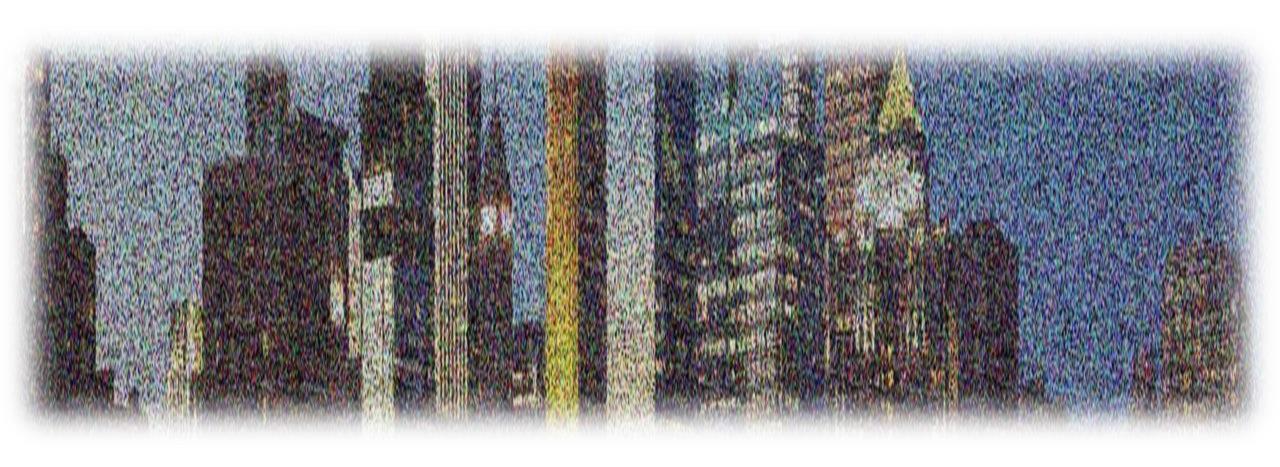# *Welcome to our*

Dynamics SL Client Event

Microsoft Sponsor's This Event

About Boyer & Associates

- Founded in 1994
- 325+ Active Clients
- 18 Staff
- Microsoft Gold-Certified Partner
- ERP Products Supported
  - Dynamics SL
  - Dynamics GP
  - Dynamics NAV

  NEW: Dynamics 365 Business Central

- Services
  - Project Management
  - Implementation
  - Support
  - Integrations
  - Customizations
  - Management Reporter training
  - NEW: Report Development through BI360, Jet Reports and Power BI

Our Core Values

Meet the Boyer Team
& Our Special Guests

Boyer Client Exclusive

- **10% discount** on Dynamics SL full users.
- **20% discount** on Dynamics SL new modules.
- **10% discount** on Dynamics SL Upgrades. WO signed and work scheduled.

These offers are for Boyer clients only and ends June 29th .
Contact Carol Simonson at 763-412-4315 or
csimonson@boyerassoc.com for details.
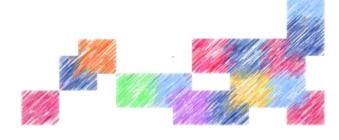
Making Businesses Better

You've heard this before, and it's still true. We're all about Making Businesses Better and we hope you leave today with some additional tips to equip you to do just that.

DISTRIBUTION

MEDICAL

FINANCIAL

Agenda

Time	Description	Presenter
9:00	Welcome, Introductions, Agenda Review	Jack
9:15	Dynamics SL2018	Colleen
9:45	Dynamics SL Tips & Tricks	Paul & Colleen
10:15	Plumbline– Fixed Assets & Audit Trail	Valerie Borak
11:15	**Lunch - Social Time**	
12:00	PowerBI with Dynamics SL – Reporting & Dashboards. Also Jet & BI360.	Paul
12:45	Xlstatements	Jonathan Van Houtte
1:30	Dynamics SL Tips & Tricks	Paul & Colleen
2:00	Closing	Colleen

Dynamics SL2018

Presented By COLLEEN MCCOSHEN

Microsoft Dynamics SL Lifecycle

Mainstream Support	Mainstream Support	Extended Support	Support Ended
Hot Fixes & Year End Updates	**Hot Fixes & Year End Updates**	**No Hot Fixes & No Year End Updates**	**+ No Support Calls**
Microsoft Dynamics SL 2018	Microsoft Dynamics SL 2015 CU2	Microsoft Dynamics SL 2011 SP3	Microsoft Dynamics SL 7
Mainstream through 2023 **Extended through 2028**	**Mainstream through 1/14/2020** **Extended through 1/14/2025**	**Extended through 7/13/2021**	

MEDICAL

Microsoft Dynamics SL 2018 Themes

Microsoft Dynamics SL 2018 Release Themes

Bringing two worlds together			Enhancing the core application and platform		One Microsoft
Enhanced Query & Preview	**Approvals**	**Web Apps**	**Optimize Financials**	**Project**	**Power Suite Evolution**
Query & Preview interface added across multiple modules	Adding approval process to key Dynamics SL areas	Monthly release cycle	General Ledger enhancements	Project feature enhancements	Odata Service
New views and drill back capabilities		New enhancements scheduled for every release	Payables enhancements	Invoice preliminary & print enhancements	SL Power BI Content Pack
+ more		New Web Apps	Receivables enhancements	Time related enhancements	Power Apps for SL
		+ more	*+ more*	*+ more*	Flow for SL
					+ more

MEDICAL

Microsoft Dynamics SL 2018 System Requirements

- Windows Server 2012 Standard Edition R2,
  Windows Server 2016 Standard or Data Center Edition

- SQL Server 2014 Standard or Enterprise Edition
  SQL Server 2016 Standard or Enterprise Edition

- Microsoft Windows 10

- Microsoft Office 2013, Microsoft Office 2016, Microsoft Office 365
  Enterprise Edition E3 and E5

- Microsoft SharePoint 2013, Microsoft SharePoint 2016

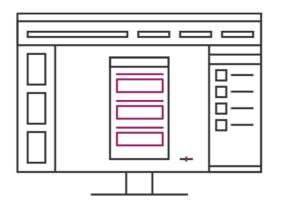# Microsoft Dynamics SL 2018 Web Apps

Microsoft Dynamics SL 2018 Web Apps

Project Time Entry	Project Maintenance	Employee Utilization Module	Reporting (Web SL reporting)
Project Timesheet Entry	Employee and Resource Maintenance	Resource Planning by Project & by Resource	Quick Query ad-hoc query
Project Expense Entry	Employee Position/Rate Maintenance	Vendor, Customer & Payroll employee Maintenance	Item Request Entry & Approval
Project Approvals & Delegation: T&E, Invoice, Budget	Project Analyst	Inventory Lookup	Payroll & Advanced Payroll Timecard Entry
Timecard Status	Project Charge Entry	Project Change Order	External Links to Websites

MEDICAL

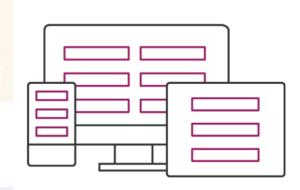# Microsoft PowerApps

- **Microsoft PowerApps** is a service for creating and using custom business apps across platforms

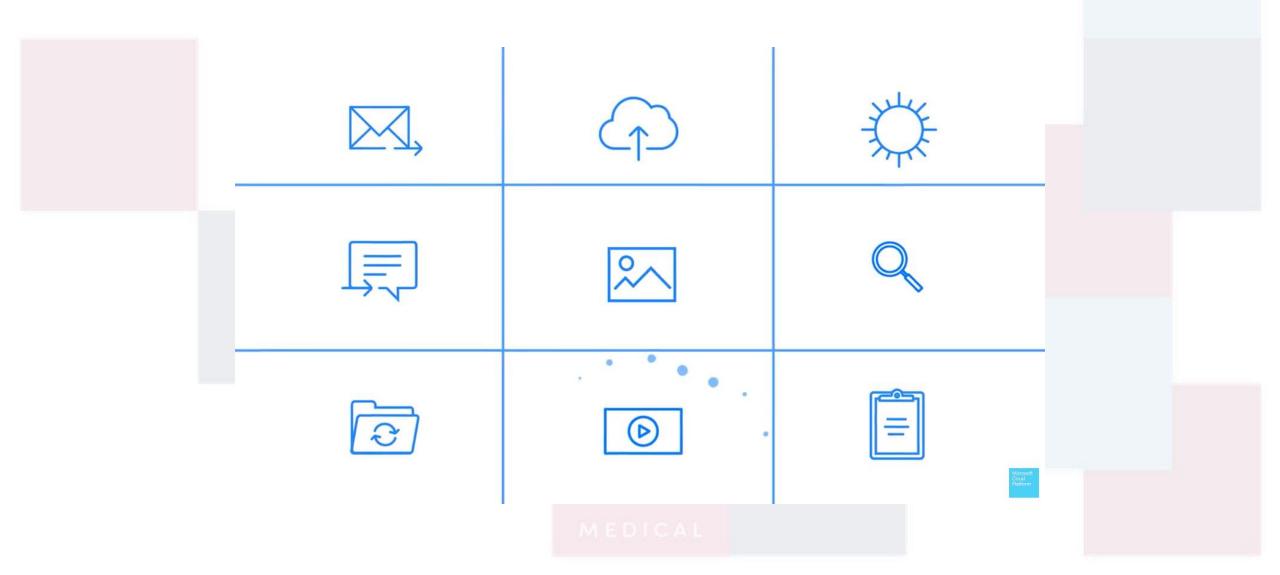<u>Connect</u> to data & systems you're already using; create the data you need

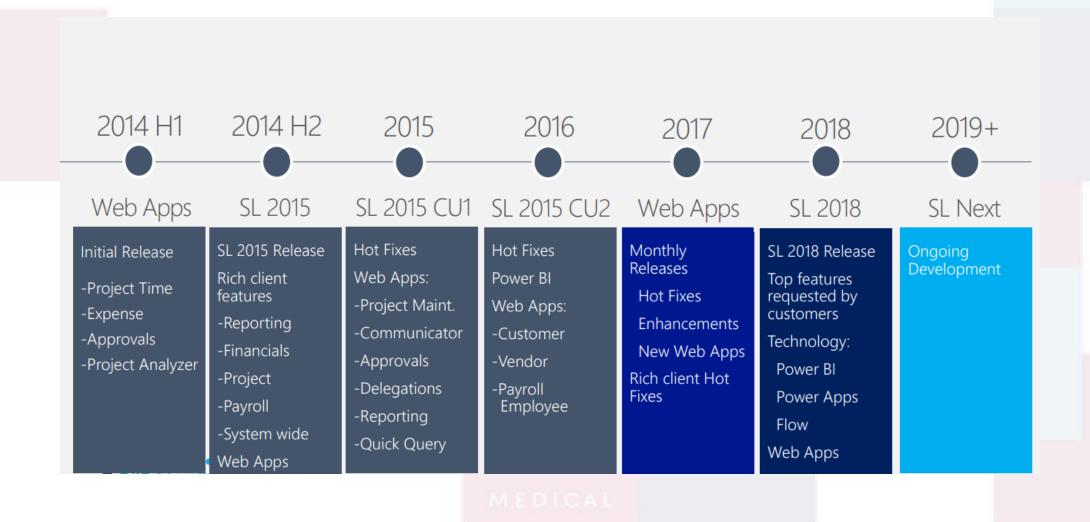<u>Create</u> apps, forms, and workflows without writing code
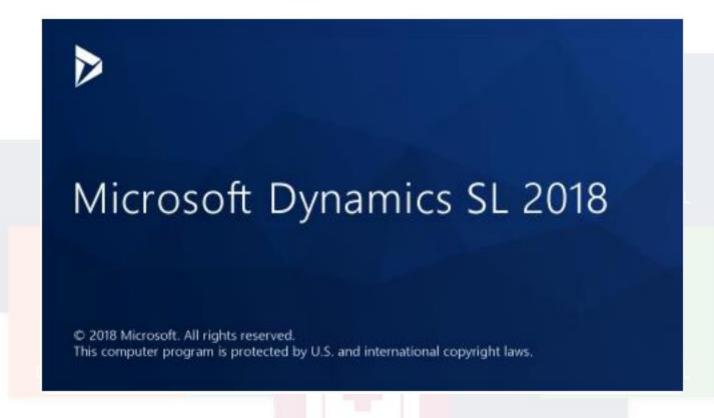
<u>Use</u> apps on web and mobile

Microsoft Flow-a way to monitor, notify and take action

Microsoft Dynamics SL Roadmap

Microsoft Dynamics SL 2018

Microsoft Dynamics SL 2018-enhancements coming
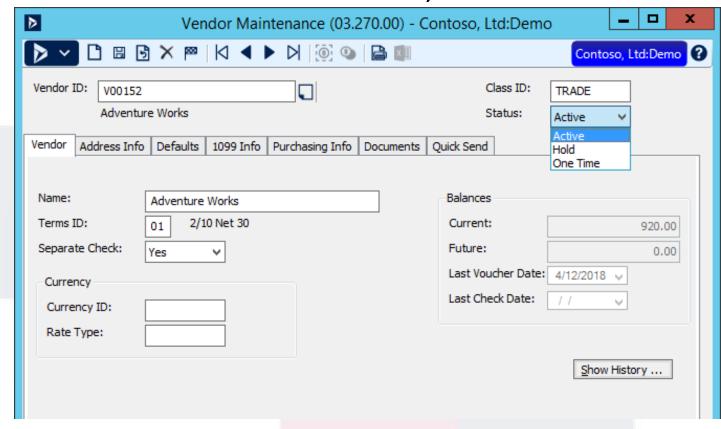
- Vendor-inactive status so no new PO's, Vouchers & Checks can be done

Microsoft Dynamics SL 2018-enhancements coming
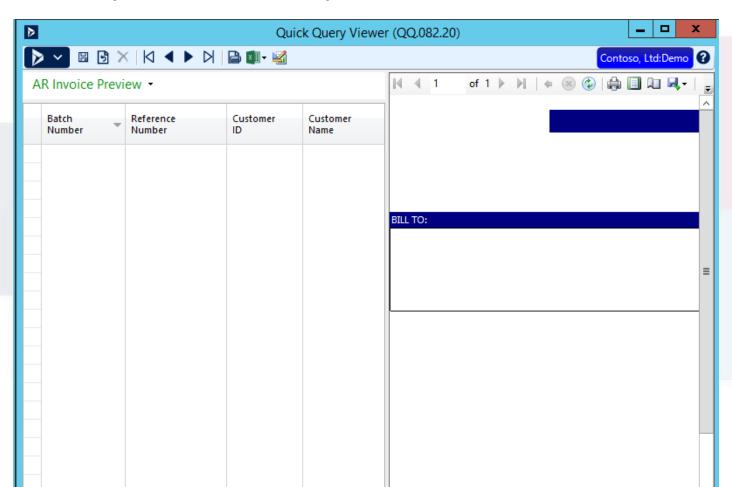
- Adding Period to Post field to grid in Release GL Batches. Use initialize mode to change.

Microsoft Dynamics SL 2018-enhancements coming

- More Quick Query & Preview Options

Microsoft Dynamics SL 2018-enhancements coming

Potential areas:
- GL   – Journal Transactions
- AP   – Check Preview
- AP   – Vouchers and Adjustments Batch Preview
- PO   – Receipt Preview
- PO   – Purchase Order Preview
- IN   – Inventory Batch Preview
- OM   – Sales Order Preview
- RQ   – Requisition Preview
- Service   – Invoice Preview

Microsoft Dynamics SL 2018-enhancements coming

AP – Void Check & Voucher at the same time! This removes the need to print/do zero checks

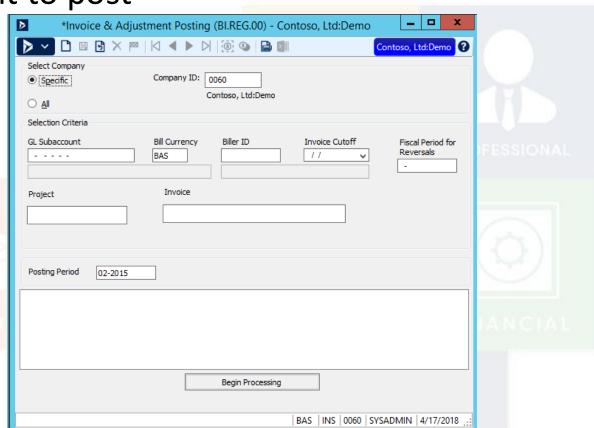# Microsoft Dynamics SL 2018-enhancements coming

- Project End Date will do something with this change
- Turn on the ability to NOT allow
  - Time entry
  - Expense entry
  - for projects or tasks that have past the end date
- The Project lookup list will not show Projects that have end dates past the current business date.

Microsoft Dynamics SL 2018-enhancements coming

- Provide a way to auto generate week maintenance information
  - The Week maintenance screen must be setup
    before Project Time can be entered
  - Currently this is a manual setup process

- Create a way to setup week maintenance by:
  - Date range
  - Beginning of the week day
  - End of the week day
  - Define frequency (weekly, biweekly, semimonthly)
  - Defining the month end break behavior

Microsoft Dynamics SL 2018-enhancements coming

- Allow users the ability to select what project/projects or invoice numbers they want to post

Dynamics SL Tips and Tricks

Presented By PAUL JAMES & COLLEEN MCCOSHEN

System Tips & Tricks

- Dynamics SL Roadmap-New version delivered May 1st, 2018.
- Agile Methodology now-quarterly release cycle of updates.
- System Requirements for SL 2018.
- Crystal –new customers will need to purchase Crystal Report writer as it doesn't come with SL 2018.
- 2018 Year-end Updates only for Dynamics SL 2015 & 2018.
- Extended support for Dynamics SL 7 ended 10/10/2017-time to upgrade.
- Dynamics SL 2011 is in extended support through 7/13/2021.

System Tips & Tricks - continued

- Possible Value(PV's) & Super PV's –example account history
- User Guides – Included in your installation – please use them they are great!
- Schema – ALL tables with field names, descriptions, and more
- Export to Excel with Grid to Excel Feature
- Required Fields – use customization manager to make this happen
- Tools Menu:Options - Grid/Number Lines & Cache Settings
- ZoomPercent on preview reports can be changed in Solomon.ini. Example: [Report-01620]
    ZoomPercent=300

System Tips & Tricks - continued

- Usability Shortcuts
- F1: Access Online Help Files
- F2: Edit in grid view or enter an absolute/relative formula in a date or period field
- F3: Look up possible values for a field or date
- F4: Switch between form and grid view
- F5: Clears the value in a field
- F7: Set a date field to today's date
- F9: Enter and display notes
- F10: Puts focus on main Microsoft Dynamics SL window

System Tips & Tricks - continued

- **Keyboard Shortcuts**
- **What you would use it for:**
- **CTRL+[click in each field)**
- Use to clear multiple data fields, you can press and hold CTRL while clicking each data field you wish to clear. Use Actions menu, click **Clear Selection**
- **CTRL + C**
- To copy a data item
- **CTRL + X**
- To cut a data item
- **CTRL + V**
- To paste a data item
- **CTRL + Z**
- To undo a paste operation
- **CTRL+F**
- To save data and clear the screen
- **CTRL + S**
- To save data and keep it on the screen

System Tips & Tricks - continued

- **Keyboard Shortcuts continued**
- **CTRL + N**
- To clear the screen and enter a new record
- **CTRL + E**
- To export data in a grid to Excel
- **CTRL + D**
- To delete a data record
- **ALT + CTRL + C**
- Launches Customization Mode in a screen
- **ALT + F4**
- Closes the active screen
- **TAB**
- Go to next field
- **SHIFT + TAB**
- Go to the previous field
- **RIGHT ARROW**
- To move right one character in a field

System Tips & Tricks - continued

- **Keyboard Shortcuts continued**
- **LEFT ARROW**
- To move left one character in a field
- **HOME**
- Go to the beginning of a field
- **END**
- Go to the end of a field
- **PAGE DOWN**
- Go to the next record or batch
- **PAGE UP**
- Go to the previous record or batch
- **CTRL + HOME**
- Go to the first record
- **CTRL + END**
- Go to the last record
- **CTRL _ TAB**
- Go to the next screen tab

System Tips & Tricks - continued

- **Keyboard Shortcuts continued**

- **SHIFT_CTRL+TAB**

- Go to the previous screen tab

- **ALT + TAB**

- Go to Windows Taskbar or Quick Launch bar

- **Shift + F3**

- "Super PV". Some screens will display additional columns if you open the PV in "Super PV" mode, by using Shift+F3. For example, the GL Account History screen will display Account, Distribution and Type when using F3. However, if using Shift+F3, this same screen will display additional columns: SubAccount, Ledger ID and Fiscal Year, while not displaying Description and Type.

System Tips & Tricks - continued

- Application Menu
- Address Bar(Crumb tray) and Search
- Help Menu:Module help and Schema(awesome information)
- Business date
- Vendor Sorting with @
- Screen & Report Templates
- Deleting Templates
- Switch Company Button: Multiple Companies screens open at same time

System Tips & Tricks - continued

- Status Bar: click to change date, change customization level
- Button Overflow
- Favorites -Menu
- Quick Print
- Attachments & Notes
- Notes - all screens; Yellow Icon
- Color code Companies
- Create Test Databases to try new things
- Change key fields – Use KeyChange or PSTL to change your key fields such as account/sub structure to get reporting the way you need it.
- Unlimited report formats per report in Report Control Maintenance

Financial Tips & Tricks

- Sorting and Selecting in ROI - easier to understand table/field
- Email report directly from Print Preview
- Correct Journal Transactions Screen (Reverse,Reverse/Correct,Copy)
- Hard Close restrictions by module - Flexible
- Batch Reports On/Off by Module
- Delete suspended batches from AR & AP(X on toolbar is active)
- Document Maintenance AP & AR – can change some information
- Separate Check Option in AP

Financial Tips & Tricks - continued

- Correct Payment Applications - Options
- Can attach a document after the fact to a released AP/GL/AR batch
- Can record a voucher & hand check at the same time
- Recurring Journals/Vouchers/Invoices
- AR Print/Preview Invoices for Invoice batches with a status of B or H or can use Quick Query screen under Inquiries in AR. From this screen you can right click and drill back to invoice/memo screen.
- Audit trail now on changes to Employee's in Payroll (rate, deductions)
- Can run calculation in payroll as many times as needed

Financial Tips & Tricks - continued

- Can recalculate in Review Edit Check screen in Payroll
- Void Payroll Check - now you don't have to enter timecard earnings again if check box is checked to Reactivate Earnings
- Reminder - void date of payroll check determines which 941 it will go to
- Use Check Sequence in payroll to allow multiple checks per run per person

Project Tips & Tricks

- Can delete locks (error 0063) in Project Controller/Control Parameter Maintenance

- Can change current period in Project Controller Setup. If going back to a prior year to pull something in via FTT make sure you run Closing of year again.

- Closing period – fails. Run Unallocated Report out of Project Allocator to find what is stuck.

- Closing period-batches on hold in AR,GL,AP. Clean up those batches in those modules-either release them or delete them.

- Use Project Net Profit screen for analyzing projects

Distribution Tips & Tricks

- Use the inquiries in Order Management to find out why Shippers are not being created or moving through order steps.
- Use Reporting out of Inventory to balance Inventory Trial Balance to Inventory Valuation
- Missing revenue from Order Management – look for Batch status of V for void. Re-run the Sales Journal report and on the options tab specify the sales journal ID.
- Use Inventory Inquiry Screen – lots of information!
- Use Unvouchered Receipts report in Purchasing to help balance to the ledger

Boyer Tips & Tricks

- Need support - please email slsupport@boyerassoc.com

- Visit our website frequently for great Blogs & Videos www.boyerassoc.com

- Follow us on Twitter

- Use CustomerSource

- User Group – SLUG, great way to connect with other users. Great webinars all year long. Conference next year in Anaheim, CA.

- Summer Training Sessions for Management Reporter

- Spring promo on modules, users, and upgrades see Carol.

Plumbline-Fixed Assets & Audit Trail

Presented By Valerie Borak

(vborak@plumblineconsulting.com)

407-583-8857

XL-Xlstatements for Dynamics SL

Presented By Jonathan Van Houtte

(jonathan@xlstatements.com)

Survey Drawing

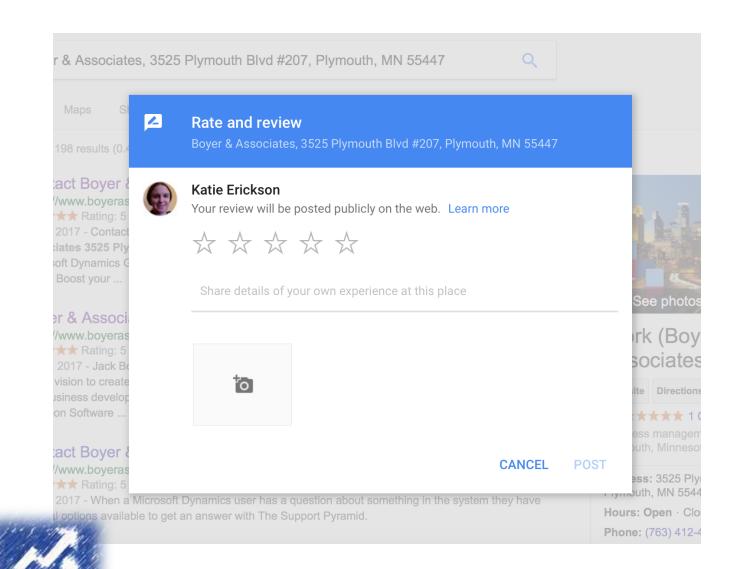It's time to fill out your surveys so we can choose today's lucky prize winner!

Google Reviews

We need your help telling others about Boyer.

1. Search for Boyer and Associates in Google.

2. On right-hand column, click on reviews.

3. Share your story (must have Google account).

4. Get a Starbucks or Caribou gift card!