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Dynamics SL
Tips ‘n Tricks

WELCOME!

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Function Keys

- F1 Help
- F2 Edit field in grid view/enter date in period field
- F3 Check Possible Values
- F4 Switch between Form and grid view
- F5 Clear a field in form view
- F7 Set a date field to today's date
- F9 Enter and display notes

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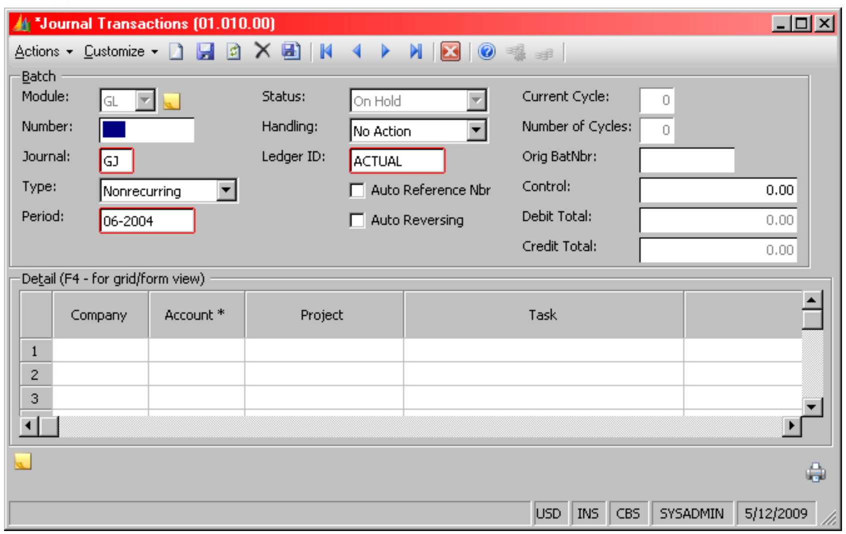
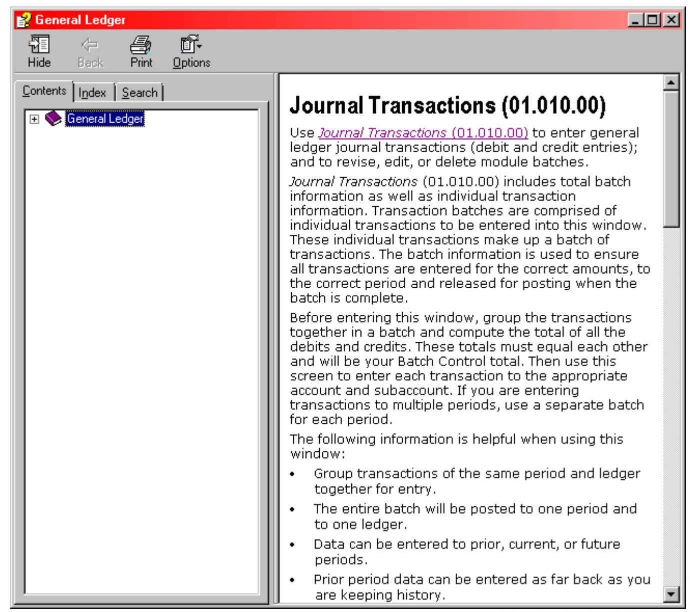
Screen Level Help - v7.0

- Click on the ? to access help documents related to that screen.





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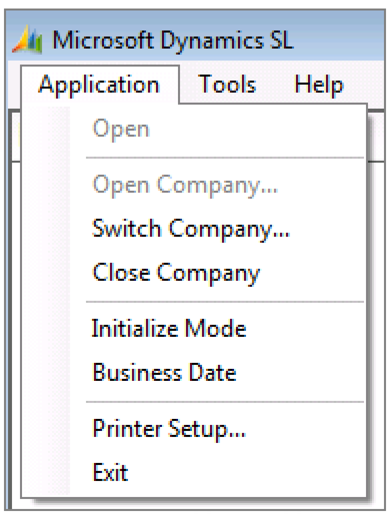
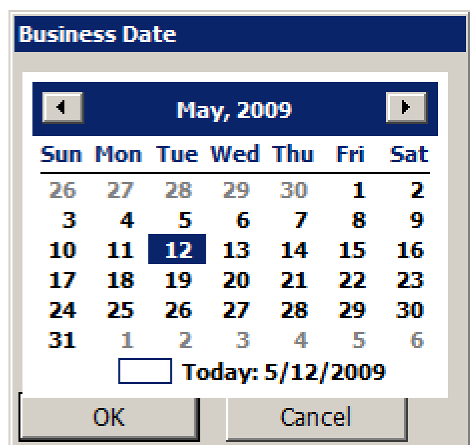
Change/Set Business Date

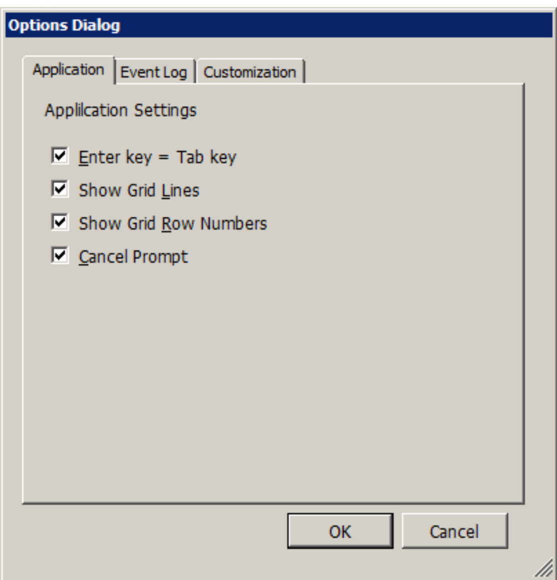
- To date stamp a large number of documents with a date other than today’s date, change the business day and enter the documents into the system. Upon completion, change the business day back to the actual date. The date will also refresh when exiting/entering Dynamics.

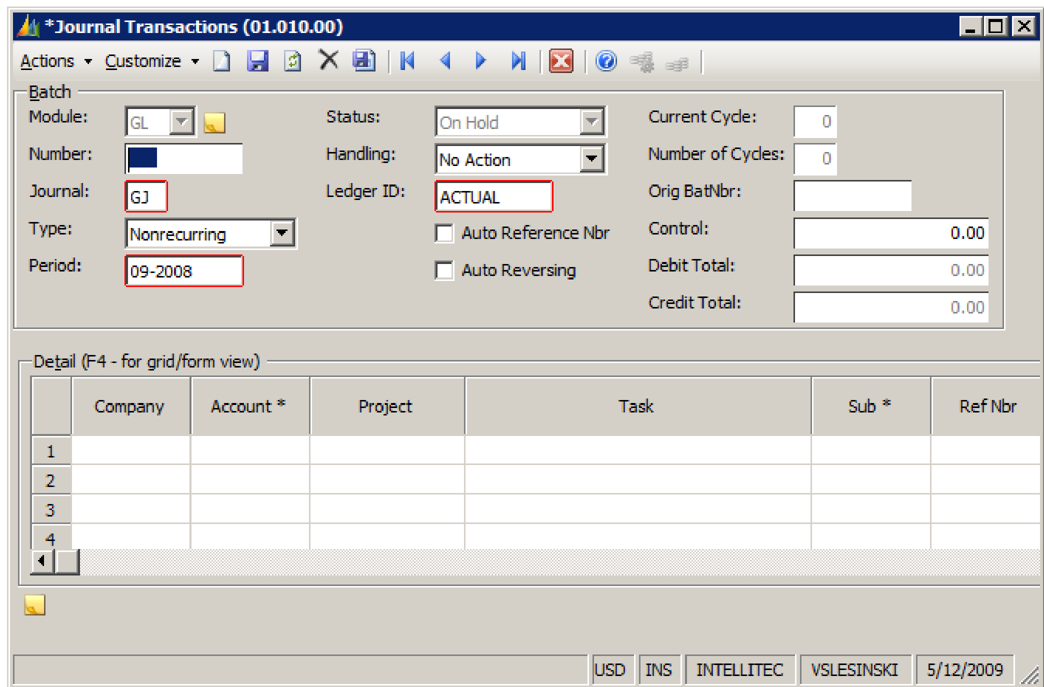




Options

- **Set options by user, see example to display row numbers in grid.**





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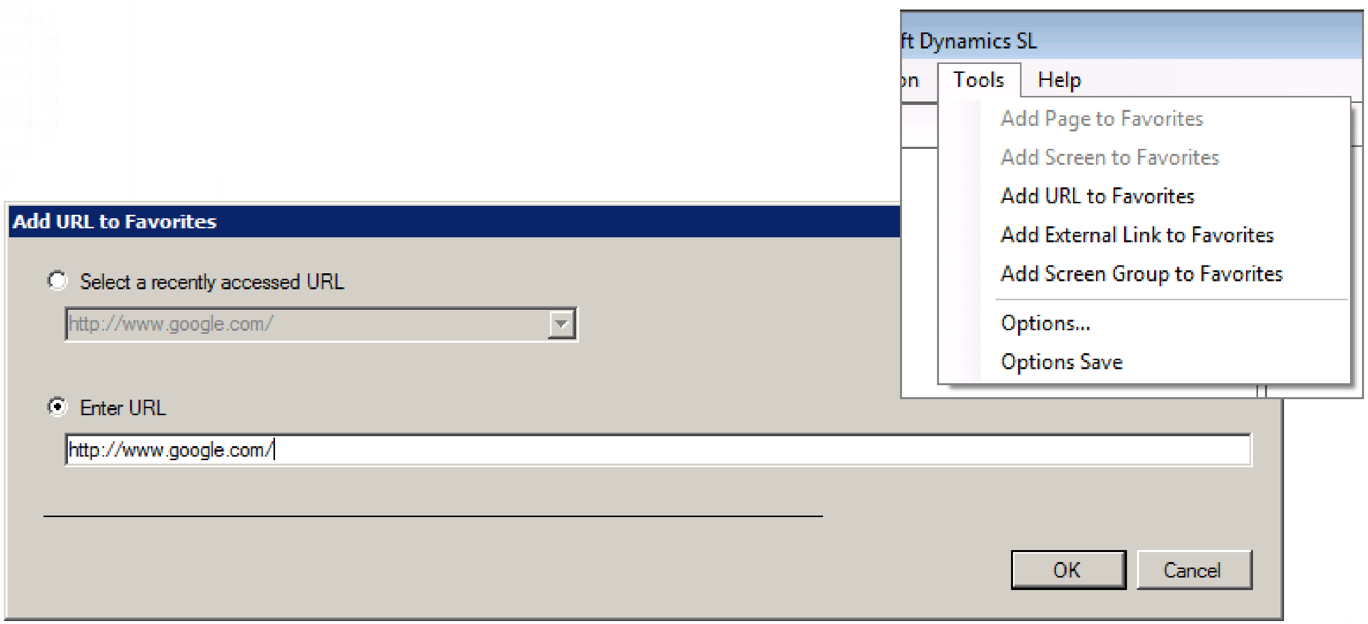
Customize Favorites menu v7.0

- **Add URL to Favorites menu**
- **Add program to Favorites (External Link)**
- **Add a whole menu group to Favorites (Screen Group)**



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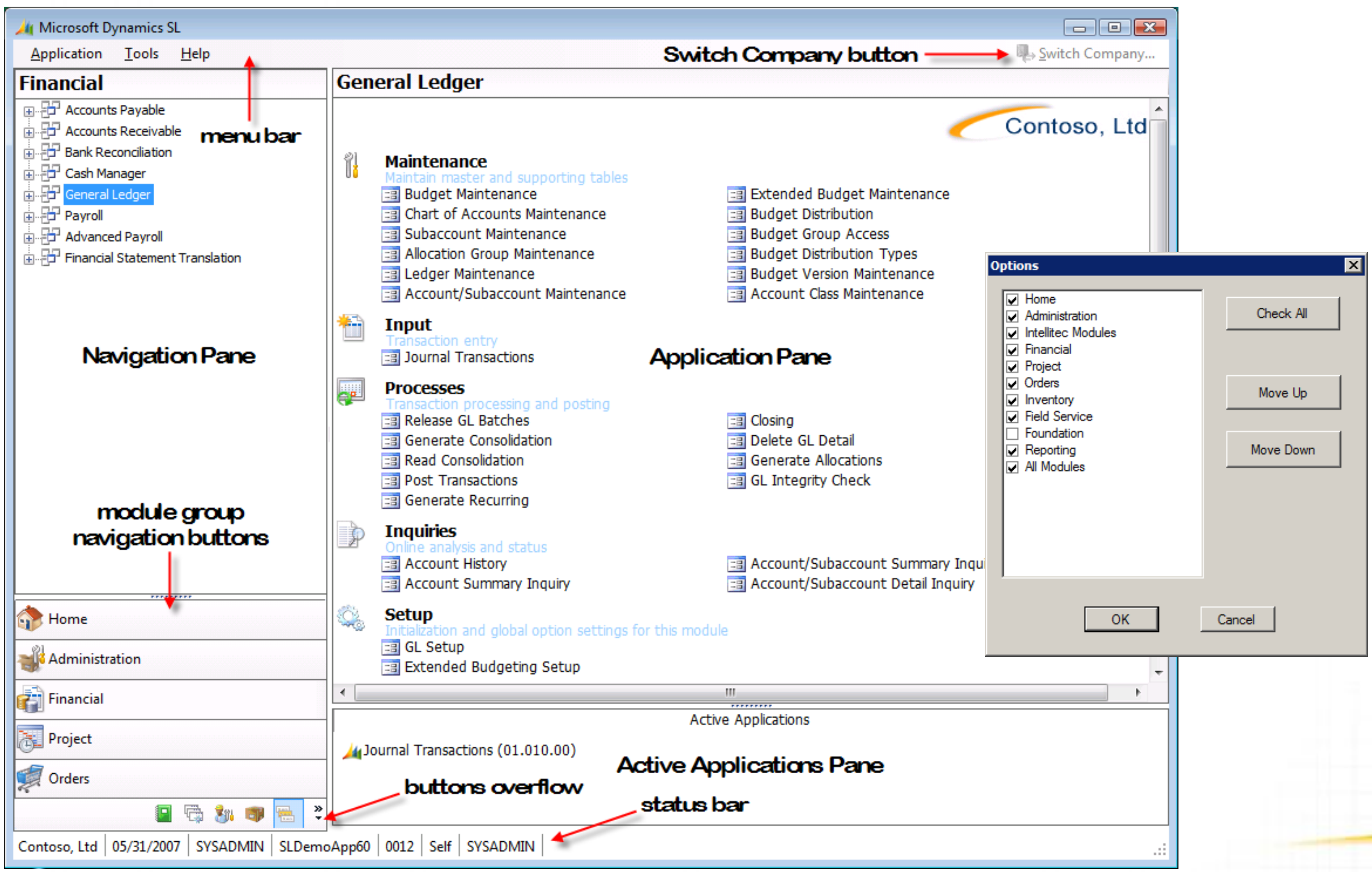
Navigation Pane Options v7.0



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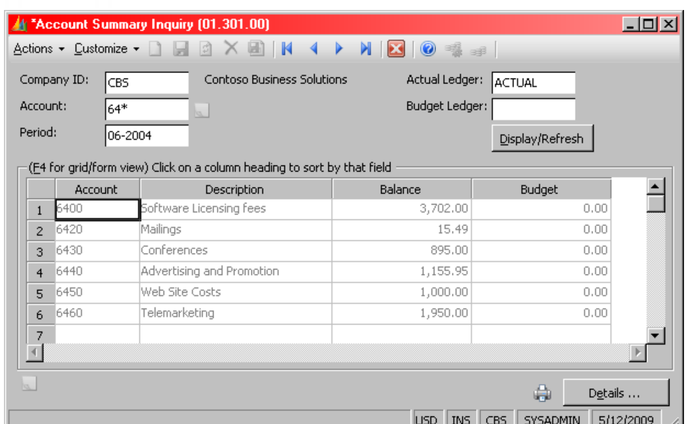
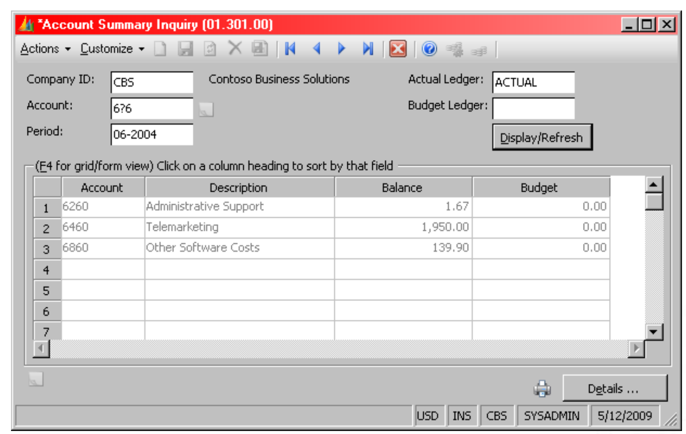
Account Inquiry Hints

You may enter a mask to select a set of accounts.

- ***The "?" represents a placeholder***
- ***The "*" is used to represent any number of values.***
  - ***For example, 60?? displays all accounts that begin with "60" and are followed by two more digits. Entering 60* displays all accounts beginning with 60 and followed by any number of digits.***





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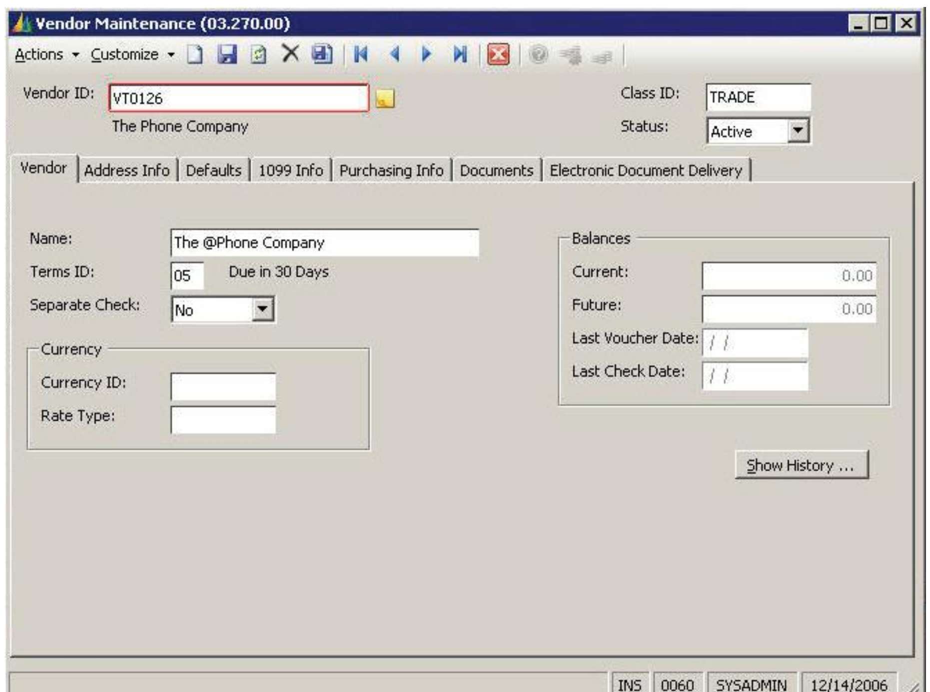
Sorting Hint

Type the Vendor Name using the @ symbol

so it sorts by the word "Phone". Also works with Customers and other modules.



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Transaction Import

- **Transaction Import offers a powerful, yet flexible way to import data into the Solomon database. TI sends the data to specific data entry screens. It appears as if entered manually.**

- **Examples:**
  - Import transactions from another system i.e. billing transactions.
  - Import customer list
  - Import vendor list
  - Import inventory items
  - Import beginning balances

Templates

Templates are attached to the screen or report from where they were created.

- **Examples:**
  - Record the same journal entry.
  - Enter the same voucher each week.
  - Generate a report with complex sort/select and printing options.
  - Transaction Import template.

Report Assistants for Dynamics SL 6.5

Assist with Flexible reporting in the Dynamics SL Modules

- **Sort and Select overview and options**
- **Possible Values chart**
- **Data Fields illustrations**
- **Report Information overview**

https://mbs.microsoft.com/customersource/news/report_assistants_msdyslv6.5.htm?printpage=false&stext=report%20assistants

Thank you !

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