



Welcome to Dynamics SL Client Event



Today's Agenda

| Time | Description | Presenter |
|-------|--|----------------|
| 9:00 | Welcome, Introductions, Agenda Review | Jack |
| 9:15 | Roadmap/Dynamics SL2018 CU2 | Colleen |
| 9:45 | Best Practices for SL Security | Paul |
| 10:15 | Break | |
| 10:30 | Plumblin— Period to Post Lock; Period Mover; Credit/Purchase Card; Voucher to Credit Card; | Valerie |
| 11:30 | Lunch - Social Time | |
| 12:00 | Power Apps & Flow | Jeff |
| 12:30 | Papersave— Third Party Spotlight | Tammy |
| 1:15 | Break | |
| 1:30 | Dynamics SL Tips & Tricks | Paul & Colleen |
| 2:00 | Closing | Colleen |

We're Celebrating!



About Boyer & Associates

- Founded in 1994
- 325+ Active Clients
- 18 Staff
- Microsoft Gold-Certified Partner



Solutions and Services

- ERP Solutions

- Dynamics GP
- Dynamics SL
- Dynamics 365 Business Central
(including NAV)

- Related Services

- Implementation
- Dedicated Phone Support
- Data Integration Creation
- Customization Development
- Report Development
- Business Intelligence Integrations
(Power BI, BI360 and Jet Reports)
- [Azure Cloud Hosting](#)



Making Businesses Better

This is our mission and what brings us to work every day.

We're all about helping you resolve the issues that are holding back your business. We want to help you continue to improve your ERP system, streamline business processes and provide critical data to make your business better.

DISTRIBUTION

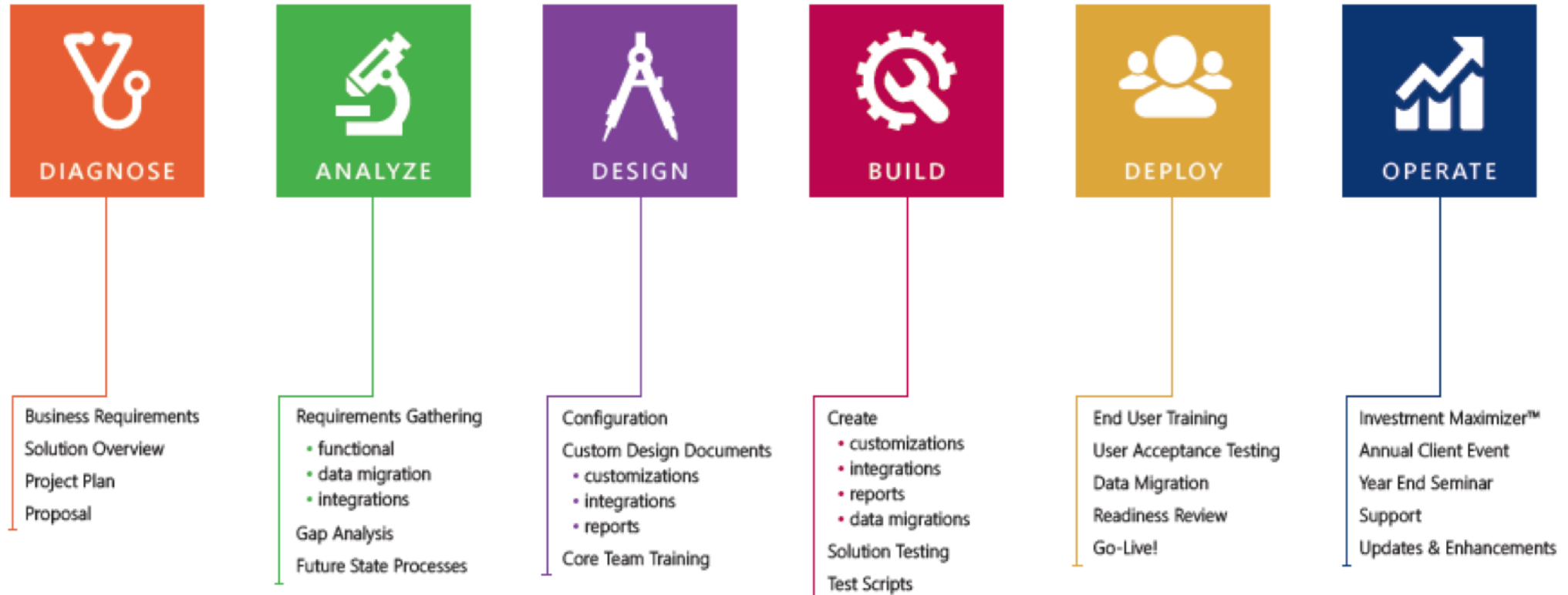


MEDICAL



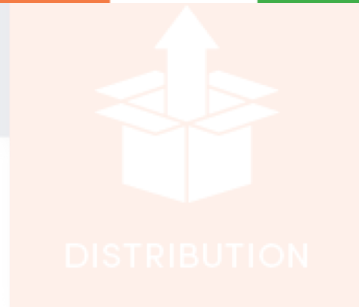
FINANCIAL

Why Boyer?



Proven Process

Our Core Values



Together, T.E.A.M.

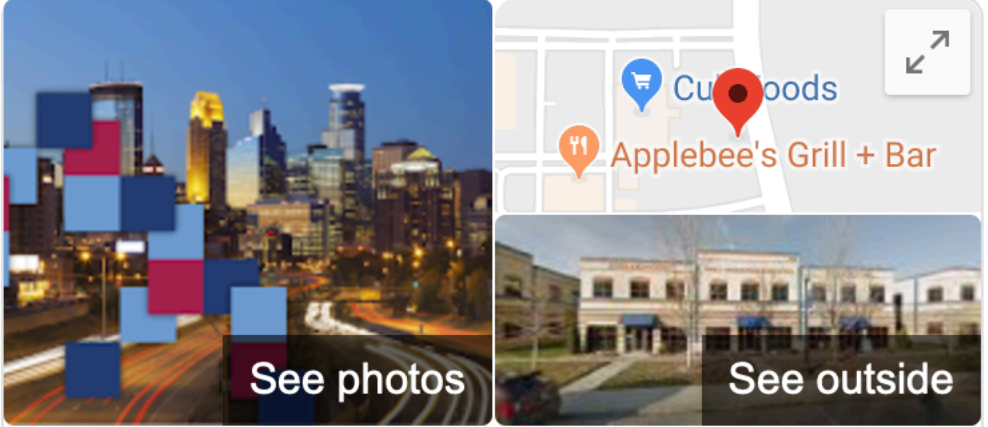
The Boyer & Associates TEAM



Have we made your business better?

Please take 5 minutes to fill out a Google review and let others know what you think about Boyer:

- http://search.google.com/local/writerreview?placeid=ChIJMbhdv9dLs1IRNgNXXJie_mA
- Or search “Boyer & Associates,” then click on “Google reviews”



The image shows a Google Business Profile for Boyer & Associates. At the top, there are two photos: a city skyline at night with a 'See photos' button, and a street view of the building with a 'See outside' button. Below the photos is a map showing the location relative to 'Cul de Sac' and 'Applebee's Grill + Bar'. The business name 'Boyer & Associates' is prominently displayed. Below the name are buttons for 'Website', 'Directions', and 'Save'. The rating is 4.9 stars with 18 Google reviews. The business is described as a 'Business management consultant in Plymouth, Minnesota'. The address is 3525 Plymouth Blvd #207, Plymouth, MN 55447. The hours are listed as 'Open' and 'Closes 5PM'. The phone number is (763) 412-4300. The products and services are listed as 'boyerassoc.com'.

Boyer & Associates

Website Directions Save

4.9 ★★★★★ 18 Google reviews

Business management consultant in Plymouth, Minnesota

Address: 3525 Plymouth Blvd #207, Plymouth, MN 55447

Hours: Open · Closes 5PM ▼

Phone: (763) 412-4300

Products and Services: boyerassoc.com

Boyer Support Pyramid

Dynamics SL Support:

slsupport@boyerassoc.com

763-412-4325



25th Anniversary Client Special

**10% off 2 or more
Dynamics users and modules**

Contact Carol Simonson at 763-412-4315
or csimonson@boyerassoc.com for details.

Offer ends June 30, 2019.

NON-PROFIT

PROFESSIONAL

DISTRIBUTION

FINANCIAL

MEDICAL



Dynamics SL 2018

Presented by COLLEEN MCCOSHEN

Microsoft Dynamics SL Lifecycle

Mainstream
Support

Hot Fixes &
Year End Updates

Microsoft Dynamics
SL 2018

Mainstream through 2023
Extended through 2028

Mainstream
Support

Hot Fixes &
Year End Updates

Microsoft Dynamics
SL 2015
CU2

Mainstream through 1/14/2020
Extended through 1/14/2025

Extended
Support

No Hot Fixes &
No Year End Updates

Microsoft
Dynamics SL 2011
SP3

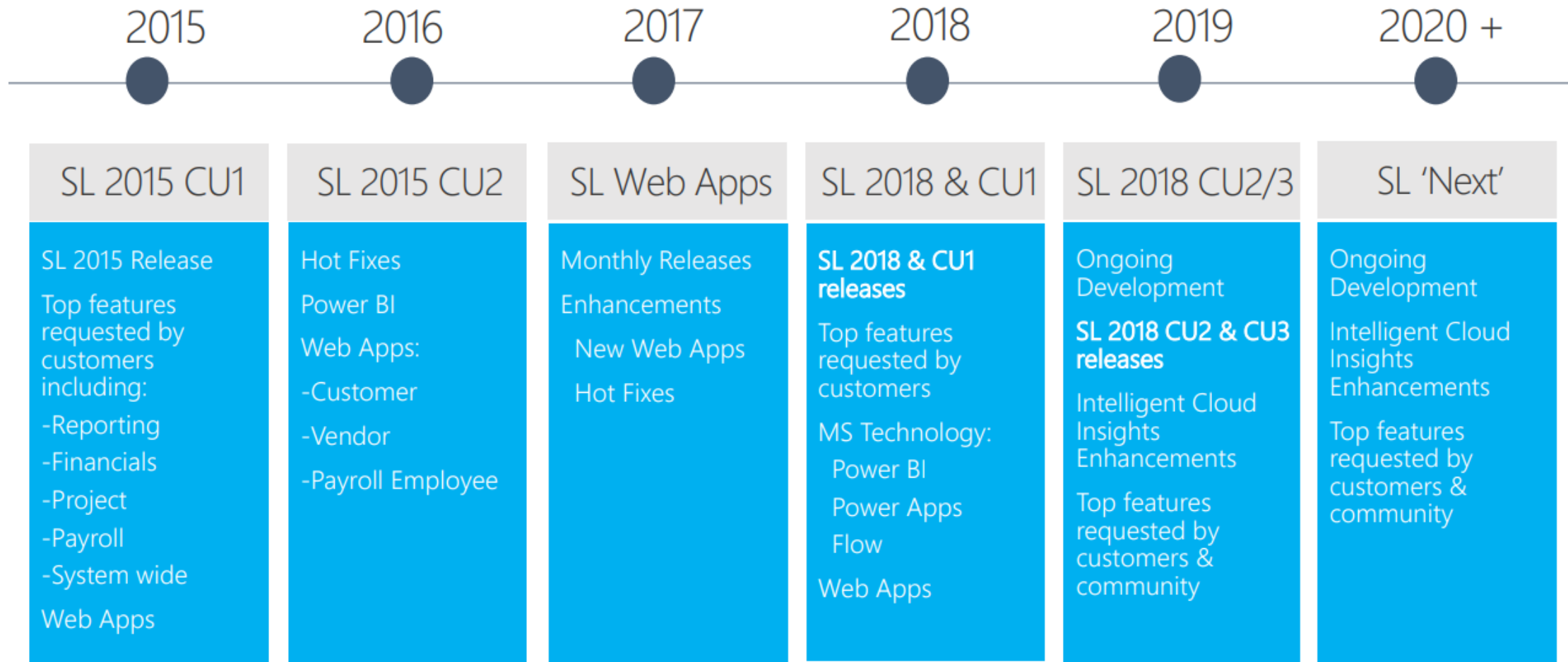
Extended through 7/13/2021

Support
Ended

No Hot Fixes &
No Year End Updates
+ No Support Calls

Microsoft
Dynamics SL 7

Microsoft Dynamics SL Roadmap



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

What's New for SL 2018 CU2

- Inactivate Vendors
- Period to Post Correction
- Week Maintenance Generation
- Project & Task – End Data Validation
- AP Approvals via Email or Online

Inactivate Vendors

Vendor Maintenance (03.270.00) - Contoso, Ltd:Demo

Vendor ID: V00213
Fabrikam, Inc.

Class ID: TRADE

Status: Active

Vendor Address Info Defaults 1099 Info Purchasing Info Documents Quick Send

Inactivate

Vendor Maintenance (03.270.00) - Contoso, Ltd:Demo

Vendor ID: V00213
Fabrikam, Inc.

Class ID: TRADE

Status: Active

Vendor Address Info Defaults 1099 Info Purchasing Info Documents Quick Send

Active

Period to Post Correction

Release GL Batches (01.400.00) - Contoso HVAC Services, Inc.

Contoso HVAC Services, Inc.

Select Company
☒ Specific Company ID: CHS
☐ All

(F4 for grid/form view)

| Selected | Batch Number | Company | Period to Post * | Status | Journal Type | Ledger ID | Batch Control |
|--------------------------|--------------|---------|------------------|----------|--------------|-----------|---------------|
| <input type="checkbox"/> | 000281 | CHS | 06-2025 | balanced | GJ | ACTUAL | 120.00 |
| <input type="checkbox"/> | | | | | | | |
| <input type="checkbox"/> | | | | | | | |
| <input type="checkbox"/> | | | | | | | |
| <input type="checkbox"/> | | | | | | | |
| <input type="checkbox"/> | | | | | | | |
| <input type="checkbox"/> | | | | | | | |
| <input type="checkbox"/> | | | | | | | |

Select All Clear All Begin Processing ...

Week Maintenance Generation

Week Maintenance (TM.WEM.00) - Contoso HVAC Se...

Generation Selections:

Last Day of Week in Timecard Entry: Friday

Timecard Period: Weekly

Start Date: 5/ 4/2019

Timecard period crosses months: ☐

End Date: 5/25/2019

Begin Processing

| Week Ending Date * | Labor Period * | Timecard Period * | Fiscal Period * | Salary Factor |
|--------------------|----------------|-------------------|-----------------|---------------|
| 2/6/2004 | 2004-02 | 01 | 02-2004 | 1.000 |
| 2/13/2004 | 2004-02 | 02 | 02-2004 | 1.000 |
| 2/20/2004 | 2004-02 | 03 | 02-2004 | 1.000 |
| 2/27/2004 | 2004-02 | 04 | 02-2004 | 1.000 |
| 2/29/2004 | 2004-02 | 05 | 02-2004 | 1.000 |
| 3/5/2004 | 2004-03 | 01 | 03-2004 | 1.000 |
| 3/12/2004 | 2004-03 | 02 | 03-2004 | 1.000 |
| 3/19/2004 | 2004-03 | 03 | 03-2004 | 1.000 |
| 3/26/2004 | 2004-03 | 04 | 03-2004 | 1.000 |
| 3/31/2004 | 2004-03 | 05 | 03-2004 | 1.000 |
| 4/2/2004 | 2004-04 | 01 | 04-2004 | 1.000 |

Project & Task – End Date Validation

Project Maintenance (PA.PRJ.00) - Contoso Business Solutions

Project: CO-002 Description: Solomon Upgrade Conversion

Project Task Budgets Additional Info Quick Send

Company ID: CBS Contoso Business Solutions

Start/End Date: / /

End Date Validation: **None** (dropdown menu with options: None, Project Level, Task Level)

Contract: - None

PO Number: Task Level

Contract Type:

Utilization Type: DIR Direct

Revenue Recog Type: None

Direct or Revision Budget: Direct Budgeting

Balance Forward at Year End: ☒

Available for All Employees to Charge: ☒

Resource Assignment Required to Charge Tasks: ☐

GL Subaccount: 00 Balance Sheet

Status Flags: Project Controller: Active

AP AR GL PO LB IN

Project Mgr: SLADMIN SLADMIN

Business Mgr: WWHEELER Wendy Wheeler

Customer: C015 Adventure-Works

Salesperson:

Project Currency Code: USD Dollars

Rate Type:

Revenue Recognition: ☐

Billing Currency Code: USD Dollars

Rate Type:

Fixed Rate: 0.000000000

Alloc Method 1: TM Time and Material

Alloc Method 2:

Rate Table ID: STND Standard Rates

Labor Account: 4100 Labor Rate Table ID: STND


Billing Information... Project Maximums... Revenue Recog. Setup... Addresses... Project Amounts...


Approvals for AP via Email or Online

File

Message

Help


 Tell me what you want to do




Wed 4/10/2019 2:03 PM

Account No Reply

Dynamics SL Approval Required: Accounts Payable Module, Batch 000122

To  Allen :

 Approvals | Powered by Microsoft Flow

Pending approval

Requested by **Allen**

Date Created: Wednesday, April 10, 2019 6:03 PM GMT

Details: Batch #: 000122 | Module: Accounts Payable | Company: 0060 | Total: \$125

Vendor: E01182 | Pilar Ackerman | Terms: 06 | Ref Nbr: 000102 | Type: VO | Total: \$50.0

Vendor: E01184 | Kim Akers | Terms: 06 | Ref Nbr: 000101 | Type: VO | Total: \$75.0

Link: [Open Batch in the Voucher and Adjustment screen in Dynamics SL. Note: Must be connected to Microsoft Dynamics SL and have a valid login](#)

Approve

Reject



Best Practices for SL Security

Presented by PAUL JAMES

Users

Adding Users

- Password vs Windows
- Fill Out All Information
- Assign Groups
- Administrator Role - Caution

Do Not Delete

- SL Records Reference User ID
- Orphaned Records with Groups
- Remove Associated Groups

The screenshot shows a web application window titled "User Maintenance (95.260.00) - Contoso, Ltd:Demo". The interface includes a toolbar with various icons and a sidebar with the text "Contoso, Ltd:Demo". The main content area is divided into two tabs: "Details" (selected) and "Groups".

User Information:

- User ID: DHILL
- Name: David Hill
- Password: (empty field)

Options:

- ☐ Active Application Server User
- ☐ Role
- ☐ Default User

Default List Lookup Behavior: (dropdown menu)

Details Tab:

- Telephone: (555) 555-5555
- Location: Bldg #1
- E-Mail Address: DHILL@SLD.net
- Windows User Name: (empty field)
- Home Page: <https://www.dslugconference.com/home>
- Pick Required Field Color: (red color picker)

Groups

Uses

- Menu
- Access Rights

Tips

- Consider the Job Function or Role
- Clear ID or Name for Identification
- Remove Users Before Deleting

The screenshot shows a software window titled "Group Maintenance (95.280.00) - Contoso, Ltd:Demo". The window has a standard Windows-style title bar and a toolbar with various icons. Below the toolbar, there are input fields for "Group ID:" and "Name:", both containing the text "AP ENTRY - 0060". To the right of these fields is a checkbox labeled "Role". Below this is a section titled "Detail (F4 - for grid/form view)" which contains a table with two columns: "User ID *" and "Name". The table has one row of data: "BTHOMPSON" and "Beverly Thompson". Below the table is a "Home Page" label and a text input field. At the bottom of the window, there is a status bar displaying "BAS | INS | 0060 | SYSADMIN | 3/6/2019".

| User ID * | Name |
|-----------|------------------|
| BTHOMPSON | Beverly Thompson |

Home Page

BAS | INS | 0060 | SYSADMIN | 3/6/2019

Access Rights

Tips

- Do Not Assign Rights by User
- Separate by Module
- Identify Screens and Level of Rights
- Separation by Company?

Access Rights Maintenance (95.270.00) - Contoso, Ltd:Demo

Type: Group

Group / User ID: AR ENTRY - 0060

Name: AR ENTRY - 0060 ☐ All Companies

Company ID: 0060

Preload...

Screen/Report/Query | Web Service | Role Center

Detail (F4 - for grid/form view)

| Screen/Report Number * | Type | Name | Module | View | Up |
|------------------------|--------|-------------------------------|--------|-------------------------------------|----|
| 08.010.00 | Screen | Invoice and Memo | AR | <input checked="" type="checkbox"/> | |
| 08.030.00 | Screen | Payment Application | AR | <input checked="" type="checkbox"/> | |
| 08.032.00 | Screen | Apply Customer ID to Document | AR | <input checked="" type="checkbox"/> | |
| 08.050.00 | Screen | Payment Entry | AR | <input checked="" type="checkbox"/> | |

DIAGNOSE

ANALYZE

DESIGN

DEPLOY

Documentation

Tips

- List Companies
- List Groups
- Identify Group/Company Relationship
- List Users
- Identify User/Group Relationship
- By Module Show Access Rights by Group



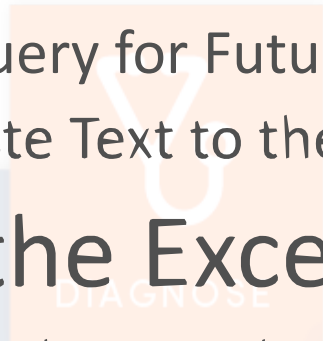
Demo and Review

Quick Query QQ.SYU.AR

- Eliminate SYSADMIN with Filter
- Save a Query for Future Use
- Copy/Paste Text to the Documentation File

Modify the Excel Documentation

- Create Lookups and Formulas
- Review User/Groups
- Review Module Access Rights





Plumblin — Third Party Spotlight

Presented by VALERIE BORAK (vborak@plumblinconsulting.com or 407-583-8857)

Break Time

- ✓ Use the restroom
- ✓ Grab another drink or snack
- ✓ Fill out your survey
- ✓ Write a Google review and request your \$5 Starbucks gift card



ANALYZE



BUILD



OPERATE



DEPLOY



DESIGN



Power Apps & Flow

Presented by JEFF LARSON

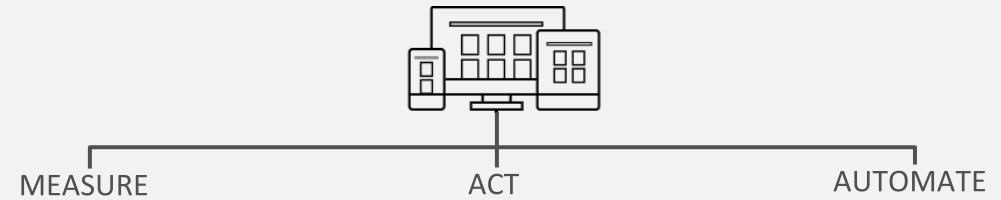
Agenda

- What are Power Apps & Flow
- SL 2018 Power Apps & Flow preview
- How to get started with Power Apps & Flow

The drivers for PowerApps and Flow

Build modern business apps fast

Compose analytics, user experiences, and automation using an integrated set of services from Microsoft



Empower power users

People who understand their business needs best can now build apps quickly without writing code



Power BI



PowerApps



Microsoft Flow

More efficient developers(*)

Seamlessly extend capabilities for power users and leverage powerful Azure platform services

Azure Data analytics
Azure Internet of Things
SQL Server BI
...

Azure AppServices
Azure Service Fabric
Azure Functions
...

Azure Logic Apps
Azure API Management
BizTalk
...

Easily connect data across apps

Whether built on the Common Data Model or integrated with existing systems, get more value from your data



Common Data Model



Connectors & Gateways



when you're building business apps
it's hard to keep everyone happy

Secure

Scalable

Managed

Integrated

Compliant

VS

Fast

Iterative

Cross-platform

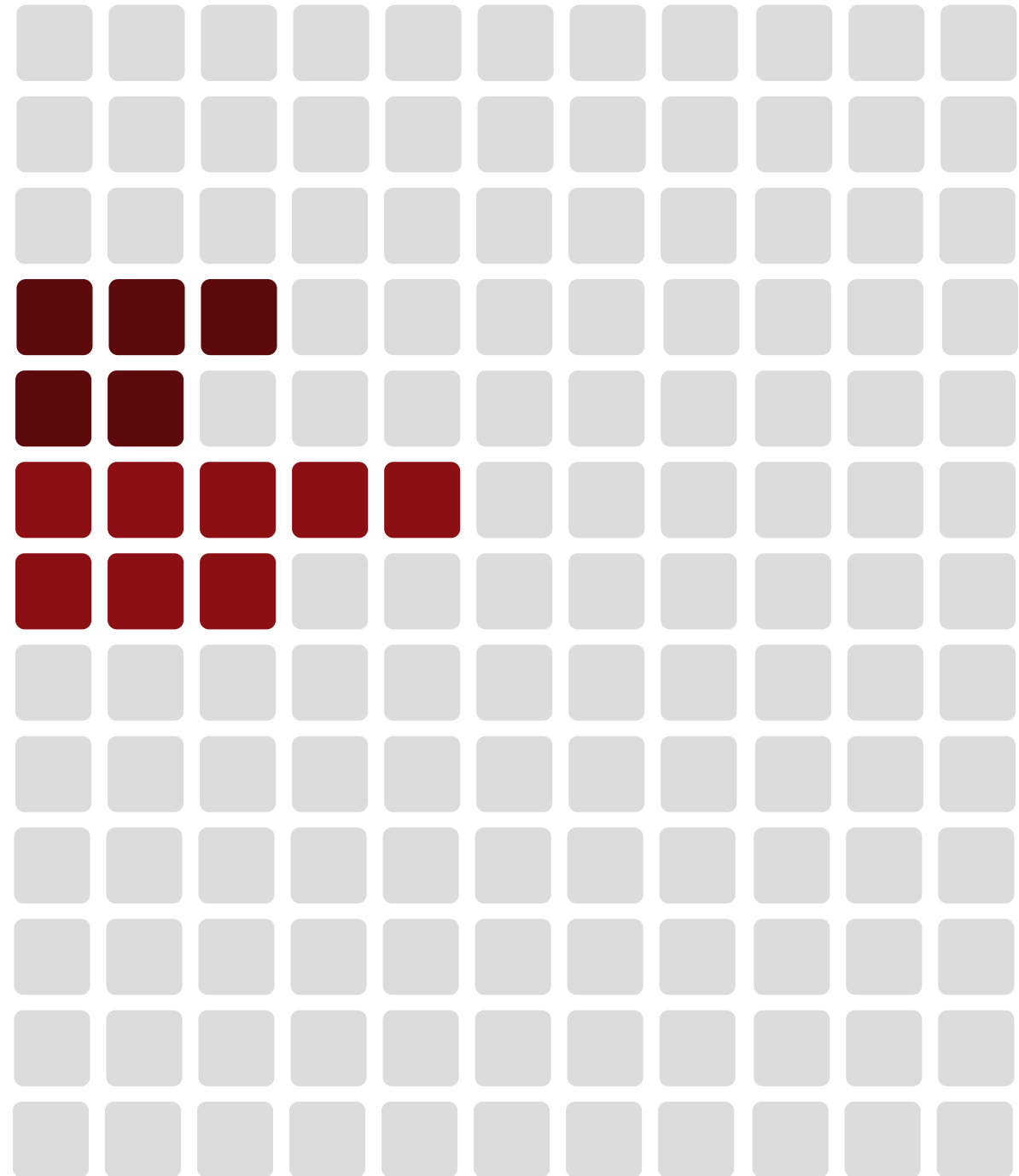
Beautiful

Easy

Only a handful of business apps merit
the time and cost of traditional
custom software development...

...and only so many problems can be
solved with **off-the-shelf SaaS.**

**What about every other
need your business
faces?**



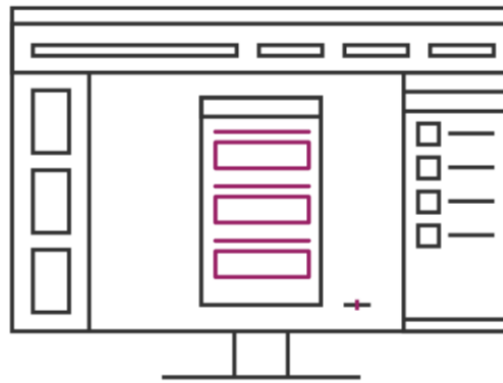
Let's change the way we build business apps

Power apps

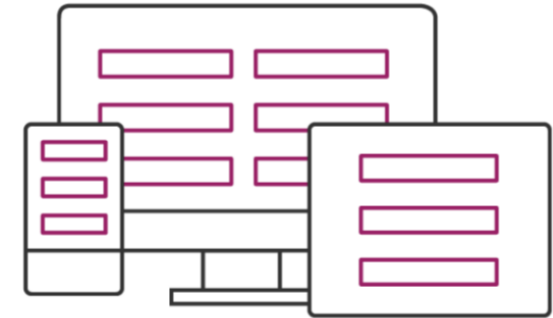
Microsoft PowerApps is a service for creating and using custom business apps across platforms



Connect to data & systems you're already using; create the data you need



Create apps, forms, and workflows without writing code

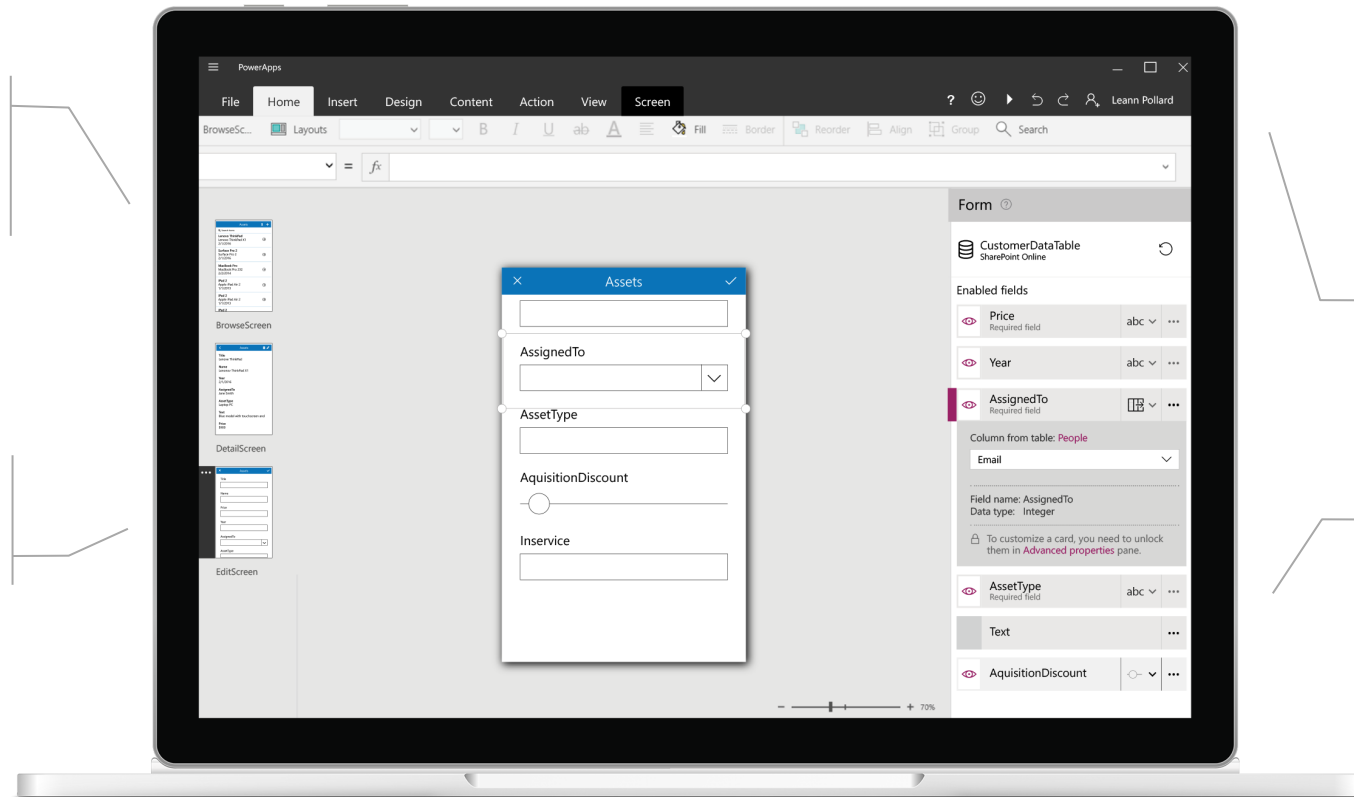


Use apps on web and mobile

Build useful apps without writing code

Craft forms and screens in a visual designer that helps you see exactly what you'll get

Take advantage of device capabilities like cameras, GPS, and pen controls



Build business logic into your apps with an Excel-inspired expression language

Extend the capabilities of connected data sources, or focus just on the bits you need



Connect to the systems you're already using

Quickly generate and customize apps based on Excel files, SharePoint Online lists, Salesforce records and more. You can even connect custom APIs.

Even connecting to data in your on premise systems through a common Data Gateway.

Your apps will be able to fully interact with underlying sources and will respect the permissions you've already established in them.

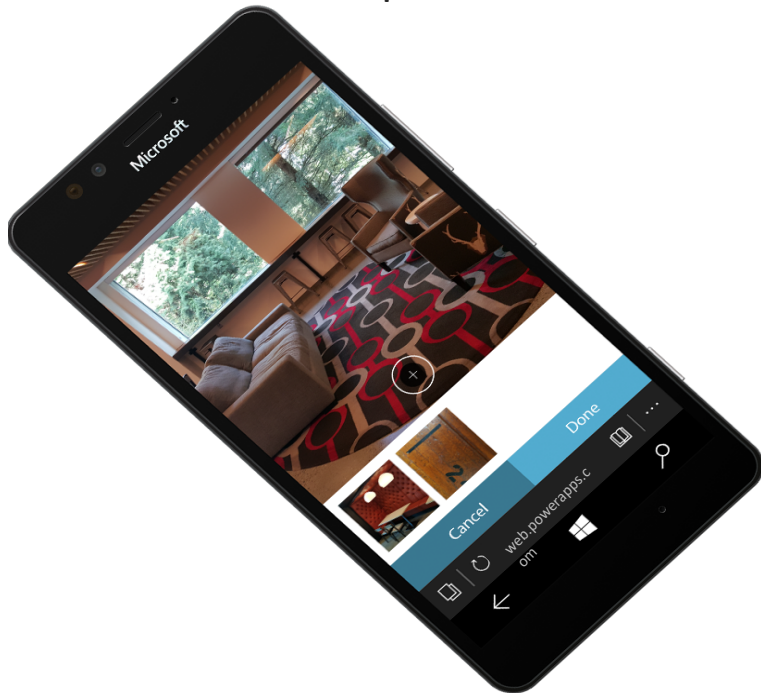


Microsoft Dynamics SL 2018

© 2018 Microsoft. All rights reserved.
This computer program is protected by U.S. and international copyright laws.

Publish apps instantly for web and mobile

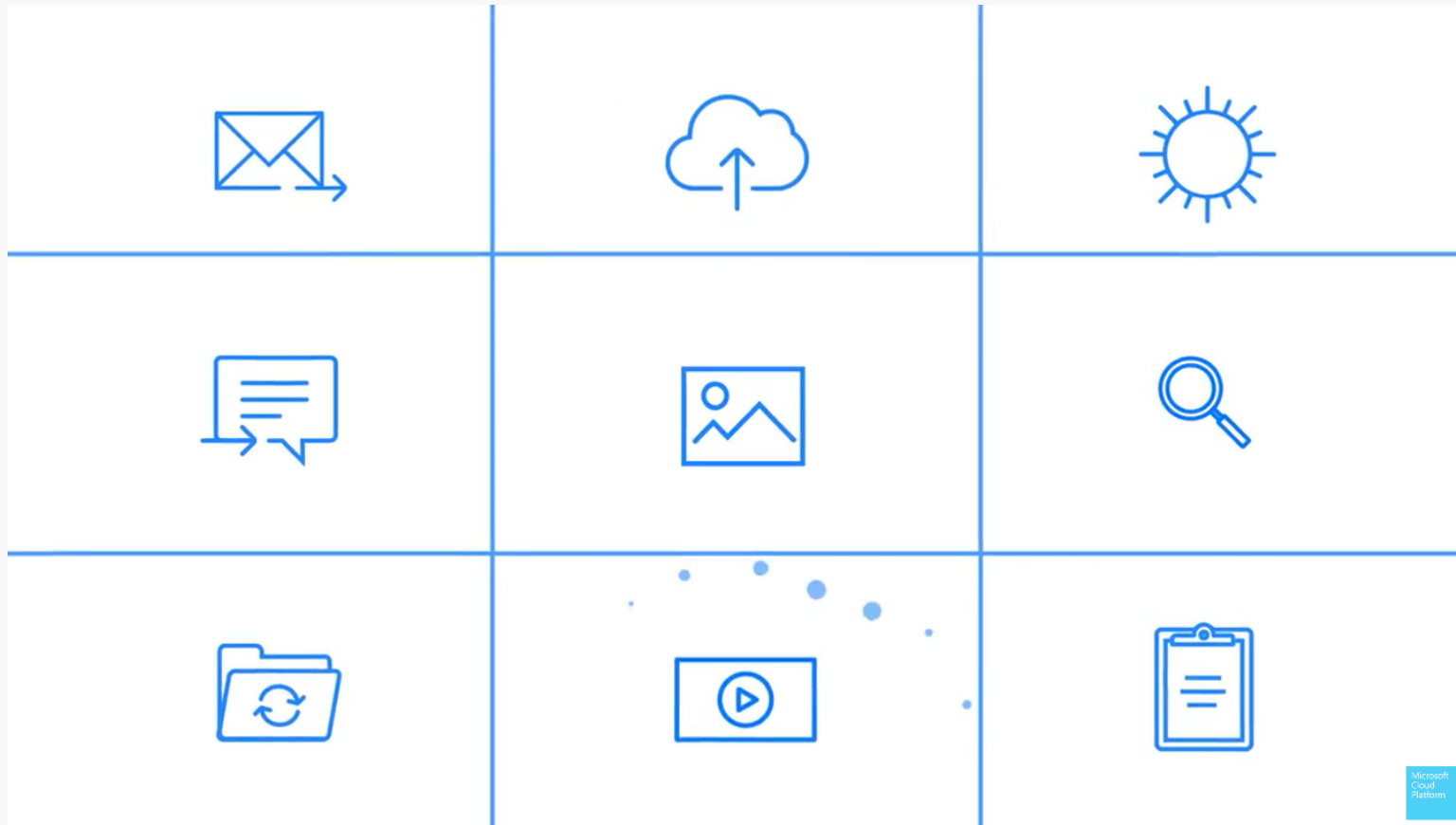
Get apps to your team when and where they're needed, whether that's on the web, Windows, iOS or Android—no app store required.



Flow

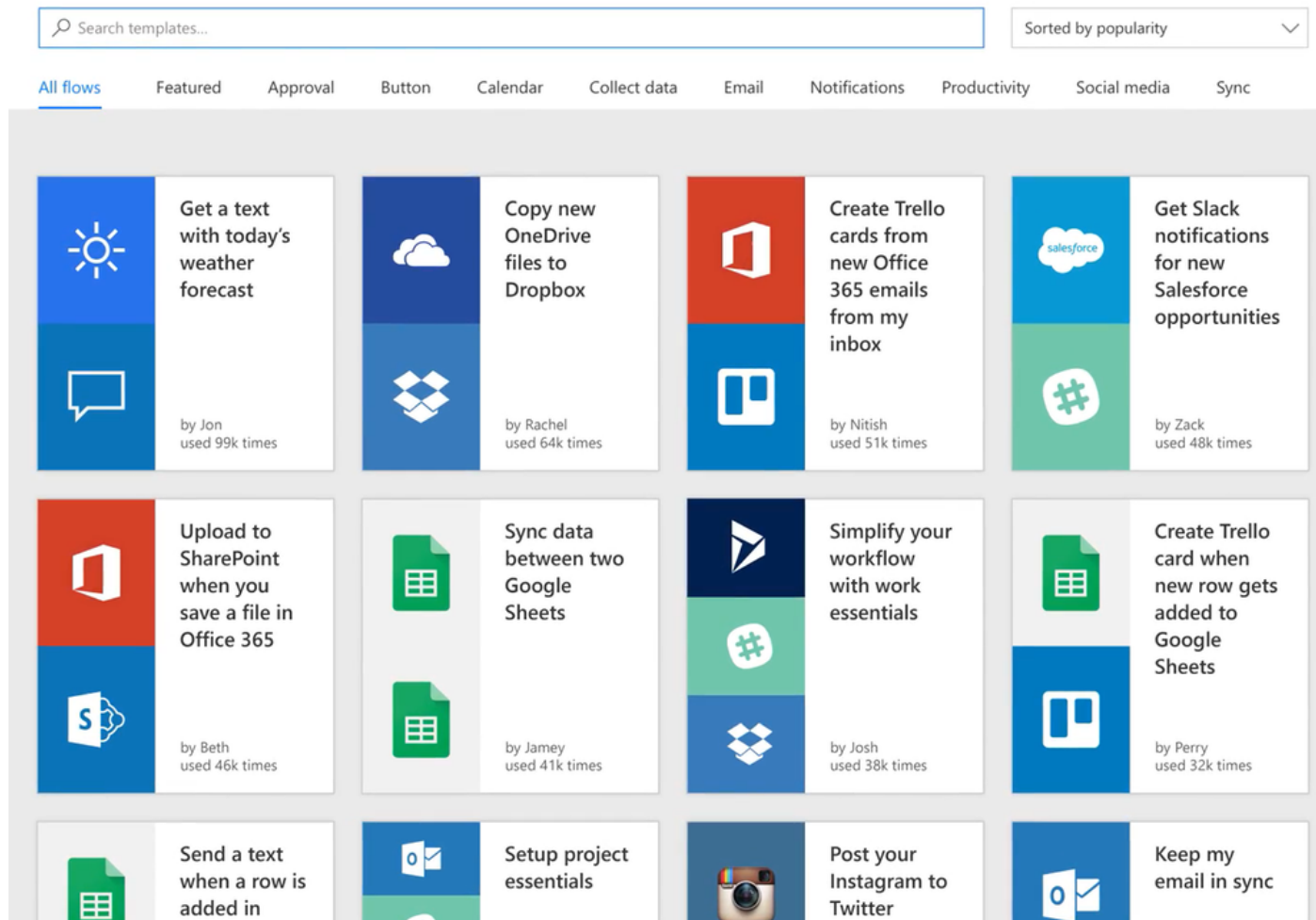
Microsoft Flow

A way to monitor, notify and take action



Microsoft Flow

- Prebuilt Templates

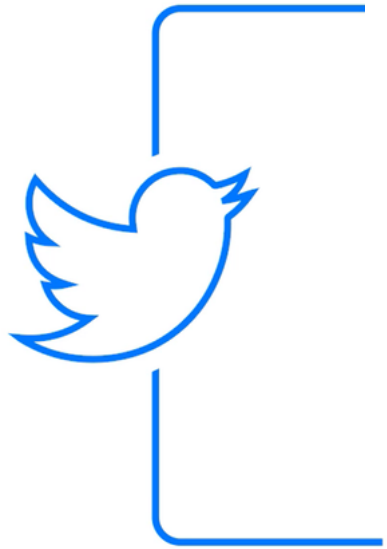


Flow Available On

- Web
- Phone/Tablet/PC
- Inbox
- Preset Flows...



Microsoft Flow Example



Office 365 extensibility

SharePoint Modern List integration with PowerApps and Microsoft Flow

The image illustrates the integration of Office 365 extensibility tools with SharePoint Modern Lists. It features a laptop screen showing the SharePoint 'Big Wins' list, a smartphone displaying the Office 365 mobile app, and a Microsoft Flow workflow diagram.

Access SharePoint content using PowerApps

Add external content and logic to lists with Microsoft Flow

The Microsoft Flow workflow diagram shows the following steps:

- When an object is created
- Get object
- Condition
- If yes: Create item
- If no, do nothing
- Send Email

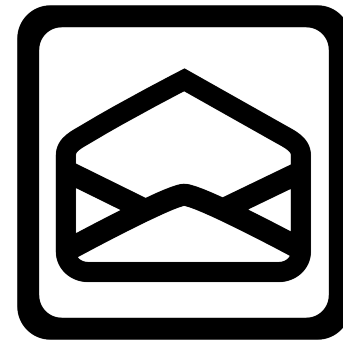
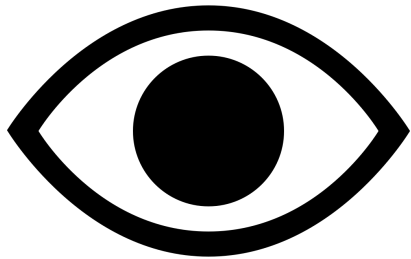
| Account Name | Order date | Order size | Operations I | Fulfillment Stat |
|-------------------------------------|------------|----------------|--------------|------------------|
| Fabrikam, Inc. | 3/28/2016 | | | |
| Best For You Organics Company | | | | |
| Tailspin Toys | | | | |
| Adventure Works Cycles | | | | |
| Alpine Ski House | | | | |
| Coho Winery | 3/22/2016 | \$1 | | |
| First Up Consultants | 4/8/2016 | \$8 | | |
| School of Fine Art | 3/16/2016 | \$4 | | |
| VanArsdel, Ltd. | 3/30/2016 | \$8 | | |
| Woodgrove Bank | 3/28/2016 | \$1 | | |
| Northwind Electric Cars | 4/4/2016 | \$1 | | |
| Proseware, Inc. | 3/27/2016 | \$1 | | |
| Best For You Organics Company | 3/14/2016 | \$1 | | |
| Munson's Pickles and Preserves Farm | 3/31/2016 | \$7,852,000.00 | | |

Power Apps & Flow

SL Demo for Phone &
Tablet

Accounts Receivables Power App & Flow

- View Customer Receivables Due
- Contact customers
- Run Aging
- Email Aging Results



AR Customer Balances

 Search Customer

Refresh



C065

City Highway Department

\$418,535 Outstanding Balance



C045

Baldwin Construction

\$408,034 Outstanding Balance



C050

Fabrikam, Inc.

\$376,615 Outstanding Balance



C015

Adventure-Works

\$207,905 Outstanding Balance



C010

A. Datum Corporation Jeff

\$199,054 Outstanding Balance

\$2,186,404 Total AR Balance

AR Customer Balances



Refresh



C015

Adventure-Works

\$207,905 Outstanding Balance



C020

Adventure Works

\$40,107 Outstanding Balance



MO01

Adventure Workers

\$75 Outstanding Balance

\$248,087 Total AR Balance

AR Customer Balances

 Search Customer

Refresh



C065

City Highway Department

\$418,535 Outstanding Balance



C045

Baldwin Construction

\$408,034 Outstanding Balance



C050

Fabrikam, Inc.

\$376,615 Outstanding Balance



C015

Adventure-Works

\$207,905 Outstanding Balance



C010

A. Datum Corporation Jeff

\$199,054 Outstanding Balance

\$2,186,404 Total AR Balance



Baldwin Construction

\$408,034 Outstanding Balance



CHS

● CBS ● CHS ● CMI

Cust ID C045
Attn
Email v-jsuwyn@microsoft.com
Phone 5555551212
Address 645 Research Place

Ashland
97666

OR
US



AR Aging Process



Baldwin Construction

\$408,034 Outstanding Balance



CHS

CBS CHS CMI

| Company ID | Current Bal Days to Pay | 30 Days Over 90 Days Over | 60 Days Over >90 Days Over |
|------------|----------------------------|------------------------------|-------------------------------|
| CBS | \$34 15.86 | \$0 \$0 | \$0 \$34 |
| CHS | \$408,000 0 | \$0 \$0 | \$0 \$408,000 |
| CMI | \$0 0 | \$0 \$0 | \$0 \$0 |



Baldwin Construction

\$408,034 Outstanding Balance

Format

Insert

Options

Discard Send

B

I

U



A



Heading 1

Heading 2



Undo



Redo

From: jsuwyn@plumblinconsulting.com



To: Administrator@contoso.com;

Cc & Bcc

Subject

Sent from [Mail](#) for Windows 10



AR Aging Process



Baldwin Construction

\$408,034 Outstanding Balance



CHS

● CBS ● CHS ● CMI

Cust ID C045
Attn
Email v-jsuwyn@microsoft.com
Phone 5555551212
Address 645 Research Place

Ashland
97666

OR
US



AR Aging Process



Choose Statement Cycle

01



Aging Days 1

30

Aging Days 2

60

Aging Days 3

90

Last Statement Day

11/25/2003 7:00 PM

Last Age Day

10/2/2017 8:00 PM

Last Financial Charge Day





2/21/2003 7:00 PM

Execute AR Aging

**Are you sure you want to execute the AR
aging process?**

Execute

Cancel

 Reply  Reply All  Forward  IM


Thu 8/31/2017 4:27 PM



Phillip

Aging Schedule Attached

To  Phillip  Jeff Suwyn

 If there are problems with how this message is displayed, click here to view it in a web browser.



Customer_Aging_Schedule.csv
29 KB

Aging Schedule Attached



Hi,

Please see attached results of the accounts recievable aging procedure.

Thanks, Admin

[Send to Manager](#)





[Test](#)

 Show original message

| | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | AA | |
|----|-------------|-------------------|----------|---------------------------|---------|-----------------------|-----------|-----------|-----------|-----------|-----------|---------------|--------------|--------------|--------------|--------------|----------|------------|------------|------------|------------|------------|------------|------------|------------|------------|----|---|
| 1 | @odata.etag | ItemInternalId | Customer | Customer_x0020_Name | Company | Current_x0020_Balance | Future_x0 | Age_x0020 | Age_x0020 | Age_x0020 | Age_x0020 | Average_x0020 | Credit_x0020 | Create_x0020 | Create_x0020 | Create_x0020 | Currency | Last_x0020 | Last_x0020 | Last_x0020 | Last_x0020 | Last_x0020 | Last_x0020 | Last_x0020 | Last_x0020 | Last_x0020 | | |
| 2 | | 3e42eb63-0050-4e | C010 | A. Datum Corporation | CBS | 24940.75 | 0 | 0 | 0 | 0 | 0 | 24940.75 | 36.74 | 0 | 2003-04-1 | BIREG | SYSADMIN | USD | 2015-02-2 | 2017-08-3 | 1900-01-0 | 2015-02-2 | 2625 | 0 | 0 | 0 | 0 | |
| 3 | | 785924e9-ab63-40 | C015 | Adventure-Works | CBS | 5179.57 | 0 | 0 | 0 | 0 | 0 | 5179.57 | 41 | 0 | 2003-07-0 | BIREG | SYSADMIN | USD | 2007-07-0 | 2017-08-3 | 1900-01-0 | 2007-07-0 | 0 | 0 | 0 | 0 | 0 | |
| 4 | | 04567314-25b6-40 | C020 | Adventure Works | CBS | 3948.75 | 0 | 0 | 0 | 0 | 0 | 3948.75 | 19.82 | 0 | 2003-08-2 | BIREG | SYSADMIN | USD | 2004-04-3 | 2017-08-3 | 1900-01-0 | 2004-04-3 | 11030.29 | 500 | 0 | 0 | 0 | |
| 5 | | 84f8c30f-38eb-45 | C025 | Alpine Ski House | CBS | 15000 | 0 | 0 | 0 | 0 | 0 | 15000 | 0 | 0 | 2004-06-0 | BIREG | SYSADMIN | USD | 2004-04-3 | 2017-08-3 | 1900-01-0 | 2004-04-3 | 0 | 0 | 0 | 0 | 0 | |
| 6 | | dc210e33-5e57-4c | C030 | Alpine Ski House Builders | CBS | -637.5 | 0 | 0 | 0 | 0 | 0 | -637.5 | 48.25 | 0 | 2003-07-1 | BIREG | SYSADMIN | USD | 2004-04-3 | 2017-08-3 | 1900-01-0 | 2004-04-3 | 112.5 | 0 | 0 | 0 | 0 | |
| 7 | | 4411c14b-d997-44 | C040 | City Power & Light | CBS | 15576.56 | 0 | 0 | 0 | 0 | 0 | 15576.56 | 0 | 0 | 2004-03-2 | BIREG | staylor | USD | 2004-04-3 | 2017-08-3 | 1900-01-0 | 2004-04-3 | 0 | 0 | 0 | 0 | 0 | |
| 8 | | 60bd2cfc-57a4-43 | C045 | Baldwin Construction | CBS | 33.75 | 0 | 0 | 0 | 0 | 0 | 33.75 | 15.86 | 0 | 2003-11-1 | SQL | SQL | | 2004-03-1 | 2017-08-3 | 1900-01-0 | 2004-03-1 | 135 | -10056 | 0 | 0 | 0 | |
| 9 | | 2b95e8ab-96d3-46 | C050 | Fabrikam, Inc. | CBS | 4230.25 | 0 | 0 | 0 | 0 | 0 | 4230.25 | 0 | 0 | 2004-07-2 | BIREG | CDEWER | USD | 2004-07-2 | 2017-08-3 | 1900-01-0 | 2004-07-2 | 0 | 0 | 0 | 0 | 0 | |
| 10 | | 8a86fbf0-a5c1-45 | C070 | School of Fine Art | CBS | 27585.67 | 0 | 0 | 0 | 0 | 0 | 27585.67 | 12.99 | 0 | 2003-04-1 | BIREG | SYSADMIN | USD | 2004-04-3 | 2017-08-3 | 1900-01-0 | 2004-04-3 | -30000 | 0 | 0 | 0 | 0 | |
| 11 | | 434b5cee-aa79-48 | C080 | Southridge Video | CBS | 14625 | 0 | 0 | 0 | 0 | 0 | 14625 | 0 | 0 | 2004-05-3 | BIREG | SYSADMIN | USD | 2004-04-3 | 2017-08-3 | 1900-01-0 | 2004-04-3 | 0 | 0 | 0 | 0 | 0 | |
| 12 | | 37be4e90-4636-47 | CE02 | Graphic Solutions, Inc. | CBS | 750 | 0 | 0 | 0 | 0 | 0 | 750 | 0 | 0 | 2004-02-0 | BIREG | SYSADMIN | USD | 2004-04-3 | 2017-08-3 | 1900-01-0 | 2004-04-3 | 0 | 0 | 0 | 0 | 0 | |
| 13 | | 5e0857ca-1170-47 | DE01 | Humongous Insurance | CBS | 520 | 0 | 0 | 0 | 0 | 0 | 520 | 32.2 | 0 | 2003-07-2 | BIREG | SYSADMIN | USD | 2004-01-0 | 2017-08-3 | 1900-01-0 | 2003-12-2 | 9640.7 | 3200 | 0 | 0 | 0 | |
| 14 | | 264fc80b-28ae-49 | EU01 | Humongous Mechanical | CBS | 6472.5 | 0 | 0 | 0 | 0 | 0 | 6472.5 | 18 | 0 | 2003-06-0 | SQL | SQL | | 2004-04-3 | 2017-08-3 | 1900-01-0 | 2004-04-3 | 0 | 0 | 0 | 0 | 0 | |
| 15 | | 221777d7-063d-42 | EX01 | Fabrikam Solutions | CBS | 187.5 | 0 | 0 | 0 | 0 | 0 | 187.5 | 21.17 | 0 | 2003-04-2 | SQL | SQL | | 2004-03-1 | 2017-08-3 | 1900-01-0 | 2004-03-1 | 0 | 0 | 0 | 0 | 0 | |
| 16 | | 1b9359f1-e8f2-4dc | FO01 | School of Fine Art | CBS | 187.5 | 0 | 0 | 0 | 0 | 0 | 187.5 | 15.17 | 0 | 2003-05-1 | BIREG | SYSADMIN | USD | 2004-03-1 | 2017-08-3 | 1900-01-0 | 2004-03-1 | 43.75 | 0 | 0 | 0 | 0 | |
| 17 | | d23212f2-4fa3-4f0 | GI01 | Woodgrove Bank | CBS | 2262.5 | 0 | 0 | 0 | 0 | 0 | 2262.5 | 15.92 | 0 | 2003-04-0 | BIREG | SYSADMIN | USD | 2004-04-3 | 2017-08-3 | 1900-01-0 | 2004-04-3 | 0 | 3125 | 0 | 0 | 0 | |
| 18 | | b074bce5-ab6b-4b | IN03 | Southridge Video | CBS | 150 | 0 | 0 | 0 | 0 | 0 | 150 | 16.29 | 0 | 2003-08-2 | BIREG | SYSADMIN | USD | 2004-04-3 | 2017-08-3 | 1900-01-0 | 2004-04-3 | 5200 | 0 | 0 | 0 | 0 | |
| 19 | | 1e819606-59b9-40 | KC01 | Southridge Video Distribu | CBS | 122.8 | 0 | 0 | 0 | 0 | 0 | 122.8 | 31.44 | 0 | 2003-11-2 | BIREG | SYSADMIN | USD | 2004-04-3 | 2017-08-3 | 1900-01-0 | 2004-04-3 | 3430 | 0 | 0 | 0 | 0 | |
| 20 | | dc6c8704-54e3-49 | KO01 | Wingtip Optical | CBS | 75 | 0 | 0 | 0 | 0 | 0 | 75 | 14.12 | 0 | 2003-03-3 | BIREG | SYSADMIN | USD | 2004-04-3 | 2017-08-3 | 1900-01-0 | 2004-04-3 | 450 | 0 | 0 | 0 | 0 | |
| 21 | | 102acf99-2617-485 | MO01 | Adventure Workers | CBS | 75 | 0 | 0 | 0 | 0 | 0 | 75 | 32.09 | 0 | 2003-04-1 | | 8400 | SYSADMIN | USD | 2004-03-1 | 2017-08-3 | 1900-01-0 | 2004-02-1 | 0 | 0 | 0 | 0 | 0 |
| 22 | | 4a48f506-85fc-463 | MU01 | Coho Printing | CBS | 11925 | 0 | 0 | 0 | 0 | 0 | 11925 | 0 | 0 | 2004-02-2 | BIREG | SYSADMIN | USD | 2004-04-3 | 2017-08-3 | 1900-01-0 | 2004-04-3 | 0 | 0 | 0 | 0 | 0 | |
| 23 | | b14df7e0-1d92-4b | OC02 | Trey Processing | CBS | -13137.5 | 0 | 0 | 0 | 0 | 0 | -13137.5 | 0 | 0 | 2004-02-1 | | 8400 | SYSADMIN | USD | 2004-03-1 | 2017-08-3 | 1900-01-0 | 2004-03-1 | 0 | 0 | 0 | 0 | 0 |
| 24 | | 325ad9b7-1890-44 | OD01 | Wide World Importers | CBS | 1447.5 | 0 | 0 | 0 | 0 | 0 | 1447.5 | 0 | 0 | 2004-02-2 | | 8400 | SYSADMIN | USD | 2004-03-1 | 2017-08-3 | 1900-01-0 | 2004-03-1 | 0 | 0 | 0 | 0 | 0 |
| 25 | | aafb5586-df75-4d3 | OL01 | Wide World Exporters | CBS | -6389.7 | 0 | 0 | 0 | 0 | 0 | -6389.7 | 0 | 0 | 2004-03-1 | | 8400 | SYSADMIN | USD | 2004-03-1 | 2017-08-3 | 1900-01-0 | 1900-01-0 | 0 | 0 | 0 | 0 | 0 |
| 26 | | 9a7dabed-ef60-4b | OR01 | School of Fine Art Press | CBS | 4012.5 | 0 | 0 | 0 | 0 | 0 | 4012.5 | 225.47 | 0 | 2003-03-3 | BIREG | SYSADMIN | USD | 2028-04-2 | 2017-08-3 | 1900-01-0 | 2004-04-3 | 3385 | -6128.32 | 0 | 0 | 0 | |
| 27 | | e9d61fd2-6a30-47 | OR02 | Woodgrove Safety Equipr | CBS | 3450 | 0 | 0 | 0 | 0 | 0 | 3450 | 19.85 | 0 | 2003-06-2 | | 8400 | BR01 | USD | 2004-04-3 | 2017-08-3 | 1900-01-0 | 2004-04-3 | 9337.5 | 0 | 0 | 0 | 0 |
| 28 | | 29b1e3f6-7b47-49 | PE01 | Fabrikam Remodeling | CBS | 8583.75 | 0 | 0 | 0 | 0 | 0 | 8583.75 | 24.75 | 0 | 2003-11-2 | | 8400 | SYSADMIN | USD | 2004-04-3 | 2017-08-3 | 1900-01-0 | 2004-04-3 | 87.75 | 0 | 0 | 0 | 0 |
| 29 | | 2ec42d36-8a76-44 | RT01 | The Phone Company | CBS | 7725 | 0 | 0 | 0 | 0 | 0 | 7725 | 3 | 0 | 2004-02-0 | BIREG | SYSADMIN | USD | 2004-04-3 | 2017-08-3 | 1900-01-0 | 2004-04-3 | 0 | 0 | 0 | 0 | 0 | |
| 30 | | 625e50c2-5f43-4a0 | SM01 | Southridge Video | CBS | 14025 | 0 | 0 | 0 | 0 | 0 | 14025 | 19.57 | 0 | 2003-11-0 | BIREG | SYSADMIN | USD | 2004-04-3 | 2017-08-3 | 1900-01-0 | 2004-04-3 | 5993.75 | 0 | 0 | 0 | 0 | |
| 31 | | 95f196dc-6ca6-4bc | SN01 | Northwind Trade Union | CBS | 1950 | 0 | 0 | 0 | 0 | 0 | 1950 | 22.43 | 0 | 2003-11-2 | BIREG | SYSADMIN | USD | 2004-04-3 | 2017-08-3 | 1900-01-0 | 2004-04-3 | 1011.9 | 0 | 0 | 0 | 0 | |
| 32 | | 98ffdf7f-a916-4de | TA01 | Blue Yonder Airlines | CBS | 9982.28 | 0 | 0 | 0 | 0 | 0 | 9982.28 | 0 | 0 | 2004-01-2 | | 8400 | BR01 | USD | 2004-04-3 | 2017-08-3 | 1900-01-0 | 2004-04-3 | 0 | 0 | 0 | 0 | 0 |
| 33 | | 1d27a401-ef0b-47 | VA01 | Tailspin Mechanical | CBS | 202.5 | 0 | 0 | 0 | 0 | 0 | 202.5 | 39.33 | 0 | 2003-05-0 | | 8400 | SYSADMIN | USD | 2004-03-1 | 2017-08-3 | 1900-01-0 | 2004-03-1 | 0 | 0 | 75 | 0 | 0 |
| 34 | | a7130fca-c4c5-40 | CE020 | Adventure Works | CCC | 14625 | 0 | 0 | 0 | 0 | 0 | 14625 | 0 | 0 | 2004-06-1 | BIREG | SYSADMIN | USD | 2004-04-2 | 2017-08-3 | 1900-01-0 | 2004-04-2 | 0 | 0 | 0 | 0 | 0 | |
| 35 | | 9050a8b6-03b7-43 | C050 | Fabrikam, Inc. | CCC | 4500 | 0 | 0 | 0 | 0 | 0 | 4500 | 0 | 0 | 2004-06-1 | BIREG | SYSADMIN | USD | 2004-04-1 | 2017-08-3 | 1900-01-0 | 2004-04-1 | 0 | 0 | 0 | 0 | 0 | |
| 36 | | cd606eee-830f-47 | C060 | Northwind Traders | CCC | 13800 | 0 | 0 | 0 | 0 | 0 | 13800 | 0 | 0 | 2004-06-1 | BIREG | SYSADMIN | USD | 2004-04-3 | 2017-08-3 | 1900-01-0 | 2004-04-3 | 0 | 0 | 0 | 0 | 0 | |
| 37 | | 53872776-9812-48 | C010 | A. Datum Corporation | CDI | 38475 | 0 | 0 | 0 | 0 | 0 | 38475 | -68 | 0 | 2004-06-2 | | 40400 | CDI | | 2009-03-0 | 2017-08-3 | 1900-01-0 | 2009-03-0 | 0 | 0 | 0 | 0 | 0 |
| 38 | | 7592a43a-c3e4-41 | C020 | Adventure Works | CDI | 18033.6 | 0 | 0 | 0 | 0 | 0 | 18033.6 | 0 | 0 | 2004-06-2 | | 40400 | CDI | | 2004-04-1 | 2017-08-3 | 1900-01-0 | 2004-04-1 | 0 | 0 | 0 | 0 | 0 |
| 39 | | 66657434-125b-4a | C030 | Alpine Ski House Builders | CDI | 3808 | 0 | 0 | 0 | 0 | 0 | 3808 | 0 | 0 | 2004-06-2 | | 40400 | CDI | | 2004-04-1 | 2017-08-3 | 1900-01-0 | 2004-04-1 | 0 | 0 | 0 | 0 | 0 |
| 40 | | 9f8fdd11-4b3e-4d | C060 | Northwind Traders | CDI | 157500 | 0 | 0 | 0 | 0 | 0 | 157500 | 0 | 0 | 2004-06-2 | | 40400 | CDI | | 2004-04-2 | 2017-08-3 | 1900-01-0 | 2004-04-2 | 0 | 0 | 0 | 0 | 0 |
| 41 | | e07ea59f-23c6-4ca | ED01 | EDISON Distributing | CDI | 6787.2 | 0 | 0 | 0 | 0 | 0 | 6787.2 | 0 | 0 | 2011-06-1 | | 40400 | SYSADMIN | | 2011-06-2 | 2017-08-3 | 1900-01-0 | 2011-06-2 | 0 | 0 | 0 | 0 | 0 |
| 42 | | faee120c-0076-49 | C010 | A. Datum Corporation | CEC | 14999.2 | 0 | 0 | 0 | 0 | 0 | 14999.2 | 0 | 0 | 2004-06-2 | BIREG | CEC | USD | 2004-04-2 | 2017-08-3 | 1900-01-0 | 2004-04-2 | 0 | 0 | 0 | 0 | 0 | |
| 43 | | 37237a70-e877-4f | C040 | City Power & Light | CEC | 4567.5 | 0 | 0 | 0 | 0 | 0 | 4567.5 | 0 | 0 | 2004-06-2 | BIREG | CEC | USD | 2004-04-3 | 2017-08-3 | | | | | | | | |

Customer_Aging_Schedule



 Reply  Reply All  Forward  IM


Thu 8/31/2017 4:27 PM



Phillip

Aging Schedule Attached

To  Phillip  Jeff Suwyn

 If there are problems with how this message is displayed, click here to view it in a web browser.



Customer_Aging_Schedule.csv
29 KB

Aging Schedule Attached



Hi,

Please see attached results of the accounts recievable aging procedure.

Thanks, Admin

Send to Manager

Test

▼ Show original message

Customers

Accounts Receivable Customer Balances

Search Customer

Refresh Data

Total Current Balance
\$2,186,408

Total > 90 Days
\$2,186,408

| Customer ID | Customer Name | Current Balance | 30 Days | 60 Days | 90 Days | > 90 Days |
|-------------|---------------------------|-----------------|---------|---------|---------|-----------|
| C065 | City Highway Department | \$418,535 | \$0 | \$0 | \$0 | \$418,535 |
| C045 | Baldwin Construction | \$408,034 | \$0 | \$0 | \$0 | \$408,034 |
| C050 | Fabrikam, Inc. | \$376,615 | \$0 | \$0 | \$0 | \$376,615 |
| C015 | Adventure-Works | \$207,905 | \$0 | \$0 | \$0 | \$207,905 |
| C010 | A. Datum Corporation Jeff | \$199,054 | \$0 | \$0 | \$0 | \$199,054 |
| C060 | Northwind Traders | \$171,300 | \$0 | \$0 | \$0 | \$171,300 |
| C030 | Alpine Ski House Builders | \$166,371 | \$0 | \$0 | \$0 | \$166,371 |
| C020 | Adventure Works | \$40,107 | \$0 | \$0 | \$0 | \$40,107 |
| C070 | School of Fine Art | \$27,586 | \$0 | \$0 | \$0 | \$27,586 |
| C090 | The Phone Company | \$26,661 | \$0 | \$0 | \$0 | \$26,661 |
| C180 | Microsoft Corporation | \$20,695 | \$0 | \$0 | \$0 | \$20,695 |
| C040 | City Power & Light | \$20,149 | \$0 | \$0 | \$0 | \$20,149 |

\$408,034 Outstanding Balance



US

AR AGING PROCESS

Getting started with PowerApps



Papersave — Third Party Spotlight

Presented by TAMMY BOWER (tbower@papersave.com)



Dynamics SL Tips & Tricks

Presented by PAUL JAMES & COLLEEN MCCOSHEN

System Tips & Tricks

- Possible Value(PV's) & Super PV's –example account history
- F3 then Control E – will export to Excel
- 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
- Zoom Percent on preview reports can be changed in Solomon.ini. Example:
[Report-01620] ZoomPercent=300

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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



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System Tips & Tricks — continued

Keyboard Shortcuts

- **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**

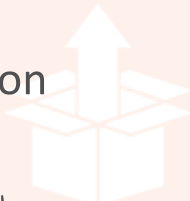
To save data and keep it on the screen



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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



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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



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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.



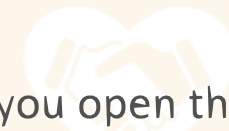
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System Tips & Tricks — continued

- 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



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System Tips & Tricks — continued

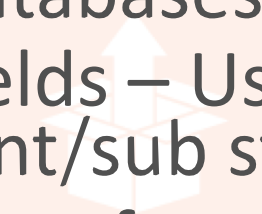
- Status Bar: click to change date, change customization level
- Button Overflow
- Favorites -Menu
- Quick Print
- Attachments & Notes
- Notes - all screens; Yellow Icon
- Color code Companies
- Create Test Databases to try new things
- Change key fields – Use KeyChange or PSTL to change your key fields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



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System Tips & Tricks — continued

- System reminders/FYI on Microsoft end of support date

- SQL Server 2008 and 2008 R2 - July 9, 2019
- Windows Server 2008 and 2008 R2 – January 14, 2020
- Exchange Server 2010 – January 14, 2020
- Windows 7 – January 14, 2020
- Windows 7 Prof. For Embedded Systems – January 14, 2020
- Office 2010 Client – October 13, 2020
- Sharepoint Server 2010 – October 13, 2020
- Project Server 2010 – October 13, 2020
- Windows Embedded Standard 7 – October 13, 2020



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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 Employees in Payroll (rate, deductions)
- Can run calculation in payroll as many times as needed

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Financial Tips & Tricks — continued

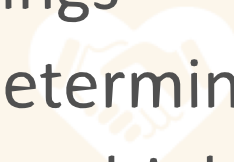
- Can recalculate in Review Edit Check screen in Payroll
- Void Payroll Check – now you don't have to enter timecard earnings again if check box is checked to Reactivate Earnings
- Reminder – void date of payroll check determines which 941 it will go to
- Use Check Sequence in payroll to allow multiple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



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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

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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

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Boyer Tips & Tricks

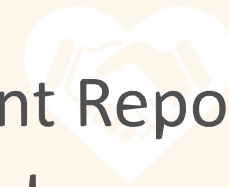
- Need support – please email slsupport@boyerassoc.com
- Visit our website frequently for great Blogs & Videos www.boyerassoc.com
- Follow us on Twitter: @BoyerAssoc
- Use CustomerSource
- Future Training Sessions for Management Reporter
- For spring promo on modules, users, and upgrades see Carol.



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Upcoming Events



Management Reporter classes:

- July 24-25
- September 18-19
- November 20-21

Dynamics 365 101:

- July – Dates TBD
- Monthly intro webinar

Year-End Events:

- December





Thank you for coming!

Colleen McCoshen, Director of Operations

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Please leave your name badge for your next visit and have a great afternoon!