

Progressive System Solutions, Inc. Newsletter

PSS Monthly™ is a monthly email publication from Progressive System Solutions, Inc.

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Budget Entry Utility for Microsoft Dynamics™ SL



Manage budgets more effectively; PSS Budget Entry simplifies budget entry and approval in Microsoft Dynamics™ SL. Prior year budget amounts and notes can be copied over to the new budget year. Approved budgets are posted into the Budget Maintenance screen in GL, for use with FRx and financial reporting.

Features Overview

Organizes users by departments to provide control of who can enter and approve budgets.

Assign accounts and sub-accounts to departments/users.

View Multiple Years Actual/Budget History in the data entry window.

Grow or reduce prior years

We hope that 2009 is treating you well so far. We would like to thank everyone who entered our ERP software giveaway last month. The response was overwhelming! Our winners were the first two companies that responded and they are....

Presidente Club de Viajes

Mexico City, DF Mexico

Diamond Resorts International®

Las Vegas, NV USA

Speaking of giveaways, you're invited to participate in the future by signing up via [email](#).

Enjoy this month's issue and, if you have any comments, please send us an [email](#).

Carolyn Jasiulewicz
CPA, President

Please forward this newsletter to your colleagues and friends who are interested in IT and Microsoft Dynamics™ issues. Your feedback is always welcome at mail@progsys.net

What do business users want from their ERP system?

By Mitchell Khorsandi,
Progressive System Solutions, Inc.



It's simple. They want information to do their jobs and they don't want to have to work hard to get it. When they can't get information from their ERP database, they are forced to build shadow IT systems using tools like Excel.

The most widely used Business Intelligence tool today is the spreadsheet. Almost everyone in the business world gets Microsoft Office with Excel on their PC. Many track expenses, plan their budgets and forecasts, and create reports using Excel.

Excel is a great tool and if the business user wants to use it, we can't argue. However, the creation of custom built reports with data pulled from who-knows-where using self-serving metrics creates problems. Too often, a spreadsheet is used to twist budget reports and forecasts to be the most favorable to certain departments. Then you end up with a group of business people debating the numbers they have in their reports rather than discussing what measures they should take to improve their business. Getting bogged down with unrealistic reports when it comes to making projections is dangerous to any business.

amounts or breakdown each line item into detailed entries.

Automatically email for approval. Approved data updates the specified budgets on the GL with the click of a button.

Managers can have access to the YTD Actual Inquiry screen which allows them to view budget to actual.

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Don't miss our Webinars

Fixed Asset Management

Microsoft Dynamics™ SL Utility

Date: September 2, 2009

Time: 2 PM to 3 PM EST

Budget Entry

Microsoft Dynamics™ SL Utility

Date: August 26, 2009

Time: 2 PM to 3 PM EST

Space is limited.
Call 407-523-7676
now or send us an
email to register.

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Too often business users pull data in from unofficial databases, because they don't know that it is available. Business users don't want to create extra work for themselves. So consider how you can set up a data distribution capability with your ERP tool and database.

The best way to eliminate shadow IT systems and improve your business productivity is to find Enhancement Utilities for your ERP software to create a feature-packed system.

Microsoft Dynamics™ SL Tips and Tricks

By Carolyn Jasiulewicz,
Progressive System Solutions, Inc.



Would you like to be able to see the logo for the company that you are logged into? This really helps you identify what company you are in to avoid posting errors. To do this follow these steps:

1. Create or use a logo of your company.
2. Name the logo in .BMP format using the Company ID for the file name. (So if your company ID you use when you log in is "PSS" you would name the file "PSS.BMP".
3. Save the file in the root folder where your software is stored. This would be the folder where you can see the /usr_rpts folder and other application folders.
4. When you next login you should now see your logo!

Learn about some Microsoft Dynamics™ SL shortcuts using function keys:

- F1 Opens the Solomon help.
- F2 Opens Relative Date window.
- F3 Display a list of possible values for the field.
- F4 Switches screen between "grid-view" and "form-view".
- F5 Zero out the current contents of the control.
- F7 Enters the current date.
- F9 Opens Solomon notes screen.