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Tip of the Month – March 2004

Creating Custom Checklists in Great Plains

Did you know that you can create custom checklists to make it easier for users to know what steps need to be done for a certain task (e.g. GL Month End Close)? Below are the instructions for creating a financial user-defined checklist.

1 - Click on Routines-Financial-Checklist
2 - Change the Frequency dropdown to 'User Defined'
3 - Click the 'Add' button
4 - Enter a 'Routine' Name
5 - Use the lookup glass to select a Great Plains Window
6 - Click 'Ok'
7 - Click 'Ok' again
8 - Repeat steps 3 through 7 until you have input all of your tasks
9 - Close the window

To use the checklist, open the checklist window and double-click on the first task. This will bring you directly to that task window. Complete the step and then click on the next step.

Marcia Nita Doron
Marketing Manager
DataSys Corporation
4 Mount Royal Avenue, Suite 250
Marlborough, MA 01752
508-303-9490 ext. 214
mdoron@DataSysCorp.com
www.DataSysCorp.com

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