Free Guide!



How to Take a GP Company Offline

Microsoft Dynamics GP





How to Take a GP Company Offline

It's the end of the year and you are trying to encourage your Microsoft Dynamics GP users into staying logged out of company related windows as you work to complete year-end close. You send blast emails, make calls and even send a few instant



messages to schedule the process, yet you still find that there are folks that just didn't get the memo. This same scenario also crops up when you try to perform file maintenance, even though it is often scheduled and thoroughly communicated. After the battery of unread emails, missed calls and so on, you find yourself wishing there was an easier way.

Microsoft heard your pleas and added a feature in Microsoft Dynamics GP 2013 R2 that allows you to take a company offline. This should help keep your busy bee Microsoft Dynamics GP user's company activity to a minimum during year-end close and for file maintenance. Continuing to schedule these procedures along with this feature should help minimize interruptions and frustration.

As you know, new features are released all the time in the software world. Mass emails are typically sent out to make users aware of the changes, the benefits, and how they can increase productivity. But new tools are only beneficial if you know how to use them, and we all know that between meetings, conference calls, and other things that flood our busy workday, it's not always easy to keep up.

CSSI Technologies is here to help. We've created an easy-to-use, comprehensive guide on how to take a company offline in Microsoft Dynamics GP. Here's what you need to do:

Start by going to Administration > Utilities >System >Take Company Offline. Select a company and click on the Insert button to move the company to the Offline Companies section. You can insert multiple companies one at a time, or use the Insert All button to insert all companies.

| 🚮 Take Company Offline for Mainte | nance | |
|---------------------------------------|--------------------|-----------------------------|
| File Edit Tools Help | | sa Fabrikam, Inc. 1/12/2018 |
| Online Companies: | Offline C | Companies |
| Test Canadian Company Test Company | Insert >> Fabrikan | n, Inc. |
| Offline Message: | Current L | Jsers: 1 |
| () | | • OK Cancel |



Pro Tip...

When you select a company in the Offline Companies list, you can see how many Current Users are logged into that company. Click on the blue hyperlink "Current Users" to see the list of User ID's.

| | 📶 User Activity | | | | |
|---|-----------------------|----------------|-----------|------------|--------------------|
| | File Edit Tools | Help | | sa Fabrik | am, Inc. 1/12/2018 |
| | by User ID | • | | | |
| | ▼ View: All Users; by | User ID | | | 8 |
| | User ID | Company | Date | Time | Client Type |
| | sa | Fabrikam, Inc. | 1/12/2018 | 8:08:24 AM | Desktop 👻 🔺 |
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You can establish a message that will be shown to any user that attempts to log in to a company after it has been taken offline. Select "Default" to utilize the default message, or "Custom" to provide additional information to users. Users that are currently working in the company until they log out. Once they log out, they will only be able to log back in to the company if they have offline access.

| 🚮 Take Company Offline for M | aintenance | | (| |
|---------------------------------------|---|-------------------|-------------------|-----------|
| File Edit Tools Help | | | sa Fabrikam, Inc. | 1/12/2018 |
| Online Companies: | | Offline Companies | | |
| Test Canadian Company Test Company | Insert >> Insert All Remove Remove <u>A</u> ll | Fabrikam, Inc. | | |
| Offline Message: 🧕 Default | Custom | Current Users: | | 1 |
| The company is currently offline fo | r maintenance. Try again later | | | * |
| ۵ 🔘 | | | ОК | Cancel |



Once you are finished, click on the OK button in the bottom right-hand corner.

If users are logged into the companies that are being taken offline, a message appears asking if you would like to send those users a message.

| Microsoft Dyn | namics GP |
|---------------|--|
| 1 | There are users logged into the companies taken offline. Do you want to send the users a message? |
| | |
| | Yes No |

If you click "Yes," the Send Message window appears.

| 🚮 Sen | d Messa | ige | | - | × |
|-------|--------------|------------|------------|--|-------|
| File | Edit | Tools | Help | sa Fabrikam, Inc. 1/12 | /2018 |
| | in an I line | | | a ha Hara IN | 0 |
| | Jser ID | rs in Umin | e Companie | s; by User ID Company Name | - |
| | a | | | Fabrikam, Inc. | |
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| | | | | | |
| Sanda | message | | V Notific | cation Message (for users who are currently logged on) | |
| Sena | message | S 65 | | alion message (for usels who are currently logged on) with Reminder | |
| Messa | ige: | | I dok | with the first design of t | |
| | | | | | * |
| | | | | | E |
| | | | | | |
| | | | | | • |
| 0 | 0 | | | Send Cancel | |



Users will see either a "Task" on their Homepage:

| 🛐 To Do | |
|---|---|
| Reminders | |
| Past Due Receivables Transactions (527) | |
| Past Due Payables (210) | |
| Past Due Payables > \$1,000 (126) | |
| Tasks | |
| Please log out of Fabrikam for file maintenance | |
| | |
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Or they will receive a popup message:

| Microsoft Dy | namics GP |
|--------------|---|
| Â | Please log out of the Fabrikam company for file maintenance |
| | ΟΚ |
| | UK |



When users try to log back in, it will be indicated that the company is offline in the Company name:

| Company Login | | |
|---------------|---|--|
| | | 💾 Microsoft |
| Microsoft Dy | namics | GP 2016 |
| | Company: | Fabrikam, Inc. *Offline* 🔹 👻 |
| | Server User ID Current Users Users Allowed | Dynamics GP 2016 dnewcomer 2 44 |
| 0 | Chang | e User OK Cancel |

If they select the offline company, they will receive this message:



Earlier, we mentioned that the only way a user could continue working in an offline company was if they were granted offline access. Here's how to grant a user offline access:



Go to Microsoft Dynamics GP > Tools > Setup > Company > Company. Once you're on the Company Setup screen, specify the user you would like to set up by entering the User ID in the "User with offline access" field. Be sure to click OK in the bottom right-hand corner to save your changes.

| 🚮 Company Setup | | | | | - • • |
|-----------------|--------------------------|----------|-----------------------|------------|-----------------------------|
| File Edit Tools | Help | | | | sa Fabrikam, Inc. 1/12/2018 |
| Company Name | Fabrikam, Inc. | | Company ID | TWO |] |
| Address ID | Primary 201 | | User Defined 1 | | |
| Name | Fabrikam, Inc. |] | User Defined 2 | | |
| Contact | Taylor Stewart-Cray | | Tax Exempt 1 | | |
| Address | 4277 West Oak Parkway | | Tax Exempt 2 | | |
| | | | Tax Registration | | 23-45615789 |
| | | | Sales Tax Schedule | | COMPANYSALES |
| City | Chicago | | Purchases Tax Sche | edule | COMPANYSALES |
| State | IL . | 1 | | | |
| ZIP Code | 60601-4277 | | | | |
| County | | | 🔽 Security | | |
| Country Code | | Q | Account Security | y | |
| Country | United States | | | | |
| Phone 1 | (312) 436-2671 Ext. 0000 | | User with offline acc | ess | sa 🔎 |
| Phone 2 | (000) 000-0000 Ext. 0000 | | | | |
| Phone 3 | (000) 000-0000 Ext. 0000 | | | | |
| Fax | (312) 436-2896 Ext. 0000 | | | | |
| 20 Q | Human Resources | Extra Fi | elds Options | Internet U | ser Defined Address |

While this feature is very easy to configure, the CSSI team still recommends scheduling year-end close and file maintenance. With the support of our team and this Microsoft Dynamics GP feature, we hope that your year-end and scheduled file maintenance procedures will become frustration free and painless. If you have any questions, our Microsoft Dynamics GP support team is always happy to help! We can be reached at support@cssi.com or at 570-524-4424.

CSSI Technologies is a **certified Microsoft Dynamics GP partner** with over 25 years of experience supporting Great Plains ERP users in Pennsylvania, Delaware, Maryland, New Jersey and New York. CSSI works with GP users in a broad range of industries, such as manufacturing, distribution, warehousing, construction, hospitality, healthcare and education. CSSI's team of experienced GP and accounting professionals is complemented by teams dedicated to custom software development as well as auto ID (barcoding and RFID) and mobile computing technologies.

<u>Contact CSSI today</u> with questions or support requests regarding your GP instance:

www.cssi.com 570-524-4424