



# 2026 DYNAMICS CON

Vegas



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# Agenda

- Check Links
- Reconciles
- Reporting Clean Up
- Remove History
- User Related Cleanup
- Product Cleanup
- Archiving Data



# Check Links

Check links examines table “groups” instead of just one table & re-creates the damaged records in the applicable table.

## Microsoft Dynamics GP\Maintenance\Check Links

- Have users out of GP
- Make a back up first
- Run check links before upgrades – review errors
- Be careful running Check Links on Security Setup



# Reconciles

Use the Reconcile window to repair damaged data. You should check links before you attempt to reconcile your data.

- Have users out of GP
  - Make a back up first
  - Run reconciles before upgrades – review errors
  - Consider monthly reconciles if you are a heavy user of SOP/POP/Inventory
  - Be careful with security reconciles
- 
- Under Utilities in each module.



# Years of Reporting

- Modified Reports
  - Determine location of report dictionaries
  - Review security for access to modified reports
  - Discuss reports with users to determine who is using which reports
- Report Options
- SmartList Favorites
- Management Reporter Reports
  - Purging MR History:  
<https://community.dynamics.com/gp/f/microsoft-dynamics-gp-forum/409198/mr-clean-up-old-reports>
  - Resetting the DataMart  
<https://community.dynamics.com/blogs/post/?postid=d26c7f08-c470-4907-a51b-64ae5cbc58fc>



# User Related Cleanup

- Clean Up Security
- Inactivate Old Users
- Clear Activity Tracking

## RDP Tips

- Clear disconnected sessions
- Make sure users are logging out not “x-ing” out!



# Product Clean Up

```
DYNAMICS.SET - Notepad
File Edit Format View Help
13
0
Microsoft Dynamics GP
949
FieldService
1042
Interfund Management
1493
SmartList
1632
Cash Flow Management
1878
Excel-Based Budgeting
2277
Purchase Order Enhancements
2416
Control Account Management
2547
Enhanced Commitment Management
2992
CopierSeries
3104
Advanced Security
3278
Report Scheduler
5597
HITB Report
Windows
:C:\Program Files (x86)\Microsoft Dynamics\GP2018\Dynamic.dic
:C:\Program Files (x86)\Microsoft Dynamics\GP2018\Data\FORMS.DIC
:C:\Program Files (x86)\Microsoft Dynamics\GP2018\Data\REPORTS.DIC
:C:\Program Files (x86)\Microsoft Dynamics\GP2018\SrvcAdv.DIC
:C:\Program Files (x86)\Microsoft Dynamics\GP2018\Data\FRMS949.DIC
:C:\Program Files (x86)\Microsoft Dynamics\GP2018\Data\RPTS949.DIC
```

Top # is the number of modules/products installed

Product id usually matches in the path area

- Uninstall unused modules
- Uninstall unused ISV (add-on) products
- Uninstall prior versions of GP

C:\Program Files (x86)\Microsoft Dynamics\GP

# Dynamics.set



# Removing or Archiving

- Remove History
- Create an Archive company
- Company Archiver by Professional Advantage



# Documentation

- What do we own? Microsoft products, ISV products, etc.
- Are we current on all annual renewals?
- What integrations do we have?
  - What systems feed GP?
  - What systems pull from GP?
- What processes are we doing manually?
  - Do we have the steps documented?
  - Could we replace with automation?
- Who knows all our passwords?



# Questions?

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