2025
DYNAMICS
CON
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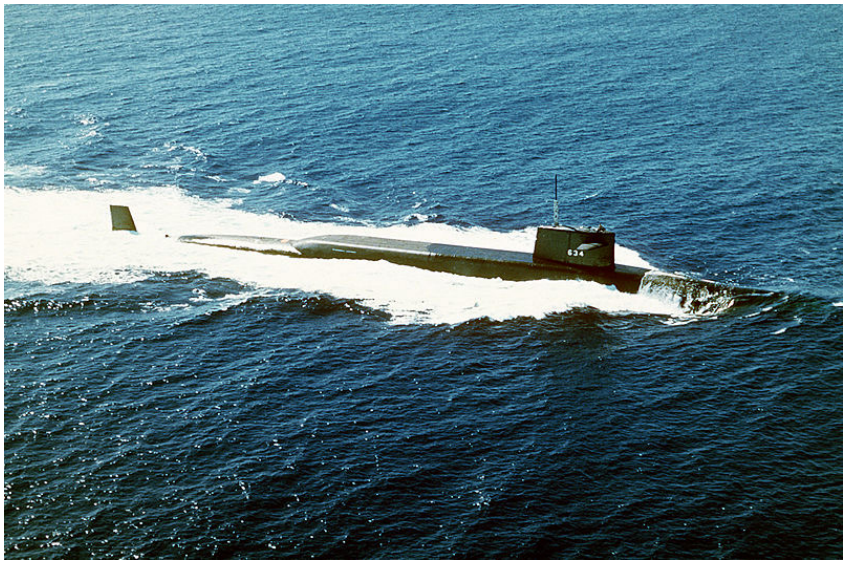
The Strategic CFO Toolkit

Introduction

ICAN Software Solutions

David Eichner, CPA



- Experience
  - Navy Veteran (Submarines)
  - Nuclear Engineer
  - CPA, CITP
  - Database/Cloud Architect
  - Founder – ICAN Software Solutions
    - Mass Apply Receivables
    - Mass Apply Payables
    - InvestmentAssets
    - Vendor Price Lists
  - 30 years experience supporting Dynamics GP

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The Strategic CFO Toolkit (In Order To Know What You Need To Know)

- Identify Business Events Or Key Metrics To Track
  - New Vendors?
  - Transactions Or Balances?
    - Payments Above Threshold
    - Checkbook Balance
    - Vendor Balance
    - Customer Balance
  - Key Metrics
    - Current Ratio, Quick Ratio, DebtToEquity Ratio, etc.

The Strategic CFO Toolkit (In Order To Know What You Need To Know)

- Selecting The Data With SQL:
  - SELECT statement – What To Know
    - SELECT * FROM DATABASE..TABLE WHERE COLUMN1 = VALUE1 AND…
    - ORDER BY GROUP BY
- Using Copilot To Generate The SQL You Need

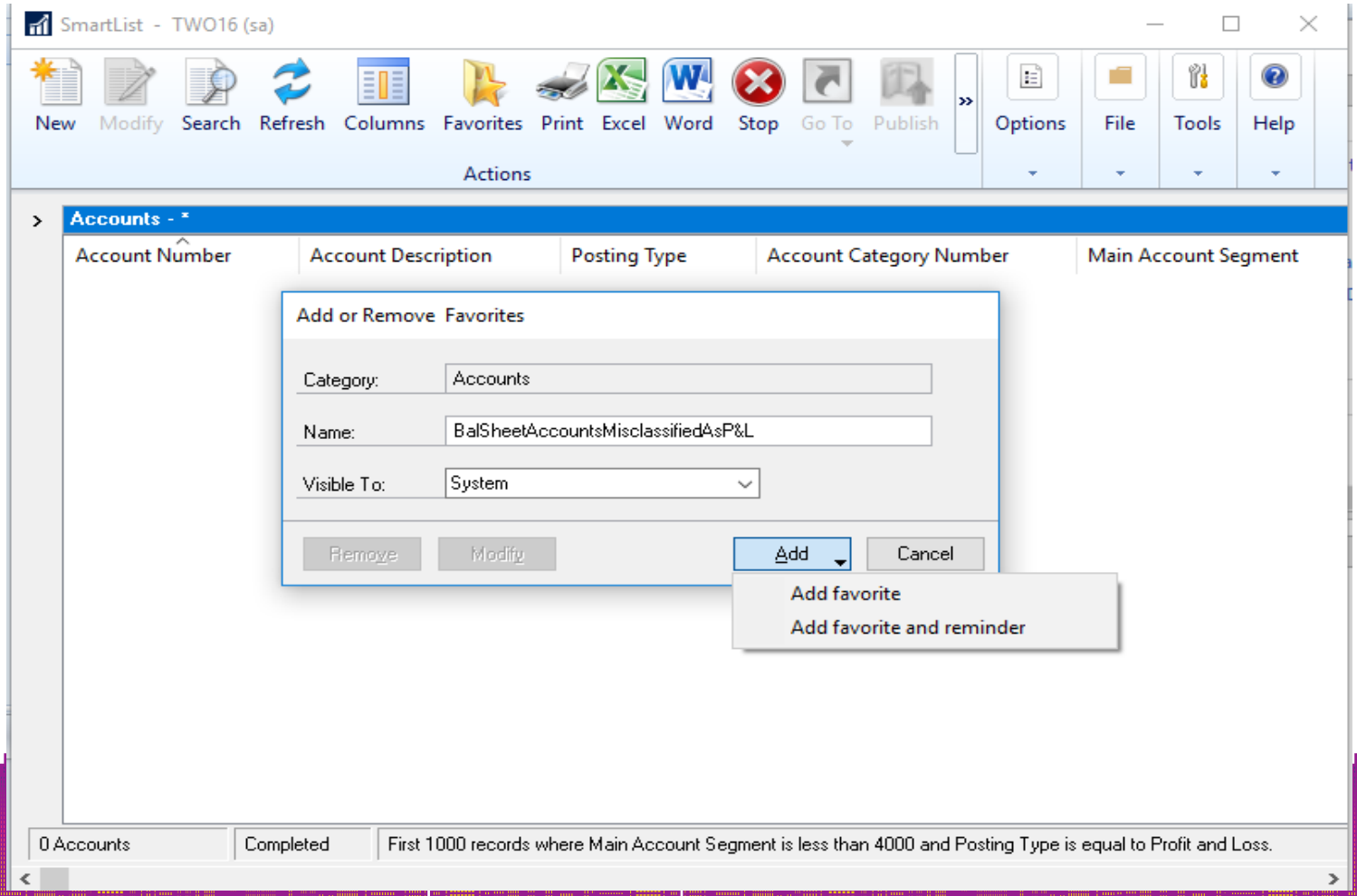
Demo
Using Copilot To Generate SQL

The Strategic CFO Toolkit (In Order To Know What You Need To Know)

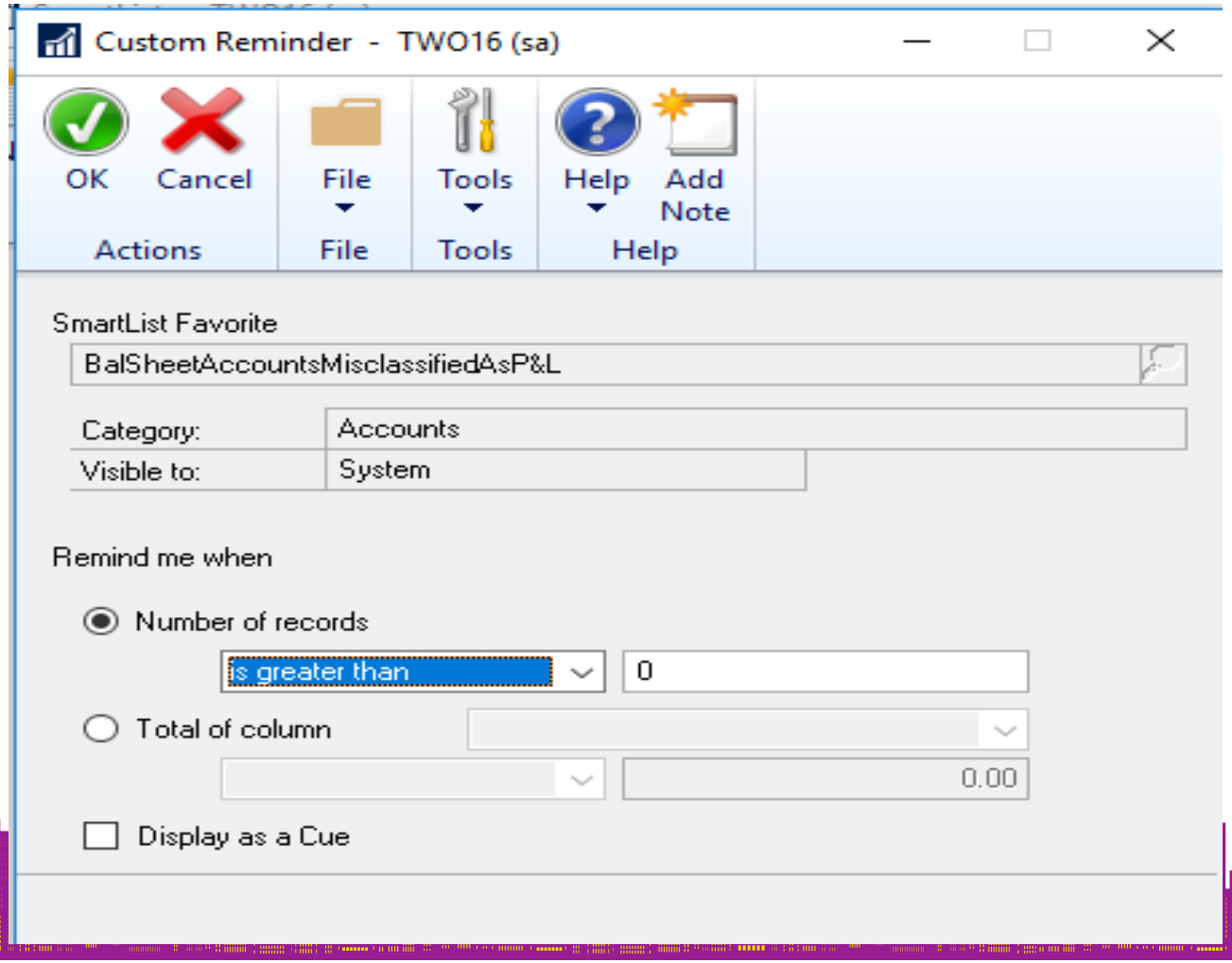
- Event Notifications:
  - SmartList Alerts
  - Business Alerts
  - SQL Reports
    - SQL Report Builder
    - SSRS Scheduler

Exception Based SmartList Alerts

SmartList Alerts



SmartList Alerts



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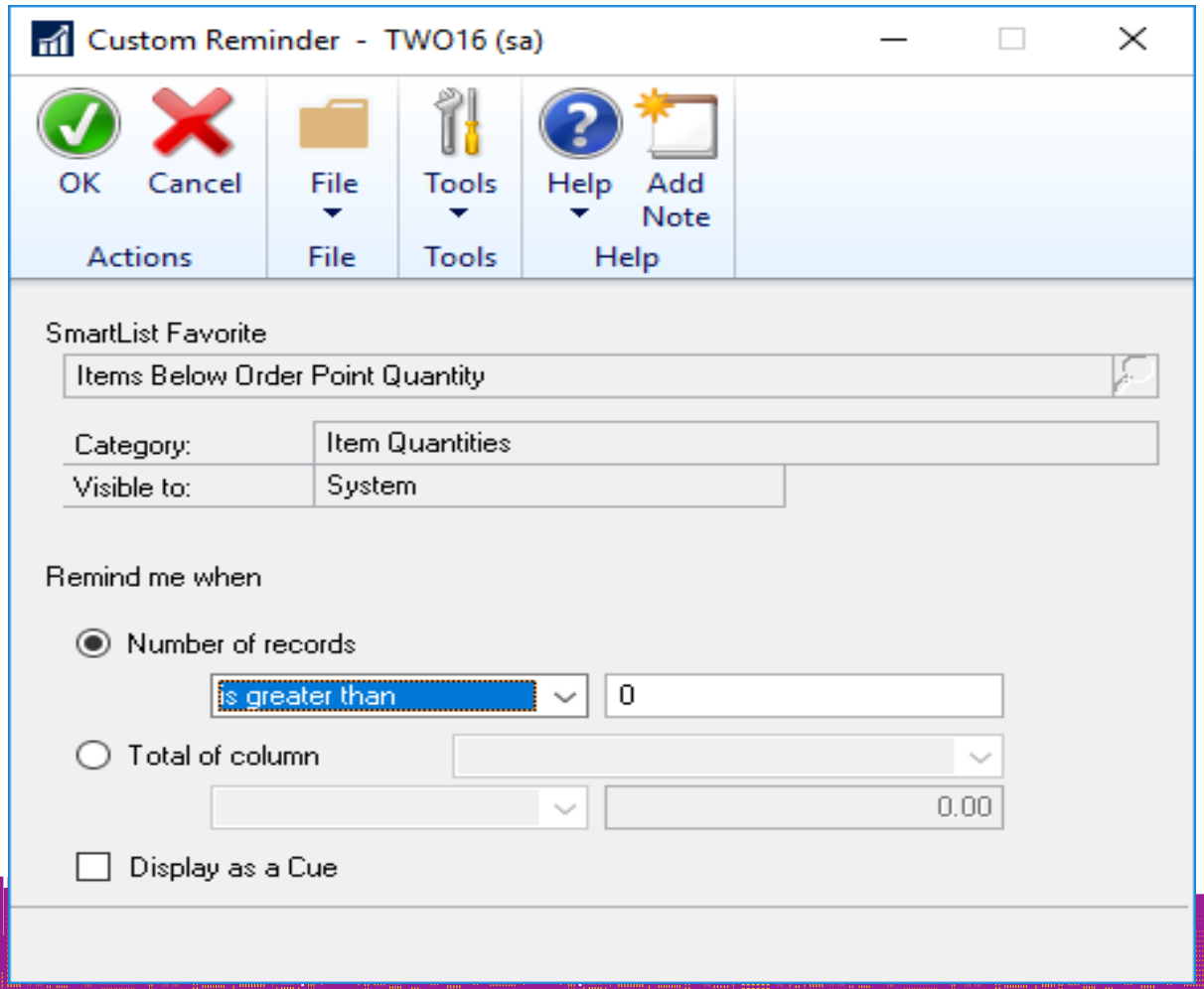

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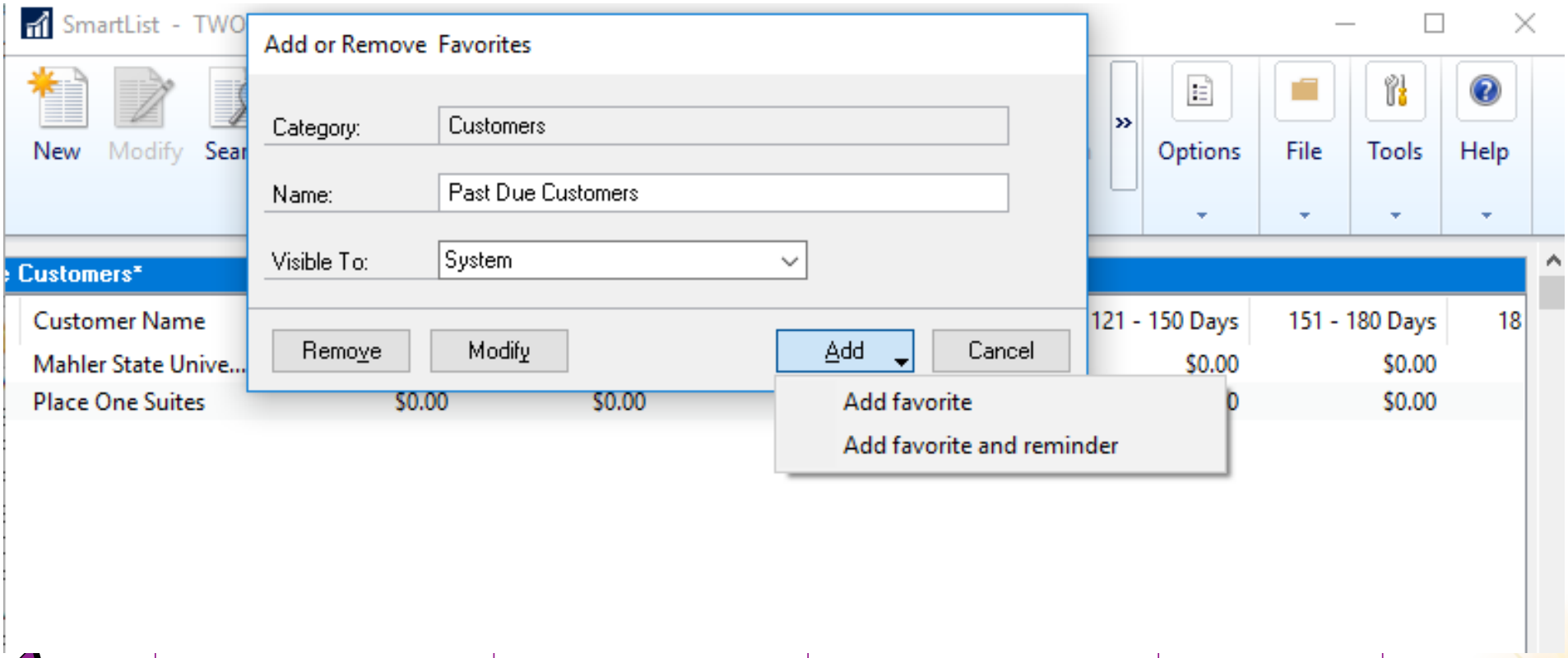

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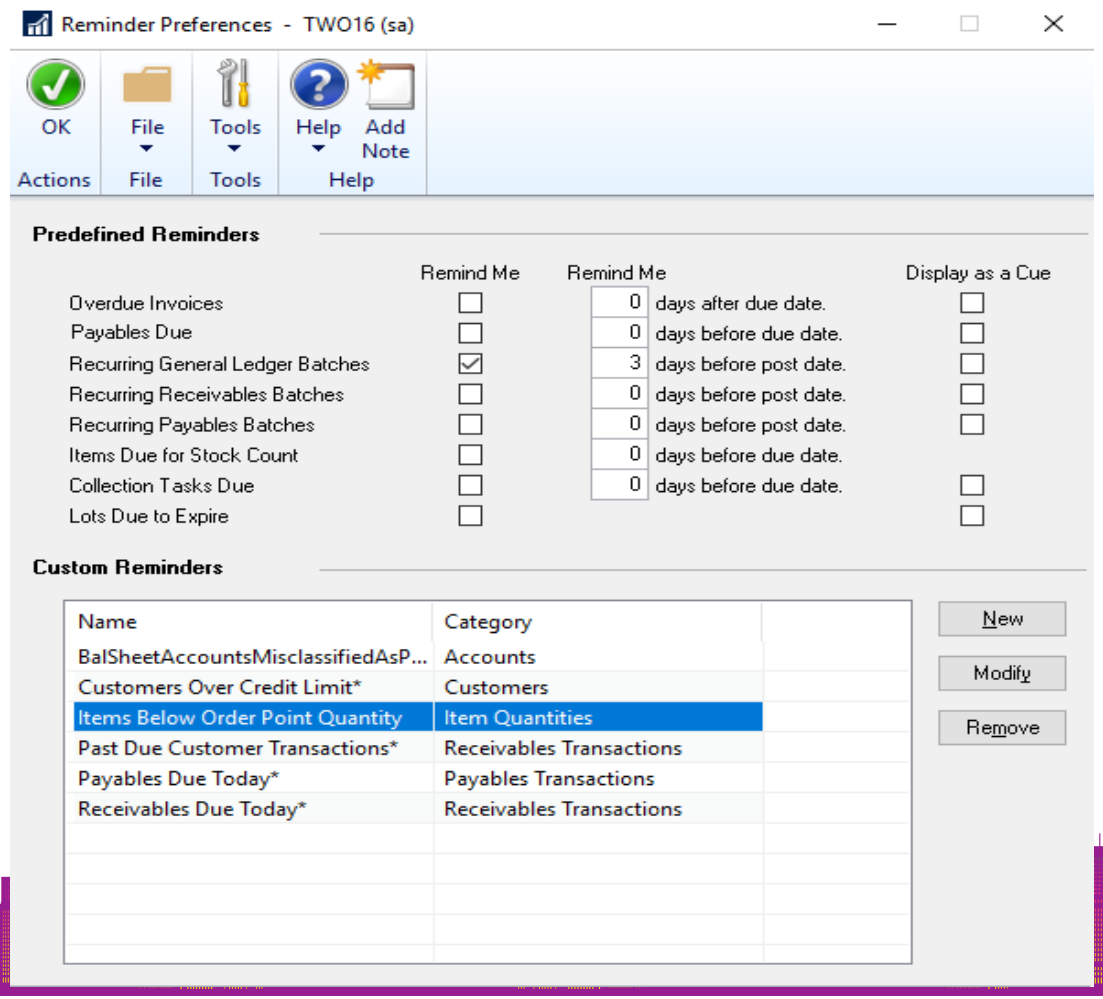
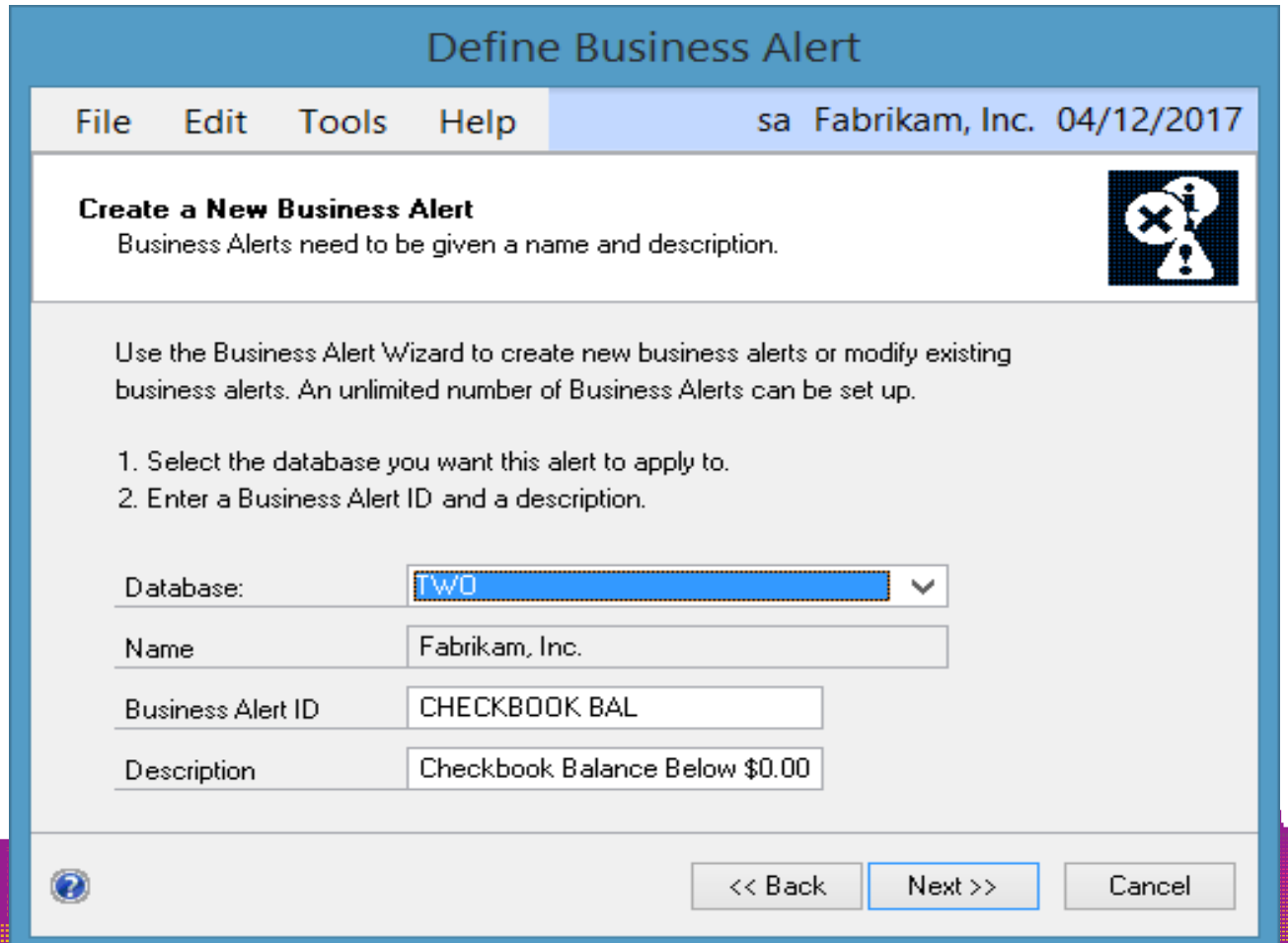


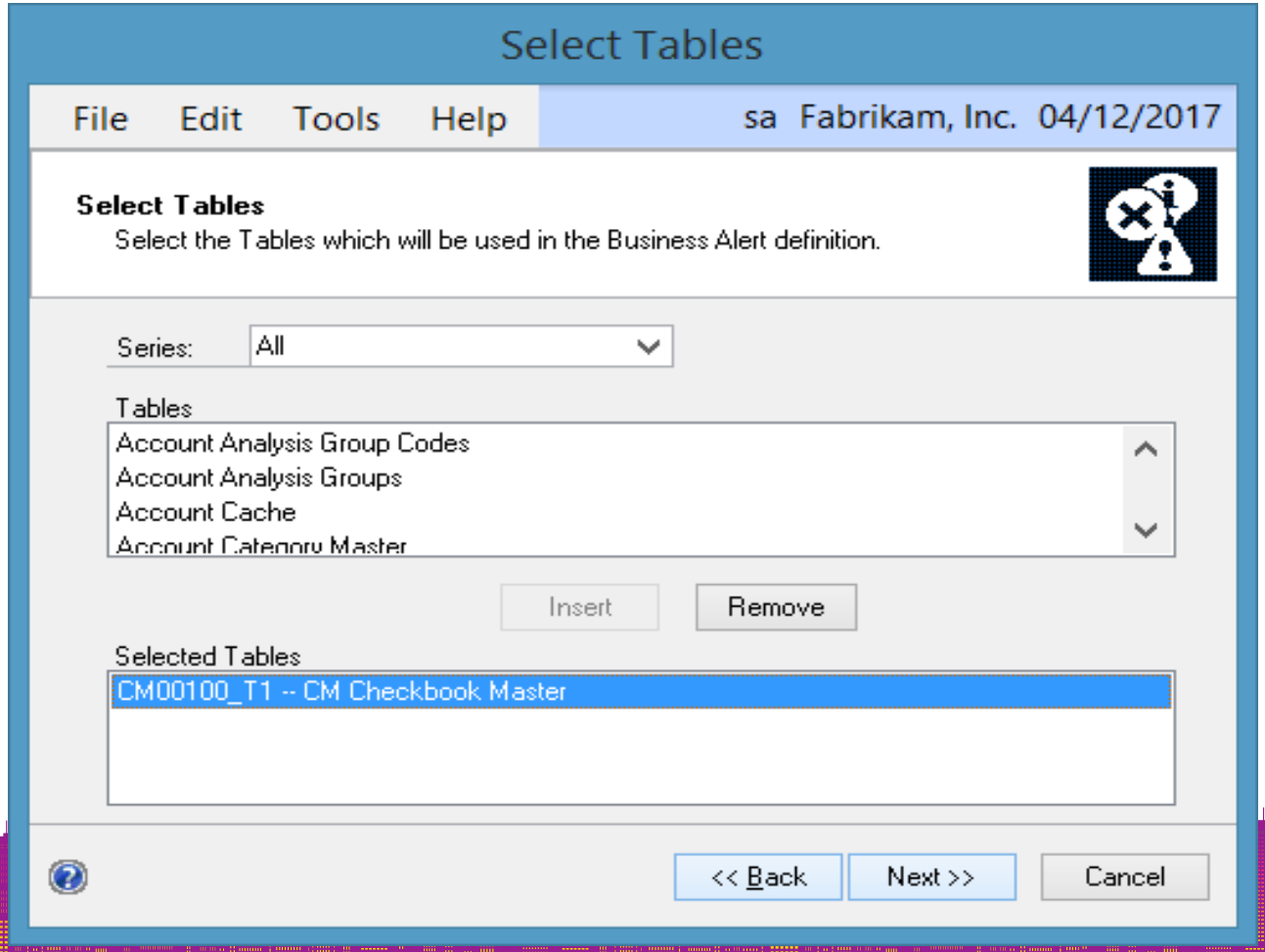
Demo
SmartList Alerts

Business Alerts

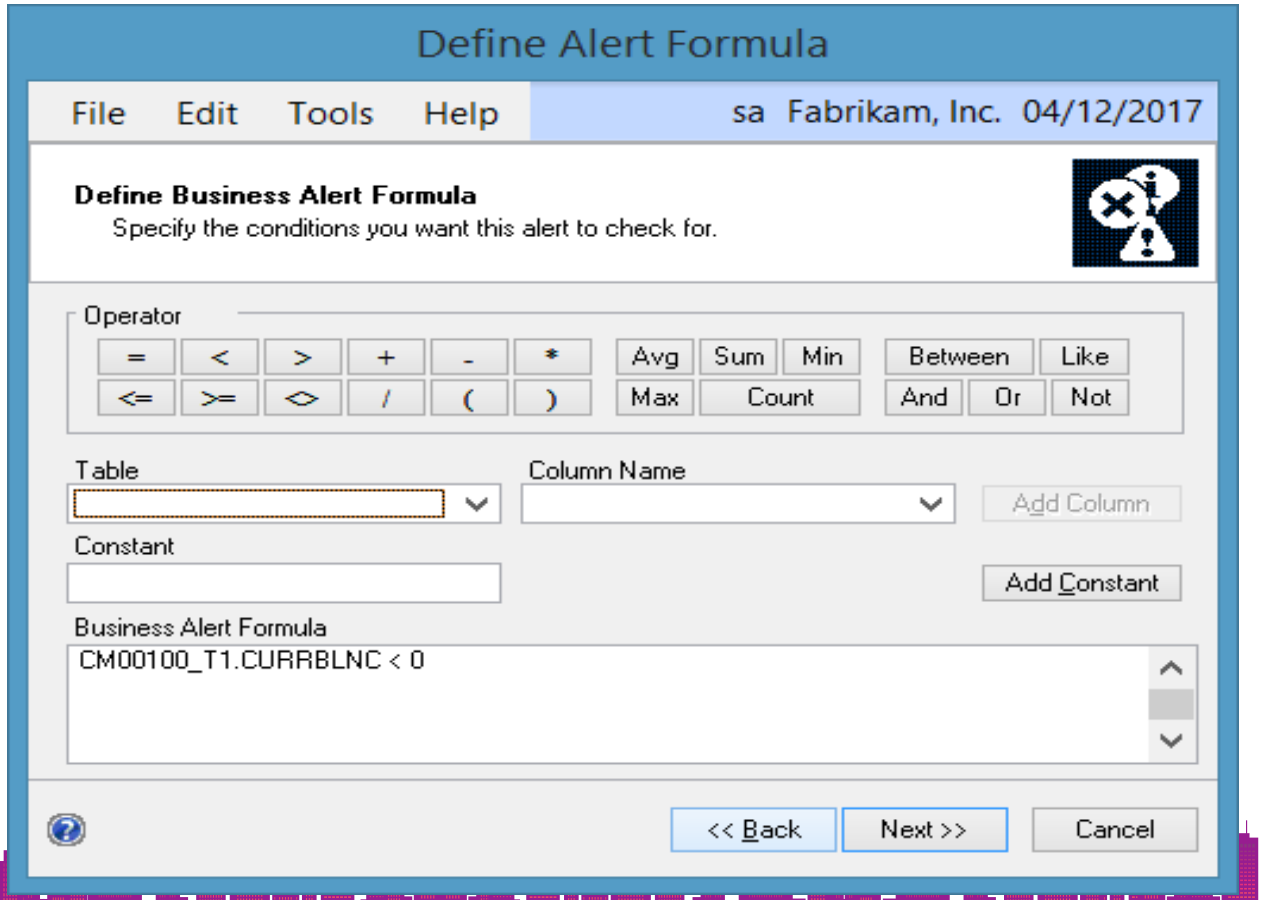
EXISTING BUSINESS ALERTS CAN BE MODIFIED



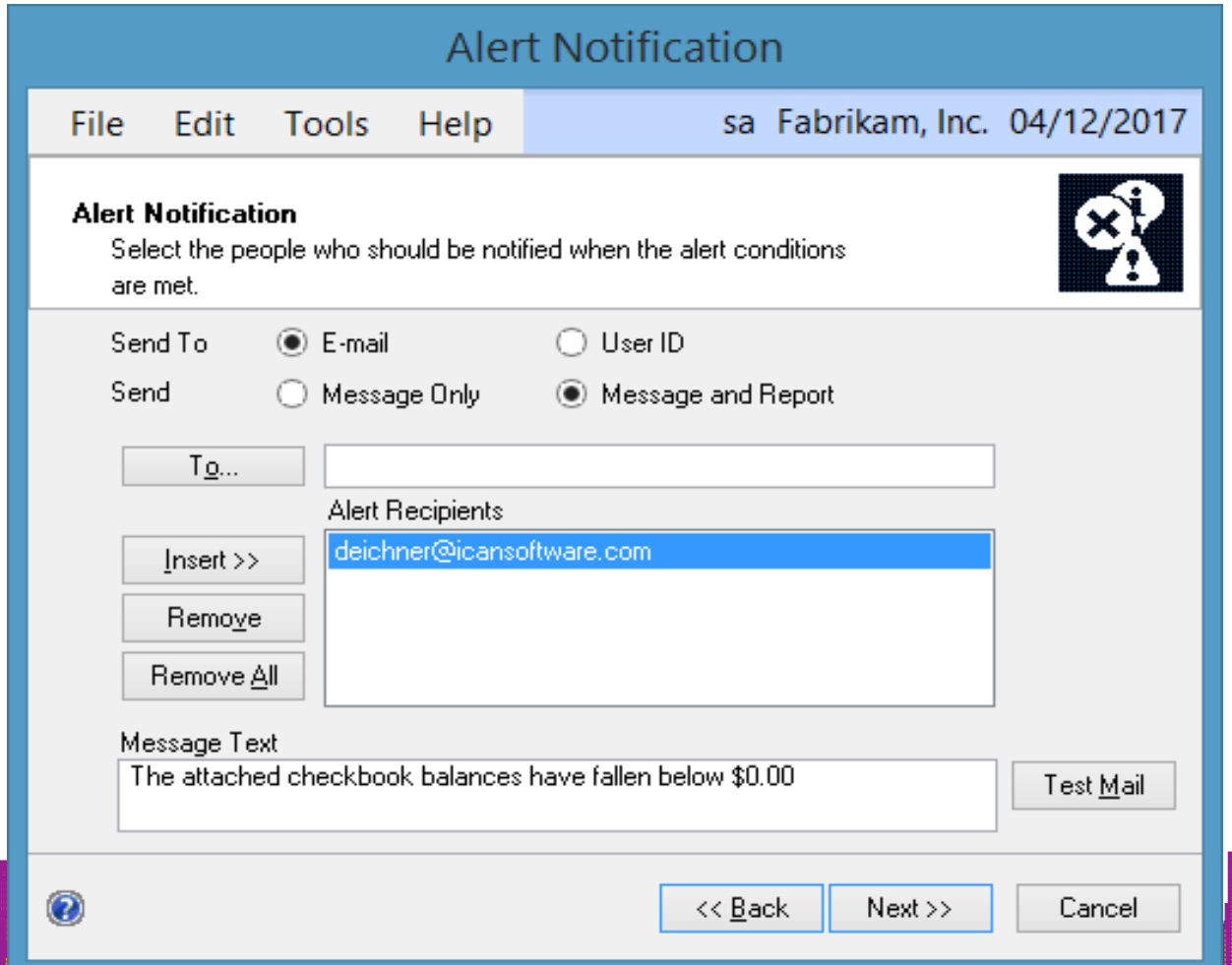
SEEMS PRETTY EASY...



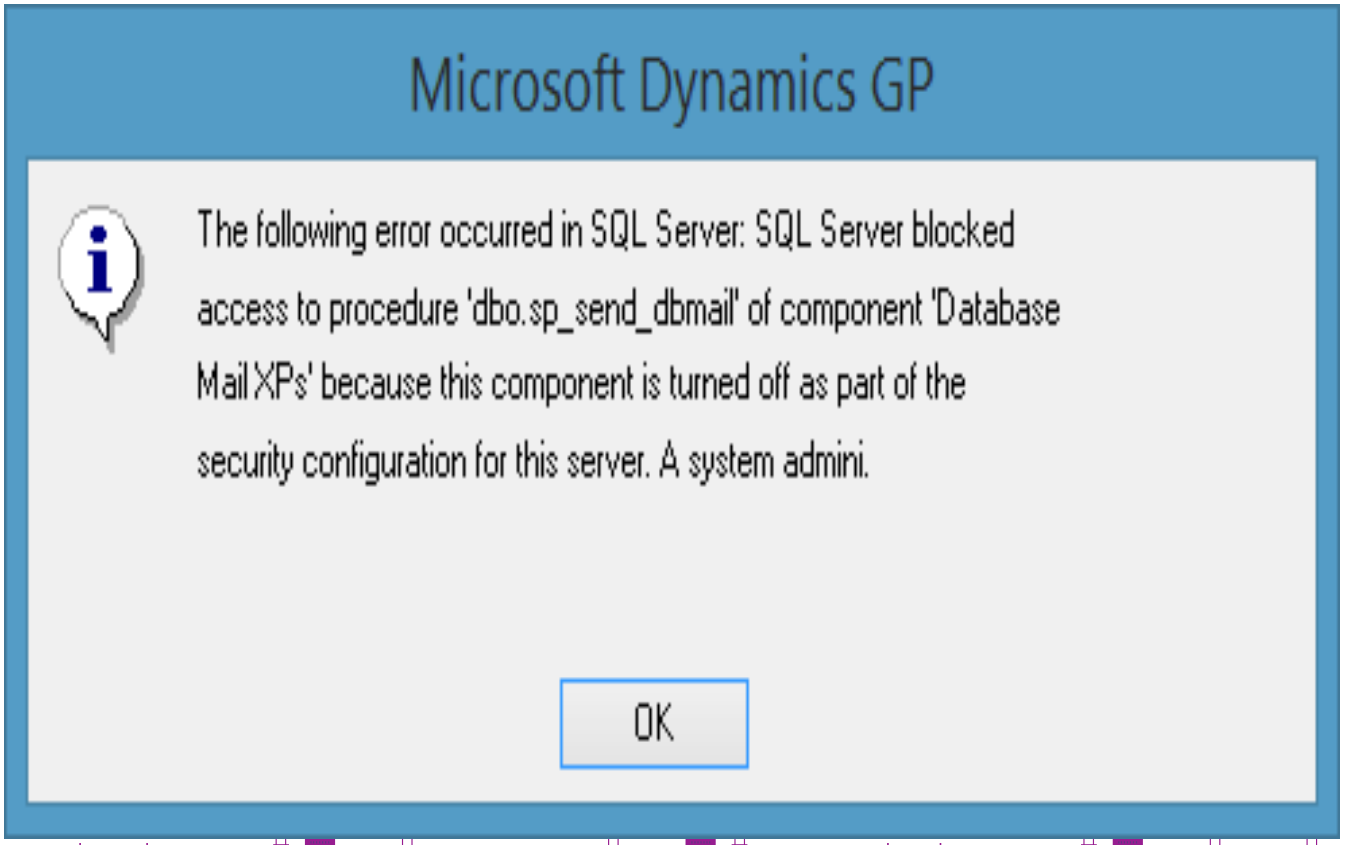
I'M GETTING IT...



THIS IS PRETTY COOL...



MAYBE NOT…WHAT DO I DO NOW?



Setup – Configuring SQL Server For Email

- Login on SQL Server as the sa user
- Show Advanced Options
  - `SP_CONFIGURE 'show advanced options', 1 RECONFIGURE WITH OVERRIDE`
- Enable Database Mail XPs Advanced Options in SQL Server
  - `SP_CONFIGURE 'Database Mail XPs', 1 RECONFIGURE WITH OVERRIDE`
- Hide Advanced Options
  - `SP_CONFIGURE 'show advanced options', 0 RECONFIGURE WITH OVERRIDE`
- Reconfigure
  - `RECONFIGURE`

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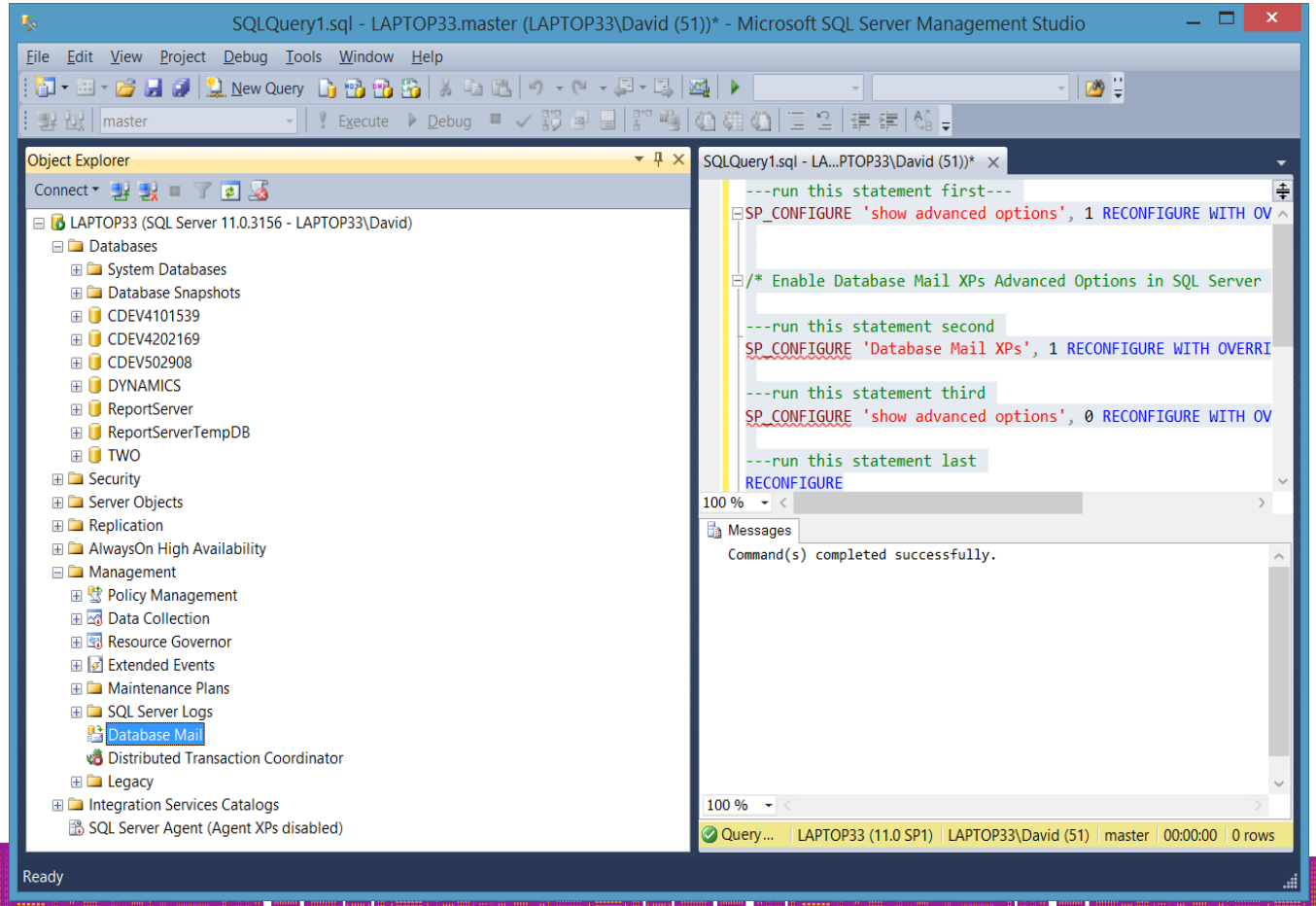

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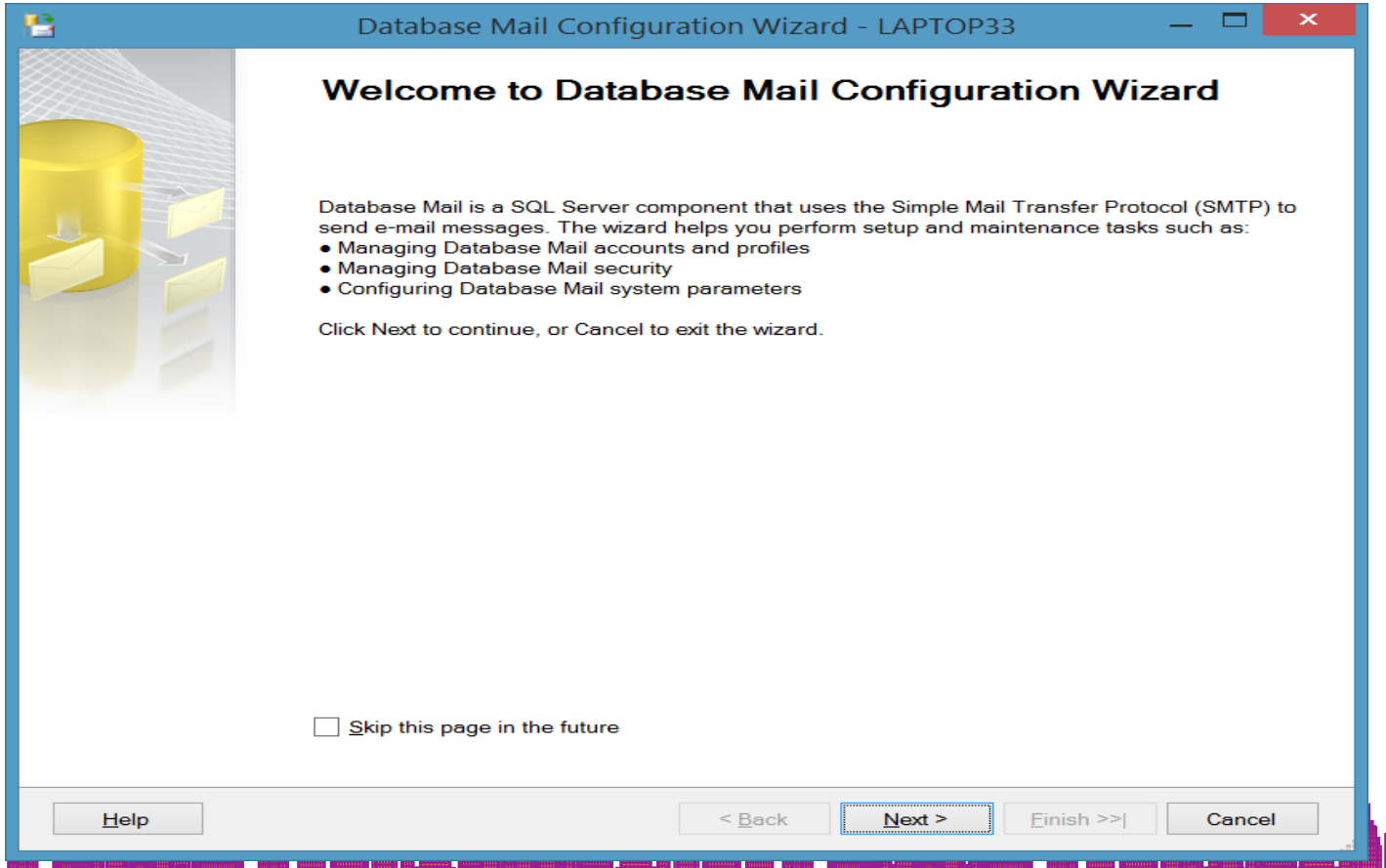

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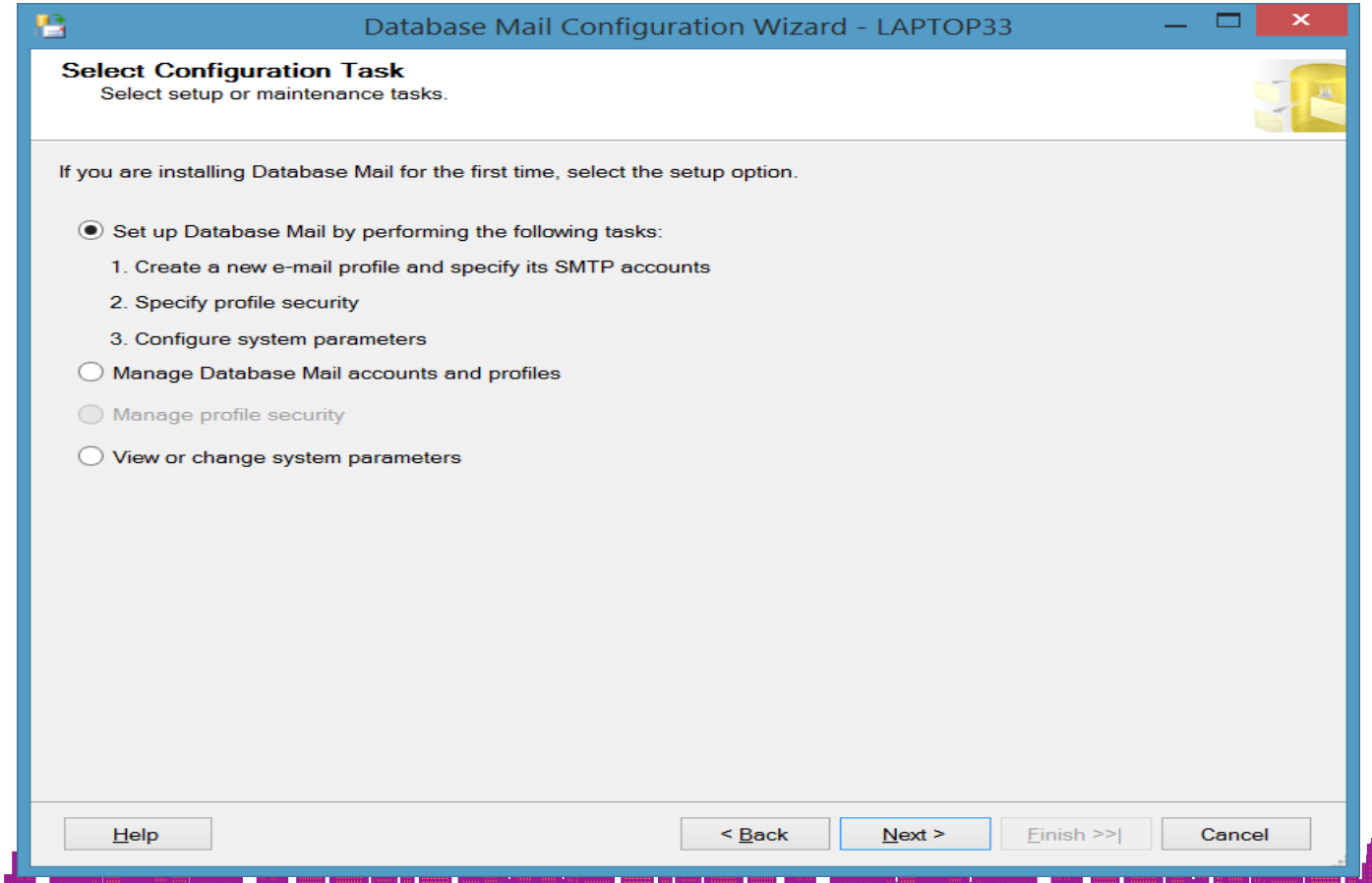

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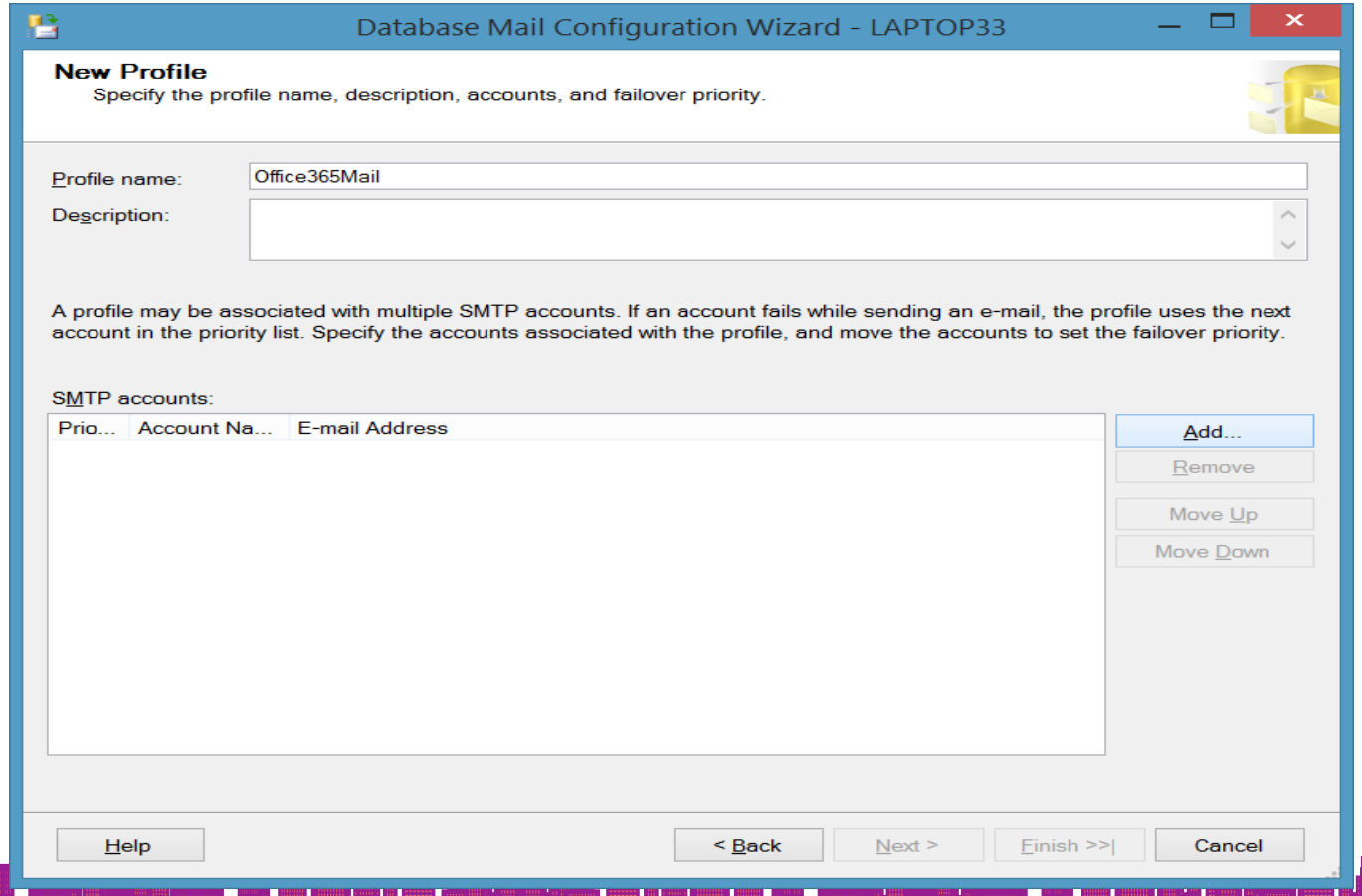

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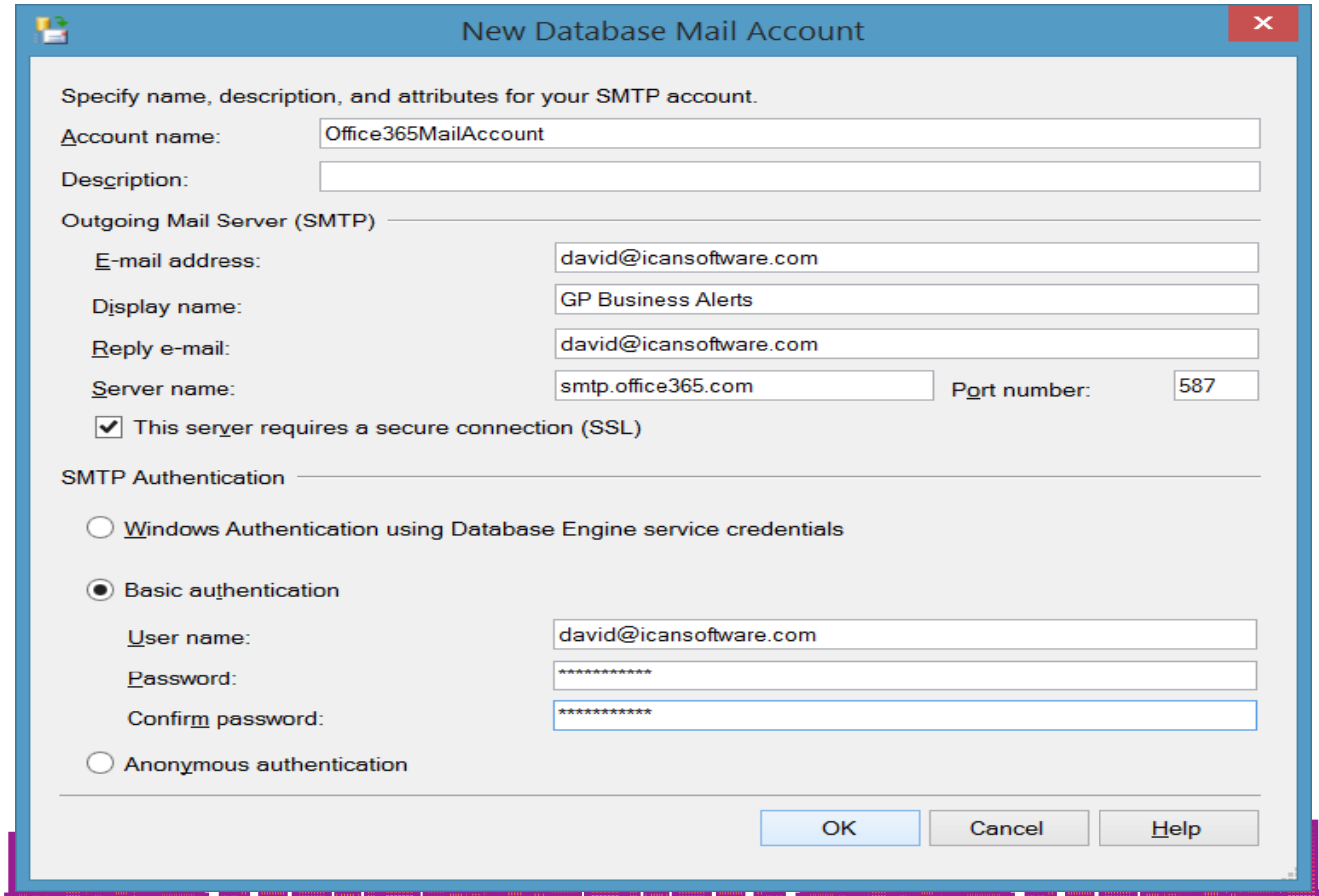

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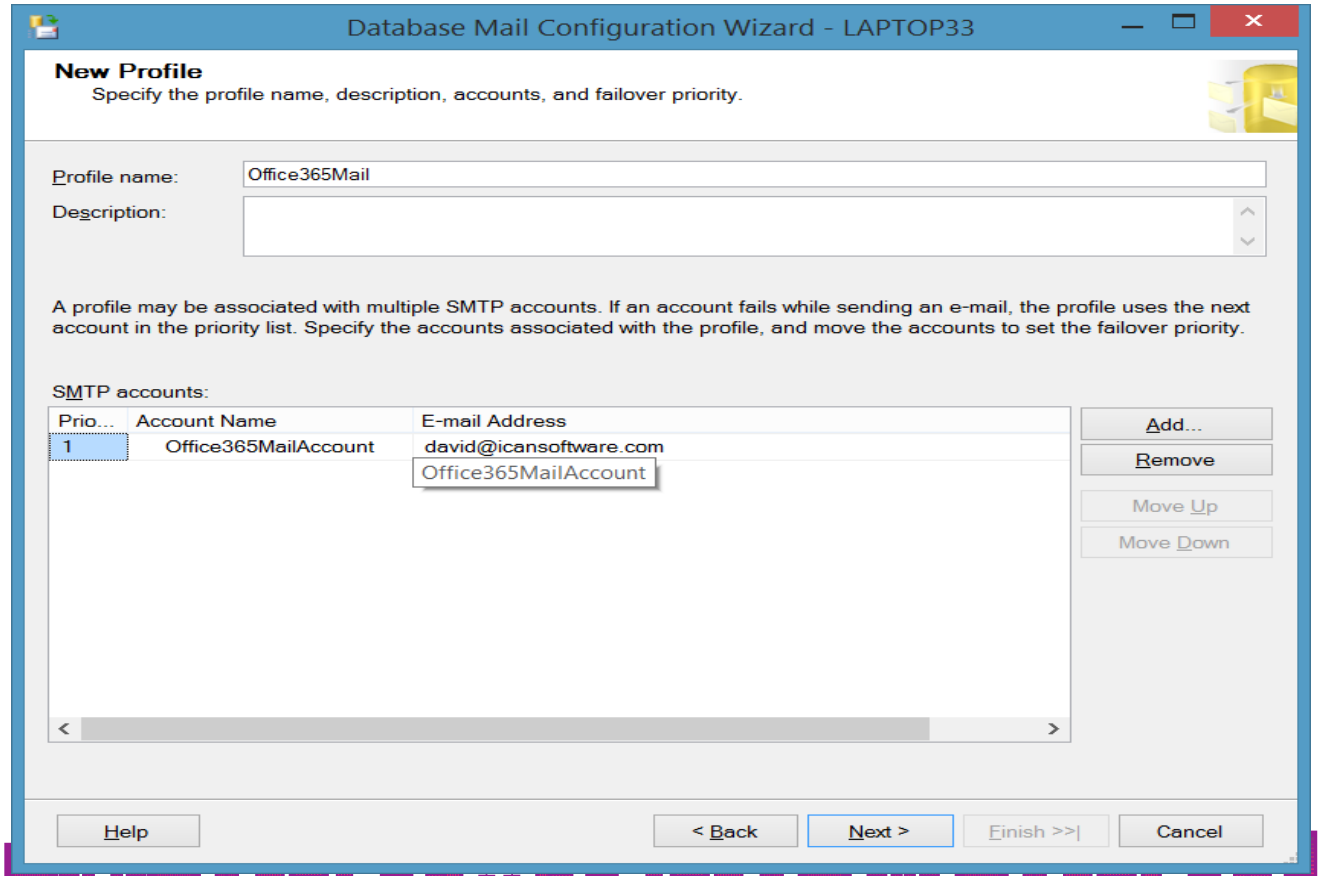

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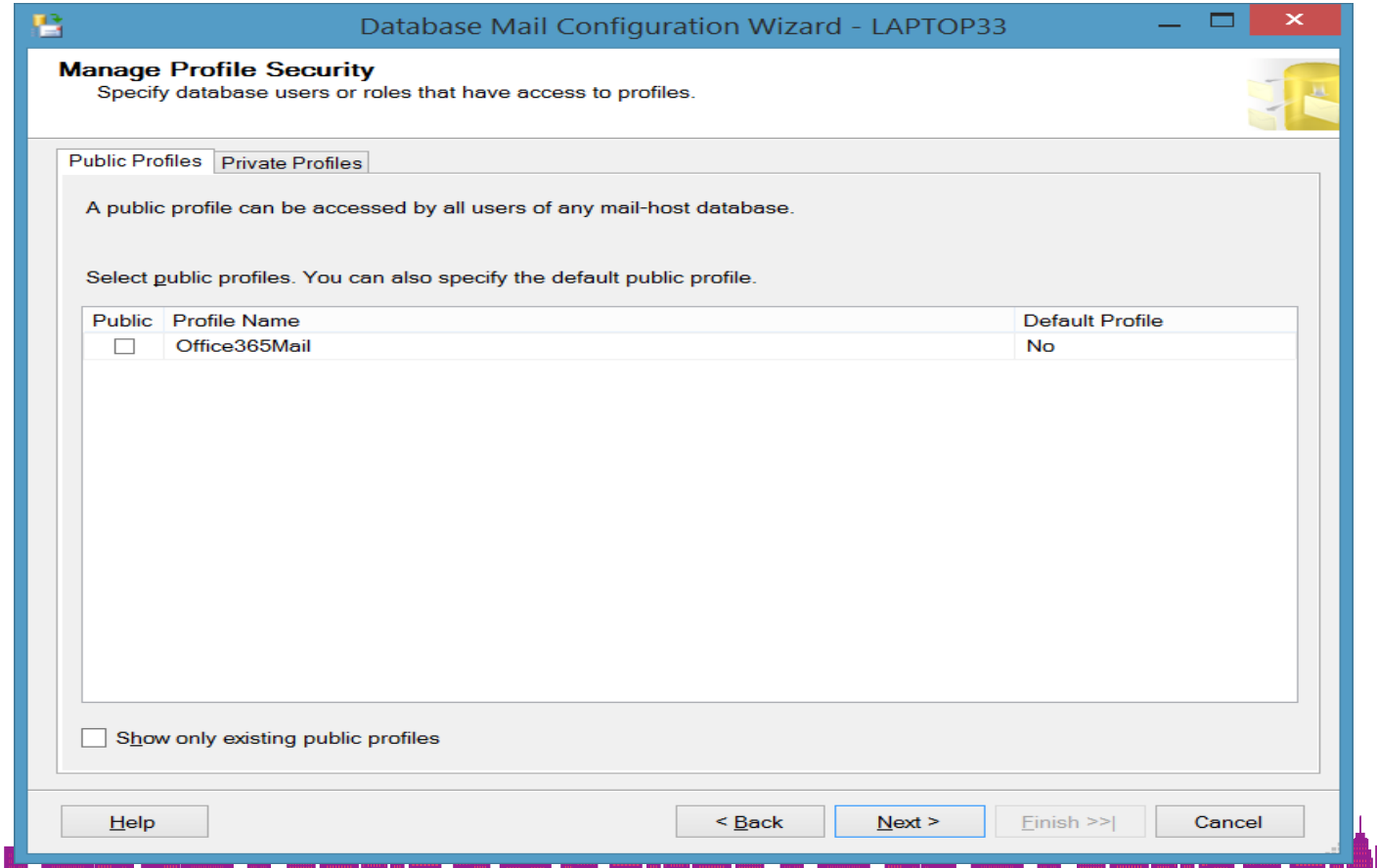

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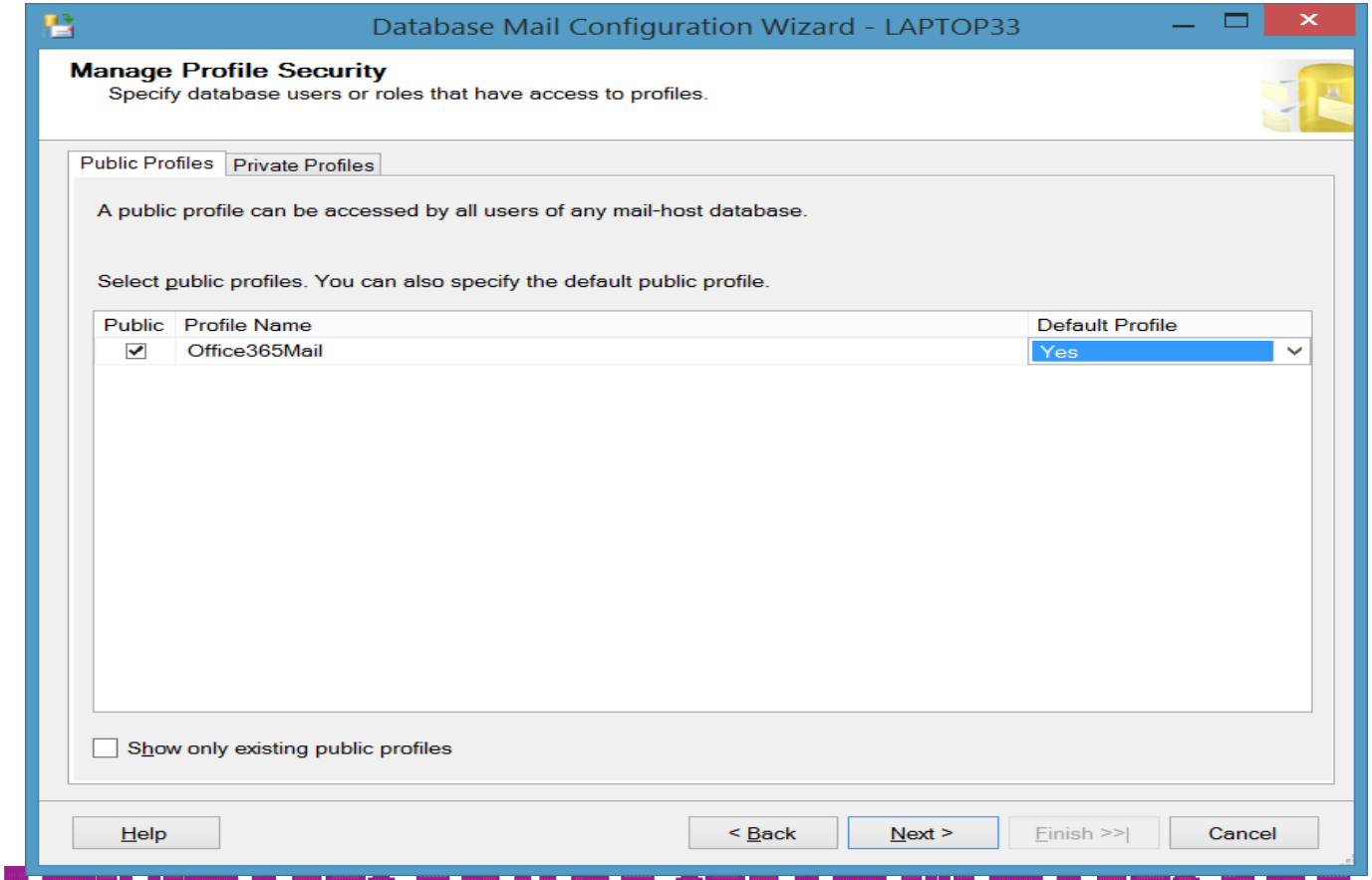

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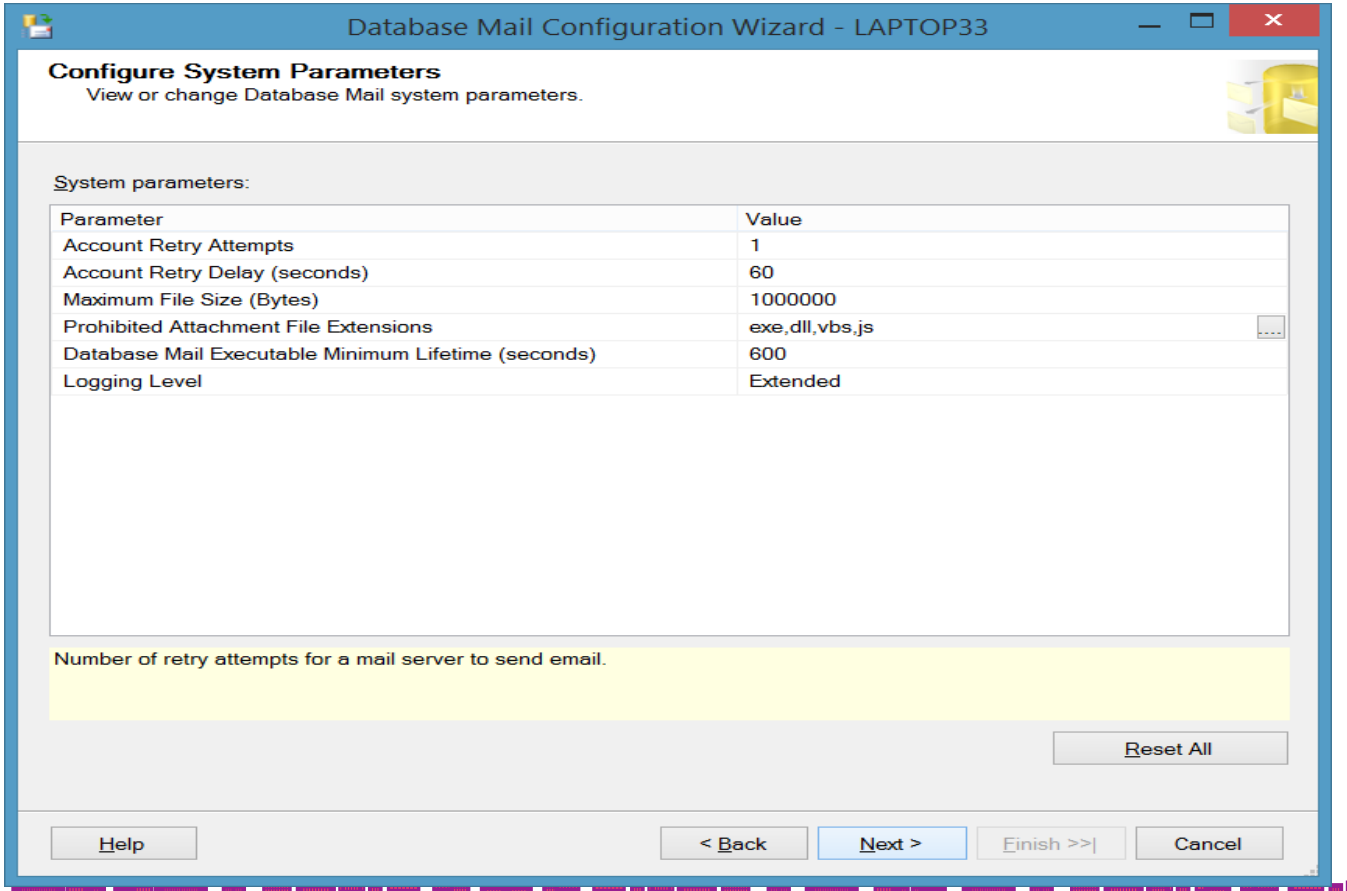

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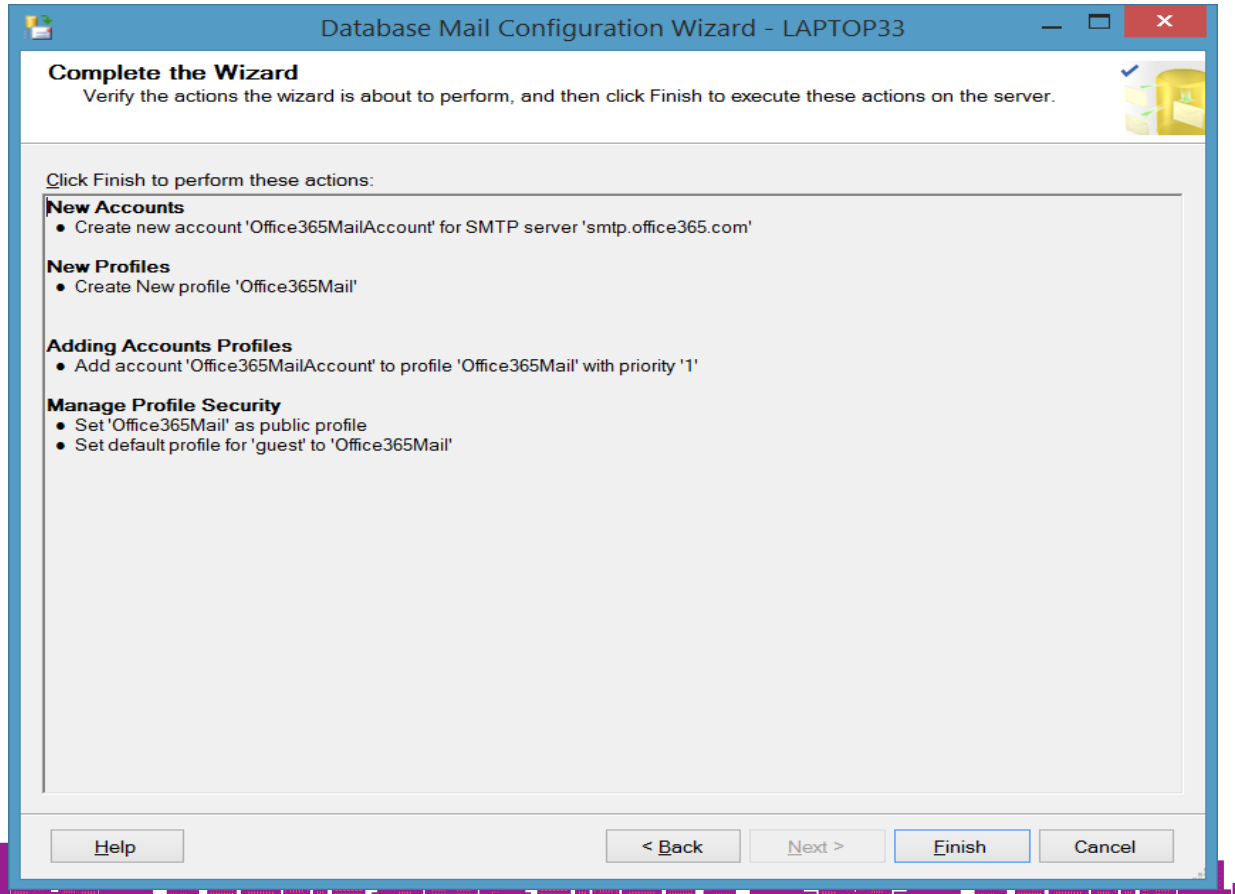

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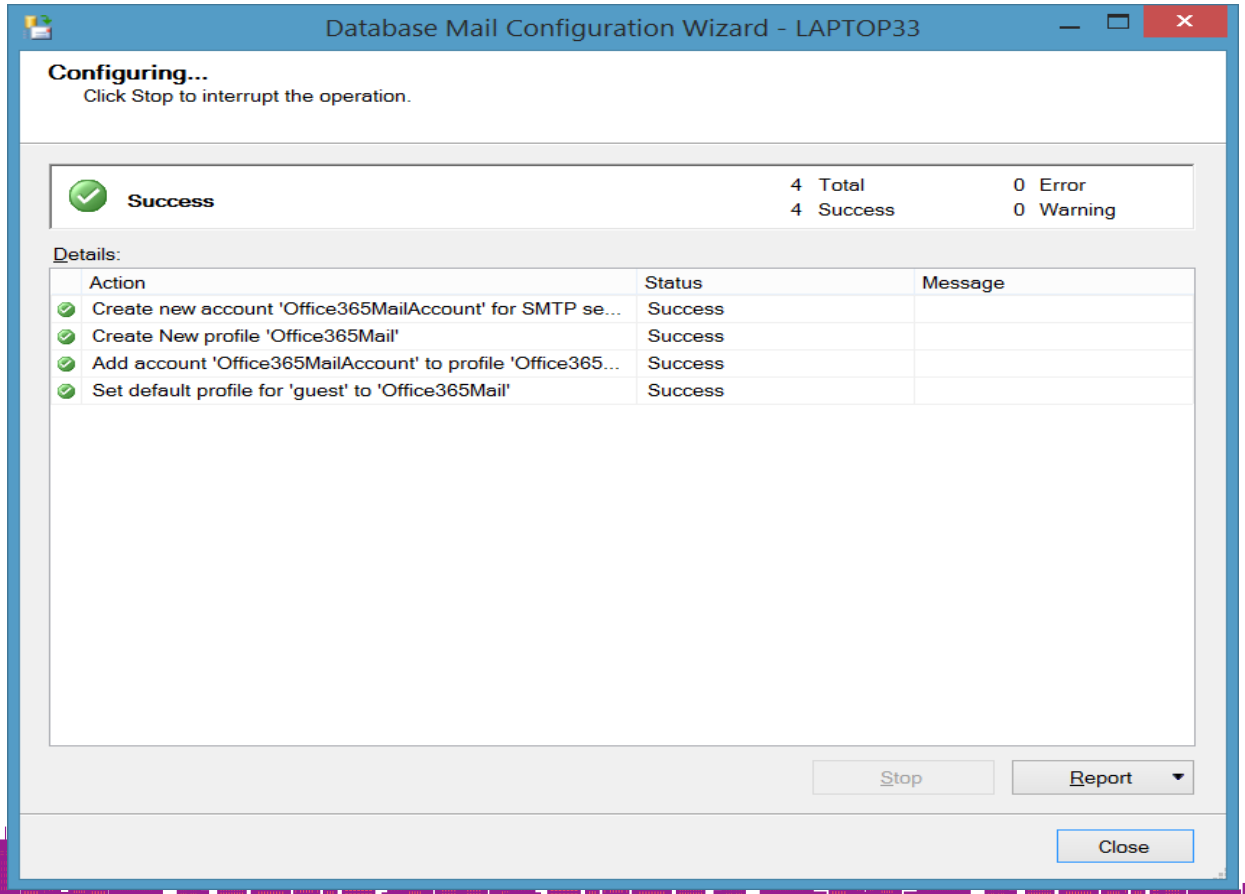

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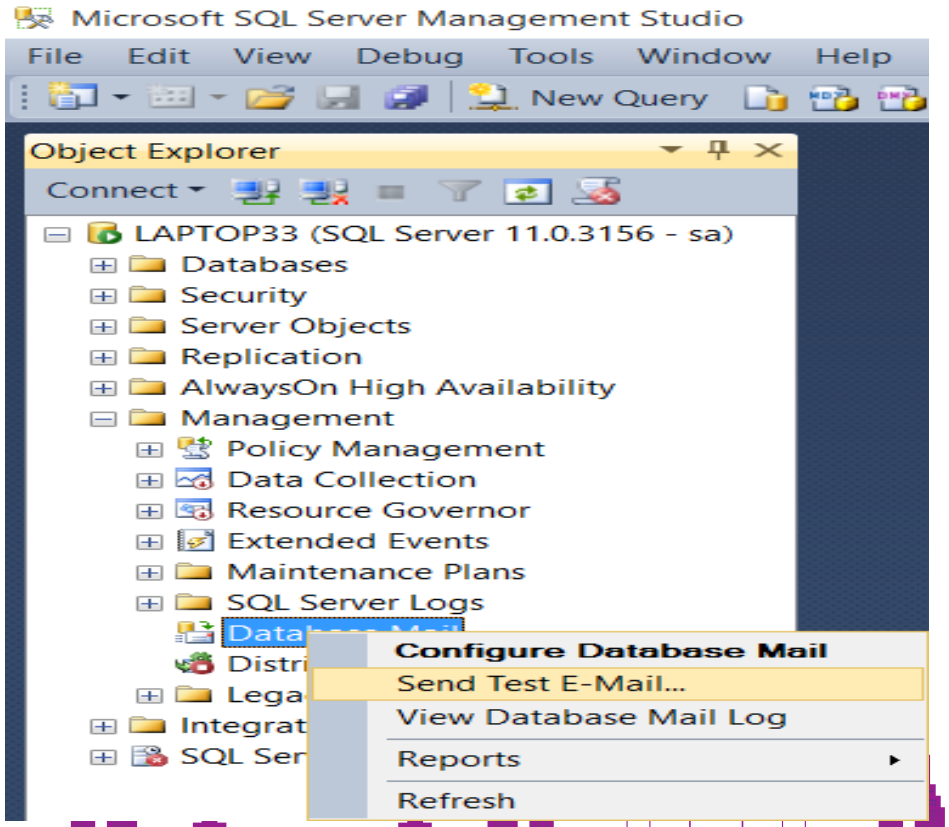

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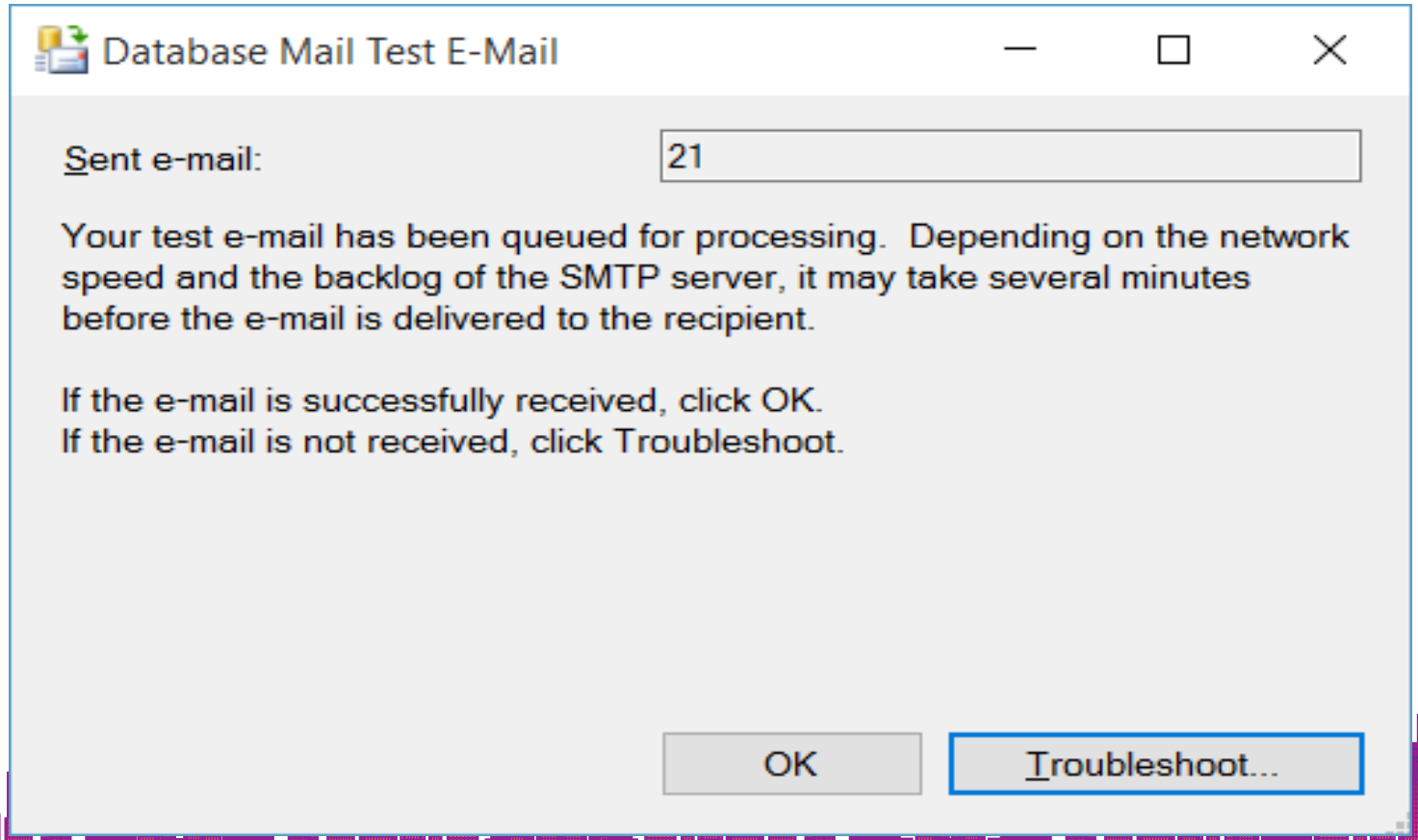

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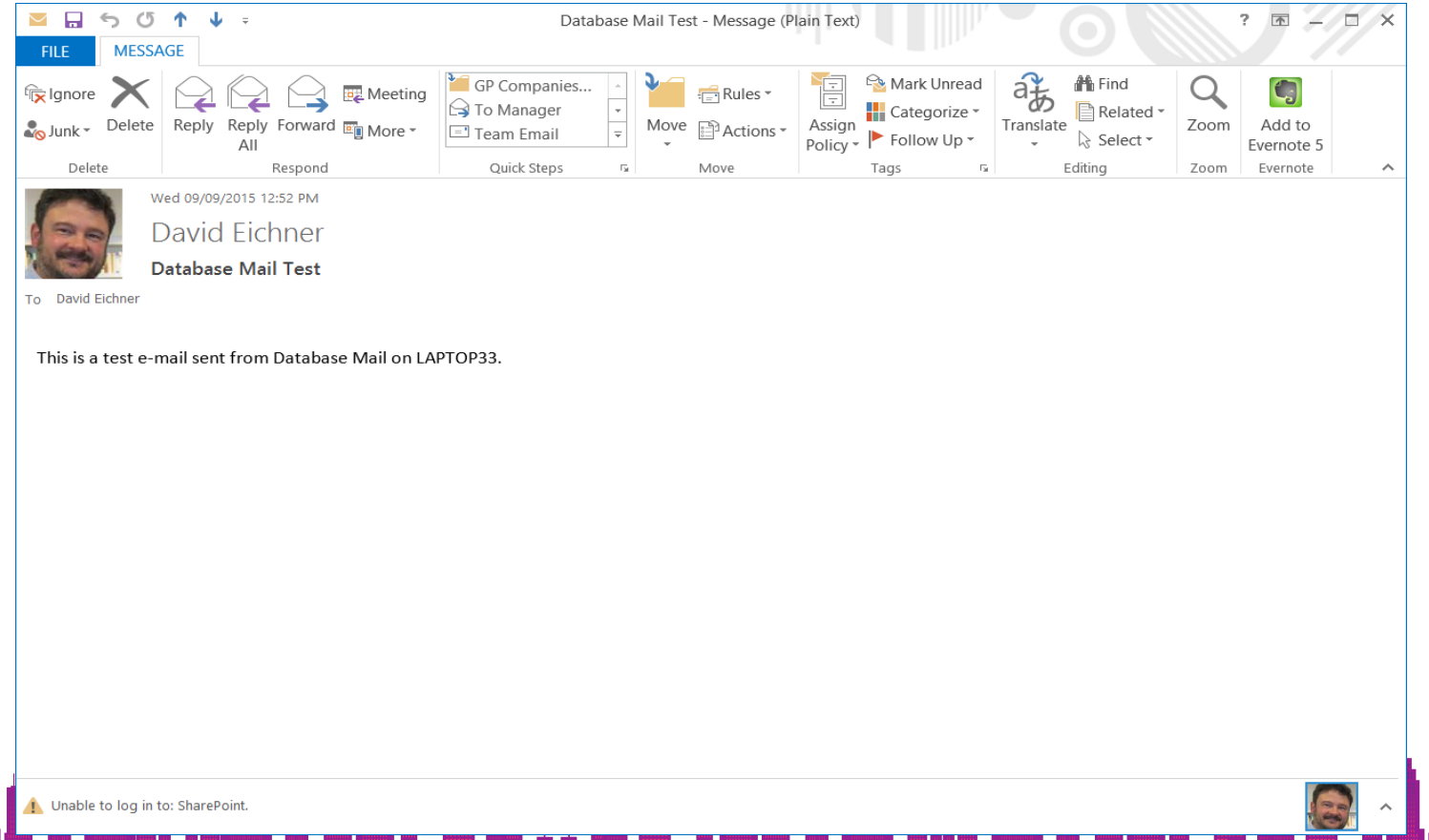
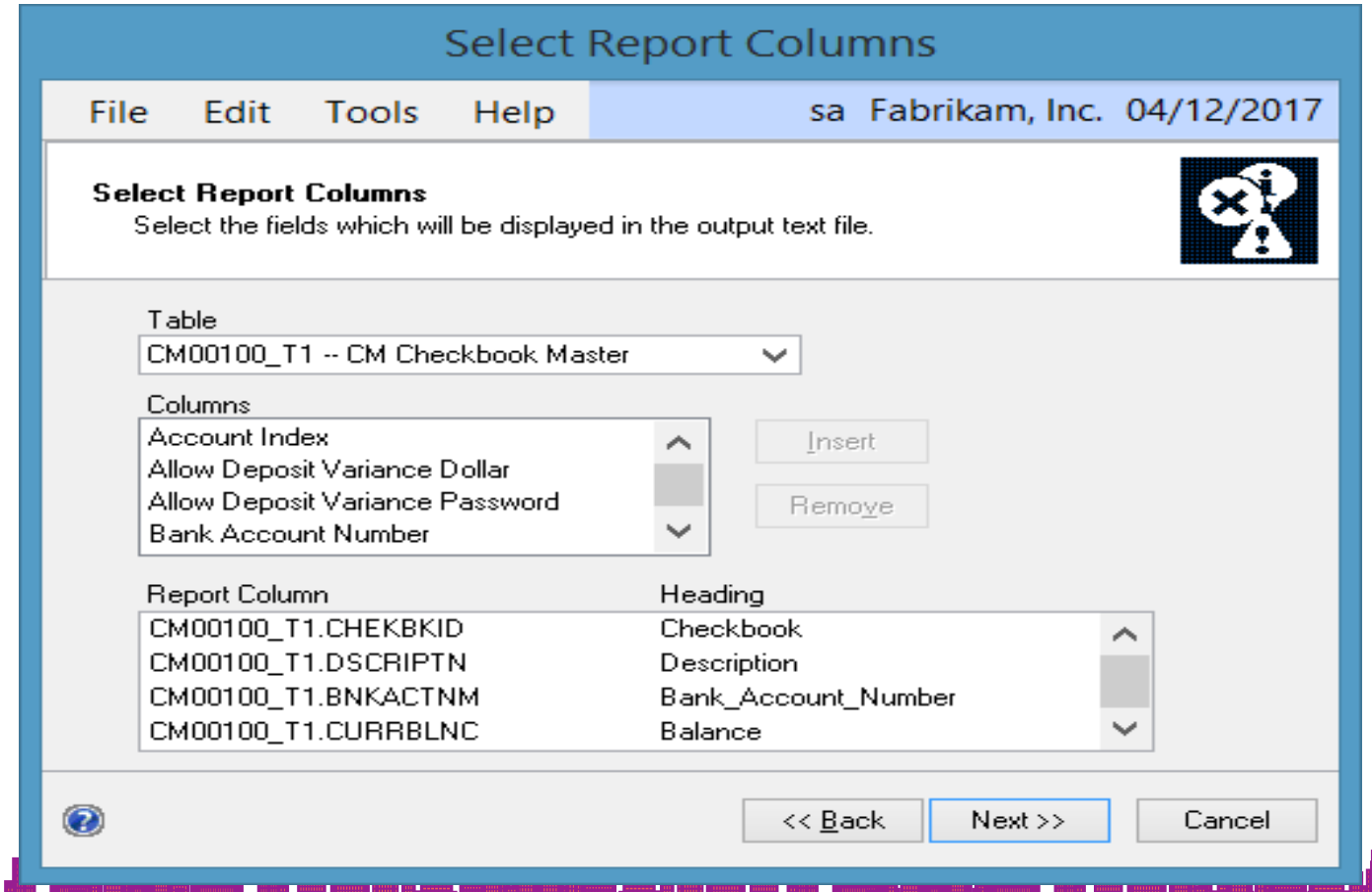


Testing Existing Business Alert Report



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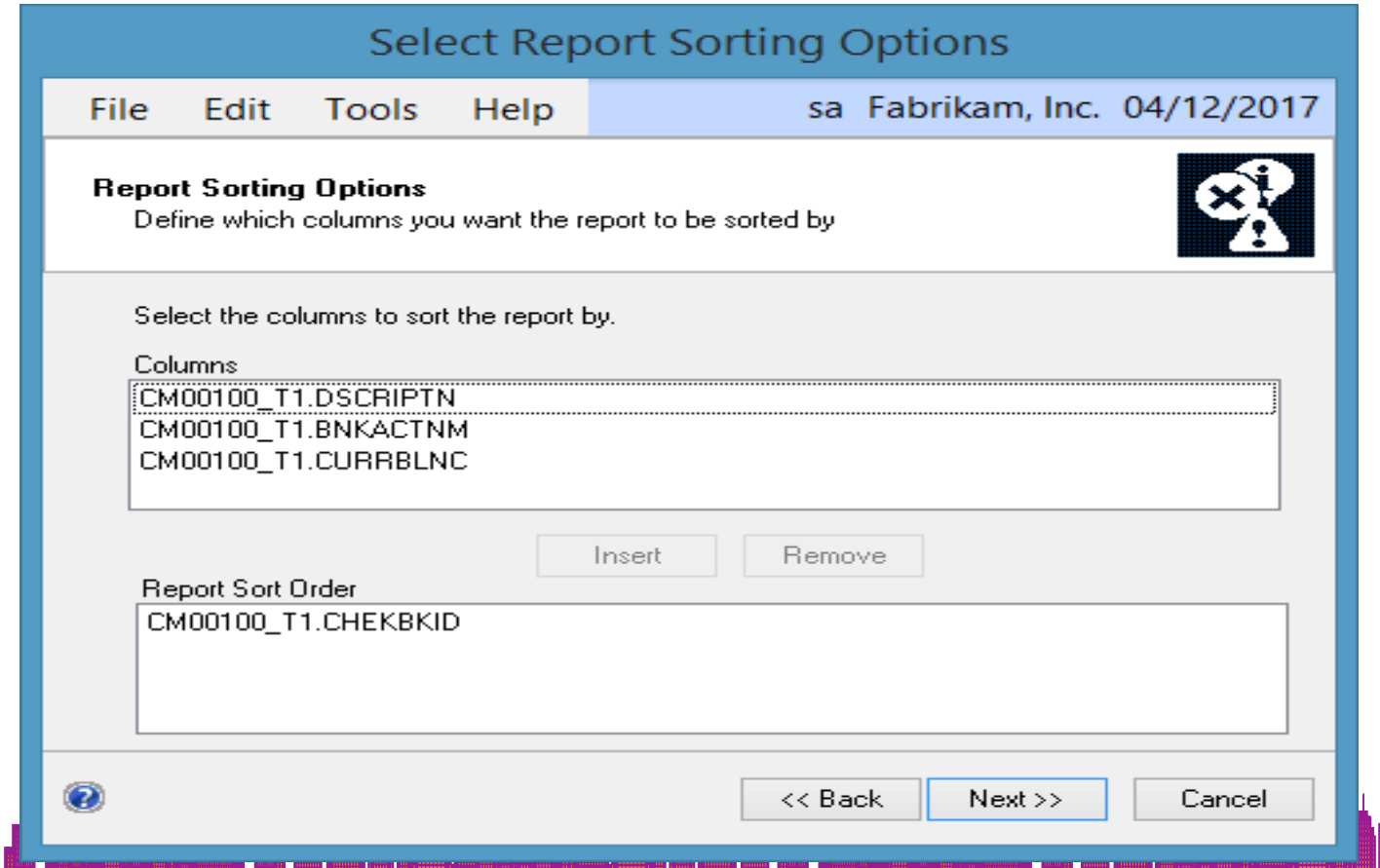

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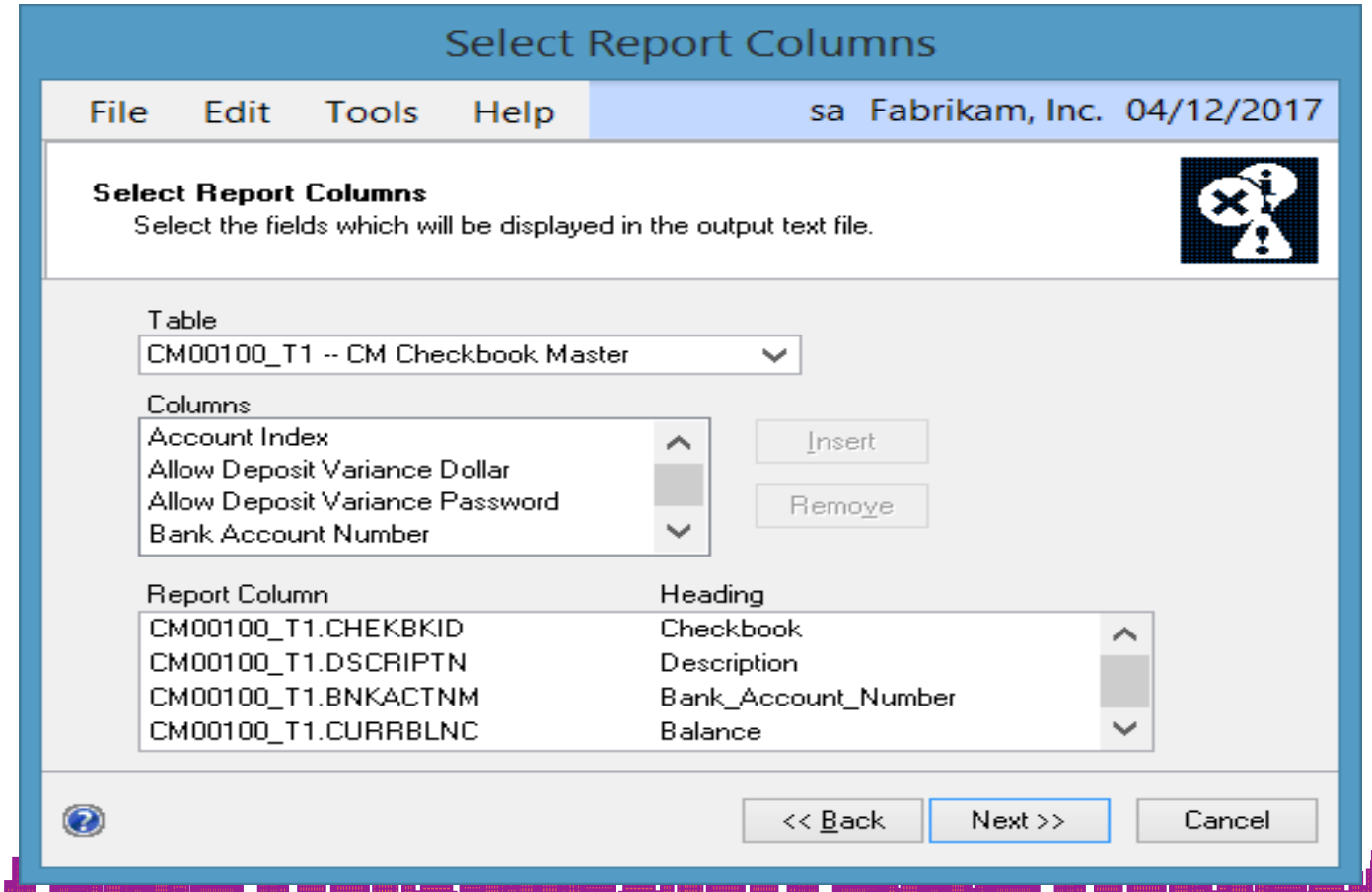

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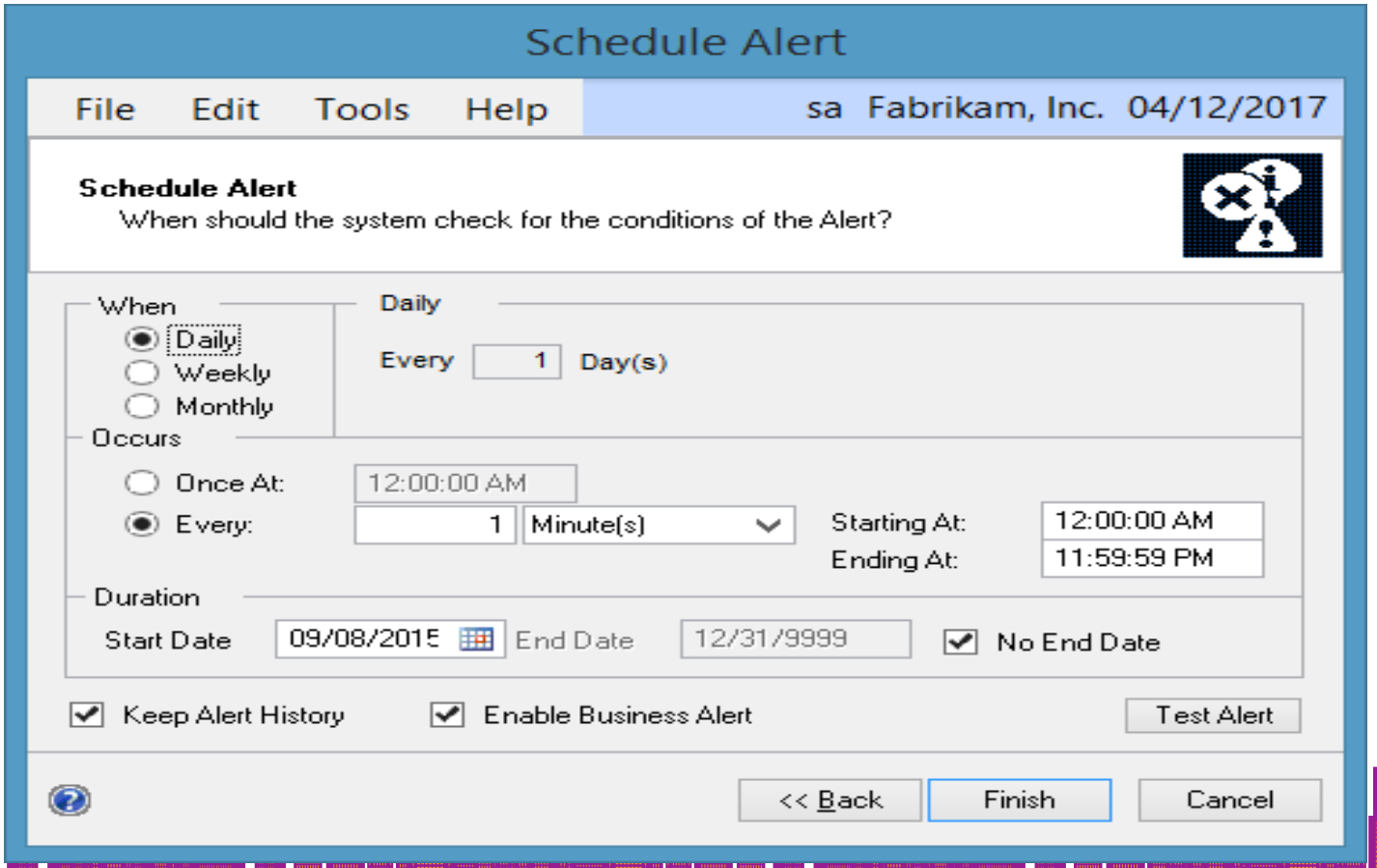

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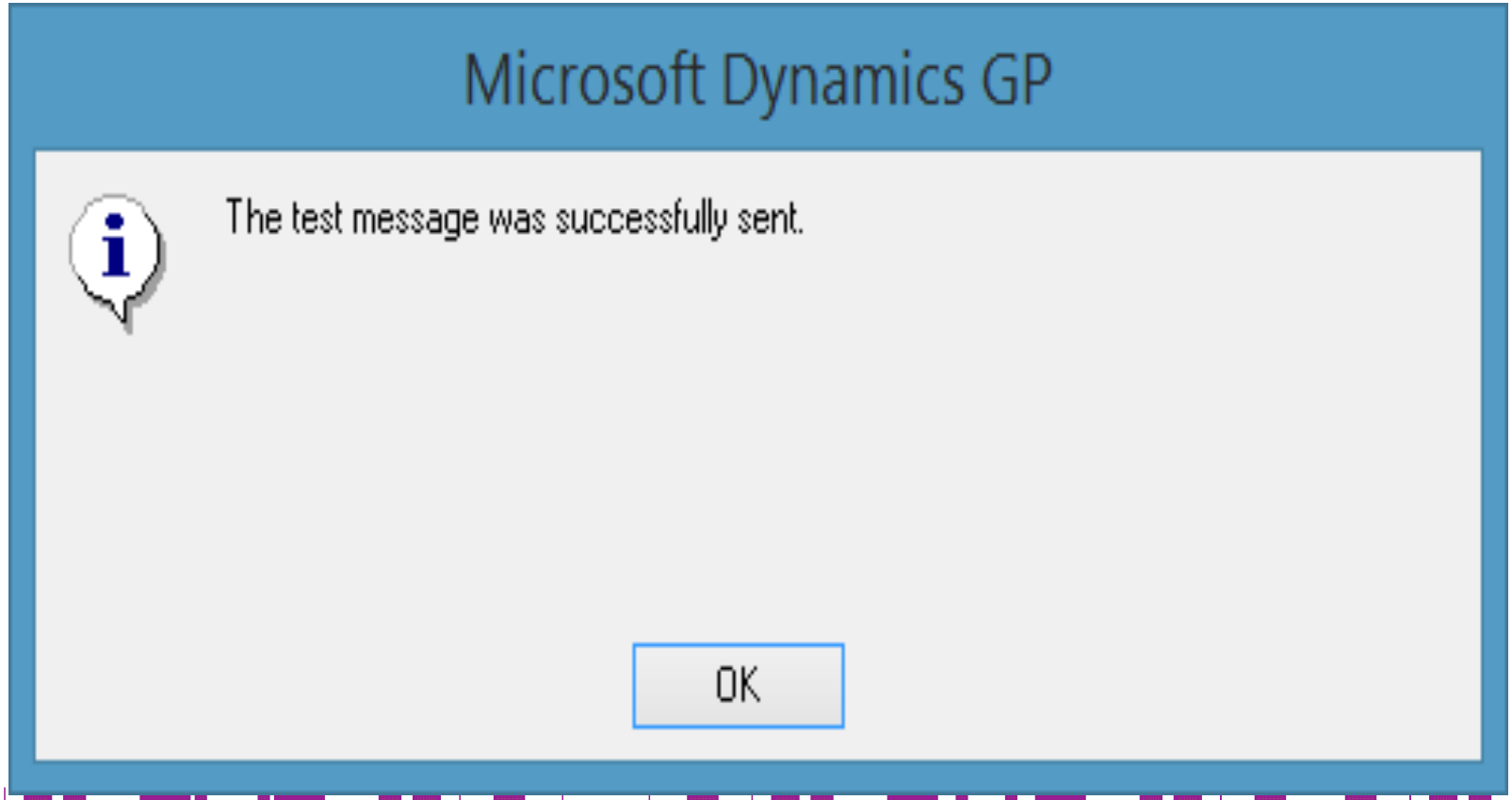

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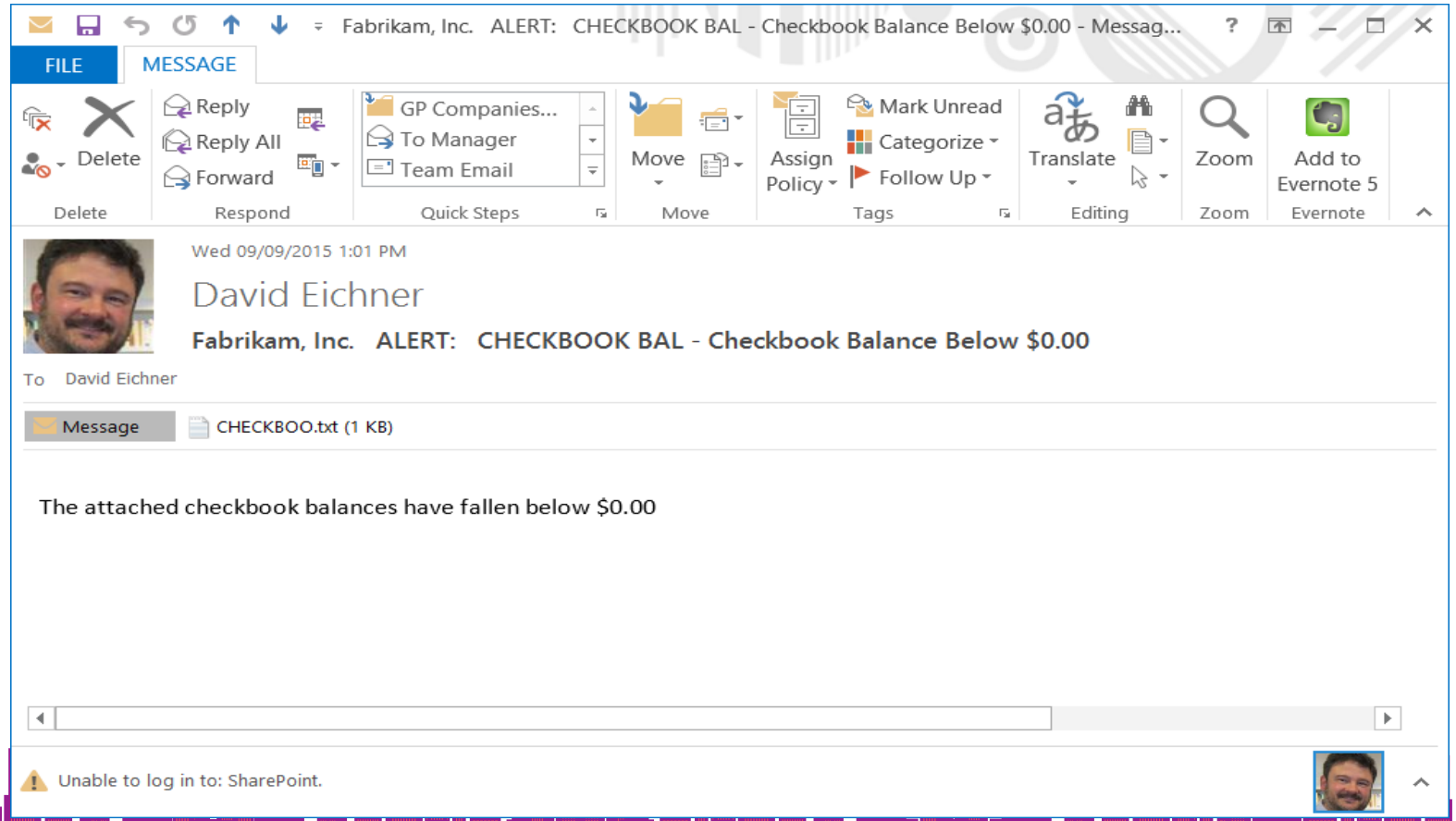

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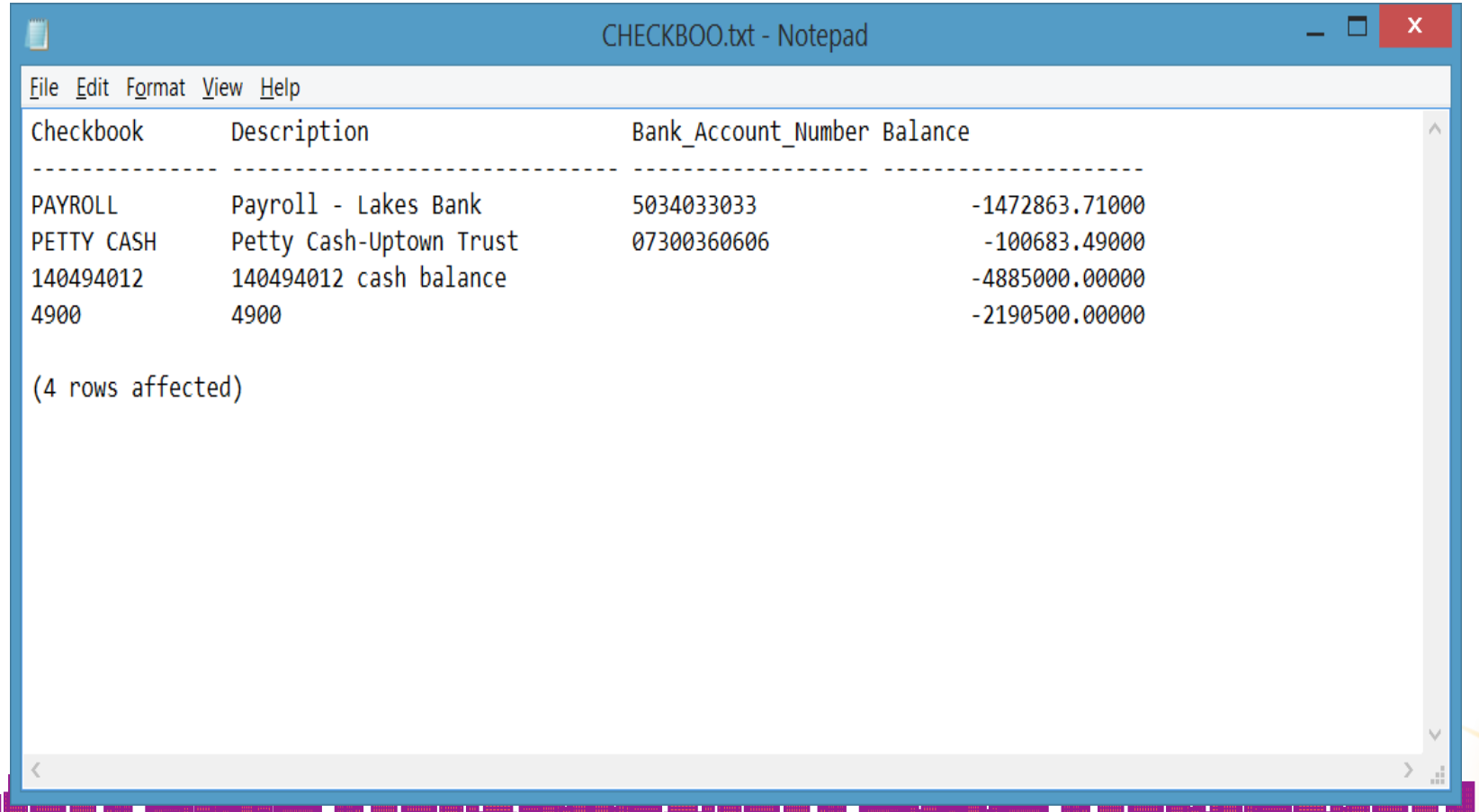

Modifying Existing Busines Alerts

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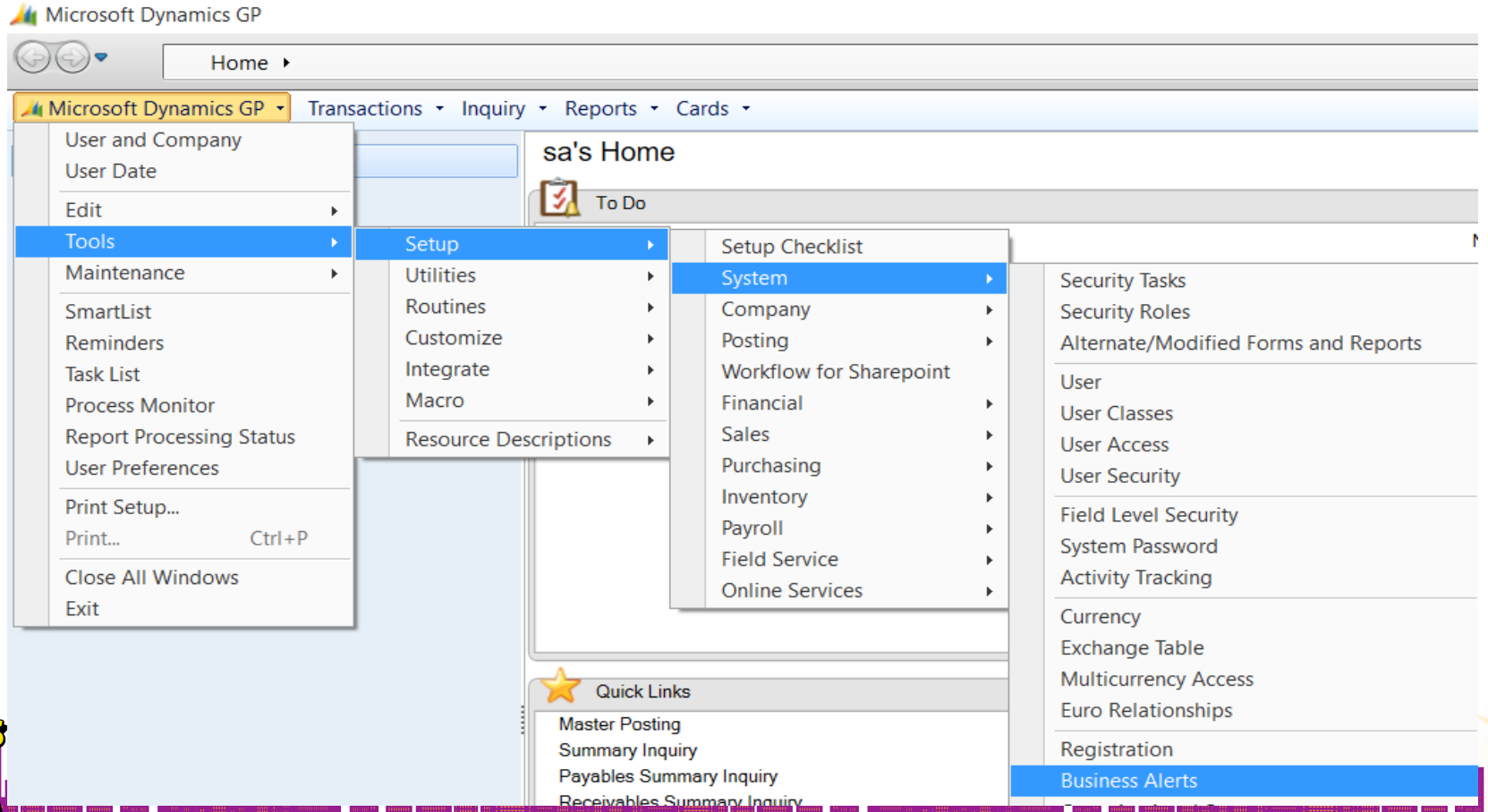

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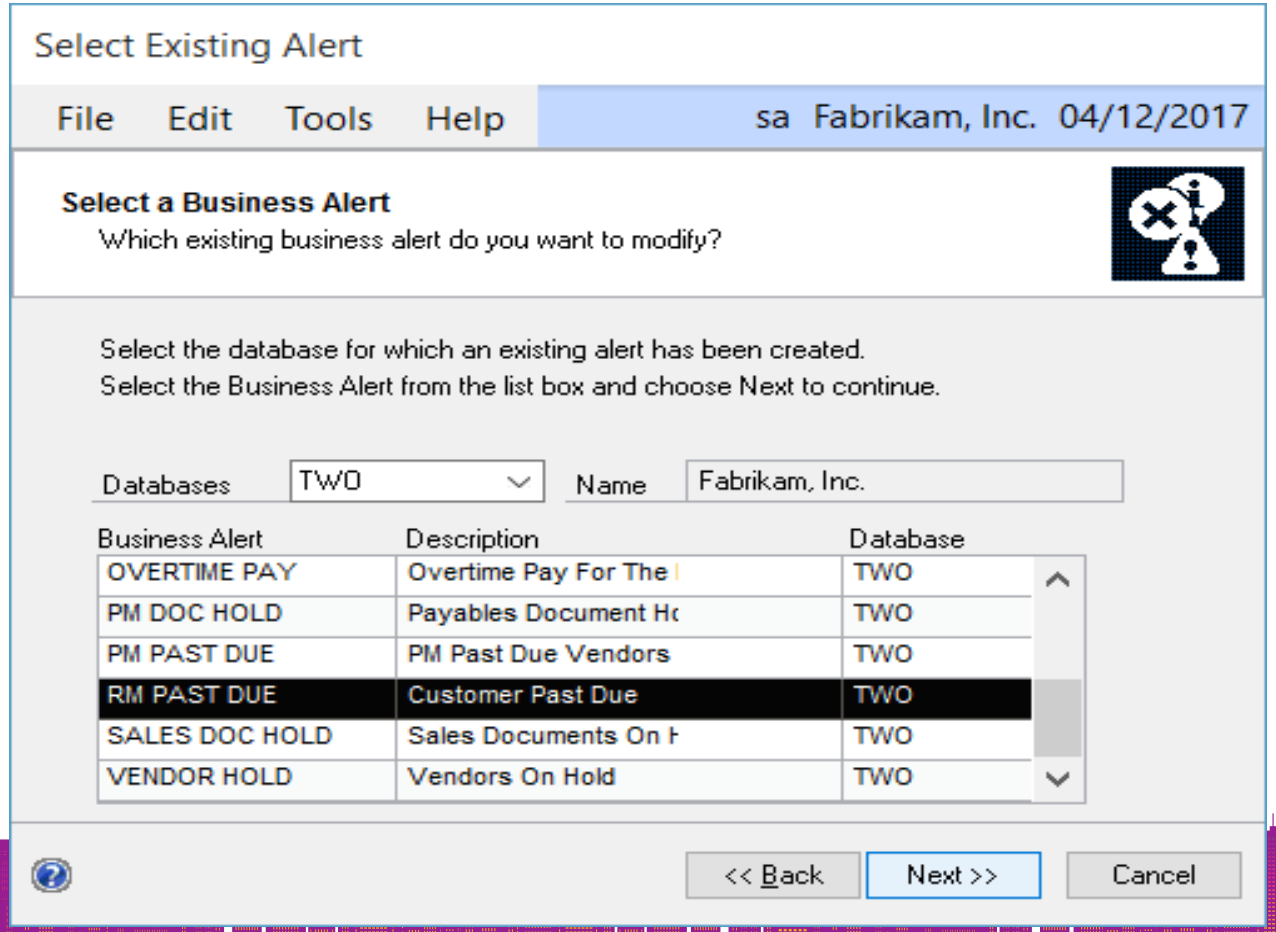

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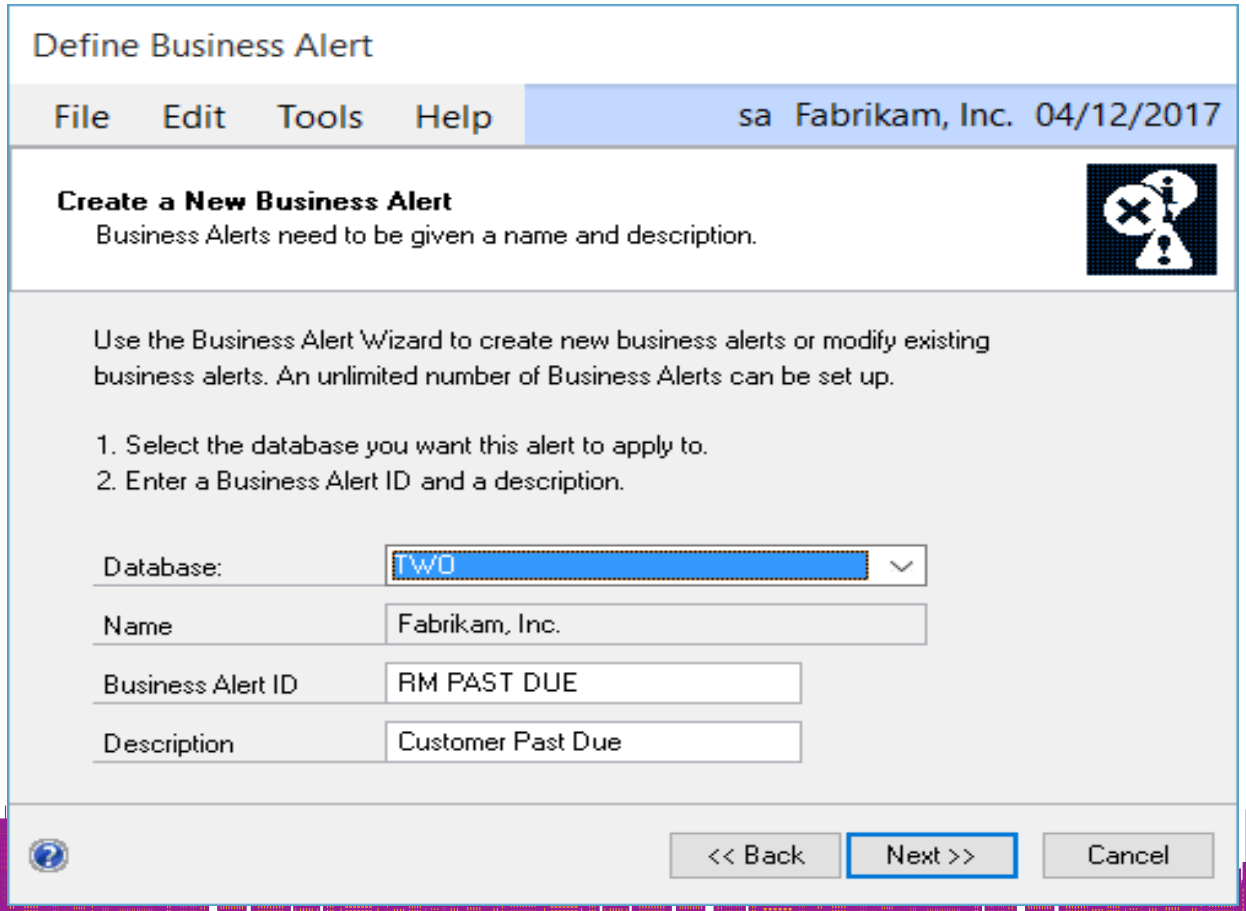

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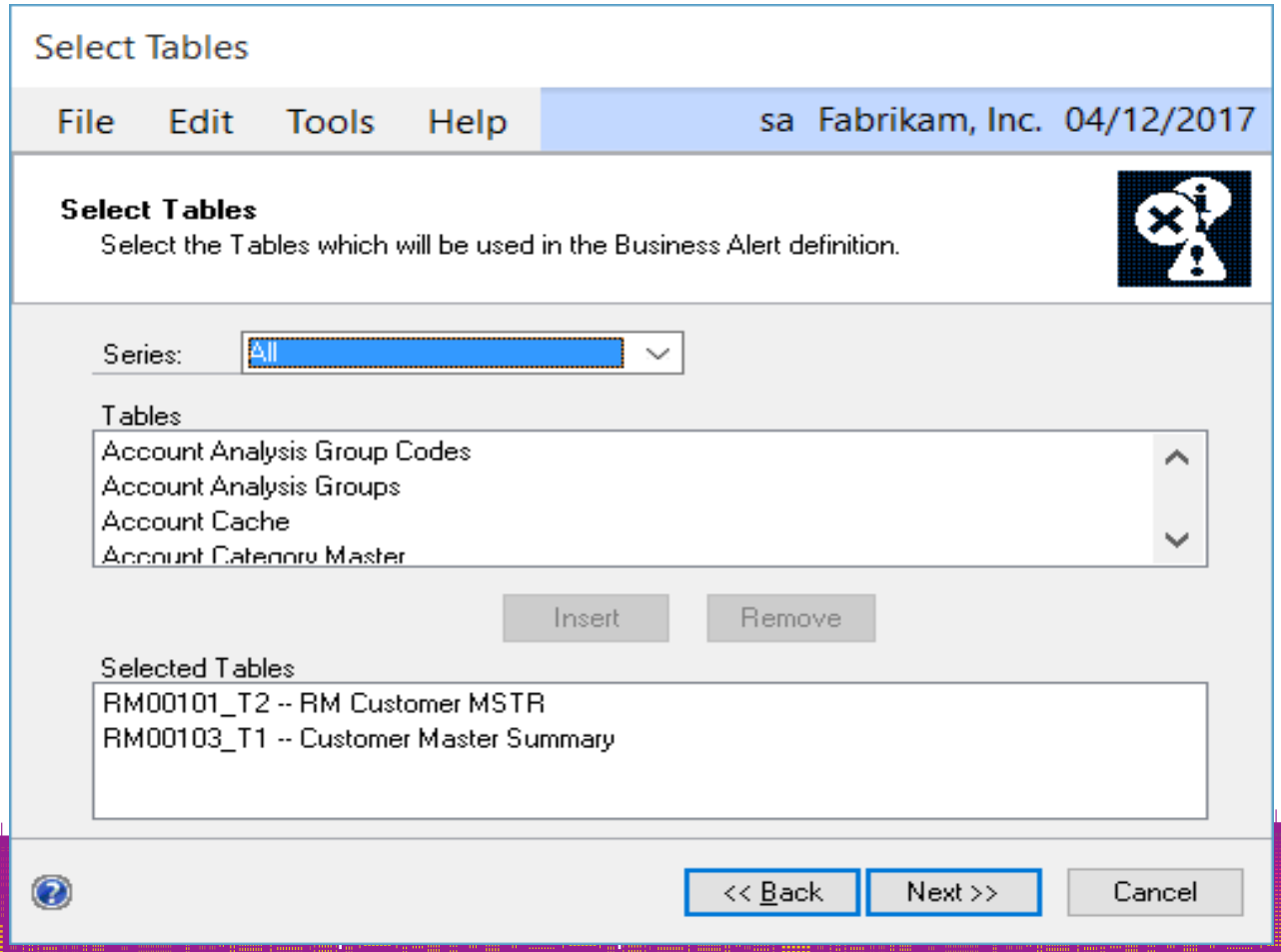

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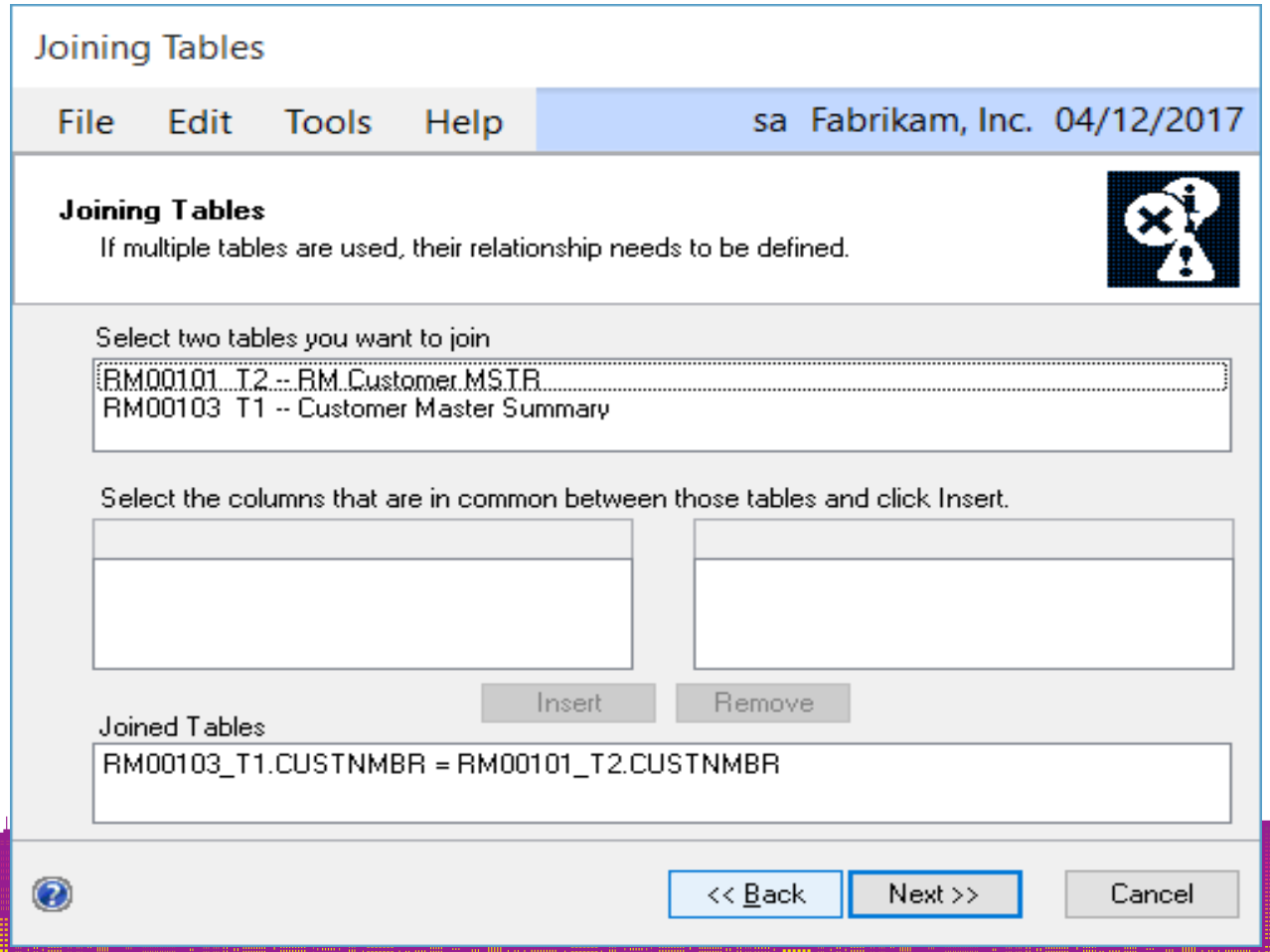

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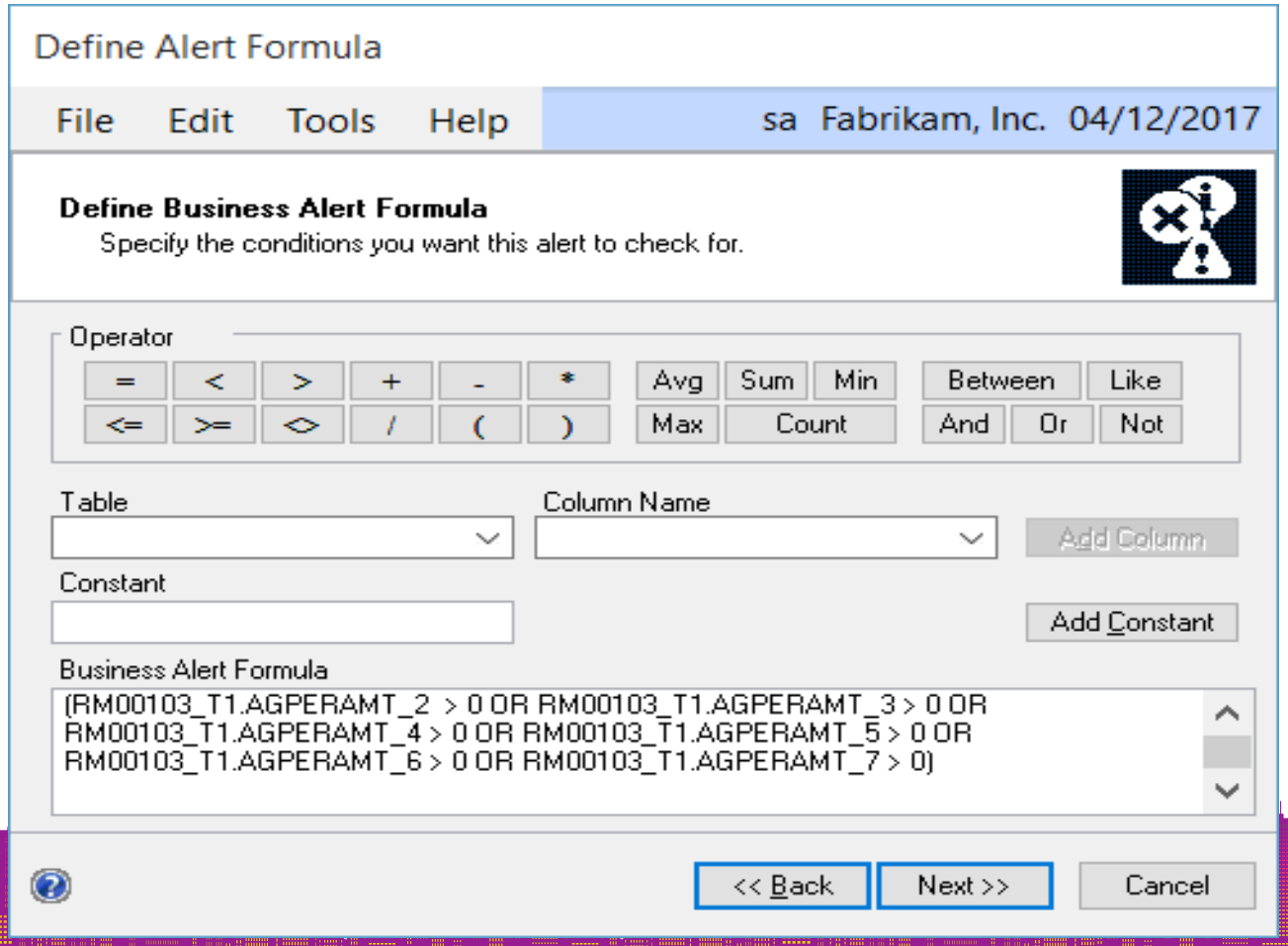

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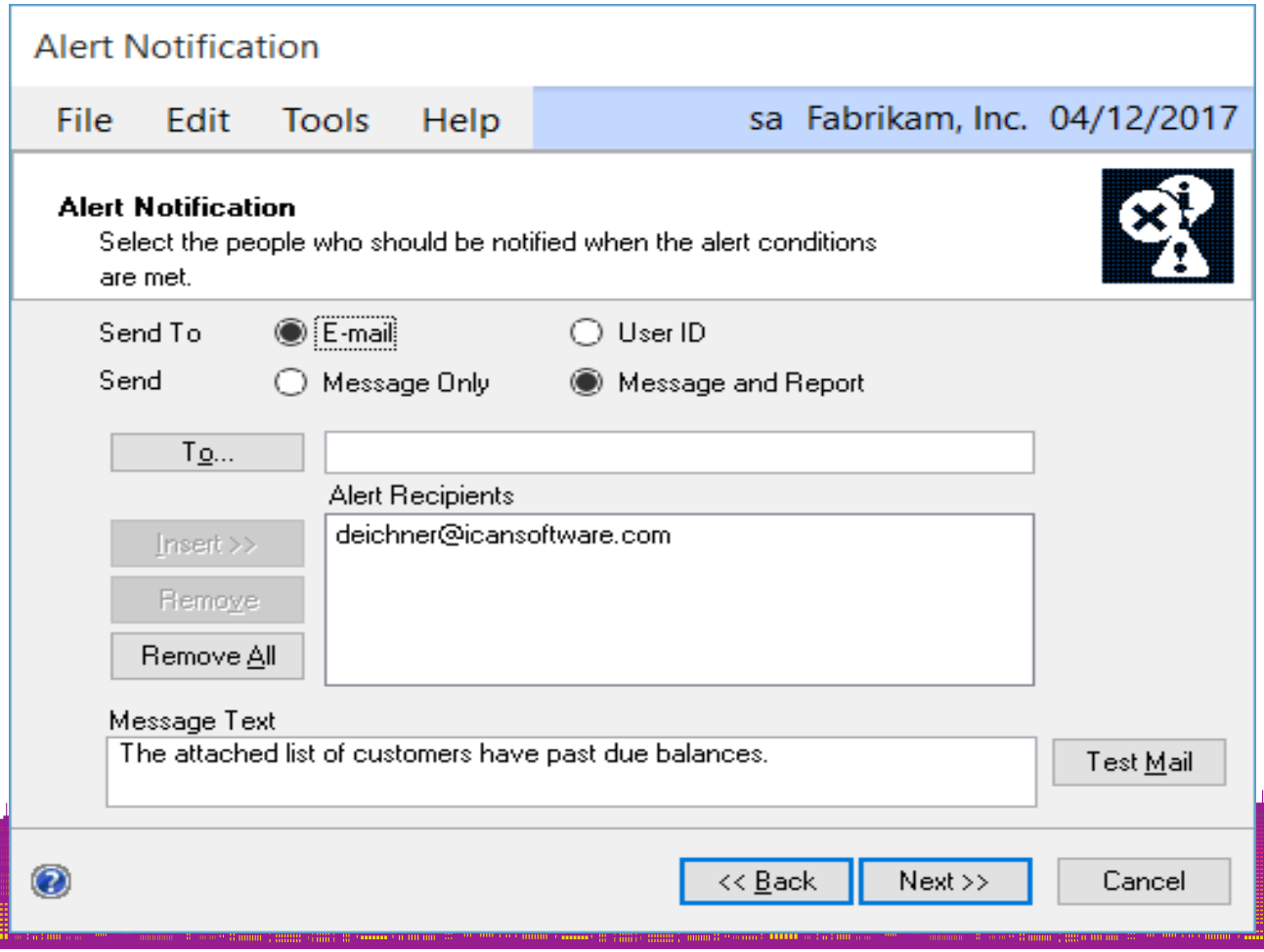

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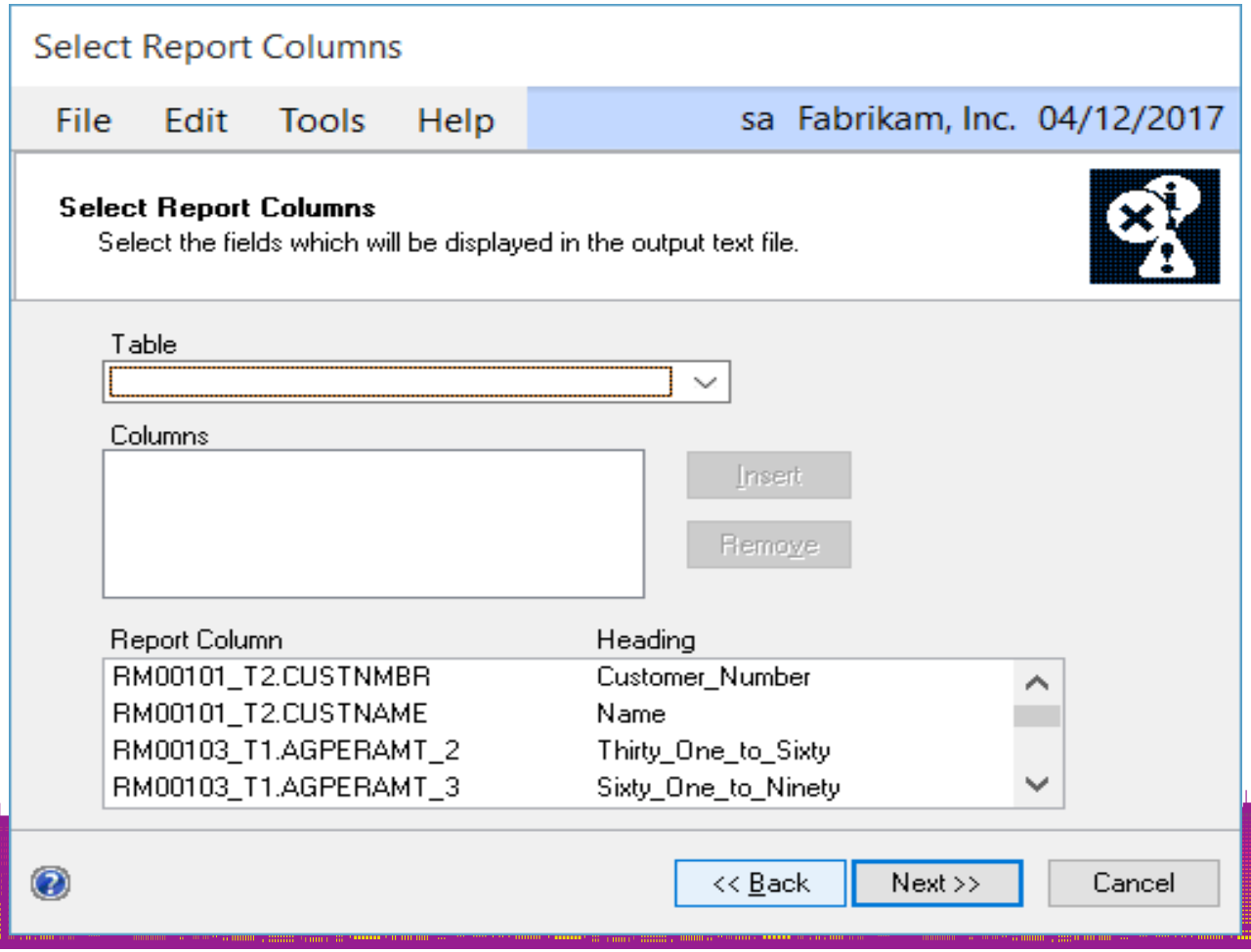

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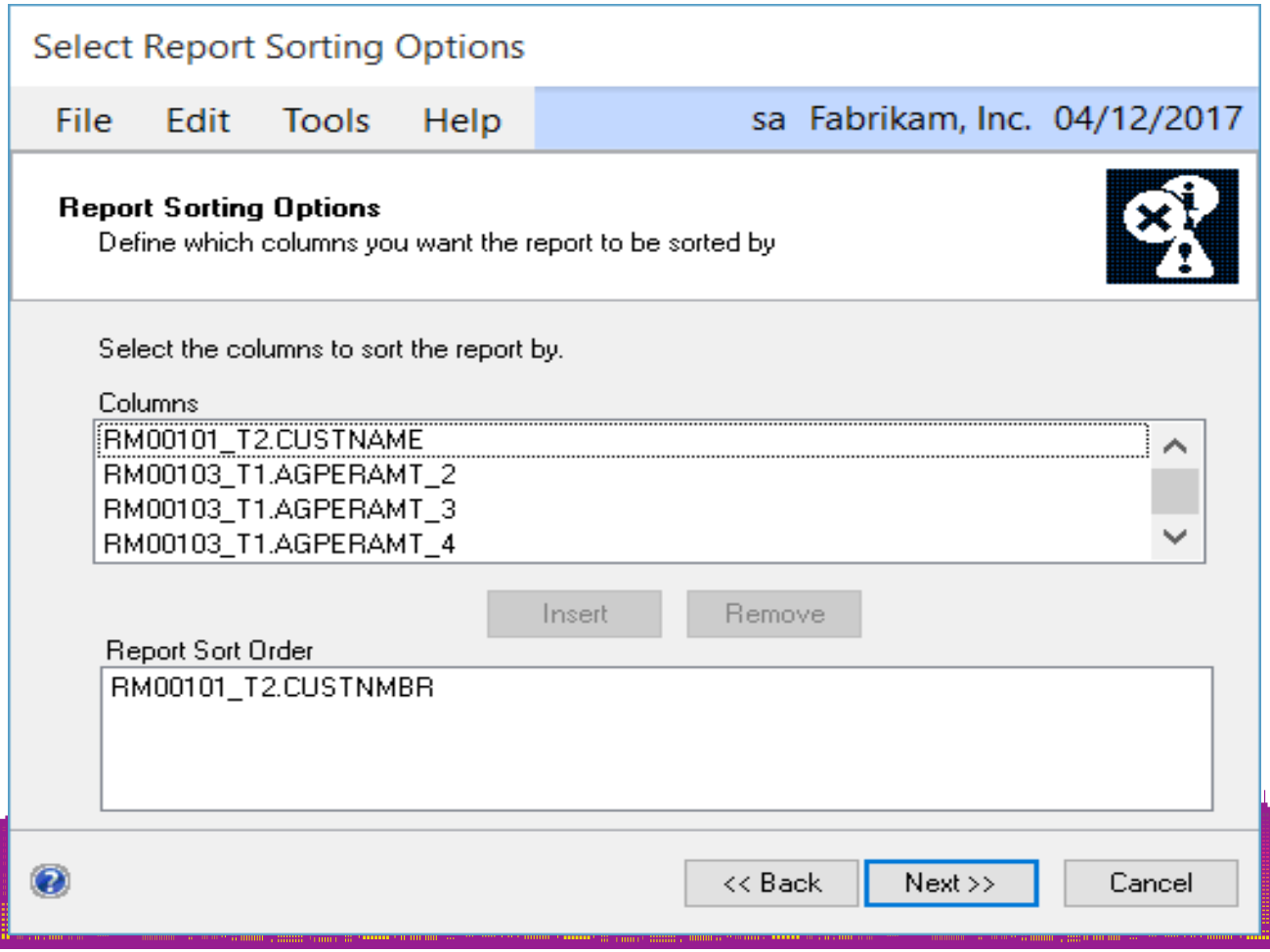

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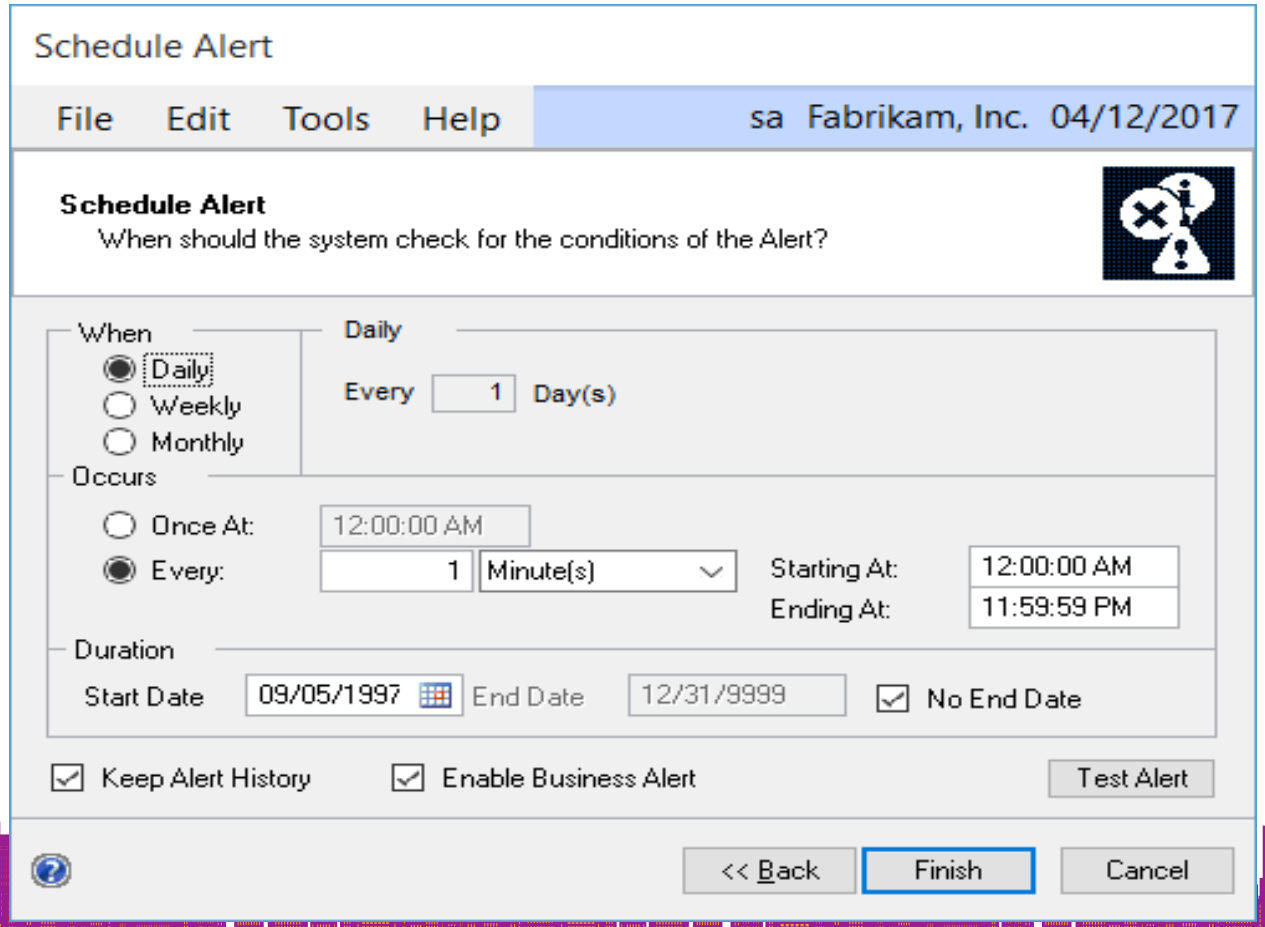

Creating New Busines Alerts

Additional Business Alerts?

- New GL Account
- New Vendor
- New Employee
- Excessively High Credit Limit
- Payments To A Specific Vendor
- Employee Check With Zero Amount
- Employee With Leave Balance Above Certain Level

SQL Report Builder for SSRS

SQL Report Builder

- Free Download From Microsoft
- Does Not Require SSRS
- Can Create And Publish To SSRS
- Wizard For Creating The Report You Need Quickly
- Can Be Used To Create Dashboards

Demo
SQL Report Builder
BC
CE
F&SC
P
GP
CROSS PRODUCT

Power BI Reports

Power BI Reports

- Enhanced Reporting and Visualization
- Integration With More Data Sources (especially cloud-based services)
- Reports Can Be Shared In Teams For Better Decision-Making & Teamwork
- Mobile Accessibility With Mobile Apps for iOS and Android
- Cloud-Based or On-Premises Options

Automating Dynamics GP With Macros

Automating Dynamics GP With Macros

- Easy To Record (Even From The Login Screen)
- Macros Can Be Scheduled To Run
- Schedule Long Running Processes
  - Run Reports At Night
  - Paid Transaction Removal
  - Aging
  - Email Statements Automatically

Contact Info:

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david@icansoftware.com

icancloudapps.com

Mass Apply Receivables | Mass Apply Payables | InvestmentAssets | Vendor Price Lists