

Foundation I in Microsoft Dynamics GP 10.0

IN BRIEF

Delivery: Instructor Led

Duration: 1 day

Class size: 10 Students Max.

Cost: \$650.00+GST

Inclusions: Microsoft expert instructor, comprehensive course manual, individual computer access and refreshments.

Prerequisites: Before attending this course, students must have:

- General knowledge of Microsoft Windows
- Basic knowledge of accounting principles

Audience

Customers wanting to learn the basic features and elements required to effectively use each Microsoft Dynamics GP module. The class is targeted toward data entry clerks, administrators; office managers, CEOs, and consultants who need to understand the technical aspects of Microsoft Dynamics GP Foundation and gain basic general knowledge of the application functionality.

Products Covered:

Microsoft Dynamics GP 10.0

Course Description

This one-day Microsoft Dynamics GP Foundation course explores the basic elements of Microsoft Dynamics GP. Topics covered during this session include: system and company setup procedures, how to use reports and inquiries, how to use SmartList to expand inquiry and analysis capabilities, business alerts, process server and tips for the user to personalize shortcuts and checklists to streamline business practices.

Objectives

- Use basic elements such as lookup windows, browse buttons and zooms to access data in Microsoft Dynamics GP.
- Enter record and window level notes.
- Attach OLE Notes.
- Use SmartList to export data to Microsoft Word or Microsoft Excel for further analysis.
- Use the Posting Setup options to define posting processes.
- Customize system and company setup procedures using the Setup Checklist.
- Assign and track the completion of setup tasks using the Setup Checklist.
- Set up fiscal periods, account formats, credit cards and payment terms.
- Use inquiries and reports to get at the information needed.
- Customize Microsoft Dynamics GP toolbars, home pages and display settings.
- Describe the benefits of using Business Alerts and Process Servers.
- View and use resource descriptions for tables and fields in Microsoft Dynamics GP.
- Use the SQL backup system to back up a company database.

Topics Covered

Overview and Basic Elements

- Microsoft Dynamics GP Series
- Integration
- Address Bar
- Main Toolbar
- Menus
- Advanced Lookups
- Window Components
- Notes
- User Preferences
- Tasks & Reminders
- Navigation Pane
- Home Pages
- Help

SmartList, Reports and Inquiries

- SmartList Objects
- Creating SmartList Favorites
- Report Options
- Printing Reports
- Report Groups
- Excel Reports
- Named Printers
- Process Monitor

System and Posting Setup

- Registration
- Security Tasks
- Security Roles
- User Setup
- User Security
- User Classes
- Posting Setup
- Posting Accounts Setup

Company Setup Procedures

- Creating Companies
- Setup Checklist
- Account Format
- Fiscal Periods
- Company Information
- Internet Information
- Shipping Methods
- Payment Terms
- Credit Cards
- Custom Links
- Other Company Setups
- Taxes

Customization and Utilities

- Series Checklists
- Customizing Toolbars
- Activity Tracking
- Process Server
- Macros
- Installation Customization Options
- Table, Field and Window Information
- Backups