



Tips 'n' Tricks from Altico



There are dozens of little tips and tricks for using your Microsoft Dynamics GP system that can make your life ever so much easier. We'll be bringing you a new tip every month in the hope that you find them useful.

The resident Altico wizard presents your September 2006 tip:

Build Information Lookups

Learn better search methods in Microsoft Dynamics GP to make sure you can find the information you need. When it comes to tracking down information, Microsoft Dynamics GP offers a wide range of search options. For example, you can set up different Advanced Lookups to search vendors or customers by ZIP code or phone number. Or you can build yourself a "favorite" search. Here's how.

For Advanced Lookups, follow these steps:

- Go to Tools > Setup > Company > Advanced Lookups.
- For each available lookup, you can select four additional search criteria. For example, you can choose to search vendors by city or phone number, or search customers by contact name.
- These Advanced Lookups are accessible via the selected lookup window (e.g., clicking the Vendor ID lookup on the Vendor Maintenance card accesses the Vendors lookup window).
- When you are in the lookup window, click Additional Sorts (in the header of the vendor list) to access Advanced Lookups.

To set up search capabilities in SmartList Favorites, follow these steps:

- Go to View > SmartList.
- Select the appropriate SmartList for your lookup (for example, the Vendors SmartList can be used in the Vendors lookup).
- Use the Columns icon to control the columns displayed in the Smartlist and the Search icon to restrict the results (for example, creating a SmartList that only shows 1099 vendors).

- Once these two parameters have been defined, click Favorites to name and save the Favorite.
- You can now use the Favorite, accessible from the menu of the SmartList page, to locate the record you wish to view.
- You can then use the Go To button in the upper right corner of SmartList to access windows and inquiries related to the selected record. The Favorite can also be used in conjunction with a lookup throughout the system.
- To use the Favorite with a lookup, simply click the Views menu in the lookup, then click Favorites and select the Favorite.
- The lookup will be restricted to the search criteria defined in the Favorite, and you can perform a secondary search within the returned results.

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I'm NOT the resident wizard, but be that as it may, you're welcome to channel your questions through me.

Yours,

Marcia Nita Doron
Marketing Director
[Altico Advisors](#)
2 Mount Royal Avenue, Suite 410
Marlborough, MA 01752
508-485-5588 x107
mdoron@alticoadvisors.com
www.alticoadvisors.com