Introduction to Microsoft Dynamics GP 2015

Course Details

Course Outline

Module 1: Overview and Basic Elements

This module introduces many of the basic elements that are used throughout Microsoft Dynamics GP. The main window of the application is discussed along with logging on to Dynamics, and many common window functions and objects in Microsoft Dynamics GP are identified and explained.

Lessons
• Basic Elements
• Using Notes
• User Preferences
• Navigation Pane
• Home Pages
• Help and Other Documentation
Lab : Advanced Lookups
Lab : OLE Notes
Lab : User Preferences

Module 2: SmartList, Reports, and Inquiries

This module discusses SmartList, an inquiry tool that can be used to access data. It also discusses reporting and inquiry capabilities and the use of Microsoft Word Templates to generate common documents.

Lessons
• SmartLists
• Microsoft Word Templates
• Report Options and Printing
• Report Groups
• Report List and My Reports
• Excel Reports
• Inquiries, Named Printers and Process Monitor
Lab : SmartList
Lab : Report Options and Groups

Module 3: System and Posting Setup

This module explains some basic system setups along with information about the different ways to post transactions in Microsoft Dynamics GP. System setups discussed include security, users and user classes. Posting Setup is discussed along with related topics such as audit trails and source documents.

Lessons

• System Setup

• Posting Methods and Setup Options

• Posting Accounts and Audit Trails

Lab : Security Tasks

Lab : Security Roles

Lab : Assigning Security Roles to Users

Lab : Modifying Posting Settings

Module 4: Company Setup Procedures

This module examines how to set up companies in Microsoft Dynamics GP and then define options specific to each company. The company setup windows are used to define company parameters such as company information, Internet information, fiscal periods, account format, credit cards, shipping methods, payment terms and custom links.

Lessons

• Creating Companies

• Accessing Companies

• Setup Checklist

• Account Format

• Fiscal Periods

• Company Information and Setup Options

• Shipping Methods

• Payment Terms

• Credit Cards

• Other Company Setups

• Internet Information

• Emailing Documents

• Unified Communications

• Tax Setup

• Tax Calculations in Receivables and Payables

• Tax Calculations in Sales Order Processing

Lab : Create a New Company

Lab : Account Format

Lab : Defining Fiscal Periods

Lab : Entering Company Information

Lab : Set Up Shipping Methods

Lab : Set Up Payment Terms

Lab : Set Up Custom Links

Lab : Set Up a New Tax

Module 5: Customization and Utilities

This module explains the ways to customize a number of elements in the Microsoft Dynamics GP system to individual needs, enabling work to be completed more efficiently. Additionally, resource information on tables and fields are discussed and some other miscellaneous system utilities are also a focus in this module.

Lessons

• Series Checklists

• Customizing Toolbars

• Activity Tracking

• Process Server Overview

• Other Customization Options

• Removing Security Setup Records

• Installation and Customization

• Table Information and Maintenance

• Backups

Lab : Checklists

Lab : Toolbars