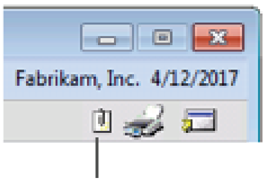
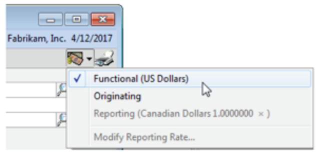
Quisitive Microsoft Dynamics GP Cheat Sheet

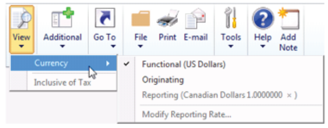
Buttons & Window Elements



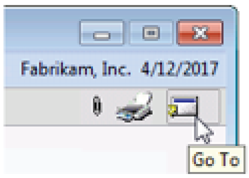
This icon indicates that files are attached



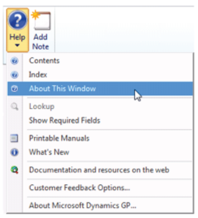
In menu bar mode, the currency list appears on the right side of the widow



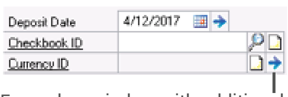
In action pane mode, the currency view is selected from the View group



Provides alternative navigation to related windows

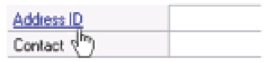


In action pane mode, the Help button provides access to the help actions

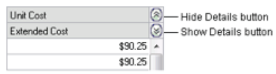


Expands a window with additional information and advanced options

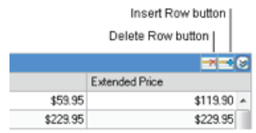
Allows you to select a date from a calendar



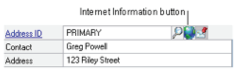
Click the link to open a maintenance or setup window for this item



Hide all but one, or display multiple lines of information about each record

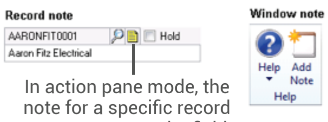


Use these buttons to add or remove a row in a scrolling window

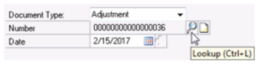


Allows you to enter or view Internet information for your company, associated item, person or vendor

In action pane mode, the button is found in the Go To group



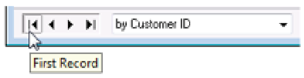
In action pane mode, the note for a specific record appears next to the field



Displays a lookup window for the field next to the button

Displays additional information about the selected item

Displays help for the window



From left to right, the buttons allow you to move to the first, previous, next, or last record

Tool Bars

The Microsoft Dynamics GP toolbars contain specific tasks that you can complete for selected categories, such as transactions or cards, and are customizable on a per-user basis. From the Layout menu, choose Toolbars and select the toolbar to display in Microsoft Dynamics GP. You can also right-click in the toolbar area to hide or display toolbars.

Toolbars	Windows, Commands, or Menus
Main	Transactions menu, Inquiry menu, Reports menu, Cards menu
Financial	General Transaction Entry, Quick Journal Entry, Detail Inquiry, Financial Series Posting
Sales	Sales Transaction Entry, Receivables Transaction Entry, Receivables Batch Entry, Cash Receipts Entry, Sales Series Posting
Purchasing	Purchase Order Entry, Receivings Transaction Entry, Enter/Match Invoices, Payables Transaction Entry, Payables Series Posting
Inventory	Item Transfer Entry, Item Transaction Entry, Item Maintenance, Inventory Series Posting
HR & Payroll	Employee Maintenance, Applicant, Payroll Transaction Entry, Attendance Transaction Entry, Benefit Deduction Summary, employee Pay Code Maintenance
Project	Project Maintenance, Timesheet Entry, Employee Expense Entry, PA Purchase Order Entry, PA Receivings Transaction Entry, Billing Entry
Standard	SmartList, Task List, Reminders
Custom	Add custom commands as needed

To Customize a Toolbar

1. Open the Toolbar Customization window (Layout menu >> Toolbars >> Customize)
2. Select a toolbar to add a window or command to.
3. Choose Add to open the Add Command window.
4. Choose a menu from the menu groups listed.
5. In the Categories/Commands pane, expand a category to display the windows and commands in it, select a category or a command from the list.
6. Choose OK.

Customizing User Preferences

To Customize User Preferences:

Use the User Preferences window to modify your individual preferences. These preferences are saved on a per user basis.

1. Be sure the current user ID is the one that you want to set preferences for.

2. Open the User Preferences window. (Home >> User Preferences)

3. Mark the Horizontal Scroll Arrows option to display scroll arrows for some fields. Marking this option will allow you to use scroll arrows on either side of the field to view the entire account number.

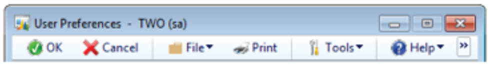
4. Mark Printer, Screen, or both to set default report destinations.

5. Mark Tab or Return to select the entry key used for moving the highlight from field to field. If you select Return, you'll press the enter key to move from field to field and shift + enter to save or process information on a window.

6. Select how to display commands in Microsoft Dynamics GP windows.

Action Pane

Action Pane Strip



Menu Bar

7. If you use Sales Order Processing, select the default sales document type that appears in the Sales Transaction Entry window.

8. Choose Local or Remote to determine where you want designated process to be performed. Refer to your System Administrator's Guide (Help >> Contents >> select System Administration) for more information.

9. Choose an option to specify Microsoft MapPoint mapping settings.

10. Choose Reminders, Display, Password or AutoComplete to continue modifying your preferences, or choose OK to close the window and save your changes.

List Personalizations

Columns: You can drag and drop columns to put them in the order that you want them. You can also resize the width of the columns to be the size that you want.

Sort Order: You can sort a list by clicking on any one of the column headings that are displayed in the list.

Information Pane: You can choose to hide or show the information pane by choosing Show >> Information Pane from the list title drop-down menu. You also can resize the information pane vertically by dragging the top border up or down.

Filter Options: You can hide or show the filter options area by choosing Show >> Filter Options from the list title drop-down menu.

Action Pane: You can hide an action pane by choosing Show >> action pane from the list title drop-down menu.

Your Partner for Complete Dynamics GP Support & Migration

ask@quisitive.com

Keyboard Shortcuts

Tools Keyboard Shortcuts	*alt + f9*
Report Writer	
Window Navigation Keyboard Shortcuts	
Move to next field	*tab*
Move to previous field	*shift + tab*
Move from scrolling next	*ctrl + tab*
Move from scrolling previous	*shift + ctrl + tab*
Default button on window	*enter*
Close the current window	*ctrl + w*
Exit application	*alt + x*
Window-Specific Keyboard Shortcuts	
Edit Purchase Order Status— Display Vendor Item Detail	*ctrl +d*
Payables Manual Payment Entry — Create Temporary Vendor	*ctrl + t*
Payables Transaction Entry — Create Temporary Vendor	*ctrl + t*
Purchase Order Entry — Create Temporary Vendor	*ctrl + t*
Purchase Order Entry — Display Vendor Item Detail	*ctrl + d*
Purchase Order Entry — Open Item Detail	*ctrl + e*
Purchase Order Inquiry Zoom — Display Vendor Item Detail	*ctrl+ d*
Purchase Order Inquiry Zoom — Open Item Detail	*ctrl + e*
Purchase Order Processing Item Inquiry — Display Vendor Item Detail	*ctrl + d*
Purchasing Invoice Entry — Display Vendor Item Detail	*ctrl + d*
Purchasing Invoice Entry — Open Item Detail	*ctrl + e*
Purchasing Invoice Entry — Open Match Shipments to Invoice	*ctrl + m*
Purchasing Invoice Inquiry Zoom— Display Vendor Item Detail	*ctrl + d*
Purchasing Item Detail Entry — Display Vendor Item Detail	*ctrl + d*
Purchasing Item Detail Inquiry Zoom — Display Vendor Item Detail	*ctrl + d*
Purchasing Item Receipts Zoom — Display Vendor Item Detail	*ctrl + d*
Purchasing Vendor Detail Entry — Create Temporary Vendor	*ctrl + t*
Receivings Item Detail Entry — Display Vendor Item Detail	*ctrl + d*
Receivings Transaction Entry — Create Temporary Vendor	*ctrl + t*
Receivings Transaction Entry — Display Vendor Item Detail	*ctrl + d*
Receivings Transaction Entry — Open Item Detail	*ctrl + e*
Receivings Transaction Inquiry Zoom — Open Item Detail	*ctrl + e*
Receivings Transaction Inquiry Zoom— Display Vendor Item Detail	*ctrl + d*
Sales Transaction Entry — Open Item Detail	*ctrl + e*
Sales Transaction Entry— Quick Print	*ctrl + q*
Select Purchase Order Items — Display Vendor Item Detail	*ctrl + d*
Vendor Account Maintenance — Open Additional Vendor Accounts	*ctrl + e*
Other Common keyboard shortcuts	
View Functional Currency	*ctrl + u*
View Originating Currency	*ctrl + o*
View Reporting Currency	*ctrl + r*
Account Alias	*ctrl + q*
Analysis	*ctrl + y*

Creating Shortcuts

To create a shortcut to the current Microsoft Dynamics GP window:
1. Open the window to add a shortcut for.
2. Choose File >> Add to Shortcuts.

To create an external shortcut:
1. Right-click anywhere in the list of shortcuts and choose Add >> Add External Shortcut.
2. The Add External Shortcut window appears.
3. Enter a name for the application or file in the Name field.
4. Choose the Browse button to locate the external application or file to add. The Select an Application window appears.
5. Select a program or file. Choose Open to add its path to the Command Line field in the Add External Shortcut window.
6. Choose Add to create a shortcut to the file.
7. Repeat steps 3 through 6 for each external shortcut you want to create.
8. Choose Done to close the Add External Shortcut window.