

## Did you know that you could create Custom Reminders to allow you a quick view into key data of Dynamics GP?

If you are a Dynamics GP 9.0 user, you might like to know that you are able to create custom reminders that are relevant to your company's business. Custom Reminders give you a view into the data in the accounting system.

Please note that if you are a Dynamics GP 8.0 user you are also able to use the "Reminder" functionality, however reminders are only predefined and will show you data that met specific criteria such as Overdue Invoices from Receivables.

Some aspects of Custom Reminders are below:

- The custom reminders display on the Home Page in the To Do section
- If you aren't using a Home Page, the custom reminders display in the Reminders window
- You are able to link a reminder to a Smart List Favorite
- The custom reminder will display the number of records or a sum of a specified column from the Smart List favorite
- Determine when the custom reminder will display
  - When the number of records is greater than 0
  - Or when the total of a specified column is greater than \$0.00
- The custom reminder sum will use the functional currency format
- When the user selects the custom reminder it will open the Smart List favorite
- Custom Reminders are stored per user

### What does it look like?

This screenshot shows the Custom Reminder window. Notice the remind me when criteria. When this criterion is met the reminder will display on the Home Page.

The screenshot shows the 'Custom Reminder' dialog box. The 'SmartList Favorite' section includes a search box with the text 'Customers Over Credit Limit\*', a 'Category' dropdown menu set to 'Customers', and a 'Visible to' dropdown menu set to 'System'. The 'Remind me when' section has two radio buttons: 'Number of records' (selected) and 'Total of column'. Under 'Number of records', there is a dropdown menu set to 'is greater than' and a text box containing the number '5'. Under 'Total of column', there are two dropdown menus and a text box containing the value '0.00'. At the bottom right, there are 'OK' and 'Cancel' buttons.

The screenshot below shows the end user's Home Page. Notice the custom reminders in the To Do section.

The screenshot displays the user's home page in Microsoft Business Solutions - Great Plains. The interface includes a menu bar, a toolbar, and a sidebar with navigation options like 'Financial Lists', 'Financial', 'Sales', 'Purchasing', and 'Shortcuts'. The main content area is titled 'Theresa's Home' and shows the date 'Friday, July 15, 2005'. Key sections include:

- To Do:** A section with a 'Reminders' icon showing 'Payables Due (29)', 'Past Due Customers\* (7)', and 'Discounts Expiring this Week\* (\$229.08)'. It also lists 'Tasks' such as 'Customer Experience Improvement Program (CEIP)' and 'Check for Payroll tax updates'.
- Quick Links:** A list of frequently used functions like 'Purchasing Invoice Entry', 'Payables Transaction Entry', 'Select Payables Checks', 'Receivables Transaction Entry', 'Cash Receipts Entry', 'Lockbox Entry', 'Sales Checklists - Receivables Month End', 'Customer Maintenance', 'Letter Writing Assistant', 'Master Posting', 'Bank Deposit Entry', 'Bank Transfer Entry', and 'Reconcile Bank Statements'.
- My Reports:** A section for adding reports.
- Microsoft Office Outlook:** A section showing '0 unread messages' and a calendar for 'Today' and 'Saturday' with events like 'Payday' and 'Discuss detailed feature list for estimates'.
- Metrics:** A section titled 'Payables Aging' containing a bar chart.

The 'Payables Aging' chart shows the following data:

Aging Period	Amount
Current Period	-1000
31 - 60 Days	0
61 - 90 Days	0
91 and Over	6000