

Setup

Last updated: August 25, 2022

Install

Before installing Advanced Credit Control, please ensure that there are no users logged into Microsoft Dynamics GP as this could adversely affect the installation process.

This process will need to be completed on all workstations on which Microsoft Dynamics GP is installed. However, if Microsoft Dynamics GP is run from a network (DYNAMICS.dic is installed in a network location), you only need to install to that location.

1. Launch the install application (provided on cd-rom or downloaded from www.nolanbusinesssolutions.com) .
2. Follow the on-screen instructions to complete the install. The install will confirm the location of Microsoft Dynamics GP and will install the Advanced Credit Control chunk file into this directory.
3. Once the install has completed, run Microsoft Dynamics GP to load the chunk file.

Setup

Form security changes, additions to the menu structure, and any necessary file upgrades are not made during the previous application install process. Use the

Install window to complete these tasks automatically by following the steps below. See Appendix A for information on which forms and menus will be affected.

1. Make sure that no other users are logged into the system.
2. Start Microsoft Dynamics GP – if you log in using the 'sa' user, the install window will automatically be added to your shortcuts (go to step 7). You must login as 'sa' to install when using Microsoft Dynamics GP on a SQL database.
3. Open the 'Shortcut Bar' and select Add. Then select Other Window.
4. Enter Advanced Credit Control Install into the Name field and then expand the Advanced Credit Control folder in the Available Windows list.
5. Expand the Company folder. Then find and select the Install Advanced Credit Control window in the list and push the Add button.
6. Click on the Done button to close the Add Shortcut window.
7. Select Advanced Credit Control Install from the Shortcut Bar. A window showing all the companies will appear, as illustrated below.



8. To register Advanced Credit Control, enter your Registration Keys in the fields provided (You will have received these Registration Keys with your purchase of Advanced Credit Control). This is required to enable use of Advanced Credit Control in companies other than the sample company, 'Fabrikam, Inc.'.

Note: The registration keys may have a built in expiry date. This information is displayed at the bottom of the window (to the left of the Install button).

9. Click on the Register Button, you will receive a message indicating that the Registration was successful.

10. The Add Menu Items option determines if the install should automatically place entries for Advanced Credit Control into the appropriate menus. See Appendix A for more details.

11. The Set Security option will set default security for all users to access the alternate forms and reports. N.B. This will not replace existing security settings (i.e. will not grant a user access to posting screens if they had previously had access removed).

12. For SQL Installations, make sure the Build Tables option is ticked to create the tables on SQL, set permissions to them correctly and install stored procedures.

13. If this install is an upgrade from any previous version of Advanced Credit Control, or part of a Microsoft Dynamics GP upgrade, make sure the Upgrade Tables option is ticked. The install window will automatically default this option to ticked if it detects a table upgrade is required.

14. Use the Mark/Unmark, Mark All and Unmark All buttons to mark all the companies to install Advanced Credit Control to. Finally, push the Install button.

The system automatically places all Credit Control windows on a new 'Credit Control' sub-menu on the affected Microsoft Dynamics GP menus, for example Enquiry, Sales, Credit Control will then list each of the Credit Control enquiry screens.

Ten customer letters are provided by the system, with four styles for each letter. You can make use as many or as few of these as you wish, and they may be amended using report writer to reflect the requirements of your company. The ten letters are known as Debtor_Letter1_x through Debtor_Letter10_x, with x being the style from 1 to 4.

The customer letters should be setup before using Advanced Credit Control and then customer letters should be assigned to the ageing periods. This is accomplished through the Customer Letters Maintenance window and the Overdue Levels setup window.

Installing the Advanced Credit Control extensions into SmartList is handled separately. See the SmartList Integration section on page 28 for details.