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Introduction

Quick Reference Guide Overview
This guide provides information that will help you with your Microsoft Dynamics® SL tasks, such as navigating through screens, entering data, and printing reports, just to name a few. It provides the information necessary for making decisions regarding how to use the Microsoft Dynamics SL modules to get the most from your system.

Who Should Use this Guide?
The Quick Reference Guide is designed for readers who are new to Microsoft Dynamics SL and for those who need to quickly refresh their knowledge of basic tasks in the software.

How to Use the Guide
Read the appropriate section of the guide before proceeding with your task. To assist you in locating the information you need, this guide contains:

- A table of contents of logically organized topics.
- An alphabetized “Quick Reference Task List” of commonly performed tasks.
- An alphabetized index of the information provided in this guide.
Documentation Conventions

The following conventions are used throughout the user guide or help to assist you in quickly identifying screen names, keystroke combinations, procedures, menu selections, and button names.

- Menu options, tabs, and buttons appear in **Bold** text. A vertical bar appears between individual options where a series of menu selections is indicated. For example:
  - Click the *Save* button.
  - Select *Batch* to apply the navigation functions to batches.

- Screen names are *italicized* and followed by the screen number in parentheses. The names of boxes into which you type data and check boxes and option buttons that you select, appear in **Bold** text. Names of frames and field options appear as normal text. For example:
  - Click *Save* to close *Time Entry* (02.010.00).
  - In the Microsoft Dynamics SL window, click the *Administration* button, and then select *User Maintenance. User Maintenance* (95.260.00) appears.
  - The *Master Company Info* tab contains information that was entered in *Company Maintenance* (98.280.00).
  - In the Consultant frame, enter the information about your Microsoft Certified Partner.

- Keystroke combinations are shown in **UPPERCASE** Courier New font, separated by a plus sign (+). To use a keystroke combination, press and hold the first key in the sequence, then press the second key. For example:
  - Press **CTRL+C** to copy your selection to the clipboard.

- Code samples are also shown in the **Courier New** font. For example:
  - Handles Update1.UpdateEvent

- In some cases, multiple procedures may exist for each topic. A paragraph appears in **bold** text at the start of each instruction or set of steps to help you quickly find the procedures on each page. For example:

  **To set up a recurring invoice:**

- Notes and examples are identified with the word **Note** or **Example** to distinguish them from body text. For example:

  **Note:** Setup options for the General Ledger module are defined on *GL Setup* (01.950.00).

  **Example:** Open *DD Setup* (02.951.00) in the Payroll module.
Quick Reference Task List

This list contains tasks that are commonly performed. Each task is cross-referenced to a specific page in the user’s guide.

How do I attach...?
- Notes to data items — see “Attaching a Note to a Data Item” on page 60.
- Notes to transaction detail lines — see “Attaching Notes to Transaction Detail Lines” on page 61.
- Source documents to data items – see “Attaching Source Documents to Data Items” on page 62.

How do I change...?
- The transaction currency — see “Changing the Transaction Currency” on page 59.
- The business date — see “Changing the Business Date” on page 58.
- A password — see “Changing Your Password” on page 10.
- The description of source documents attached to data items – see “Modifying Source Document Descriptions” on page 65.

How do I clear...?
- Data fields — see “Clearing Data Fields” on page 46.
- A selection before pasting — see “Clearing a Selection before Pasting” on page 51.

How do I copy...?
- An entire screen of data or section of data — see “Pasting a Template into a Screen” on page 75.

How do I create...?
- A screen template — see “Creating a Screen Template” on page 72.
- A report template — see “Creating and Using Report Templates” on page 76.

How do I delete...?
- A data record — see “Deleting a Data Record” on page 53.
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- Links between data items and source documents — see “Removing Links between Data Items and Source Documents” on page 66.

How do I enter...?
- Data items — see “Entering Data Items” on page 38.
- Dates — see “Entering Dates” on page 39.

How do I exit...?

How do I link...?
- Source documents to data items – see “Linking Source Documents to Data Items” on page 63.
How do I navigate...?
- Microsoft Dynamics SL — see “Navigating Microsoft Dynamics SL” on page 11.
- Data entry screens — see “Navigating Data Entry Screens” on page 33.

How do I paste...?
- Data in grid or form view— see “Pasting Data in Grid or Form View” on page 51.

How do I print...?
- Reports — see “Printing a Report” on page 99.

How do I save...?
- Data — see “Saving Data” on page 47.
- A report template — see “Saving a Report Template” on page 100.

How do I select...?
- Data items — see “Selecting Data Items” on page 48.

How do I set...?
- Data entry options — see “Setting Application Options” on page 68.
- Printer options — see “Setting up the Default Printer” on page 90.

How do I sign on...?
- Microsoft Dynamics SL — see “Logging On” on page 7.

How do I switch...?
- Between grid and form view — see “Switching Between Grid and Form Views” on page 54.
- To a different company — see “Switch Company” on page 41.

How do I transfer...?
- A single data item — see “Transferring a Single Data Item” on page 50.
- Data — see “Transferring Data” on page 50.
- Multiple data items — see “Transferring Multiple Data Items” on page 50.
- Data from a Grid to Excel— see “Exporting a Grid to Excel” on page 52.

How do I use...?
- Help — see “Help Menu” on page 19.
- Toolbar keys — see “Using the Application Toolbar” on page 30.
- The Module menu — see “Exploring the Microsoft Dynamics SL Window” on page 11.
- Function keys — see “Using Function Keys” on page 41.
- The keyboard and mouse — see “Using the Keyboard and Mouse” on page 40.
- Possible values lists — see “Using Possible Values Lists” on page 43.
- Extended possible values lists — see “Using Extended Possible Values Lists” on page 45.
- Screen templates — see “Pasting a Template into a Screen” on page 75.
- Report templates — see “Creating and Using Report Templates” on page 76.
• Navigation shortcut files — see “Creating and Using Navigation Shortcut Files” on page 69.

How do I view...?

• A note attached to a data item — see “Viewing a Note” on page 61.
• A source document file attached to a data item — see “Previewing Source Documents” on page 64.
• Help — see “Help Menu” on page 19.
Starting Microsoft Dynamics SL

Overview
This topic provides information and procedures for accessing Microsoft Dynamics SL and using the toolbar and menus. The basic tasks include:

- Logging On
- Locating a System Database
- Exiting Microsoft Dynamics SL
- Using Passwords

Logging On
To log on for the first time, see the instructions that follow.

For later log ons, the user ID that you used last appears in Microsoft Dynamics SL Login (98.000.00) if you are using SQL Server authentication. If you select a company that is configured for Windows authentication and you are not required to enter a password (see “Using Passwords” on page 10), Microsoft Dynamics SL Login (98.000.00) does not appear. The software uses your Windows credentials to automatically log on to the last company that you accessed.

Note: Use the Switch Company button in the Microsoft Dynamics SL window to change to a different company. For more information, see “Switch Company” on page 16.

To log on the first time:
1. Click Start | All Programs, and then select Microsoft Dynamics SL. Find Database (98.000.01) appears.

2. Select the instance of SQL Server from the Server Name list, or type the name if it does not appear on the list.

3. Select a system database name from the Database Name list, or type the name of the system database if it does not appear on the list.

Note: See your database administrator if you need help determining the names of your instance of SQL Server and system database.
4. Click **OK**. *Microsoft Dynamics SL Login (98.000.00)* appears.

![Figure 2: Microsoft Dynamics SL Login (98.000.00)](image)

5. Type your **User ID** and **Password**, and then click **OK**. *Select a Company* appears.

![Figure 3: Microsoft Dynamics SL Login (98.000.00)](image)

6. Select the company that you want to access, and then click **OK**. The companies that appear in the list are limited to those that you have rights to access.
Locating a System Database

The system database you select becomes the default for all of your future logons until you select a different database.

To locate a system database:
1. On Microsoft Dynamics SL Login (98.000.00), click Find Database. Find Database (98.000.01) appears.

![Figure 4: Find Database (98.000.01)](image)

Note: See your database administrator for the server and database names.

2. Select a server name from the Server Name list, or type the name of the server if it does not appear on the list.
3. Select a system database name from the Database Name list, or type the name of the system database if it does not appear on the list.
4. Click OK.

Exiting Microsoft Dynamics SL

Upon exit, the software automatically closes all Microsoft Dynamics SL databases.

To exit Microsoft Dynamics SL:
Click Exit on the Application menu.
- OR -
Click Close in the upper right corner of the window.
Using Passwords

Password Protection

Division of responsibilities for all functions can be enhanced by password protecting screens and reports. Access to certain screens, such as setup screens, should be limited to only the accounting supervisor.

System administrators set up access privileges, including passwords, for Microsoft Dynamics SL users. If your organization uses Windows authentication, requiring user passwords at logon is optional. If you are using SQL authentication, you must use a password to access Microsoft Dynamics SL. To help maintain a strong security practices, change your password on a regular basis.

Changing Your Password

Note:
- This option is used to set passwords for all users if your database is configured to use SQL authentication.
- This option is used to set passwords, when you use Windows Authentication, for only those users who you want to log on to Web Apps if you set the web.config setting so that they use their Microsoft Dynamics SL user id to log on to Web Apps.
- Check with your system administrator for Microsoft Dynamics SL to determine which authentication method you use.

To change your password:

1. In the Microsoft Dynamics SL window, click Administration, and then click Set Password. Or, click Set Password on the Tools menu. Password Change appears.

2. In Old Password, type the old password.
3. In New Password, type the new password.
   A “strong” password is required. Strong password requirements are:
   - Must be six characters in length minimum, 22 characters maximum.
   - Must be case-sensitive.
   - Must include three of the following categories:
     - Numeric characters
     - Uppercase characters
     - Lowercase characters
     - Special characters (such as those used in punctuation, with the exception of = and ;)
4. Click OK.

When you log on to Microsoft Dynamics SL the next time, your new password will be ready for use.
Navigating Microsoft Dynamics SL

Exploring the Microsoft Dynamics SL Window

After you have successfully logged on, the Microsoft Dynamics SL window appears. It offers many of the features you may have become accustomed to in other Microsoft applications. You can initiate most tasks using one of two actions:

- Use the Address Bar to navigate to a screen or report
- Choose the menu item that corresponds with the task.

![Microsoft Dynamics SL window](image)

Figure 6: Microsoft Dynamics SL window
Address Bar
The address bar help you navigate through the software. There is a relationship between the menu navigation and the address bar navigation.

Figure 7: Address Bar

The features within the Address bar include:

- Travel Buttons
- Breadcrumb bar
- Sync of Application Navigation
- Most recently used navigation

Travel Buttons

Figure 8: Travel Buttons

The Travel Buttons provide a way to move backward or forward on the Address bar. Back navigation is available if a prior entry exists. Forward navigation is available if a back navigation has occurred. A drop down list of previous navigations of menu groupings is made available after prior entries exist. The travel button navigation is reset when the parent toolbar is exited.

Figure 9: Travel Buttons – with the drop down list of previous navigations

Breadcrumb bar

Figure 10: Breadcrumb Bar

The Breadcrumb bar allows for navigation within the system by levels. The levels are Company, Module Groups, Module, Categories and nodes (screen, reports or links). The combinations of these levels separated by delimiters make up the navigation path. The navigation delimiter is “\” (backslash). The Breadcrumb bar supports copy/paste functionality.

As you select a menu item the Breadcrumb bar will be populated with the information for each level.
If you would like to go directly to a lower level, you can click on that section of the **Breadcrumb bar** and you will be taken there directly.

**Example:** Enter Company\Project\Allocator\Maintenance\Rate Type Definition. The Rate Type Definition screen will open if you have rights to that screen.

**Note:** You can drag and drop a navigation shortcut (.DSLPath) file onto the breadcrumb bar to open the screen, company, and key locations saved within the file. See “Creating and Using Navigation Shortcut Files” on page 69.

### Most recently used navigation button

The **Most recently used navigation** button provides a dropdown list of the addresses that you last visited. The list is controlled by the **Tools | Options** screen, in the **Navigation Menu** tab. The default number of addresses saved is 15, it can be changed. The maximum number that will be saved to the cache is 35. This can be cleared in the same screen. The list is maintained by user and is available the next time you log on to the system.

![Address Bar – with the drop down list when Most recently used list is displayed](image)

### Sync button

The **Sync** button is used to synchronize the Navigation pane, Area page and the Address Breadcrumb bar. The address in the breadcrumb bar is the primary for the synchronization.
Menu Navigation Search

Figure 12: Menu Navigation Search

The **Menu Navigation Search** area is used to lookup screen or reports that you know part of the name. This will display in the list of locations (reports, screens, modules) that fit the search criteria. Start typing in this box and you will see a list appear in the Area page that fit the criteria that you typed. You can sort on the Name, Link, Type, or the Path.

Figure 13: Menu Navigation Search – results from information entered.
Application Menu

Use the Application menu to:

- Open an application in the navigation pane. You can also access an application by clicking its name in the area page.
- Locate a system database.
- Switch from one user to another. This option is available only if your system uses SQL Server authentication mode. For help determining which authentication mode your system employs, see your Microsoft Dynamics SL system administrator.
- Close a company.
- Start Initialize mode.
- Change the business date.
- Configure a printer.
- Exit Microsoft Dynamics SL.
Switch Company

Use the **Switch Company** button to open another company you have access to without closing the current company in which you are working.

For example, you are entering accounts payable vouchers in Company A when you receive a request to check the price of an inventory item in Company B. You leave **Voucher and Adjustment Entry (03.010.00)** open in Company A, and then click **Switch Company**. After selecting Company B from the list, you open **Inventory Items (10.250.00)**, check the price of the item, and close the screen. Company A’s **Voucher and Adjustment Entry (03.010.00)** appears again, just as you left it.

With the ability to have multiple companies open at one time, the identification of which company an individual is in becomes critical. A color can be assigned to each company in **Company Maintenance (98.280.00)** and that color and company name will change the appearance of the **Switch Company** button. For example, the color selected for Company B is **Contoso, Ltd:Demo**. The name of the company will also appear in the title bar of the application.

**Note:**
- The **Switch Company** button has the current company name on the button and has the color selected for that company that was selected in **Company Maintenance (98.280.00)**.
- Your organization must have Multi-Company installed and configured to use **Switch Company**. See your Microsoft Dynamics SL system administrator if you have questions.
- The status bar at the bottom of the Microsoft Dynamics SL window shows the name of the company you last selected.
- To open another company, you can also close the company you are currently working in and then log on using the other company's ID.
- Use the [Company] section of the Solomon.ini file to set up the default company. For more information, see the “Appendix A: Solomon.ini Settings” topic in the System Manager help or user guide.

**To switch to a different company:**

1. Click **Switch Company** in the Microsoft Dynamics SL window. The **More Companies** button appears.

![Figure 15: Switch Company button and More Companies button](image)
2. Click on the **More Companies** button, **Select a Company** screen appears with a list of available companies.

![Select a Company](image)

*Figure 16: Switch Company button and the company list*

3. Click a company to select it. The new company name will appear on the button, with the color selected for that company. Any applications you open from this point on will run in the selected company. You can access the company you were originally working in using the **Select Company** button.

**Note:** You can also search on a company name by typing the beginning of the name in the search area. Those companies that fit the criteria will be the only companies listed to select from.

**More Companies**

**More Companies** is a selection when the **Switch Company** button is clicked, it will open the Select a Company Screen.

![More Companies](image)

*Figure 17: Switch Company button and More Companies button*

The system will store the companies that you have accessed since logging on. They will appear with the more companies button when the **Switch Company** button is selected. The number of companies that appear here is configurable in the **Navigation Menu** tab of the Options screen off of the tools menu. The default is set to 10. It can be changed by selecting Tools | Options or **Administration | Maintenance | Options** and changing the number in the **Most recently used companies** field. See the System Manager user guide or help for more information on the Options screen.
The Tools menu includes several options that help you select options that affect your applications. They are:

- **Add Page to Favorites** allows you to quickly add a highlighted menu item to your Favorites menu.
- **Add Screen to Favorites** allows you to quickly add the screen you are currently on, to your Favorites menu.
- **Add URL to Favorites** allows you to select a URL that you recently accessed or enter a URL to appear on your Favorites menu.
- **Add External Link to Favorites** allows you to link a file to your Favorites menu.
- **Add Screen Group to Favorites** allows you to name new screen groups to add to your Favorites.
- **Set Password** allows you to change your password.
- **Options** allows you to make changes for defaults in the screens. See "Setting Application Options" on page 68 or see the “Options Dialog” topic in the System Manager help or user guide for more information.
- **Options Save** will save the changes made when changed.

See the System Manager help or user guide for more information.
Help Menu

Using the Help menu, you can access the help system and also view information about your Microsoft Dynamics SL installation. You can also open help by pressing F1 while you are working in an application to open screen-specific help topics.

Help topics are organized by module, and each module has its own table of contents. The help system includes:

- Applications assistance topics
- Guidelines and procedures
- Reference material
- Database structure information
- Documentation feedback capability

Help Toolbar

Several options appear on the help toolbar.

Hide/Show

Use Hide to keep the table of contents out of sight. If you hide the table of contents, this option changes to Show, giving you the ability to easily make it visible again.

Locate

Use Locate to see the topic you are reading in relation to other help topics on the table of contents.

For example, you press F1 to open a help topic. Next, you want to see other topics that are before or after the one you chose, so you click Locate. The table of contents appears with the topic you are currently using highlighted so you can clearly see where it is among other topics on the list.

You can also use Locate to look for information in the index or to search help for a specific subject.

Back

Use Back to go to the previous topic you were reading.

Print

Use Print to print a topic alone or with any related subtopics.
Options
The Options menu includes:

- Hide Tabs / Show Tabs — Conceals the table of contents or makes it visible.
- Locate — Shows you on the table of contents the help topic you are using in relation to other help topics. You can also use Locate to look for information in the index or to search help for a specific subject.
- Back — Takes you to the help topic you were reading previously.
- Forward — Takes you to the help topic you were reading last.
- Home — Currently unavailable.
- Stop — Currently unavailable.
- Refresh — Returns the help window to its appearance before you expanded a drop-down item.
- Internet Options — Opens your Web browser Internet Options window.
- Print — Gives you the option of printing the contents of the current help topic alone or with any related subtopics.
- Search Highlight Off / Search Highlight On — Toggles the ability to highlight a search term when you open a glossary search topic.

About Microsoft Dynamics SL
You can view information about your installation by using the About Microsoft Dynamics SL option on the Help menu. This screen includes information about how the product registration, the unlocked modules, and the version of Microsoft Dynamics SL.

![About Microsoft Dynamics SL](image-url)

Figure 21: About Microsoft Dynamics SL
Customer Experience Improvement Program

Click the Customer Experience Improvement Program link to help us improve the reliability and performance of Microsoft Dynamics SL. The option is defaulted to No, you must select Yes, I am willing to participate anonymously in the Customer Experience Improvement Program to provide information. You can change this selection at any time by coming to this link and changing it.

![Customer Experience Improvement Program](image)

Figure 22: Customer Experience Improvement Program

The information that will be transferred when selecting Yes will allow Microsoft to identify trends and usage patterns. No personally identifiable information will be obtained.

View the Microsoft Software License Terms

To read or print the license agreement after the software is installed, click View the Microsoft Software License Terms.

Read our privacy statement

To read or print the privacy statement after the software is installed, click Read our privacy statement.

Systems Info...

Click System Info for details about your system. This information is necessary when you are working with Support to resolve an issue.
Home Pane

Click the Home button to access your Home pane. In this pane, you can add shortcuts to the information you use most often—Microsoft Dynamics SL screens and reports and also links to other software applications (Adobe Acrobat Reader for example) and Internet sites.

![Image of Home pane]

Figure 23: Home pane

A Home Page is set for each user in User Maintenance (95.260.00). A group of users can have the same Home Page by including a website in Group Maintenance (95.280.00). If your Home Page is set in a group of which you are a part in Group Maintenance (95.280.00) and you also have a Home Page set in User Maintenance (95.260.00), the site in User Maintenance (95.260.00) is displayed.

When you have the Home pane open, you can drag-and-drop a URL from the address bar of Internet Explorer onto the Home pane. This URL will appear until you close Microsoft Dynamics SL.

Favorites

Double-click or right-click, and then select Open, to open an item on your Favorites list.

To add a favorite to your home page:

- Screen or report — In the area page, right-click the name of the screen or report that you want to add, and then click Add Screen to Favorites.
- External application — On the Tools menu, click Add External Link to Favorites. In the Add External Application dialog box, browse to the application you want to add, click the file to select it, and then click Open.
- Internet site — On the Tools menu, click Add URL to Favorites. In the Add URL to Favorites dialog box, either
  - Click Select existing URL, and then select a Web address from the list

OR
• Click **Enter URL**, and then type the full Web address in the box (for example, http://www.irs.gov)

• Page — On the Tools menu, click **Add Page to Favorites** to add the page that currently appears in your area page.

**To remove, change or organize a favorite on your home page:**

1. Right-click on the shortcut you want to change. Select **Organize Favorites**. The **Organize Favorites** screen will appear.

2. Click on the shortcut you want to change. The buttons will appear enabled. Make your change and click **OK**.

**To use the favorite:**

Double-click the favorite in your list. Or, right-click the shortcut that you want to use, and then select the action that you would like to take.

**Role Center**

The **Role Center** link on the Home pane will open a Role Center pane. See **Role Center**.
Role Center

When you click on the Role Center link on the Home pane the Role Center pane will appear with the role center parts that you have been given rights to access. The Role Center link will not appear in the Home pane if no access rights are given.

![Role Center Pane]

Figure 25: Role Center Pane

The Role Center contains Activities and Quick Lists areas. When you access the Role Center page and you have rights assigned, the Activities will appear to the left hand section of the Role Center. The Quick List part is intended to work closely with the Activity parts. Typically a Quick List part exists for each Activity Cue that represents the aggregate of items in the Quick List.

Activities

Activities are categorized by Module. Within each module listing there are Activity Cues that represent the outstanding work a user or group has; this work is typically at a document level. The Activities that are available with the product are:

- Payables – Payments Due and Past Due Payments
- Receivables – Overdue 2 cycles and Overdue 3+ cycles
- Project – Communicator Messages, Invoice pending Approval and Active Projects

Note:

- Project related Cues will include only Messages, Invoices, and Projects that are associated to Projects for projects that you manage.
- Payables related Cues will include only documents that are released.
Quick List

Quick Lists are associated with an Activity Que. The Activity Cue that has focus will be what list is showing in the Quick List area. Double-click on a line item in the Quick List to open the specific screen that will show you that information. You must have rights to the screen for the screen to open. Like the Activities the associated Quick Lists are:

- Payables – Payments Due and Past due Payments
- Receivables – Overdue 2 cycles and Overdue 3+ cycles
- Project – Communicator Messages, Invoice pending Approval and Active Projects

Note:

- Project related Cues will include only Messages, Invoices, and Projects that are associated to Projects for projects that you manage.
- Payables related Cues will include only documents that are released.

Connect

The Connect Part is intended to give users the ability sign in to CustomerSource from their Microsoft Dynamics SL screen and to receive up-to-date RSS Feeds from Microsoft Dynamics. The RSS feeds that are included are Community Blogs, Community Forum Posts, CustomerSource News, and CustomerSource Training for all products.
Navigation Pane

When you log on to Microsoft Dynamics SL, your user menu appears in the navigation pane on the left side of the window. The resources that are available on a user’s menu are based on the user groups to which the user belongs and their access rights.

Click a module, expand it to see all of the screens and reports, and then double-click to select the one you need. Click a navigation button below the pane to switch to a different module group.

When you expand a module, you will see the screen groups defined for the module and a brief description of each screen group. In the standard Microsoft Dynamics SL menu, screens and reports are divided into the following categories:

- Maintenance
- Input
- Processes
- Inquiries
- Setup
- Report

Navigation Buttons

The navigation buttons appear below the navigation pane. Click a button to switch module groups.

Use the Configure Buttons menu to change button behaviors.

- **Show More Buttons / Show Fewer Buttons**— Add a single button to the display or move it to the button overflow area.
- **Navigation Pane Options**— Add or remove a navigation button or change a button’s position by moving it up or down.

![Navigation buttons](image)

Figure 26: Navigation buttons

Area Page

If you click a navigation button for a module group and then select a module from that group, the module appears the area page. You can click a screen or report to access it from this pane. A module that is accessed using the All Modules navigation button will not appear in the area page.
Status Bar

The following information is available on the status bar at the bottom of the window:

- Microsoft Dynamics SL business date. Double click on this to bring up the calendar and change the business date.
- ID of the user who is currently logged on. Move the mouse pointer over this area to see other information about the user.
- Application database that is open. Move the mouse pointer over this area to see the number of times Microsoft Dynamics SL has been accessed and the names of the system database and database server associated with the application database.
- Current customization level. Double click on this field to display the Select Customization Level (91.260.00) screen. The tooltip displays the Customization Level and User ID.

![Figure 27: Status bar](image)

Event Log Notification

Below the Status bar in the Window task bar, a Windows notification icon with a balloon tip will display for 8 seconds if there is an event log.

![Figure 28: Event Log Notification](image)

When you click on the balloon it will open the Event Log Viewer (95.290.00). See the System Manager user guide or help for more information.

Customer Experience Improvement Program Notification

Below the Status bar in the Window task bar, a Windows notification icon with a balloon tip will display for a few seconds to allow you to choose to participate.

![Figure 29: Customer Experience Program Notification](image)
When you click on the balloon it will open the *Customer Experience Improvement Program* screen where you choose to participate in the program. You can change this selection by selecting the **About Microsoft Dynamics SL** option on the help menu. This will bring up the *About Microsoft Dynamics SL* window. Here you will find the link to **Customer Experience Improvement Program**. For more information see “About Microsoft Dynamics SL” on page 20.

![Customer Experience Improvement Program](image)

*Figure 30: Customer Experience Improvement Program*

The information that will be transferred when selecting Yes will allow Microsoft to identify trends and usage patterns. No personally identifiable information will be obtained.
Customizing the Microsoft Dynamics SL Window

You can tailor the look of the Microsoft Dynamics SL window to a user’s needs by customizing their home page. For example, when you add a new user in User Maintenance (95.260.00), you type the URL http://www.microsoft.com in the Home Page box. The next time the user logs on to Microsoft Dynamics SL, the Microsoft website home page appears. Each time the user clicks the Home button, their home page will appear.

![Figure 31: Custom home page in the Microsoft Dynamics SL window](image)

You can designate a home page URL for an individual user in User Maintenance (95.260.00) or for an entire group of users in Group Maintenance (95.280.00). In addition, a system administrator who would like all Microsoft Dynamics SL users to view the same home page can modify the Solomon.ini file to accomplish this. Here is an example:

```
[Home Page]
ALL = http://www.microsoft.com
```

In this example, users for whom a home page URL was not specified in User Maintenance (95.260.00) or Group Maintenance (95.280.00) will see the Microsoft home page when they log on to Microsoft Dynamics SL.

A second modification designates a home page URL for a specific company. For example, an entry is added for a company with the ID of 0060:

```
[Home Page]
0060 = http://www.microsoft.com
```

The software uses the following search rules to determine if a home page URL has been designated. If more than one URL is specified for a user, these rules determine which one will be used:

1. First, it checks to see if a home page URL was designated for the user (User Maintenance (95.260.00).
2. If no URL is found, it checks the user’s group records for a home page URL (Group Maintenance (95.280.00).
3. If a home page URL is still not found, it checks the Solomon.ini file to see if there is a setting for the current company.
4. If a home page URL is not found, the software looks in the Solomon.ini file for a home page setting for all users.
Using the Application Toolbar

The toolbar that appears on Microsoft Dynamics SL screens uses the standard Windows navigation conventions. You can initiate most tasks through one of two actions:

- Click the button that corresponds with the task you want to perform.
- Choose the menu item that corresponds with the task.

Not every icon appears on the toolbar for every application. Only those icons that apply to the active screen will display. Icons also may be shown as inactive, if they are not available in the application.

Figure 32: Application toolbar

The table below lists all the icons that could appear on the toolbar and their description.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Actions" /></td>
<td><strong>Actions</strong> – Opens the Actions menu – see &quot;Actions Menu&quot; for more information</td>
</tr>
<tr>
<td><img src="image" alt="New" /></td>
<td><strong>New</strong> – Adds a new record</td>
</tr>
<tr>
<td><img src="image" alt="Save" /></td>
<td><strong>Save</strong> – Saves the current record</td>
</tr>
<tr>
<td><img src="image" alt="Cancel" /></td>
<td><strong>Cancel</strong> – Clears the record. In some screens, it refreshes the data shown.</td>
</tr>
<tr>
<td><img src="image" alt="Delete" /></td>
<td><strong>Delete</strong> – Removes the current record and clears the screen</td>
</tr>
<tr>
<td><img src="image" alt="Finish" /></td>
<td><strong>Finish</strong> – Save the current record and clears the screen</td>
</tr>
<tr>
<td><img src="image" alt="First" /></td>
<td><strong>First</strong> – Takes you to the first record or batch</td>
</tr>
<tr>
<td><img src="image" alt="Previous" /></td>
<td><strong>Previous</strong> – Takes you to the previous record or batch</td>
</tr>
<tr>
<td><img src="image" alt="Next" /></td>
<td><strong>Next</strong> – Takes you to the next record or batch</td>
</tr>
<tr>
<td><img src="image" alt="Last" /></td>
<td><strong>Last</strong> – Takes you to the last record or batch</td>
</tr>
<tr>
<td><img src="image" alt="Select Currency" /></td>
<td><strong>Select Currency</strong> – Chooses a currency</td>
</tr>
<tr>
<td><img src="image" alt="Change Currency View" /></td>
<td><strong>Change Currency View</strong> – Changes to a different currency</td>
</tr>
<tr>
<td><img src="image" alt="Print Options" /></td>
<td><strong>Print Options</strong> – Allows print to screen or quick print – see Print Options for more information</td>
</tr>
<tr>
<td><img src="image" alt="Print Screen" /></td>
<td><strong>Print Screen</strong> – Prints the current Microsoft Dynamics Application screen</td>
</tr>
<tr>
<td><img src="image" alt="Quick Print" /></td>
<td><strong>Quick Print</strong> – Prints the associated document or report for the screen</td>
</tr>
<tr>
<td><img src="image" alt="Grid to Excel" /></td>
<td><strong>Grid to Excel</strong> – Allows export to Excel when in grid view</td>
</tr>
<tr>
<td><img src="image" alt="Generate SSRS Report" /></td>
<td><strong>Generate SSRS Report</strong> – Allows you to create a SSRS report from an existing Quick Query while in Quick Query Viewer (QQ.VIE.00).</td>
</tr>
<tr>
<td><img src="image" alt="Export to a file" /></td>
<td><strong>Export to a file</strong> – Opens Export File (GR.FIE.00) in Project Budgeting Budget Revision Maintenance (BU.BRM.00)</td>
</tr>
<tr>
<td><img src="image" alt="Import from a file" /></td>
<td><strong>Import from a file</strong> – Opens Import File (GR.FIE.00) in Project Budgeting Budget Revision Maintenance (BU.BRM.00)</td>
</tr>
<tr>
<td><img src="image" alt="Comments" /></td>
<td><strong>Comments</strong> – Opens Notes and Comments (PA.NOT.00) for Project related notes and comments – See the Project Controller user guide or help for more information</td>
</tr>
<tr>
<td><img src="image" alt="Graphical Display" /></td>
<td><strong>Graphical Display</strong> – Opens the Project Net Profit Graph (PA.GRA.00) or Revision Analysis Graph (PA.GRA.0.0)</td>
</tr>
<tr>
<td>Icon</td>
<td>Description</td>
</tr>
<tr>
<td>------</td>
<td>-------------</td>
</tr>
<tr>
<td><img src="image" alt="Communicator" /></td>
<td><strong>Communicator</strong> – Opens the Communicator Send Messages (CO.MMT.00) screen - See the Communicator user guide or help for more information</td>
</tr>
<tr>
<td><img src="image" alt="Drill Down" /></td>
<td><strong>Drill Down</strong> - button opens Project Controller’s Transaction Detail Inquiry (PA.TRD.00) or Commitment Detail Inquiry (PA.CMD.00) from some of the project screens</td>
</tr>
<tr>
<td><img src="image" alt="Create/Modify SharePoint Site" /></td>
<td><strong>Create/Modify SharePoint Site</strong> – Allows you to create or modify a SharePoint in Accounts Receivable Customer Maintenance (08.250.00), Accounts Payable Vendor Maintenance (03.270.00), or Project Manager Project Maintenance (PA.PRJ.00)</td>
</tr>
<tr>
<td><img src="image" alt="SharePoint Site link" /></td>
<td><strong>SharePoint Site link</strong> – takes you to the SharePoint site related to the customer, vendor or project</td>
</tr>
<tr>
<td><img src="image" alt="Switch Company" /></td>
<td><strong>Switch Company</strong> – changes companies – displays the name of the company that you are currently logged into, see “Switch Company” for more information</td>
</tr>
<tr>
<td><img src="image" alt="Help" /></td>
<td><strong>Help</strong> – Opens the help menu, see “Help Menu” for more information</td>
</tr>
</tbody>
</table>

**Actions Menu**

Use the Actions menu to navigate a database and modify entries. The **New, Save, Finish, Cancel, Delete, Grid to Excel, Currency Selection, and Change Currency View** options perform the same operations as buttons on the application toolbar.

![Actions Menu](image)

*Figure 33: Actions menu*

The following options are also available:

- Clear selection — Clears several fields at once.
- Insert rows + Paste — Adds grid rows and then pastes previously copied rows into the new space.
• Copy Special — Opens the Copy Special dialog box so that you can copy all data items on a screen or in a specific section of a screen. See the System Manager help or user’s guide for more information.
• Template — Opens Template (98.230.00). See the System Manager help or user’s guide for information about screen and report templates.
• Submit to Application Server — Opens Application Server Information (96.020.00) so that you initiate an Application Server request. See the Application Server help or user’s guide for more information.
• Navigation— Opens the Navigation submenu that contains the following options:
  • First – Takes you to the first record or batch
  • Prev – Takes you to the previous record or batch
  • Next – Takes you to the next record or batch
  • Last – Takes you to the last record or batch
  • Navigation Level - Opens the Navigation Level dialog box so that you can select navigation by batch or document. See the System Manager help or user’s guide for more information about navigation levels.
  • Desktop Shortcut - Creates a navigation shortcut (.DSLPath) file on your desktop. The file contains information about the screen, the company, and key fields in the screen. For more information about the navigation shortcut file, see “Creating and Using Navigation Shortcut Files” on page 69.
• Note — Opens Note (98.260.00) for the active screen. For more information about adding notes, see “Attaching a Note to a Data Item” on page 60.
• Attachment — Opens Attachments for the active data item. For more information about attaching source document files, see “Attaching Source Documents to Data Items” on page 62.
• Add to Favorites — Adds a shortcut to the current screen or report to your home pane. See the System Manager help or user’s guide for more information about adding favorites.
• Customize Mode — Use the Customize menu to access the customization features. See the Customization Manager help or user’s guide for more information.

Print Options
The Print Options menu appears when a screen has a report or form that can be printed from the screen. There are two options that appear Print Screen and Quick Print. Those screens that do not have a report or form that prints from the screen will only be able to Quick Print and the dropdown menu does not appear.

![Print Options menu](image)

Figure 34: Print Options menu

Print Screen
Print Screen will print only what is visible on the screen.

Quick Print
Quick Print will print the form or report that this screen has available for printing.
Navigating Data Entry Screens

Use the mouse, keyboard, or the toolbar to move around data entry screens. The method used may act differently depending on whether form view or grid view is displayed.

For information about navigating the date box, navigating the calendar, and shortcuts/keystrokes, see “Entering Dates” on page 39.

Navigating in Form View

<table>
<thead>
<tr>
<th>To move to:</th>
<th>Press:</th>
<th>Or click:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Next field</td>
<td>TAB</td>
<td>The next field</td>
</tr>
<tr>
<td>Previous field</td>
<td>SHIFT+TAB</td>
<td>The previous field</td>
</tr>
<tr>
<td>Right one character in a field</td>
<td>RIGHT ARROW</td>
<td>One position to the right in the field</td>
</tr>
<tr>
<td>Left one character in a field</td>
<td>LEFT ARROW</td>
<td>One position to the left in the field</td>
</tr>
<tr>
<td>Beginning of a field</td>
<td>HOME</td>
<td>The home position in the field</td>
</tr>
<tr>
<td>End of a field</td>
<td>END</td>
<td>The end position in the field</td>
</tr>
<tr>
<td>Next record or batch</td>
<td>PAGE DOWN</td>
<td>Next</td>
</tr>
<tr>
<td>Previous record or batch</td>
<td>PAGE UP</td>
<td>Previous</td>
</tr>
<tr>
<td>First record</td>
<td>CTRL+HOME</td>
<td>First</td>
</tr>
<tr>
<td>Last record</td>
<td>CTRL+END</td>
<td>Last</td>
</tr>
<tr>
<td>Next screen tab</td>
<td>CTRL+TAB</td>
<td>The next tab</td>
</tr>
<tr>
<td>Previous screen tab</td>
<td>SHIFT+CTRL+TAB</td>
<td>The previous tab</td>
</tr>
<tr>
<td>Other open windows</td>
<td>ALT+TAB</td>
<td>Windows taskbar or Quick Launch bar</td>
</tr>
</tbody>
</table>

Navigating in Grid View

<table>
<thead>
<tr>
<th>To move to the:</th>
<th>Press:</th>
<th>Or click:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Next column</td>
<td>TAB or RIGHT ARROW</td>
<td>In the next column</td>
</tr>
<tr>
<td>Previous column</td>
<td>SHIFT+TAB or LEFT ARROW</td>
<td>In the previous column</td>
</tr>
<tr>
<td>First column</td>
<td>HOME</td>
<td>In the first column</td>
</tr>
<tr>
<td>Last column</td>
<td>END</td>
<td>In the last column</td>
</tr>
<tr>
<td>First row</td>
<td>CTRL+HOME</td>
<td>First</td>
</tr>
<tr>
<td>Last row</td>
<td>CTRL+END</td>
<td>Last</td>
</tr>
<tr>
<td>Next row</td>
<td>DOWN ARROW</td>
<td>In the next row</td>
</tr>
<tr>
<td>Previous row</td>
<td>UP ARROW</td>
<td>In the previous row</td>
</tr>
<tr>
<td>Next page</td>
<td>PAGE DOWN</td>
<td>Next</td>
</tr>
<tr>
<td>Previous page</td>
<td>PAGE UP</td>
<td>Previous</td>
</tr>
</tbody>
</table>
Operating Tips

The following topics contain hints and tips for operating efficiently. For detailed operating information, see the System Manager help or user guide.

Defining Record Coding Formats

You will likely work with a large variety of information in Microsoft Dynamics SL, such as accounts, subaccounts, transaction batches, vendor and customer invoices, purchase orders, and inventory data. For accurate, efficient storage and retrieval to print reports and complete processes, each data record is assigned a unique identifying code that distinguishes it from all other data records. These codes can be numeric, alphabetic, or a combination of alphabetic and numeric characters. Depending on the data record type, the codes are either assigned automatically by the software or manually by you.

To ensure easy record retrieval, especially for reporting, make sure the codes assigned to each type of data record follow a standard coding format established beforehand. When establishing coding formats, consider the following:

- Review the sort and select functions for the reports you need to generate to learn their effect on reporting results (see the various reports in the user’s guides or in the help system). Then apply what you learn to your reporting needs to develop coding formats that achieve the best results.

- Code sorting occurs from left to right, numerically and alphabetically. Also, numbers always sort before letters. For example, the software sorts 020243, 020242, 080656, and 042691 in the order 020242, 020243, 042691, 080656. The alphanumeric codes B20242, A20242, and B20243 are sorted A20242, B20242, B20243.

- If you cannot define a format that completely meets the needs of a data record, use a format adequate for a majority of the record’s codes and handle exceptions individually. Do not simply use a random coding format.

- Once you have defined the coding format for a record type, consistently observe this format when you enter associated data records. If the format requires six characters, all codes should have six characters. If the character order is two letters followed by four numbers, all codes should have two letters followed by four numbers.

Remember, a well-planned system of coding formats ensures the orderly, logical identification of all data records in the database for better use of the software’s data management capabilities.

Operating Efficiently

Microsoft Dynamics SL helps you keep accurate financial records, obtain timely business information, and maintain a complete audit trail of business transactions. Take the time to learn its many features.

- **Assign job descriptions** — It is helpful to define job descriptions for all employees using the General Ledger module. Use the checklists, password suggestions, and other information provided in the user guides and help to create job descriptions. The purpose of job descriptions is to ensure clear audit trails and internal controls.

- **Procedure Manual** — Each module’s documentation contains procedures for various processes. Use these as a basis for creating a company procedure manual. Include in this manual all job descriptions, who is responsible for each task, and when each task should be completed, as well as any unique functions within your company’s accounting department.

- **Chart of accounts and subaccounts** — Spend adequate time designing the structure of your chart of accounts and subaccounts before entering monthly general ledger transaction data. A well-designed chart of accounts and subaccount system is one of the most important aspects of a good accounting system.

- **Properly organize and file reports** — As you begin using Microsoft Dynamics SL, it is important to create a plan for organizing and filing your reports. The following suggestions may be helpful:
- Use a consistent paper size for all similar reports.
- Purchase color-coded binders to use for each Microsoft Dynamics SL module. Label these binders for easy, quick recognition by all office staff. Monthly division tabs can be useful.
- Maintain binders for each year. Do not combine several years in one binder. Store all binders for each year in a designated location to expedite audits.
- File batch control reports for each module in separate binders. At the end of each month, file the batch register for each module on top of the accumulated month’s batch control reports.
- Create a binder for specific maintenance reports that only need to be generated and replaced periodically, such as the Chart of Accounts (01.650.00), Customers (08.650.00), and other master list reports.
- Generate reports that are needed to help reconcile the end of the month, many of which can be destroyed when you have completed the month end work.
Entering and Editing Data

Overview
This topic provides information and procedures for entering, editing, transferring, and saving data. These basic tasks include:

- Entering Data Items
- Using Keyboard Shortcuts
- Using Possible Values Lists
- Using Extended Possible Values Lists
- Clearing Data Fields
- Saving Data
- Selecting Data Items
- Transferring Data
- Exporting a Grid to Excel
- Deleting a Data Record
- Switching Between Grid and Form Views
- Sorting Grid Columns
- Setting the Navigation Level
- Changing the Business Date
- Changing the Transaction Currency
- Attaching Notes and Source Documents to Data Items
- Setting Application Options
- Creating and Using Navigation Shortcut Files
Entering Data Items

A data item is an individual piece of information in a data record. A data record is a collection of data items. Enter data items into fields on a data entry screen. Each data entry screen has a different layout, but the process of entering data on each screen is the same.

Note: On a tab that is not available for use, the buttons, check boxes, and other elements are unavailable, although the tab may appear to be active.

To enter data, do one of the following:

- Place the cursor in the field, and then type the information.

  INS appears on the screen’s status bar, indicating that you can insert characters into text that you have already typed. For example, you notice that you mistyped an entry in the Name box—some characters are missing. You place the cursor at the point where you want to insert the missing text, and then you type the characters. The text at the point where you insert the new characters shifts and the new text is added.

  Insert mode is the default behavior for text boxes only, such fields as names or descriptions, but not dates or numeric fields. To change the default for text boxes to overtype mode, add the following section to the Solomon.ini file, which is found in the folder where your Microsoft Dynamics SL program files reside (for more information, see the “Appendix A: Solomon.ini Settings” topic in the System Manager help or user guide):

  [Insert/Overtype Mode]
  InitialStatus=OVR
  DisableFeature=No
• Click the down arrow next to the field, and then select a value from the list.
• Place the cursor in the field, and then press F3 to select a value from the possible values list. See “Using Possible Values Lists” on page 43.
• Place the cursor in the field, and then press SHIFT+F3 to select a value from the extended possible values list. See “Using Extended Possible Values Lists” on page 45.

**Entering Dates**

You will need to enter dates when you create transactions and generate reports.

![Sample Report Option Interpreter (ROI) screen](image)

Figure 36: Sample Report Option Interpreter (ROI) screen

You can enter a date by selecting it from a pop-up calendar or by simply typing it. As you type the month or day, the software inserts a date slash and automatically moves the cursor to the next date segment.

Other ways to navigate through a date field (not the calendar):

• Press ALT+HOME to move to the first date segment.
• Press ALT+END to move to the last segment.
• Press the comma (,), period (.), forward slash (/), or right arrow (>) key to move to the next segment.
• Press the left arrow (<), SHIFT+TAB, or BACKSPACE to move to the previous segment.

**Navigating the Calendar**

<table>
<thead>
<tr>
<th>To move to the:</th>
<th>Press:</th>
<th>Or click:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Next day</td>
<td>RIGHT ARROW</td>
<td>In the next day</td>
</tr>
<tr>
<td>Previous day</td>
<td>LEFT ARROW</td>
<td>In the previous day</td>
</tr>
<tr>
<td>Next week</td>
<td>DOWN ARROW</td>
<td>In the next week</td>
</tr>
<tr>
<td>Previous week</td>
<td>UP ARROW</td>
<td>In the previous week</td>
</tr>
<tr>
<td><strong>OK</strong> (button)</td>
<td>TAB or SHIFT + TAB two times</td>
<td><strong>OK</strong></td>
</tr>
<tr>
<td>To move to the:</td>
<td>Press:</td>
<td>Or click:</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>--------------------------------</td>
<td>-------------------------------</td>
</tr>
<tr>
<td>Cancel (button)</td>
<td><strong>TAB two times or SHIFT + TAB</strong></td>
<td>Cancel</td>
</tr>
<tr>
<td>Next month</td>
<td><strong>CTRL + RIGHT ARROW</strong></td>
<td>The right arrow in the header</td>
</tr>
<tr>
<td>Previous month</td>
<td><strong>CTRL + LEFT ARROW</strong></td>
<td>The left arrow in the header</td>
</tr>
<tr>
<td>1-year view, 12-year view, or 12-decade view</td>
<td><strong>CTRL _ UP ARROW (multiple)</strong></td>
<td>The center of the header (multiple)</td>
</tr>
<tr>
<td>12-year view, 1-year view, 1-month view</td>
<td><strong>CTRL _ DOWN ARROW (multiple)</strong></td>
<td>The center of the header (multiple)</td>
</tr>
</tbody>
</table>

**Using the Keyboard and Mouse**

In Microsoft Dynamics SL, you can complete all supported data entry and maintenance actions using either the standard computer keyboard or a two-button mouse. The following table lists data entry and maintenance actions, how to complete them using a keyboard or mouse and the toolbar, the context in which the actions should be completed, and their result within the system.
### Using Function Keys

Use the function keys to perform certain tasks when you are entering or editing data.

<table>
<thead>
<tr>
<th>To</th>
<th>Press</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access help</td>
<td>F1</td>
</tr>
<tr>
<td>Open Relative Date (98.240.00) when the cursor is in a date field or Relative Period (98.250.00) when the cursor is in a period field</td>
<td>F2</td>
</tr>
<tr>
<td>Look up possible values for a field</td>
<td>F3</td>
</tr>
<tr>
<td>Switch between form and grid view (in Customization mode opens the property window)</td>
<td>F4</td>
</tr>
<tr>
<td>Clear a field in form view or clear a date</td>
<td>F5</td>
</tr>
<tr>
<td>Set a date field to today’s date</td>
<td>F7</td>
</tr>
<tr>
<td>Enter and display notes</td>
<td>F9</td>
</tr>
</tbody>
</table>
Using Keyboard Shortcuts

Use keyboard shortcuts for quick navigation. Keyboard shortcuts combine the ALT key with another key to take you to an area of a screen or to open a menu. The additional key is identified by an underscore (_) below a letter in the name of a screen area or menu option. For example, if you press ALT+B in General Ledger’s Journal Transactions (01.010.00), the cursor moves to the Number box where you can type or select a batch number.

Figure 37: Journal Transactions (01.010.00)
Using Possible Values Lists

Some boxes have possible values lists from which you can select a value to use.

To use a possible values list:

1. Put focus in the box that you want to complete.
2. Double-right-click or press F3. A list of the possible values for the box appears.
3. To sort the list, click a column title. The list automatically sorts ascending based on the column that you selected. Click the column title again to sort in descending order.
4. To refine the list, type a value or part of the value that you are searching for in the **Type to filter** box, and then select the column name that corresponds to the value that you typed.

The following example uses ‘10’ as the filter for Account. So, only those account numbers that contain ‘10’ appear.
5. To select a value, double-click the value. Or, click the row that contains the value, and then click OK. The value that you selected appears in the box.

Note: You can export possible values lists to Excel by using the CTRL+E. The possible values that you export to Excel are limited to those that are visible on the list.

Adding or Changing Possible Values

If a value is not available, add a new value directly from the list. You can also change existing values.

Note:
- This is also known as Quick Maintenance.
- The ability to insert or change a value is not available on all possible values lists.
- You must have access rights to the screen that opens to maintain the values.

To add a new value:
1. In a possible values list, click Insert. The maintenance screen for the item that you want to add appears.
2. Type information about the item.
3. When you are finished, close the maintenance screen, and then click Yes to save your changes.

To edit an existing value:
1. In a possible values list, click Edit. The maintenance screen for the item that you want to change appears.
2. Change information as needed.
3. When you are finished, close the maintenance screen, and then click Yes to save your changes.
Using Extended Possible Values Lists

Some key fields, such as customer ID in Accounts Receivable or order number in Order Management, have extended possible values lists. When you select an item from an extended possible values list, additional information about the item appears in the screen in which you are working.

![Sample extended possible values list in Account History (01.300.00)](image)

To use an extended possible values list:

1. Put focus in the box that you want to complete.
2. Double-right-click while holding down the **SHIFT** key or press **SHIFT+F3**. A list of possible values for the box appears.
3. To sort the list, click a column title. The list automatically sorts ascending based on the column that you clicked. Click the column title again to sort in descending order.
4. To refine the list, type a value or part of the value that you are searching for in the **Type to filter** box, and then select the column name that corresponds to the value that you typed.
5. To select a value, double-click the value. Or, click the row that contains the value, and then click **OK**. The value that you selected appears in the box.
Clearing Data Fields

You may find it necessary to clear a screen or a field and start data entry again. Here are a few simple steps to help you when this occurs.

To clear a single data field:
Click the field you want to clear, and then press F5. You can also press BACKSPACE or DELETE to delete the field contents.

To clear multiple data fields:
1. Press and hold CTRL while clicking each field. A small number indicating the selection order appears in each of the fields to.
2. On the Actions menu, click Clear selection.

To clear all fields:
Click Cancel on the toolbar or on the Actions menu.
Saving Data

Save the data you enter on the current document before proceeding to the next document. This important step is quick and easy to do.

To save data and clear the screen:

Click Finish on the toolbar or on the Actions menu, or press CTRL+F.

To save data and keep it on the screen:

Click Save on the toolbar or on the Actions menu, or press CTRL+S.

To clear the screen to enter a new record:

1. Click New on the toolbar or on the Actions menu, or press CTRL+N.
2. Type information in the screen.
3. Close the screen, and when you are prompted to save the current record, click Yes.
Selecting Data Items
To cut or copy data in Microsoft Dynamics SL, you must first select the data items. You can also clear data item selections to start again.

Selecting Data Items in Form View
To select a single data item in form view:
Click anywhere in the box. You do not need to select the contents of the box.

To select multiple data items, do one of the following:
- Press and hold CTRL as you click each box. A number appears in the boxes to indicate the selection order.
- Click and hold in the box containing the first data item, drag the pointer to the box containing the last data item, and then release the pointer.

Note: You can click and drag in any direction. The typical method is to drag the pointer down and right. However, you can also drag the pointer down and left, up and right, or up and left to designate a data block.
• Click in the box containing the first data item, and then hold \textit{SHIFT} while you click in the box containing the last data item.

• Click in the box containing the first data item, hold \textit{CTRL}, and then press a cursor arrow key to expand the selection area.

**Selecting Data in Grid View**

\textbf{To select a single column of data:}
Click the column heading.

\textbf{To select side-by-side columns of data:}
While holding down the left mouse button, click the heading of the first column, drag the mouse pointer to the last column you want to select, and then release the mouse button.

\textbf{To select multiple rows:}
Click the first data entry field in the first row, and hold \textit{SHIFT} while clicking in the last data entry field of the last row.

\textbf{To select multiple rows using row numbers:}
While holding down the left mouse button, click the grid row number of the first row, drag the mouse pointer down to the grid number of the last row, and then release the mouse button.

\textbf{Note:} Displaying grid row numbers is optional. See “Setting Application Options” on page 68.

\textbf{To select a block of data items:}
While holding down the left mouse button, click the first data entry field in the first row and column, drag the mouse pointer to the last item in the last row and column, and then release the mouse button.

**Clearing a Selection**

\textbf{To clear a selection:}
Press and hold \textit{CTRL} as you click the box you do not want to include. The numbering sequence adjusts as you remove selections.
Transferring Data

Use the Cut, Copy, and Paste commands to transfer data items from one screen to another or to other applications, such as spreadsheets or databases. Another way to transfer data is to export a grid to Microsoft® Excel® (see “Exporting a Grid to Excel” on page 52).

Example: You can copy account numbers and descriptions from General Ledger’s Chart of Accounts Maintenance (01.260.00) to a Microsoft Excel spreadsheet.

The software will not copy values from key fields into other Microsoft Dynamics SL screens. Key fields include:
- Unique Microsoft Dynamics SL-generated numbers that identify batches, documents, and transactions within the database.
- Unique identification codes assigned to entities such as vendors, customers, or inventory items.
- Date and balance information maintained by the software, such as last voucher date, or current customer balance.

Transferring a Single Data Item

To transfer data to another Windows application, use Paste. To transfer data from another Windows application to Microsoft Dynamics SL, use Cut or Copy. To facilitate transfer to the system, edit or format the data items if necessary.

To transfer a single data item:
1. Click in the box that contains the data item.
2. To copy a data item, click Copy on the Actions menu or press CTRL+C.
3. To cut a data item, click Cut on the Actions menu or press CTRL+X.
4. Click in the box at the new location.
5. Click Paste on the Actions menu or press CTRL+V.

Transferring Multiple Data Items

When you transfer multiple data items, you can control the order in which the items are cut, copied, and pasted. You can paste data items in an order that is different from the order in which they were cut or copied.

To cut or copy multiple data items:
1. Press and hold the CTRL key while selecting the data items. As each item is selected, a number appears in the box indicating the selection order.
   To clear a selection, press and hold CTRL as you click the box you do not want to include. The numbering sequence adjusts as you remove selections.
2. Cut or copy the data items.

To paste the data items in the order they were copied:
1. Click anywhere in the first box.
2. Paste the data items

To paste the items in a different order:
1. Press and hold the CTRL key while selecting the boxes where you will paste the information you copied. A number appears in each of the boxes indicating the paste order.
2. Paste the data items.
Pasting Data in Grid or Form View
Microsoft Dynamics SL pastes data starting at the insertion point. The number of lines the software inserts depends on the number of lines that were cut or copied.

To paste data in grid or form view:
1. Click in the first column of the first blank line.
   Note: If you set the insertion point in a row that contains data, System Message 15418 appears, requiring you to confirm that you want to replace the current data.
2. Click Paste on the Actions menu, or press CTRL+V to paste the data items.

Undoing a Paste Operation
You can undo a paste operation if you pasted the data in the wrong location. The data you cut or copied remains in the clipboard so you can select the fields in the correct order and paste the data again.

To undo a paste operation:
Click Undo Paste on the Actions menu or press CTRL+Z.

Clearing a Selection before Pasting
If the order of the boxes you selected to paste data is incorrect, use the Clear selection function to remove the selection tags. Select the boxes in the correct order and paste the data.

Note: Clearing a selection deletes data in the selected box. Do not use this option to clear the selection before you copy the data, and only use it when you are pasting data into boxes.

To clear a selection:
Click Clear selection on the Actions menu. The software clears the selection tags from the selected boxes.
Exporting a Grid to Excel

To export information in any of the application screens to Microsoft Excel you must have the screen in grid view and focus must be in one of the cells of the grid area. If you are in form view the export will also work, however you must be at the level where a grid is available. All the data present in the grid will be exported. You can also use CTRL+E to export instead of clicking on the Grid to Excel button.

Note: The Grid to Excel button will not be enabled unless Microsoft Excel is installed and you have focus in a cell of the grid.

To export a grid to Excel:

1. Open a screen with a grid and put focus in the grid.

2. Click the Grid to Excel button on the application menu.

3. The grid will turn black and an Excel spreadsheet will open and appear in the task bar. Click on the Excel icon in the task bar. Excel will open the workbook with the data and headers from the grid.

4. Save the Excel spreadsheet.
Deleting a Data Record

Use caution if you must delete a data record from the database. Deleting records can break the audit trail and have other serious consequences.

To delete a data record:
1. Display the data record you want to delete.

2. Click Delete on the application toolbar or on the Actions menu, or press CTRL+D.
Switching Between Grid and Form Views

Many of the data entry screens provide two ways of displaying data, grid view and form view. In grid view, fields for all data entries are in rows and columns to help you quickly locate a specific record. Grid view is the default.

Figure 44: Journal Transactions (01.010.00) Detail area in grid view
Form view shows all the fields for a single record.

![Form view of Journal Transactions (01.010.00) Detail area in form view](image)

**Figure 45: Journal Transactions (01.010.00) Detail area in form view**

**To switch between grid and form views:**

Double-click anywhere inside the grid or form area or press F4.
Sorting Grid Columns

In several Microsoft Dynamics SL screens, you can sort information in ascending or descending order based on the grid view column you select. Look for the Click on a column heading to sort by that field label above the grid to determine if grid information is sortable.

To sort by a column in the grid:
1. Open the screen you want to sort.
2. If the screen is in form view, change it to grid view by double-clicking in the detail area or pressing F4.
3. Click a column heading to set the sort criteria. The columns are automatically sorted in ascending order based on the column you clicked.
4. Click the column heading again to change the sort to descending order, or click another column heading to change the sort criteria.
Setting the Navigation Level

Navigation functions include the First, Prev, Next, and Last buttons on the application toolbar and options on the Actions menu. You can make navigation level changes only in applications that have multiple levels.

For example, if you set the navigation level to batch and then click Next, the next batch in the database appears. Set the navigation level to document and then click Next if you want the next document in the current batch to appear.

Note: A navigation level setting change applies only to your current session in the screen.

To set the navigation level:

1. In an application screen, click Navigation Level on the Actions menu. Navigation Level appears with the screen’s default navigation level selected.

![Navigation Level dialog box]

Figure 47: Navigation Level dialog box

2. Select the desired navigation level. From this point forward, you can use the First, Prev, Next, and Last buttons to navigate the level you selected.

3. Click OK.
Changing the Business Date

The current business date appears on the status bar at the bottom of all application screens. You will use this date when you add or update data. The default business date is the computer’s system date. For more information about navigating the date box, navigating the calendar, and shortcuts/keystrokes, see “Entering Dates” on page 39.

Example: To date stamp a large number of documents with a date other than today’s, change the business date, and then enter the documents. When you are finished, change the business day back to today’s date.

Note: Business Date (98.BZD.00) is available only to persons in the system administrator role and to those who have update rights for the window.

To change the current business date:

1. Open the Application menu on the Microsoft Dynamics SL toolbar, and then click Business Date. Business Date appears.

2. Select a new date.

3. Click OK.
Changing the Transaction Currency

When you enter data on a screen that supports the use of multi-currency, you can change the transaction currency by clicking the Select Currency button on the application toolbar.

- The transaction currency is the actual currency in which the business is transacted.
- The base currency is the currency in which General Ledger account balances are kept.

When you enter data using a transaction currency that is different from the base currency, you can toggle between currencies with Change Currency View. When the button is in the up position, the monetary symbol represents the selected transaction currency. When the button is in the down position, the monetary symbol represents the base currency.

Example: The base currency and current transaction currency is USD or United States dollars. A Canadian receipt is the next document to enter. Change the transaction currency to CAD or Canadian dollars and enter the document. The base currency remains USD. The software handles the conversion of Canadian to U.S. dollars.

To change the currency:

1. Click the Select Currency button on the application toolbar, or click Currency Selection on the Actions menu. Currency Selection (24.000.00) appears.

2. Under Transaction Currency area, type the currency ID in ID.
3. Click OK.
4. To view the current currency, move your mouse pointer over the toolbar Change Currency View button.
Attaching Notes and Source Documents to Data Items

If the Notes/Attachments icon appears next to a field, you can attach a note and source documents to the data item. Some data items can have two or more types of notes. However, you can attach only one note per note type per data item. For example, a note attached to a transaction batch may direct data processing personnel not to release the batch for posting until after a certain date. Another note attached to a transaction may explain that a customer’s account is reaching their credit limit. You can also attach notes to transaction detail lines.

Data items can have multiple source document files attached to them. The source document files are stored externally on a Microsoft® SharePoint® site using the settings defined for a Doc Share entity, on a SharePoint document library, or to a network folder. The location to store the source document files, the Microsoft Dynamics SL screen number, and applicable database table names must be defined in Attachments Configuration (98.400.00) to attach source document files to data items.

Attaching a Note to a Data Item

You can attach a note to a data item if the Notes/Attachments icon exists.

To attach a note to a data item:
1. Place the cursor in a field within the data item.
2. Click Notes from the Notes/Attachments icon, or click Note on the Actions menu. Note (98.260.00) appears, indicating the current screen number in the title.
3. If you need to, change the note type in the Type list.
4. In the text box, type the desired note text, up to 30,000 characters.
5. Click Apply to save the contents of the note. The current date becomes the note’s Revised Date.
6. Click OK to save your note and close Note (98.260.00).

Note: Even though you saved the note, it is not actually saved with the data item until you save the data record. See “Saving Data” on page 47.
Viewing a Note

If you attach a note to a data item, lines appear on the Notes/Attachments icon. The note is attached to the data item but is not part of the data record.

To view a note:
1. Click Notes on the Notes/Attachments icon, or click Note on the Actions menu. Note (98.260.00) appears.
2. If you need to, change the note type in the Type list.
3. Click OK.

Attaching Notes to Transaction Detail Lines

To attach a note to a specific transaction detail line, use the Notes/Attachments icon near the bottom of the application screen.

To attach a note to a transaction detail line:
1. Select a transaction detail line.
2. Click Notes on the Notes/Attachments icon near the bottom of the screen, or click Note on the Actions menu. Note (98.260.00) appears. Notice that the Type is Lines.
3. In the text box, type the desired note text, up to 30,000 characters.
4. Click Apply, and then click OK.

Note: The first column on some application screen grids is a Note column. You can double-click in Note on a detail line to open the Note (98.260.00) screen and enter a note for the detail line. If a detail line contains a note, a Notes/Attachments icon will appear on the line.

Printing Notes

You can print transaction detail line notes when you generate a report by selecting the Print Notes check box on the Report tab. For more information, see “Creating a Report” on page 92.

Deleting Notes from Data Items

You can delete a note from a data item, use the Notes/Attachments icon.

To delete a note:
1. Click Notes on the Notes/Attachments icon, or click Note on the Actions menu. Note (98.260.00) appears.
2. If you need to, change the note type in the Type list.
3. Click Delete, and then click OK.
Attaching Source Documents to Data Items

Source document files are copied to an external location and linked to the data item when source document files are attached to data items.

To attach source document files to data items:

1. Open the applicable data entry screen.
2. Click the Attachments option on the Notes/Attachments icon. Attachments opens.

![Figure 51: Attachments](image)

3. Click Upload to open the Add files dialog box and select a source document file to attach to the data item.

Note:

- The source document file is copied to the external location and a link is created between the source document file and the data item.
- When using the Doc Share Settings or Existing SharePoint Document Library option in Attachments Configuration (98.400.00) for attaching files, it is necessary to have the Microsoft Dynamics SL SharePoint Web Service installed.
Linking Source Documents to Data Items

Source document files exist on an external location and only linked to the data item when source document files are linked to data items.

To link source document files to data items:
1. Open the applicable data entry screen.
2. Click the **Attachments** option on the **Notes/Attachments** icon. **Attachments** opens.

![Figure 52: Attachments](image)

3. Click **Link** to open the dialog box.
   a) **Link files** dialog box opens if you have selected the **Existing Folder Location** option in **Attachments Configuration** (98.400.00), and select a source document file to link to the data item.
   OR
   b) **Attach Existing File** dialog box opens if you have selected the **Use Doc Share Settings** or **Existing SharePoint Document Library** option in **Attachments Configuration** (98.400.00), and select a source document file to link to the data item.

**Note:**
- Only the link between the source document file and the data item is created. The source document file must exist on the external location.
- When using the **Doc Share Settings** or **Existing SharePoint Document Library** option in **Attachments Configuration** (98.400.00) for linking files, it is necessary to have the Microsoft Dynamics SL SharePoint Web Service installed.
Previewing Source Documents

You can preview source document files attached to data items automatically in Attachments. The ability to preview source document files can be prohibited in Attachments Configuration (98.400.00) by selecting Disable Preview.

To preview attached source document files:
1. Open the applicable data entry screen.
2. Click the Attachments option on the Notes/Attachments icon. Attachments opens.
3. Click the line containing the source document file to be previewed. Notice the file’s contents appear at the bottom of the dialog box.
Modifying Source Document Descriptions

You can modify the description of source document files attached to data items.

To modify attached source document file descriptions:
1. Open the applicable data entry screen.
2. Click the **Attachments** option on the **Notes/Attachments** icon. *Attachments* opens.

![Attachment Window](image)

*Figure 54: Attachments*

3. Click the line containing the source document file to be modified.
4. Click **Edit** to open the **Description** dialog box and specify the description for the source document file.
5. Click **OK** to close the **Description** dialog box.
Removing Links between Data Items and Source Documents

You can remove the link between data items and their source document files. The source document files remain on the external location.

To remove the links between data items and source document files:

1. Open the applicable data entry screen.
2. Click the **Notes/Attachments** icon. **Attachments** opens.

   ![Figure 55: Attachments](image)

3. Click the line containing the source document file to be removed.
4. Click **Unlink** to remove the link between the source document file and the data item.

   **Note:** Only the link between the source document file and the data item is removed. The source document file must be deleted from the external location.

5. Close **Attachments**.

Restrictions on Viewing, Adding, Changing, and Deleting Attachments

The ability to read, add, change, and delete attachments depends on both your access rights to the screen where you are trying to work with the attachment and the state or status of the item to which you are trying to attach a file.

Access rights defined for the user and screen in **Access Rights Maintenance** (95.270.00):

- **View:** Lets you view existing attachments
- **Insert:** View + Lets you add new attachments
- **Update:** View + Insert + Lets you change existing attachments
- **Delete:** View + Insert + Update + Lets you delete existing attachments
- **Initialize Mode:** View + Insert + Update + Delete + Lets you perform all these actions on many items that are read-only.

**Example 1:** You have View rights to **Journal Transactions** (01.010.00).
You can view existing attachments on batches in *Journal Transactions* (01.010.00). You cannot add, change, or delete attachments. The status of the batch has no effect on this behavior.

**Example 2:** You have Delete rights to *Journal Transactions* (01.010.00).

You can add new attachments and view, change, or delete existing attachments on unreleased batches in *Journal Transactions* (01.010.00). The status of the batch affects this behavior. If the batch is released or posted, you cannot change or delete existing attachments.

**Example 3:** You have Initialize Mode rights to *Journal Transactions* (01.010.00).

You can add new attachments and view, change, or delete existing attachments on unreleased batches in *Journal Transactions* (01.010.00). The status of the batch affects this behavior. If the batch is released, you must be in Initialize Mode to perform these actions. If the batch is posted, you must be in Initialize Mode to change or delete an attachment, adding new attachments is not permitted.
Setting Application Options

You can customize data entry by means of Options on the Tools menu found on the Microsoft Dynamics SL toolbar. These options are connected to your user ID, so they apply only to your session.

**Note:** To avoid entering extraneous tabs, do not select Enter key = Tab key when you are using Visual Basic Editor (91.251.00) in the Customization Manager module. Pressing ENTER should create a new line.

**To set data entry options:**

1. Open the Tools menu on the Microsoft Dynamics SL toolbar, and then click **Options**. The **Application** tab of Options Dialog appears.

![OptionsDialog](#)

**Figure 56: Options Dialog, Application tab**

2. Click an Application Settings check box to select it. The options are:
   - **Enter key = Tab key** — Sets the ENTER key to perform the same as the TAB key.
   - **Show Grid Lines** — Displays horizontal and vertical lines around the fields in grid view.
   - **Show Grid Row Numbers** — Displays the row numbers in grid view.
   - **Cancel Prompt** — Displays a dialog box to confirm cancellation when clicking **Cancel** during data entry.
   - **Save Settings on Exit** — Saves any changes that you made to a screen, such as resizing the window or the columns in grid view so that the changes become the default settings for the screen. For this option to display, the SaveSettingOnExit Solomon.ini setting must be set to Yes. For more information about this Solomon.ini setting, see Appendix A: Solomon.ini Settings in the System Manager Help or user’s guide. Make sure that you pay extra attention to the [Miscellaneous] section of the System Wide Settings topic.

3. When you are finished, click **OK** to apply the settings for the current session. Click **Cancel** to leave the settings as they were.

4. If you changed the options, click **Options Save** on the Tools menu if you want the changes to apply to future sessions in Microsoft Dynamics SL.
Creating and Using Navigation Shortcut Files

You can create and use navigation shortcut (.DSLPath) files to open screens within Microsoft Dynamics SL from a desktop shortcut.

To create a navigation shortcut file:
1. Open the screen for which you want to create a navigation shortcut file.
2. On the Actions menu, click Navigation, and then click Desktop Shortcut.
3. The navigation shortcut file is created on your desktop with the .DSLPath extension.

Example:
1. In Financials, open the Journal Transactions (01.010.00) screen.
2. On the Actions menu, click Navigation, and then click Desktop Shortcut.

   ![Figure 57: Journal Transactions (01.010.00) screen including the Navigation menu](image)

   Figure 57: Journal Transactions (01.010.00) screen including the Navigation menu

3. The 0101000.DSLPath navigation shortcut file is created on your desktop.

   Note: If you create another navigation shortcut file for the Journal Transactions (01.010.00) screen, the filename will be 0101000(1).DSLPath.

To use a navigation shortcut file to open a screen, choose one of the following methods:
- Drag and drop the .DSLPath file from your desktop to the Microsoft Dynamics SL breadcrumb bar. For more information about the breadcrumb bar, see “Breadcrumb bar” on page 12.
- Open the .DSLPath file from your desktop. If you are not logged on to Microsoft Dynamics SL, the file will initiate the log on process.
Using Templates

Overview
A template is a set of data copied from a Microsoft Dynamics SL screen or report. Template data may include document and transaction details of a batch or sorting and printing options of a report. Using a template, you can save a screen that contains information you use at regular intervals. Later, you can retrieve the template containing the information as you originally entered it to avoid having to retype it. Besides saving time by eliminating the need to retype information, templates also decrease the chance of data entry error.

Templates are useful for repetitive tasks such as:
- Issuing the same order to several different vendors.
- Using the same default tax information for a large number of customers.
- Generating a report with complex sort, select, and printing options, and then using these parameters for future generations of the same report.

Templates are attached to the screen or report in which they are created. A template created in Journal Transactions (01.010.00) is available in that screen only.

Templates can be private or public. A private template is available only to the user who created it. A public template is available to all users.

This section provides information for creating and using Microsoft Dynamics SL templates. These basic tasks include:
- Creating a Screen Template
- Building Formulas
- Pasting a Template into a Screen
- Modifying a Screen Template
- Creating and Using Report Templates
- Deleting a Template
Creating a Screen Template

A template is exclusive to the screen in which you create it. You cannot create a template in one screen and then use it in another screen.

To create a screen template:
1. Open the screen you will associate with the template.
2. Type information in the boxes you plan to include in the template or use the information from an existing document.
3. Define any formulas for dates and periods. See “Building Formulas” on page 73.
4. In the Actions menu, click Template. Template (98.230.00) appears, showing the screen name and number in Screen.

![Figure 58: Template (98.230.00)](image)

5. Type an identification code for the new screen template in Template ID.
6. Type brief details about the screen template in Description.
7. Select Private or Public in Visibility.
8. Select the appropriate template data option from the Section list. All and Selected always appear on the list. Additional options vary depending on the function of the screen.

**Example:** To include only a batch’s status information on Voucher and Adjustment Entry (03.010.00), choose Batch in Section and clear the Load lower levels check box. When the software creates the template, it includes batch level information only.

**Example:** To create a template that includes a batch’s voucher information and transaction details, choose Document in Section and select the Load lower levels check box. When the software creates the template, it includes both the voucher information and its related transaction details.

9. Click Save.
Building Formulas

Templates include time information, such as fiscal periods and years, and document and transaction dates. Fiscal periods and dates can be either absolute or relative.

- An absolute date or period is a specific value. Any changes to an absolute date or period are done manually.
- A relative date or period is a calculated value. The software calculates the date and period based on the defined formula.

**Example:** You create a template for a lengthy set of journal transactions on 05/05/2010 and then decide that you want to use the same set of transactions for a 05/29/2010 transaction batch. If you set the date in the template to an absolute value of 05/05/2010, you must later the date manually to 05/29/2010. If you set the dates in the journal transaction entries relative to the current system date, the software automatically changes the dates of all transactions to 05/29/2010.

To build a formula, use the relative setting. You can create period and date formulas in templates that:

- Use the current period and date. Current is the default period and date setting for templates.

  **Example:** If you create a template on 05/15/2010 but use it on 05/20/2010, the software enters 05/20/2010 in the screen.

- Enter periods or dates that are a specific number removed from the current period or date. Microsoft Dynamics SL supports both future and prior periods and dates.

  **Example:** You create a template in period 05-2010 that always calculates a period number two periods ahead of the current period. When you use the template in period 07-2010, the software enters 09-2010 as the period number.

- Use a combination of relative and absolute values for periods and dates.

  **Example:** You create a template in period 05-2010 with a transaction date formula that uses a relative value for the month and year but an absolute value of 15 for the day. If you use the template on 06/11/2010, the software enters 06/15/2010 for all transaction dates.

Defining a Fiscal Period Formula

When you create a screen template, a fiscal period is a specific month and year. In a report template, the fiscal period is a range of months.

To define a fiscal period formula:

1. Place the cursor in a fiscal period field and press F2. *Relative Period (98.250.00)* appears.

   ![Relative Period (98.250.00)](image)

   *Figure 59: Relative Period (98.250.00)*

2. Select either Relative or Absolute from the **Month** list and the **Year** list.
3. Click the up or down arrows to the right of **Month** and **Year** to select the relative or absolute values.
4. Type a period and year number in **Current** to test the formula. The period and year that appear in **Result** should increase or decrease as defined in the formula.

5. Click **OK**.

**Defining a Date Formula**

Several types of date fields appear on data entry screens. On reports, the date represents the date on which the report is printed.

To define a date formula:

1. Place the cursor in a date field and press F2. **Relative Date (98.240.00)** appears.

   ![Relative Date (98.240.00)](image)

   *Figure 60: Relative Date (98.240.00)*

2. Select either Relative or Absolute from the **Day**, **Month**, and **Year** lists.

3. Click the up or down arrows to the right of **Day**, **Month**, and **Year** to select the relative or absolute values.

4. Type a period and year number in **Current** to test the formula. The period and year that display in **Result** should increase or decrease as defined in the formula.

5. Click **OK**.
Pasting a Template into a Screen

Use a screen template to insert data, such as document information and transaction details, into a screen. Templates can insert almost any information into a screen. However, certain data items, known as key fields, are not included as part of a template’s information, because including them could result in duplicate records. These key fields include:

- Unique Microsoft Dynamics SL-generated numbers used to identify batches, documents, and transactions within the database
- Entity information including vendors, customers, and inventory items

The software pastes any other information from the template into the screen and supplies the key field data items when you save the new record.

Example: If you use a voucher template in Voucher and Adjustment Entry (03.010.00) to insert information into a new voucher you are adding to the same batch, a reference number is not included as part of the information until you save the voucher.

To use a screen template:
1. Click Template on the data entry screen’s Actions menu. Template (98.230.00) appears.
2. Type the identification code for the template in Template ID. The template Description appears.
3. Click Paste to load the template information into the current screen.
Modifying a Screen Template

Modify a screen template whenever any information changes. The changes take affect the next time the template is loaded.

To modify a screen template:
1. Open the data entry screen associated with the template.
2. Click Template on the Actions menu. Template (98.230.00) appears.
3. Type the template identification code in Template ID.
4. Click Paste to load the template information into the current screen.
5. Make changes on the screen.
6. Click Template on the Actions menu.
7. Type the template ID.
8. Click Save.

Deleting a Template

To delete a template:
1. Open the screen or report associated with the template.
2. Click Template on the Actions menu. Template (98.230.00) displays.
3. Type the template ID in Template ID.
4. Click Delete on the template form, and then click Yes to confirm the deletion.

Creating and Using Report Templates

To create a report template, define the report and save the settings as a template. See “Generating and Printing Reports” on page 89.
Using Quick Queries

Overview

A quick query is an interactive way to view data in Microsoft Dynamics SL. Quick query data may include document and transaction details of a batch or balances and history for a customer or vendor. Using a quick query, you can sort and filter, or export to Microsoft Excel.

Many modules have a set of standard quick queries. For a descriptive list of the standard quick queries, see the Quick Query help or user’s guide.

This section provides information for using Microsoft Dynamics SL quick queries. These basic tasks include:

- Opening a Base Query View
- Removing Columns
- Review a Note or Attachment
- Export to Microsoft Excel
- Using the Copy Rows functionality

Reference

The following figure shows the areas of the Quick Query Viewer (QQ.VIE.00) screen that are unique to the Quick Query module.

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**Figure 6.1: Quick Query Viewer (QQ.VIE.00), descriptions**
Following are the area descriptions for Quick Query Viewer (QQ.VIE.00).

**View selection**
*View selection* displays the name of the current Base Query View or Filtered Query View. Click *View selection* to choose a related Filtered Query View. When in maintenance mode, you can choose another Base Query View.

**Note:** To open *Quick Query Viewer* (QQ.VIE.00) in maintenance mode, you must have Update level permissions to the screen as well as open the screen from the Administration module group. To confirm that *Quick Query Viewer* (QQ.VIE.00) is in maintenance mode, look for the New icon.

**Show results Filters**
Use *Show results Filters* to specify multiple filter criteria that you want to apply to the results. You can use this interactively, or you can save it as part of a Filtered Query View. When in maintenance mode, you can save this as part of a Base Query View.

**Search Filter**
Use *Search Filter* to perform a quick search for whether a particular column contains a value.

**Column Header**
*Column Header* contains a descriptive name for the column. You can drag and drop the column by grabbing the *Column Header*. You can sort the column’s contents ascending or descending by clicking the *Column Header*.

**Results Data Grid**
*Results Data Grid* contains the data results. Use the up/down and right/left scrollbars to view all the data.

**Status Bar row count**
*Status Bar row count* provides a count of the rows in the Results Data Grid. The *Status Bar row count* refreshes after you perform a Search Filter or use the Show results Filters.
Opening a Base Query View

To open and then view a Base Query View, follow these steps:

1. From the main window of Microsoft Dynamics SL, click **Quick Query** in the navigation pane.

   ![Quick Query module group](image)

   *Figure 62: Quick Query module group*

2. In the upper navigation pane, click one of the functional groups.
The list of queries for that functional group appears in the area page.

Figure 63: Financial functional group

3. Click one of the quick queries.
Quick Query Viewer (QQ.VIE.00) appears, displaying the quick query that you selected.

![Quick Query Viewer](image)

**Figure 64: Accounts base query view**
Removing Columns

To remove one column at a time, follow these steps:
1. Open a Base Query View.
2. Right-click the column header, and then click **Remove Column**.

To remove multiple columns at one time, follow these steps:
1. Open a Base Query View.
2. Right-click the column header, and then click **Choose Columns**. The Choose Columns screen appears.
3. In the Selected Columns list, use the pointer to put the focus on the column that you want to remove, and then click **Remove**.
4. Repeat for each column that you want to remove.
5. When you are finished removing columns, click **OK** to close the Choose Columns screen.

Review a Note or Attachment

When a Quick query includes a note or attachment the text is not all viewable in the grid. Note text is truncated when you view in the grid. You can hover over the text and get more information or you can open a window to get the complete text if it is a very long note. Attachments are also able to be viewed from a window.

To review the complete text of a note, follow these steps:
1. Open a Base Query View that contains the note column.
2. Right-click a row in the result set that has a note attached, and then click **Note/Attachments**.

   ![Figure 65: Drill Down program menu](image1.png)

3. A window will appear with the complete text of the note.

   ![Figure 66: Notes/Attachments](image2.png)

To review the attachment, follow these steps:
1. Open a Base Query View that contains the note column.
2. Right-click a row in the result set that has an attachment, and then click **Note/Attachments**.
3. A window will appear with the complete text of the attachment.

**Export to Microsoft Excel**

There are several options when you export to Excel. **Copy To Table** gives you the results of your selection.

The **Connection**, **Query Table** and **Pivot Table** options give you a worksheet that can be refreshed without having to be signed into Microsoft Dynamics SL and it will update the workbook with the most current data.

To refresh the data without entering your credentials, you will need to have Initialization Mode rights assigned for the query in **Access Rights Maintenance** (95.270.00) that created the Excel File. If you do not have Initialization Mode rights within Microsoft Dynamics SL, or if you are using a SQL authenticated database you will be prompted for your SQL server credentials.

**Copy To Table**

When you select **Copy to Table** from the Export to Microsoft Excel menu, you will get the results of the selection that you made. This is data as of the point in time you created the worksheet.

**To export a result set to Microsoft Excel, follow these steps:**

1. Open a Base Query View.
2. Click Grid to Excel in the toolbar and choose the Copy To Table option. Microsoft Excel will open with the result set displayed. It copies the contents of the grid to a new worksheet.

**Connection**

When you select Connection from the Export to Microsoft Excel menu, a worksheet connected to the query will be created. This lets anyone who has access to this Excel file to open the file and refresh the data without having to sign into Microsoft Dynamics SL.

To add connection to a selected workbook, follow these steps:

1. Open a Base Query View.
2. Click Grid to Excel in the toolbar and choose the Connection.
3. Create Excel Connection will appear.

![Create Excel Connection screen](image)

**Figure 70: Create Excel Connection screen**

4. Choose from the Connection Settings available.
   - All Rows options will ignore the Expression Builder and Quick Filter. Filtered Rows will export only those rows included in the displayed grid.
   - All Columns option will include all columns from the source SQL in the order they are defined in the view. Selected Columns will export only those columns displayed in the grid.
5. Select the Workbook into which you want to put this data. <New> will appear with any other Workbook that is currently open.
7. Save the Workbook.
8. In this Excel workbook, select Data>Existing Connections>Connections in this Workbook, then select Open.
9. When the Import Data screen appears. Select how you want to view the data in your workbook.
10. Select the location you want the data, and then select OK.
11. Save the workbook.

**Query Table**

When you select QueryTable from the Export to Microsoft Excel menu, a worksheet connected and a table bound to that connection in Excel will be created. You will get the results of the selection that you made. This lets anyone who has access to this Excel file to open the file and refresh the data without having sign into Microsoft Dynamics SL.

To add connection and a table bound to a selected workbook and worksheet, follow these steps:

1. Open a Base Query View.
2. Click Grid to Excel in the toolbar and choose the Query Table.
3. **Create Excel Query Table** will appear.

![Create Excel Query Table](image)

**Figure 71: Create Excel Pivot Table**

4. Choose from the Connection Settings available.
   - **All Rows** options will ignore the Expression Builder and Quick Filter. **Filtered Rows** will export only those rows included in the displayed grid.
   - **All Columns** option will include all columns from the source SQL in the order they are defined in the view. **Selected Columns** will export only those columns displayed in the grid.

5. Select the **Workbook** into which you want to put this data. <New> will appear with any other Workbook that is currently open.

6. Select the **Worksheet** within the workbook you want the query table to appear.

7. Select the location of the **Top Left Cell** for the query table in the worksheet.

8. Select **Create**. A query table will appear with the values that were included in the grid at the time you created the query table.

9. Save the workbook.

**Pivot Table**

When you select **Pivot Table** from the Export to Microsoft Excel menu, a worksheet connected to the query will be created that has a pivot table. This lets anyone who has access to this Excel file to open the file and refresh the pivot table without having to sign into Microsoft Dynamics SL.

**To add connection to a selected workbook, follow these steps:**

1. Open a Base Query View.

2. Click **Grid to Excel** in the toolbar and choose the **Pivot Table**.
3. **Create Excel Pivot Table** will appear.

4. Choose from the Connection Settings available.
   - **All Rows** options will ignore the Expression Builder and Quick Filter. **Filtered Rows** will export only those rows included in the displayed grid.
   - **All Columns** option will include all columns from the source SQL in the order they are defined in the view. **Selected Columns** will export only those columns displayed in the grid.

5. Select the **Workbook** into which you want to put this data. <New> will appear with any other Workbook that is currently open.

6. Select the **Worksheet** within the workbook you want the pivot table to appear.

7. Select the location of the **Top Left Cell** for the pivot table in the worksheet.

8. Click **Choose Pivot Columns**. Choose Columns appears.

9. Select the columns you want included in the pivot table. Make the selection and order them in the manner you want them to appear.

10. Select **Create**. A blank pivot table will appear with all the available fields to select from appearing at the right of the worksheet.

11. Select the fields you want included in the file, make the selection and order them in the manner you want them to appear.
12. Save the workbook.

Using the Copy Rows functionality

To use the copy rows functionality, follow these steps:

1. Open a Base Query View.
2. Right-click one or more rows in the result set, and then click Copy Rows.

![Copy Rows program menu](image)

3. Switch to the program where you want to paste the results, and then click CTRL+V to paste.
Generating and Printing Reports

Overview
This topic provides you with information about generating standard reports and printing them. The basic tasks include:

- Setting up the Default Printer
- Creating a Report
- Printing a Report
- Saving a Report Template
- Using Report Templates

For detailed information about working with Microsoft Dynamics SL reports, see the Reporting Guide.

Standard Reports
Each module has a set of standard reports. To modify the standard reports, choose a report format, select a date range, sort fields, select values to include in the report, or include a cover page. Some standard reports also have a special set of options. For details about a particular report, see the associated module’s help or user guide.

Report Templates
After creating a report, save the selected report options as a template to use again later. A template contains all the report settings needed to create the report using the latest available data. See “Using Report Templates” on page 101 for more information about templates.
Setting up the Default Printer

Before printing reports, forms, or labels, set up the default printer settings. Default printing options include the print destination, the font used in all reports, and the orientation of the information on the printed page.

When printing an individual report, you can override the default printer settings. For more information, see the Reporting Guide.

To set up the default printer:

1. On the Microsoft Dynamics SL toolbar, open the Application menu, and then click **Printer Setup**. **Printer Options** (98.220.00) appears.

2. Click **Setup**. The **Print Setup** dialog box appears.

3. Select a printer to use as the default printer. If you do not see a list of printers, or if you are unable to connect to the printer you want to use, contact your system administrator.

4. Select the paper size, the source of the paper, and orientation.

5. Click **Properties**, if available, and define any advanced printer properties. See your printer documentation for more information about the options that display.

6. Click **OK** in each dialog box you use to return to **Printer Options** (98.220.00).
7. Click **Fonts**. The *Font* dialog box appears.

![Font dialog](image)

**Figure 77: Font dialog**

8. Make selections to define the default font for Microsoft Dynamics SL reports.

9. Click **OK** to accept your settings and return to *Printer Options* (98.220.00).

10. Select **Save as Default**.

11. Click **Ok** to close *Printer Options* (98.220.00).
Creating a Report

When you select a report, a screen of options appears. Use these options to define the information to include on the report.

Every report has its own set of tabs that can be used to customize the output. Some tabs may be different from the tabs shown in this section. For information about a specific report, see the particular module’s help or user’s guide.

To create a report:
- Select a report format.
- Specify a fiscal period to print.
- Specify a sort order.
- Select values to print.
- Set any options.
- Define the cover page.

For detailed information about producing reports, see the Reporting Guide.

To create a report:
1. Open a module, and then select the report you want to print. The Report tab for the selected report appears.
2. Select a format from the Report Format list.
3. Type the date that will appear on the report in Report Date. Today's date is the default. To create a date formula, press F2. For more information, see “Defining a Date Formula” on page 74.
4. Type the beginning and ending fiscal period in Beg/End Period. To create a period formula, press F2. For more information, see “Defining a Fiscal Period Formula” on page 73.
5. Type the page range to print in Beg/End Page Nbr.
6. Type the number of copies to print in Copies.
7. Select **Print Notes** to print notes attached to data items. This check box is unavailable if there are no notes fields on the specified report. For more information, see “Attaching a Note to a Data Item” on page 60.

8. If present, select **Print Mask** to print any selection criteria. The selection criteria automatically print on the cover page, if selected. For more information, see “Selecting Values” on page 94 and “Printing a Cover Page” on page 97.

### Specifying a Sort Order

Microsoft Dynamics SL prints fields on a report in columns in a default order. You can define a specific sort order by specifying whether to sort the fields in ascending or descending order. To control how the report prints, you can designate that a page break or a total report break should occur when the value of a field changes.

**Example:** By default, the software sorts the *Customer Trial Balance* report in the Accounts Receivable module first on subaccount number, second on customer ID, third on reference number, and fourth on transaction date. To sort the report first by customer ID, select CustID as the first field to sort.

**To specify the sort order:**

1. Click the **Sort** tab.

2. Type the table name and the field name in **Field**. Press F3 to open a Possible Values (PV) window listing all record.fieldnames for the report. Select a record.fieldname, and then click **OK**.

**Note:**

- An entry in **Field** is a combination of table name and field name. For example, *gltran.refnbr* indicates that the field RefNbr is found in the GLTran table. To learn more about the fields on the Sort tab, open the help, and select Help Topics | (version of the software) Schema .. Choose the schema topic for the module’s series (for example, Financial Management Schema). Select the table name, and then search for the specific field name.

- When the Possible Values (PV) window is open, the Field List screen will also include the **Description** and **Report Field** columns. The **Report Field** column will be marked with a Yes for the field if the field is included in the report.
3. Select Group Field or Sort Field in **Sort Type**.
4. Select **Sort Ascending** to sort a column in ascending order.
5. Select **Page Break** to insert a page break when the value in a field changes.
6. Select **Total Break** to insert a total report break and make the group footer area visible when the value in the field changes.
7. Select a field name and use the **Up** and **Down** buttons to move its row up or down.
8. If you have made changes that you do not want to apply, click **Reset**. This restores the report’s grouping and sorting criteria.
9. To apply your changes for this specific report generation, click **Apply**.

**Selecting Values**

To further control the contents of the report, select specific values to print, such as customer ID 349 or account numbers 100010 through 100050. By default the software prints all values in the report fields.

To select specific values, select an operator, type a value or range of values, and select a standard Boolean expression. The completed expression is also called a “selection mask.”

**Example:** To print only accounts 100010 through 100050, choose the BETWEEN operator, type the range 100010,100050 and choose the AND Boolean expression.

**To select values:**

1. Click the **Select** tab.

![Figure 80: Sample Select tab in grid view](image)

2. Type a field name in **Field**, or press F3 to select from a list of possible values. Press F3 to open a Possible Values (PV) window listing all record.fieldnames for the report. Select a record.fieldname, and then click **OK**.

**Note:**

- An entry in **Field** is a combination of table name and field name. For example, `gltran.refnbr` indicates that the field RefNbr is found in the GLTran table. To learn more about the fields on the Sort tab, open the help, and select Help Topics | (version of the software) Schema. Choose the
schema topic for the module's series (for example, Financial Management Schema). Select the table name, and then search for the specific field name.

- When the Possible Values (PV) window is open, the Field List screen will also include the Description and Report Field columns. The Report Field column will be marked with a Yes for the field if the field is included in the report.

3. Select a standard operator from the Operator list.
4. Type the value or range of values in Value.
   - Use wildcards in Value to select ranges (for more information, see “Using Wildcards”).
   - Use commas to separate values in a range.
   - If you use an operator like Between, which requires more than one select value, type a comma or the word and between the values you enter (1010,2020 or 1010 and 2020 for example).
   - Use F3 to help in your selection of data. Based on the type of field and the operator used, screens open to let you select dates or values from the database.
5. To define a range, select either AND or OR from the Boolean list.
6. If present, click View Selections to check the selection criteria.
Using Wildcards

Use wildcards in the **Value** field to select ranges of values. Wildcards include the asterisk (*) and the question mark (?).

**Example:** To select all account numbers with a 1 in the first character position and a 2 in the third character position use the wildcards 1*2*, 1?2? or 1*2? in the Value field.

Setting Options

Some reports have options. If the report you select does not have options, the **Options** tab is unavailable. See the module’s help or user’s guide for more information about report options.

**To set options:**

1. Click the **Options** tab.

2. Select the options you need.
Printing a Cover Page

Print a cover page as an introduction to the report, providing a summary of the report’s content, selection criteria, and sort order. A cover page may also contain comments you enter on the Cover Page tab prior to printing the report. The information entered in the Sort and Select tabs automatically prints on the cover page.

To print a cover page:

1. Click the Cover Page tab.

![Sample Cover Page tab]

2. Select **Print Cover Page** to print a cover page.

3. Type comments to print on the cover page in the Description box. The text prints on the cover page in addition to the sort and selection criteria.
Selecting Companies

A report is printed from the current company by default. However, if your organization uses Multi-Company and there are various companies set up in the current application database, the **Company** tab is enabled and the report can include information from more than one company. You can also print a separate report for each company you select.

**To print a report against multiple companies:**

1. Click the **Company Selection** tab.

![Figure 83: Sample Company Selection tab](image)

2. Select **Report per Company** to print a separate report for each company you select.

3. In the grid, select the companies to be included in the report.
Printing a Report

After you define the report, you can print it from any tab selecting to route it to a printer, a file, or a document library on a Microsoft® SharePoint® site. For more information about sending a report to a file or a SharePoint site, see the System Manager help or user guide or the Reporting Guide.

A report prints based on the default printer setup. Preview your report before printing to verify that it will print as desired. You can override the default printer setup by choosing a different orientation or font to fit the report on the page.

**Note:** The printing defaults can be set using the [Print Default] section of the Solomon.ini file. For more information, see the “Appendix A; Solomon.ini Settings” topic in the System Manager help or user guide.

**To preview the report:**

Click **Print Preview** to view the report as it will print. The first page of the report appears.

![Print Preview showing first page of the report](image)

**To override the default printer setup:**

Click **Printer Options**. Change the default printer setup or choose a different printer. For more information, see “Setting up the Default Printer” on page 90.

**To print the current report:**

Click **Print**.

**Note:** The **Print** button displays as **Upload** when **Upload to SharePoint** is selected in **Printer Options** (98.220.00).
Saving a Report Template

After creating a report, you can save the report definition as a template. A template is a set of data, such as the printing and sorting options of a report, which you save to use again. For more information, see “Using Report Templates.”

When you need to print the report again, you can load the template and then print. The software pulls new data into the report template from the current database.

To enhance report generation, include date and fiscal period formulas when setting up templates. For information about including formulas in templates, see “Building Formulas” on page 73.

To save a template:
1. Click the Template tab. The Template tab for the selected report appears.

   ![Sample Template tab in grid view](image)

   Figure 85: Sample Template tab in grid view

2. Click Save Template. Save Template (98.600.01) appears.

   ![Save Template (98.600.01)](image)

   Figure 86: Save Template (98.600.01)

3. Type a template identification code in Template ID.
4. Type a description of the template in Description.
5. Select Public to make the template available to other users.
6. Select Save Current Printer settings with the Template to avoid choosing the template printer’s settings each time you print using the template.
7. Click OK.
Using Report Templates

A template is a set of data, such as the printing and sorting options of a report that you save for later use with a report. To use a report template, load it and then print the report. The software uses the report definition in the template and pulls new data from the current database to create the report.

To use a template:

1. Click the Template tab.

2. Click the ID of the template you want to use in Template ID.

3. Click Load Template.

4. Make changes to the report as needed.

5. Click Print.

Figure 87: Sample Template tab in grid view
address bar
The address bar is located at the top of the Microsoft Dynamics SL window and is used for navigating through the system to a specific application, report or link.

application
A Microsoft Dynamics SL module, such as Accounts Payable or Purchasing.

application database
A database that contains all of the accounting data for an individual financial entity (see system database).

batch
A grouping of documents; the batch fields on a screen apply to all listed documents.

cue or cue stack
A graphic that depicts a stack of papers to represent the workload for a user in the Activity section of the Role Center pane of Microsoft Dynamics SL.

data item
Each individual record that composes the data entered. For example, a data item for Batch, APDoc, and APTran are created when a voucher is entered in Voucher and Adjustment Entry (03.010.00).

data record
A collection of data items.

document
An individual record in a batch. You can display document fields on a screen in either grid or form view.

extended possible values list
A list of records that displays when you press \texttt{SHIFT+F3} or double-click the right mouse button in a field. The data values associated with the record you select populate the appropriate fields on the data entry screen (see possible values).

form view
A portion of a data entry screen showing all the fields for one record. The form view helps when you need to see all the fields in one record. Toggle between form and grid view using \texttt{F4}.

grid view
A portion of a data entry screen showing all the data items for all the records in rows and columns. The grid view is useful when comparing values in detail records. Toggle between grid and form view using \texttt{F4}.

key field
A field that uniquely identifies the database record in which it resides.

module
A Microsoft Dynamics SL application.

module group
Categorizes Microsoft Dynamics SL applications based on their purpose; General Ledger and Accounts Payable are members of the Financials module group.
navigation pane
The column on the left side of a Microsoft Dynamics SL window that includes panes and shortcuts to various tasks.

navigation path
The full path that makes up screen, report, and links that execute. You will find the navigation path in the Breadcrumb bar for Microsoft Dynamics SL. It is made up of Company Name\Module Group\Module\Categories\Nodes (report, screen or link).

possible values
Values that appear when you press F3 or double-click in a field. Files containing the lists of possible values are imported into Microsoft Dynamics SL using the Possible Values Import function on the Utility menu (see extended possible values list).

role
Profile based on a user’s work-related responsibilities.

selection mask
A set of selection criteria entered on the Select and Sort tabs when creating a report. The selection mask automatically prints on a cover page.

selection tags
Small numbers in black boxes that appear when you select multiple fields. The numbers indicate the order in which you selected the fields.

system administrator
One who belongs to the Microsoft Dynamics SL Administrators group; has the ability to add, change, or remove other Microsoft Dynamics SL users. The system administrator has rights to all Microsoft Dynamics SL screens and reports.

system database
The database that contains shared site-specific data, such as database field attributes, edit characteristics, product registrations, customizations, and screen-level security (see application database).

template
A set of options, such as the printing and sorting options of a report that is saved for later use.
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