E4592A	127G	Site	(1)	0	
3-A3542A	DEPOT	Site	1	0	
3-B3813A	DEPOT	Site	1	0	
3-E4471A	DEPOT	Site	7	0	

Search  
Refresh  
Columns  
Favorites  
Print  
Excel  
Word  
Publish  
Stop  
Go To  
Back  
Forward  
Export Solutions  
Favorites Pane






Export Solutions - TWO (trainingdynamo)

Delete Save File Tools Help












Actions File Tools Help

Fancy COA

Name: Open AP  
Document: C:\Users\amber\Dropbox\Training Dynamo\   
Preparation Macro: Clear  
Completion Macro: Format|

Visible To: Everyone   
Application: Excel 

Works for Favorites:

-  Payables Transactions
  -  \*
  -  \*Open AP
  -  Cash Requirements\*
  -  Discounts Expiring this Week\*
  -  Invoices by Vendor\*
  -  Past Due Payables\*
  -  Payables Documents on Hold\*
  -  Payables Due Today\*
  -  Today's Payments\*
  -  Today's Purchases\*

New



# Using an Export Solution

SmartList - TWO (sa)

New Modify Search Refresh Columns Favorites Print Word Stop Go To Excel Publish Export/Import SmartList Additional File Tools Help

Options Additional File Tools Help

Actions

Item Qty  
Quick Export

Item Quantities - _Item Quantities (On Hand)								
Item Number	Location Code	Record Type	QTY On Hand	QTY On Order	QTY Allocated	QTY Available	QTY Back Ordered	
3-A2440A	01-NW	Site	1	0	0	1	0	
3-C2924A	102G	Site	5	0	3	2	0	



# Enabling Excel Reports

The screenshot shows the Microsoft Dynamics GP Reporting Tools Setup dialog box. The 'Excel Reports' tab is selected. The 'System Level' section has 'Location' set to 'Network Share' and 'Reports Directory' set to 'C:\GP Excel Reports\'. The 'User Level' section has 'Reports Directory' set to 'C:\GP Excel Reports\User Reports\'. The 'Reporting Services and Excel Reports Deployment Status' section shows 'Deployment Options' with a checked box for 'Deployed: Reports for 1 companies are deployed.' and an unchecked box for 'Not Deployed: Reports for 0 companies are not deployed.' A yellow callout box with the text 'Work with your Partner to select Location and Setup Security' is overlaid on the dialog box.

Microsoft Dynamics GP

Home Administration Administration

Transactions Inquiry Reports Cards

SmartList My Reports Process Monitor Close All Windows Exit

Administration

- All Reports List
- My Reports List
- Microsoft Dynamics GP Reports
- Excel Reports
- Reporting Services Reports
- SmartList Favorites
- Other Reports
- SmartList Designer View Pending Approval
- Security Workflow Pending Approval

Administration

- Setup
- Setup Checklist
- Workflow for Sharepoint
- System
  - Security Tasks
  - Security Roles
  - Alternate/Modified Forms and Reports
  - OData
  - User
    - User Classes
    - User Access
    - User Security
    - Field Level Security
    - System Password
    - Activity Tracking
  - Currency
  - Exchange Table
  - Multicurrency Access
  - Euro Relationships
  - Registration
  - Business Alerts
  - Organizational Structure
  - Intercompany
  - Language
  - Payroll Tax
  - Workflow Setup
  - Process Server
  - Edit Launch File
  - Reporting Tools Setup
  - Named Printers
  - Client Updates
  - System Preferences
  - SmartList Options
- Company
  - Company
  - Account Format
  - Fiscal Periods
  - Tax Details
  - Tax Schedules
  - Shipping Methods
  - Payment Terms
  - Bank
  - Credit Cards

Home

- Financial
- Sales
- Purchasing
- Administration
- Inventory
- PSTL
- GP Power Tools

Reporting Tools Setup - TWO (sa)

OK Cancel Additional File Print Tools Help

Actions Additional File Help

Setup

Reporting Services Excel Reports Management Reporter Power BI OData

System Level

Location Network Share Using SharePoint Online

Reports Directory C:\GP Excel Reports\

User Level

Reports Directory C:\GP Excel Reports\User Reports\

Reporting Services and Excel Reports Deployment Status

Deployment Options

- Deployed: Reports for 1 companies are deployed.
- Not Deployed: Reports for 0 companies are not deployed.

Redeploy all reports for selected companies

Print status for all companies

Print Status Report Deploy Reports

Utilities

- system
- Reconcil
- Remove
- Activity C
- Process :
- Business
- User Acti
- Delete C
- Remove
- Sand.Lie

Reports

- system
- Users
- General
- Security
- Groups
- Company
- Setup
- General
- Groups
- Maline.L

Routines

- aster Posti
- atch Recov
- Company
- Checklist
- Tax Year
- Report S
- Report S
- Report P
- Report N

Inquiry

- system
- Batch
- Activity T
- Process :



# Finding Excel Reports

Microsoft Dynamics GP

Home ▶ Sales ▶ Excel Reports

Microsoft Dynamics GP

Transactions ▶ Inquiry ▶ Reports ▶ Cards ▶

SmartList My Reports ▶ Process Monitor Close All Windows ⚠ Exit

Sales

- Customers
- Prospects
- Salespeople
- All Sales Transactions
- Receivables Transactions
- Sales Order Transactions
- Invoicing Transactions
- Receivables Batches
- Report List
- Microsoft Dynamics GP Reports
- Excel Reports**
- Reporting Services Reports
- SmartList Favorites
- Other Reports

View Print Send in E-mail Import/Export Publish Report SQL Report Manager

Actions

Edit Report Option Edit Report

Modify

Add to Rename Remove from

My Reports

GP Report Excel Report SRS Report New

Print this List Reports Export

Excel Reports (read only)

Show results

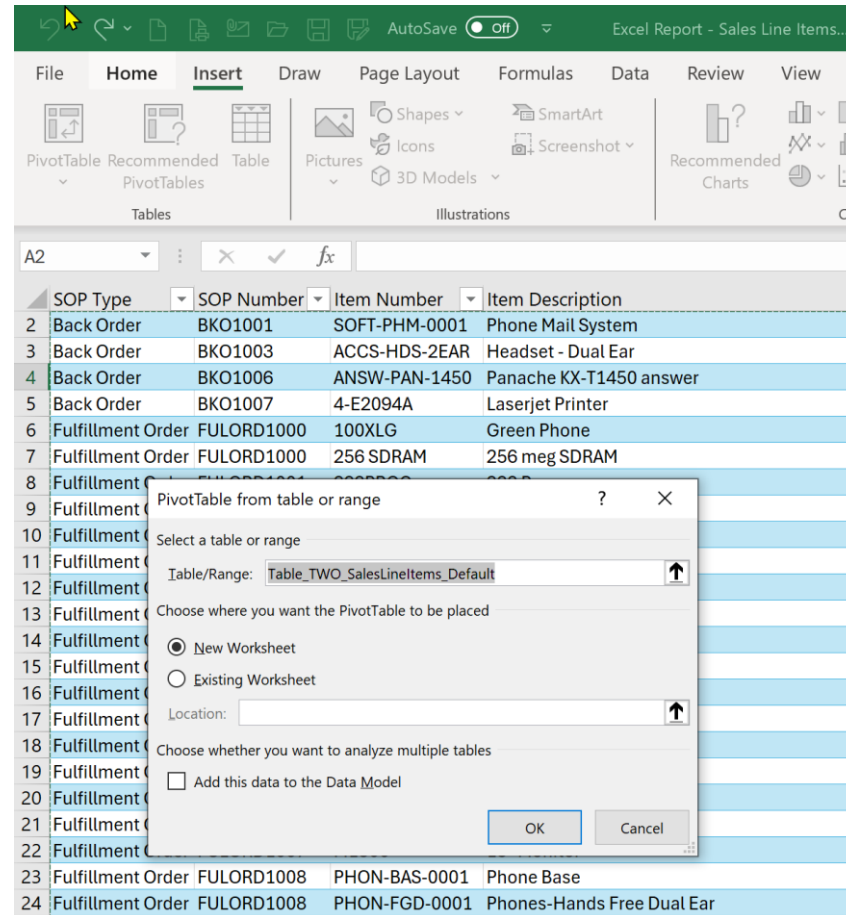
+ Add Filter

<input type="checkbox"/>	Name	Option	Series	Category
<input type="checkbox"/>	TWO SalesLineItems Default	C:\GP Excel Reports\Reports	Sales	TWO
<input type="checkbox"/>	TWO SalesLineItems Default	C:\GP Excel Reports\Data Connections	Sales	TWO
<input type="checkbox"/>	TWO SalesLineItems Default	C:\GP Excel Reports\Reports	Sales	TWO
<input type="checkbox"/>	TWO SalesLineItems Default	C:\GP Excel Reports\Reports	Sales	TWO
<input type="checkbox"/>	TWO SalesLineItems Default	C:\GP Excel Reports\Reports	Sales	TWO
<input type="checkbox"/>	TWO SalesLineItems Default	C:\GP Excel Reports\Reports	Sales	TWO
<input type="checkbox"/>	TWO SalesLineItems Default	C:\GP Excel Reports\Reports	Sales	TWO
<input type="checkbox"/>	TWO SalesLineItems Default	C:\GP Excel Reports\Reports	Sales	TWO
<input type="checkbox"/>	TWO SalesLineItems Default	C:\GP Excel Reports\Reports	Sales	TWO
<input type="checkbox"/>	TWO SalesLineItems Items Overdue to Ship	C:\GP Excel Reports\Data Connections	Sales	TWO

**"Data Connections" open in a new workbook. If you modify a "\\Reports" option, the changes will be saved to the shared file.**



# Formatting Excel Reports/Adding Pivot Tables



The screenshot displays the Microsoft Excel interface with the 'Insert' tab selected. A PivotTable dialog box is open, titled 'PivotTable from table or range'. The dialog box contains the following fields and options:

- Select a table or range:** Table/Range: Table\_TWO\_SalesLineItems\_Default
- Choose where you want the PivotTable to be placed:**  New Worksheet,  Existing Worksheet
- Location:** (Empty text box)
- Choose whether you want to analyze multiple tables:**  Add this data to the Data Model
- Buttons:** OK, Cancel

The background data table is as follows:

SOP Type	SOP Number	Item Number	Item Description
Back Order	BKO1001	SOFT-PHM-0001	Phone Mail System
Back Order	BKO1003	ACCS-HDS-2EAR	Headset - Dual Ear
Back Order	BKO1006	ANSW-PAN-1450	Panache KX-T1450 answer
Back Order	BKO1007	4-E2094A	Laserjet Printer
Fulfillment Order	FULORD1000	100XLG	Green Phone
Fulfillment Order	FULORD1000	256 SDRAM	256 meg SDRAM
Fulfillment Order	FULORD1000	256 SDRAM	256 meg SDRAM
Fulfillment Order	FULORD1000	256 SDRAM	256 meg SDRAM
Fulfillment Order	FULORD1000	256 SDRAM	256 meg SDRAM
Fulfillment Order	FULORD1000	256 SDRAM	256 meg SDRAM
Fulfillment Order	FULORD1000	256 SDRAM	256 meg SDRAM
Fulfillment Order	FULORD1008	PHON-BAS-0001	Phone Base
Fulfillment Order	FULORD1008	PHON-FGD-0001	Phones-Hands Free Dual Ear





# Example Report

Microsoft Excel interface showing a report titled "TWO\_Payables Trx Drillback SLD...". The ribbon includes Home, Insert, Draw, Page Layout, Formulas, Data, Review, View, Automate, Developer, Help, and Table Design. The formula bar shows: `=HYPERLINK([@[Document Number For Drillback]],@[Document Number])`.

The spreadsheet displays a table with columns: Vendor ID, Vendor Name, Amount, Voided, Status, and Document Lookup. The data is as follows:

Vendor ID	Vendor Name	Amount	Voided	Status	Document Lookup
252 ATTRACTI00001	Attractive Telephone Co.	5,000.00	No	Open	20334
269 ASSOCIAT0001	Associated Insurance Inc.	1,132.53	No	Open	110001
315 WESTAMER0001	WestAmerica Telephone Co.	18,790.78	No	Open	C119001

An "Payables Payments Zoom" dialog box is open, displaying details for a payment:

- Payment No.: 0000000000000114
- Batch ID: LESSON USER1
- Date: 1/13/2024
- Date Voided: 0/0/0000
- Vendor ID: ASSOCIAT0001
- Currency ID: Z-US\$
- Check Name: Associated Insurance Inc.
- Payment Method:  Check,  Credit Card,  Cash,  EFT,  Electronic
- Checkbook ID: UPTOWN TRUST
- Document No.: 110001
- Amount: \$1,132.53
- Unapplied: \$1,132.53
- Applied: \$0.00
- Total: \$1,132.53
- Terms Discount Taken: \$0.00
- Terms Discount Available: \$0.00
- Writeoff: \$0.00

Buttons at the bottom of the dialog include: Revaluation, Apply, Distribution, and Recreate Check Stub.



# Custom Reports Using SmartList Designer

- The example report started a SmartList Designer Report based on the SQL View from Microsoft called Payables Transactions.

The screenshot shows the SmartList Designer interface with the following configuration:

- List Name:** \_Payables Trx Drillback SLD
- Product:** Microsoft Dynamics GP
- Series:** Purchasing

**Database View:** PayablesTransactions (checked), Voucher Number, Vendor ID (checked), Document Type (checked), Document Date (checked), Document Number (checked), Current Trx Amount (checked), 1099 Amount, 1099 Amount LIFE, 1099 Amount LYR, 1099 Amount YTD, 1099 Type from Vendor, Account Number With, Accounts Payable Accr, Accrued Purchases Accr, Address 1, Address 2, Address 3, Amount Billed LIFE.

**Selected Fields:** PayablesTransactions.Document Number, PayablesTransactions.Document Amount, PayablesTransactions.Current Trx Amount, PayablesTransactions.Voided, PayablesTransactions.Vendor ID For Drillback, PayablesTransactions.Document Number For Drillback.

**Relationship:** (Empty table with columns: TableName, FieldName, TableName2, FieldName2)

**Filter:** (Empty table with columns: Field Name, Condition, Value)

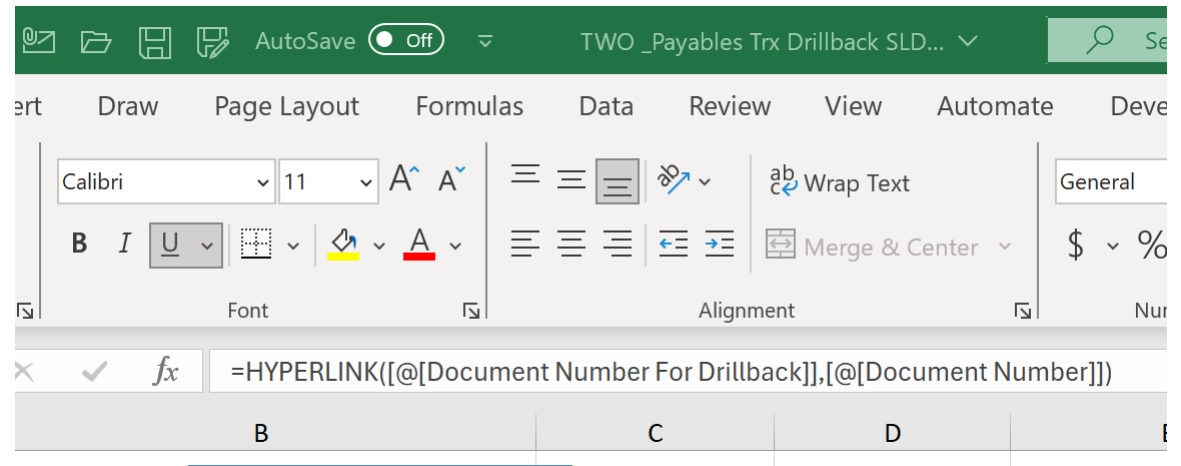
**Result's Preview:**

Batch Number	Vendor ID	Vendor Name	Document Type	Document Date	Document Number	
AB 100919	AB0001	Amber Bell	Invoice	2027-05-15 00:00:00....	WOW AWESOME	8
AB 101523	SFORD	Spencer Ford	Invoice	2027-10-15 00:00:00....	SFORD -- OCT 2027	2
AB 123545	AMEX	American Express	Invoice	2027-04-12 00:00:00....	AMEX STMT 033127	1



# Formatting Hyperlinks

- Use the HYPERLINK function to make a friendly name for the Drillback field:





***Custom Keyboard  
Shortcuts vs.  
Homepage Setup***

# What will you choose?

## Custom Keyboard Shortcuts

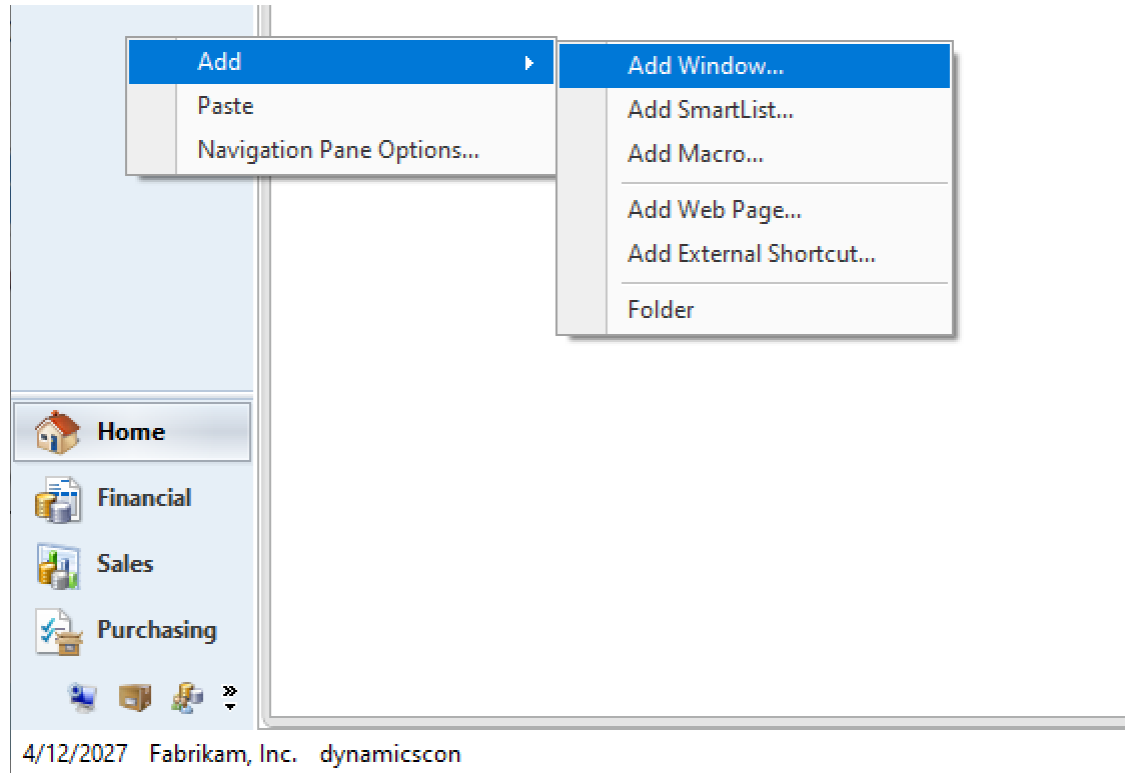
- Open GP Windows
- Open External Files
- Open Websites
- Run Macros

## Homepage Setup

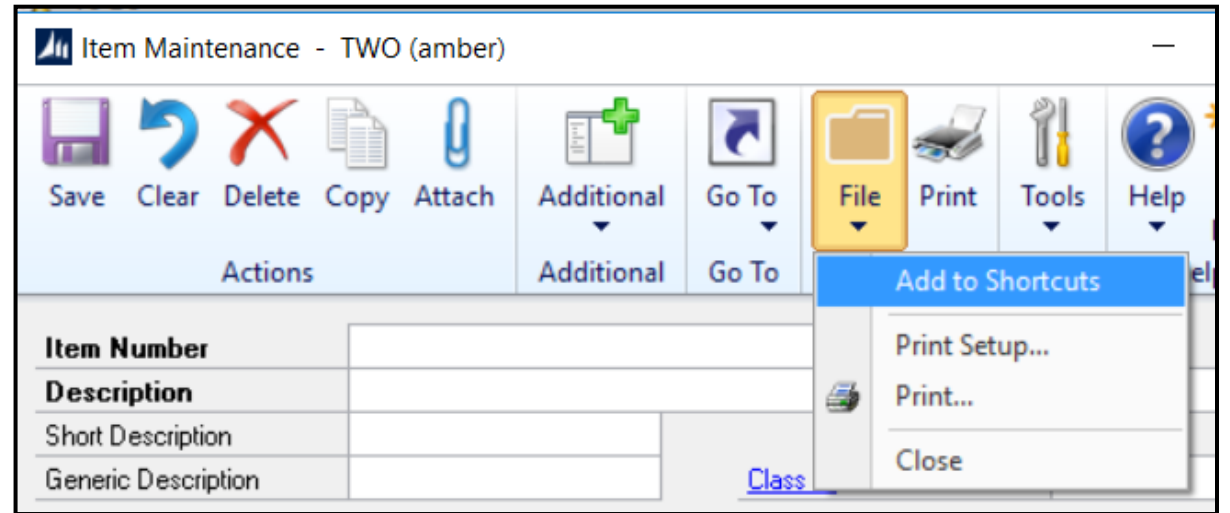
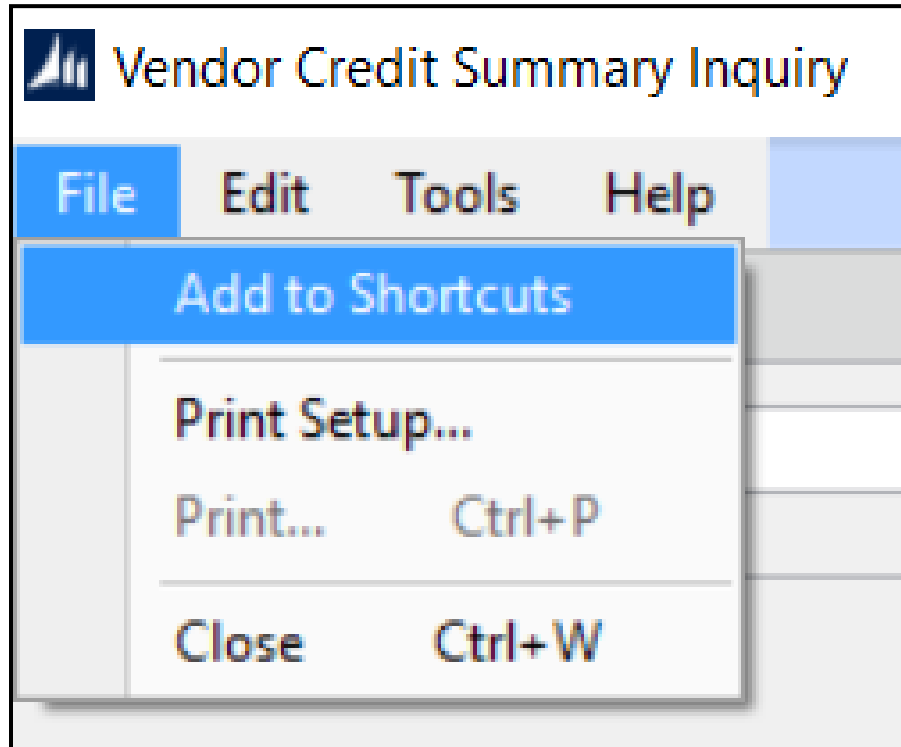
- Quicklinks
- My Reports
- Reminders



# Creating Navigation Pane Shortcuts




# Quickest Way to Create Window Shortcuts



# Keyboard Shortcuts

Shortcut Properties

 Change the properties of this shortcut and choose OK.

Name:

Window:

Keyboard Shortcut:

- (None)
- F2
- F3
- F4
- F5
- F6
- F7
- F8
- F9
- F10
- F11
- F12

OK

Cancel

Help





# Homepage Setup

The screenshot shows the Microsoft Dynamics GP homepage with a 'Customize Home Page' dialog box open. The dialog box is titled 'Customize your home page' and contains the following sections:

- Home Page Defaults:** A list of items with checkboxes and arrows. 'To Do' and 'My Reports' are checked. 'Business Analyzer', 'Connect', 'Time Management', and 'Project Time & Expense' are unchecked. 'Show All' options are present for 'Business Analyzer' and 'Power BI'.
- Column Layouts:** Three layout options: 'One Column', 'Two Column', and 'Three Column'. 'Three Column' is selected.
- Column Stack:** Three options: 'Top', 'Bottom', and 'Right'. 'Right' is selected.

At the bottom of the dialog box is a 'Change Role...' button. The background shows the Dynamics GP homepage with a sidebar containing 'Home', 'User Preferences', 'Shortcuts', 'Report Shortcuts', 'Startup', and 'Calendar'. The bottom of the window shows the date '4/12/2027' and the user 'Fabrikam, Inc. dynamicscon'.





***Letter Templates***  
***vs.***  
***Word Forms***

# What will you choose?

## Word Templates

- Create custom letters for Customers, Vendors, and Employees
- How to create new letters
- Using SmartList to create for multiple records

## Word Forms

- Used for emailing Sales and Purchasing Forms
- Adding Logos
- How to prevent mistakes
- Accessing



# Letter Templates

Vendor Maintenance - TWO (sa)

Save Clear Delete Write Letters Options All-in-One View File Print Tools Help Add Note

Actions Prepare a Vendor Letter Letter Maintenance

Vendor ID: ACET... Status: Active

Name: A Travel Company

Short Name: A Travel

Check Name: A Travel Company

Primary Address:

Address ID: PRIMARY

Contact: Greg Powell

Address: 123 Riley Street

City: Sydney

State: NSW

ZIP Code: 2086

Country Code: Australia

Phone 1: (298) 555-0101 Ext. 0000

Phone 2: (000) 000-0000 Ext. 0000

Phone 3:

Fax: (294) 555-0101 Ext. 0000

Tax Schedule: AUSNSWST+20

Shipping Method: OVERNIGHT

UPS Zone:

Address IDs:

Purchase: PRIMARY

Remit To: REMIT TO

Ship From: PRIMARY

1099

Vendor Account:

Comment 1:

Comment 2:

Options Address Accounts E-mail

by Vendor ID

SmartList - TWO (sa)

New Modify Search Refresh Columns Favorites Print Excel Stop Go To Letter Merge Publish Export/Import SmartList Additional File Tools Help

Actions Prepare a Vendor Letter Quick Export

Vendor ID	Vendor Name	1099 Type	DBA	Last Check Date	Last Purchase Date	Tax ID Number
ASSOCIAT0001	Associated Insurance Inc.	Nonemployee Compensation		2/8/2026	4/12/2027	
BEAUMONT0001	Beaumont Construction	Nonemployee Compensation		1/31/2024	4/12/2027	169876654
BERGERON0001	Bergeron Communications Sol.	Nonemployee Compensation		0/0/0000	0/0/0000	
COMNETEN0001	Comnet Enterprises, Inc	Nonemployee Compensation		1/31/2024	1/15/2024	548-365-557
COMPUTER0001	Computer Training Systems	Nonemployee Compensation		4/21/2027	1/28/2024	520388001
DOLECKIC0001	Dolecki Catering	Nonemployee Compensation		1/31/2024	1/27/2024	
GARDNERS0001	Gardner Services	Nonemployee Compensation		4/21/2027	4/12/2027	897-615-833
GKCLEANI0001	G & K Cleaning	Nonemployee Compensation		4/21/2027	12/19/2023	
INLINESE0001	Inline Service Systems	Nonemployee Compensation		1/31/2024	1/16/2024	
INTERNAT0001	International TeleCom Assoc.	Nonemployee Compensation		1/31/2024	1/23/2024	
INTERNAT0003	International Telephone	Nonemployee Compensation		1/31/2024	1/19/2024	
MULTINAT0001	Multinational Communications	Nonemployee Compensation		1/31/2024	1/13/2024	
PERMIERS0001	Premier System, Inc.	Nonemployee Compensation		0/0/0000	0/0/0000	
RELIANCE0001	Reliance Systems, Inc.	Nonemployee Compensation		0/0/0000	0/0/0000	
SIGNATUR0002	Signature Services	Nonemployee Compensation		1/31/2024	12/9/2023	
TELECONN0001	Teleconnect Systems Inc.	Nonemployee Compensation		0/0/0000	1/7/2024	
WOODCONS0001	Wood Consulting	Nonemployee Compensation		0/0/0000	0/0/0000	



# Updating Letter Templates

Letter Writing Assistant

File Edit Tools Help sa Fabrikam, Inc. 4/12/2027

**Letter Maintenance**  
Use this window to manage your existing letter templates, create new letter templates, delete existing letter templates, or rename existing letter templates.

Select a letter category. Collection

What would you like to do?

Create a New Letter  
 Edit an Existing Letter  
 Delete a Letter  
 Rename Existing Letter

Final Notice  
First Notice  
Second Notice

< Back Next > Cancel

AutoSave Off Second Noti... Saved Amber Bell

File Home Insert Draw Design Layout Referenc Mailings Review View Develop Add-ins Help

General Add Company Fields Add Customer Fields Add Invoice Fields

Menu Commands Custom Toolbars

Customer Balance  
Customer OverDue Balance  
Customer Aging Date  
Customer Aging Period 1  
Customer Aging Period 2  
Customer Aging Period 3  
Customer Aging Period 4  
Customer Aging Period 5  
Customer Aging Period 6  
Customer Aging Period 7  
Invoice Detail  
Last NSF Check Date  
Last Payment Date  
Last Transaction Date  
Last Transaction Amount

«CompanyCity» ip»

«LetterDate»

«CustomerName»  
«CustomerContact»  
«CustomerAddress1»  
«CustomerCity», «CustomerState» «CustomerZip»

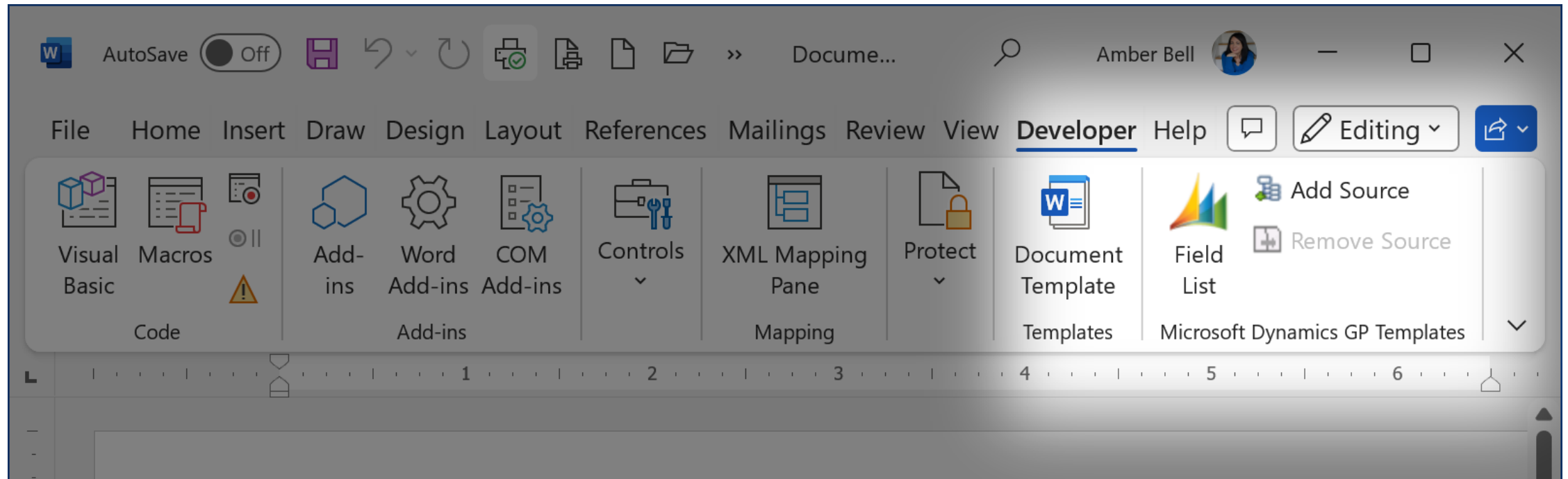
Dear «CustomerContact»,

We have previously contacted you about the outstanding invoice(s) on your account, and we have not received a response from you. Your account has an outstanding balance of «CustomerOverDueBalance». The following invoice(s) are overdue:





# Microsoft Word Add-In



# Making “Bookmarks” Visible

Word Options

General  
Display  
Proofing  
Save  
Language  
Accessibility  
**Advanced**  
Customize Ribbon  
Quick Access Toolbar  
Add-ins  
Trust Center

Use pen to select and interact with content by default

**Image Size and Quality** Document1

Discard editing data ⓘ  
 Do not compress images in file ⓘ  
Default resolution: 220 ppi

**Chart** Document1

Properties follow chart data point ⓘ

**Show document content**

Show background colors and images in Print Layout view  
 Show text wrapped within the document window  
 Show drawings and text boxes on screen  
 Show bookmarks  
 Show text boundaries  
 Show crop marks  
 Show field codes instead of their values  
Field shading: When selected  
 Use draft font in Draft and Outline views

Name: Courier New  
Size: 10  
Font Substitution...  
 Expand all headings when opening a document ⓘ

OK Cancel

**If you accidentally delete a "Bookmark", the page and section breaks will break!**





# Come to My Other Session!!



Wednesday at 2:45 PM (Room: Bluebell)

Presenters: John Arnold & Me 



# Recommended GP Sessions!

- Database and Queries and SQL, OH MY...Demystified
  - Tuesday at 4:30 PM (Room: Iris)
  - John Arnold
- GP Reporting Tools Shootout and Comparison
  - Wednesday at 8:30 AM (Room: Bluebell)
  - David Feenstra
- How is my GP data stored? SQL Tables 101
  - Wednesday at 1:15 PM (Room: Longs Peak)
  - Chris Giesbrecht



# Recommended GP Sessions! (continued)

- Build Intelligent Copilots with GP Data
  - Tuesday at 3:15 PM (Room: Longs Peak)
  - Mariano Gomez
- Solve Your Reporting Needs with SQL Reporting Services
  - Thursday at 1:45 PM (Room: Iris)
  - David Feenstra





# AMBER BELL

Email: [amber@trainingdynamo.com](mailto:amber@trainingdynamo.com)

Website: [trainingdynamo.com](http://trainingdynamo.com)

