

# ***Dynamics SL Advanced Learning Program™***

*"Learn Beyond the Basics."*



Kristin Foose (left) and Linda Smith (right), Co-Instructors  
with Brian Dietz, Host

## **How to Automate Data Entry**

Presented By:

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**1. Automating Data Entry Will**

- Save \_\_\_\_\_ time.
- \_\_\_\_\_ embarrassing errors.
- Create a \_\_\_\_\_ repeatable process.
- Make **me** a \_\_\_\_\_!

**2. Ways To Get Data Into Dynamics SL**

- Manual Entry  
Advantages: \_\_\_\_\_  
Disadvantages: \_\_\_\_\_
- Copy – Paste from Excel  
Advantages: \_\_\_\_\_  
Disadvantages: \_\_\_\_\_
- Dynamics SL data import tool  
Advantages: \_\_\_\_\_  
Disadvantages: \_\_\_\_\_

*Add Your Notes Here:*

### 3. Users Import

- Journal Entries
- AP Vouchers
- AR Customer Data
- Cash Manager
- Budgets and Forecasts
- What can data can I import? \_\_\_\_\_  
\_\_\_\_\_

### 4. Four Steps For Importing Data

- Create a \_\_\_\_\_ macro template
- Create an import file with a \_\_\_\_\_ file format
- Import file using the \_\_\_\_\_ tool
- \_\_\_\_\_ the import using Dynamics SL reports

### 5. Control Macro Generator

The control macro generator screen is located:

Dynamics SL version 6.5: \_\_\_\_\_  
\_\_\_\_\_

Dynamics SL version 7: \_\_\_\_\_  
\_\_\_\_\_

The \_\_\_\_\_ control file can be used as a template for your data file.

## 6. Data Formatting

Excel is frequently used to create the data import file but it is \_\_\_\_\_ required.

The data file should be saved in a \_\_\_\_\_ file format prior to import.

## 7. Budget Import

Import processing options include:

- Edit Only: \_\_\_\_\_
- Combined Edit and update: \_\_\_\_\_  
\_\_\_\_\_
- Update After Successful: \_\_\_\_\_  
\_\_\_\_\_

You should search the log file for the word \_\_\_\_\_ to find errors in your data file.

## 8. Correcting Import File Errors

- Any subaccount that starts with zero should be formatted as a \_\_\_\_\_ cell in Excel.

- Dynamics SL allows you to maintain \_\_\_\_\_ budget versions.

## 9. Reporting

- The \_\_\_\_\_ report can be run to verify the imported budget.
- Reports can be written in \_\_\_\_\_ Designer to view imported budget information.

Questions? Need assistance? Contact your ALP Team:

**Brian Dietz** \* [bdietz@brittenford.com](mailto:bdietz@brittenford.com) 703-860-6945 ext. 205  
**Linda Smith** \* [LSmith@Brittenford.com](mailto:LSmith@Brittenford.com) \* 703-860-6945 ext. 261  
**Kristin Foose** \* [KFoose@Brittenford.com](mailto:KFoose@Brittenford.com) \* 703-860-6945 ext. 253

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