

**COPY/
FROM EXCEL
PASTE
INTO DYNAMICS GP**

TGP Copy/Paste Manual

TitaniumGP® Copy/Paste User Manual Version 2.3

Microsoft
Partner

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What is TGP Copy/Paste?

TitaniumGP's Copy/Paste is exactly what it sounds like. TGP Copy/Paste allows users to copy information from Microsoft Excel and paste it directly into Dynamics GP. With TGP Copy/Paste, users can create multiple transactions with every paste operation and are able to do so in over 100 different GP windows, including:

- Journal Entries
- Purchase Orders
- Receiving Transactions
- Inventory Transfer
- SOP Entries
- and many, many more!

TGP Copy/Paste is intended to ease the process of entering information into GP, reducing the time you spend inputting and reviewing data with our easy-to-use Excel templates. With TGP's ability to create multiple transactions at once, users are also able to bulk update data every time they use TGP Copy/Paste.

To paste into Dynamics GP using TGP Copy/Paste, the current user must have access to that window. This built-in security check prevents unauthorized users from pasting master data or transactions where access has not been granted.

How can TGP Copy/Paste help my business?

TGP Copy/Paste is a great tool for all GP users. With its incredible capacity to bulk update information and its ability to copy data directly from Microsoft Excel into Dynamics GP, it's a tool that can drastically improve user productivity.

Here are some of the ways that our customers have leveraged TGP Copy/Paste:

Update existing sales orders.

It's easy to update transactional data when using TGP Copy/Paste in conjunction with our Excel templates. In case of unforeseen order delays or cancellations, TGP Copy/Paste can be used to update all the unfulfilled sales orders containing delayed items. Start by using SmartList to find all of these orders. Once exported to Excel, the Copy/Paste Excel template can be used to update every single one of these sales orders in one paste operation by using the "UpdateLine" action.

Bulk update inactive item statuses.

Dynamics GP's SmartList provides an easy way to query information. Once you find the information that you'd like to bulk update, you can copy this data into Excel and add an additional column called Inactive. Using this column, you can denote which inventory items will no longer be active. With TGP Copy/Paste, it takes a matter of seconds to make this update across your system.

Update multiple purchase orders at once.

One of the amazing things TGP Copy/Paste can do is edit multiple purchase orders at once. Just fill in each row of our Excel template for Purchase Orders with a change you'd like made. Once you're done, paste all the information into GP at once with a single paste operation.

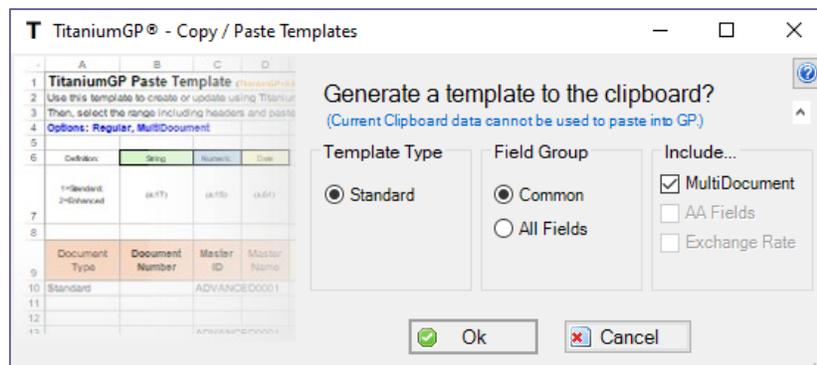
More than anything else, TGP Copy/Paste is an amazing tool for optimizing a company's workflow. With TGP Copy/Paste, your employees won't have to manually update or create entries line by line. With a single paste operation, it's possible to create dozens of entries at once.

Accessing TGP Excel Templates

The templates for Copy/Paste can be accessed in two different ways:

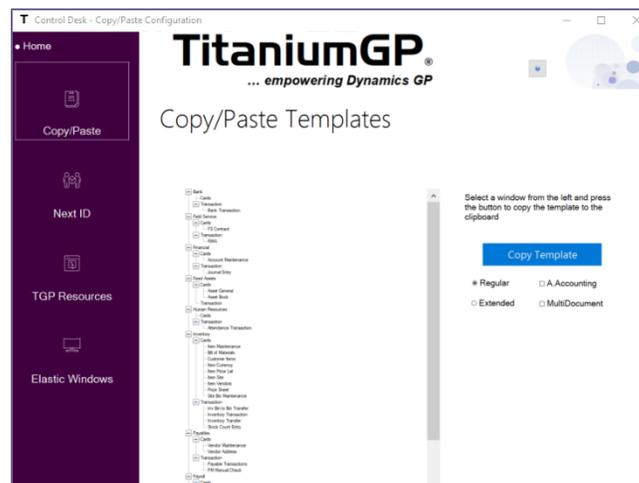
1. Access the templates by attempting to paste

The first way to access the templates is by attempting to paste into GP with an empty clipboard or with one that is incompatible with TGP Copy/Paste. TGP will recognize the error and open a window with our Copy/Paste templates. Simply choose the template you want to copy into your clipboard. Paste the template into Excel and start populating!



2. Access the templates in the Control Desk

The second way to access our Excel templates is to open the TGP Control Desk and enter the Copy/Paste settings (Home > Features > Copy/Paste). From there, users can select a template. Paste it into Excel to start using right away!



Using TGP Excel Templates

There are certain things to keep in mind when using one of the TitaniumGP® templates:

- When selecting data to paste, the range needs to include headers.
- Empty rows and columns are automatically ignored by the program, so don't worry about unselecting them.
- Only the columns whose headers are in bold with a red asterisk are required.
- Colors and any type of formatting are ignored.
- If a cell has a formula, only the value is considered (when pasted from Excel).
- The order of the columns is irrelevant if the headers are correct.
- Numeric columns are transformed into the following:
 - o A single dash is converted to 0
 - o If a \$ sign is included, it will be ignored from numeric fields
 - o Commas will be removed from numeric fields

For master data, if you need to clear a field value use \s in the cell.

You'll notice that some of the columns in the templates have instructions in the row above them.

For example, the image below is from the Sales Transaction Entry Excel template:

Definition:	String	Numeric	Date				
UpdateHeader, VoidDoc, DeleteDoc, AddLine, UpdateLine, DeleteLine, Purchase	1=Quote; 2=Order; 3=Invoice; 4=Return; 5=Back order; 6=Fullfillment order	(s:21)					
Action*	Type*	Document No*	Batch No	Document Date	Customer PO	ReqShipDate	Tr N

You'll see that above Action (which is in bold and has a red asterisk meaning that it is a required field) there are certain actions you can use: UpdateHeader, VoidDoc, etc. These are the options that you have for this column. The templates are prepopulated with instructions that vary by template and by column depending on the types of things that can be typed into that space.

Let's look at another example.

The following template is for Item Maintenance:

Definition:	String	Numeric	Date							
(s:30)	(s:100)	(s:15)	(s:10)	(s:10)	Active / Inactive	Item type 1=Sales inventory; 2=Discontinued; 3=Kit; 4=Miscellaneous charges; 5=Services; 6=Flat fee Default is one on new record	Valuation method: 0=Any ITEMTYPE other than 1 or 2; 1=FIFO perpetual; 2=LIFO perpetual; 3=Average perpetual; 4=FIFO periodic; 5=LIFO periodic Default is one on new record	Sales tax options: 1=Taxable; 2=Nontaxable; 3=Base on customers Default is one on new record	(s:15)	(s:15)
Item Number*	Item Description	Short Description	Generic Description	Class Id	Inactive	Item Type	Valuation Method	Sales Tax Options	Tax Schedule Id	S

You'll notice that the columns are different from before and that the options for each column are listed right above it. This will be the case for all our Excel templates, making it easy to understand the type of information that can be filled into that space.

It might sound complicated, but once you get started using our Excel templates you'll see that it's actually quite simple!

Using TGP Copy/Paste

There are a few simple steps that need to be followed every time a GP user wants to paste information. Before pasting:

1. Validate that the clipboard data is a table
2. Verify that the columns remain consistent for each row
3. Verify that the first row has the header information
4. Check that the required fields are included in the data range
5. Validate that all column names match the ones in the template

There is a possibility of failure at each of these steps. When a failure occurs, the user will be presented with an error message describing the failure.

Let's get started using TGP Copy/Paste.

Step 1

Open the Dynamics GP card you want to paste information into.

The screenshot displays the Dynamics GP Vendor Card form. The form is organized into several sections:

- Vendor Information:** Vendor ID, Name, Short Name, Check Name, Status (Active), Class ID.
- Primary Address:** Address ID, Contact, Address, City, State, ZIP Code, Country Code, Country.
- Phone and Fax:** Phone 1, Phone 2, Phone 3, Fax.
- Shipping and Tax:** Tax Schedule, Shipping Method, UPS Zone.
- Additional Information:** Vendor Account, Comment 1, Comment 2.

The form includes a navigation bar at the bottom with the text "by Vendor ID" and a dropdown menu.

Step 5

Using the pasted template, fill in the necessary information. Remember that only the fields in bold and with a red asterisk are required.

In the following table, the only required field is Vendor ID:

The screenshot shows an Excel spreadsheet titled 'Vendor Maintenance Template (CPV - TitaniumGP v2022.0.60.0)'. The spreadsheet contains instructions for using the template and a table of vendor data. The table has the following columns: Vendor ID*, Vendor Name, Vendor Short Name, Vendor Check Name, Hold, Vendor Status, Vendor Class Id, Primary Vendor Address Id, Vendor Contact, Address 1, Address 2, Address 3, City, State, Zip Code, Country Code, Country, Phone 1, Phone 2, Phone 3, and Fax Number. The data rows include ACETRAVEA Travel Company, ADVANCE Advanced Office Systems, and ALLENSON Allenson Properties.

Vendor ID*	Vendor Name	Vendor Short Name	Vendor Check Name	Hold	Vendor Status	Vendor Class Id	Primary Vendor Address Id	Vendor Contact	Address 1	Address 2	Address 3	City	State	Zip Code	Country Code	Country	Phone 1	Phone 2	Phone 3	Fax Number
	ACETRAVEA Travel Company							Miguel	123 Riley St	123123		Sydney	NSW	2086			(298) 555-0102			
	ADVANCE Advanced Office Systems							Sue	678 Sherwood Park South			Arlington	IL	60004-2922			(618) 555-0102			
	ALLENSON Allenson Properties								543 Washington			Chicago	IL	60608			(312) 555-0103			

Step 6

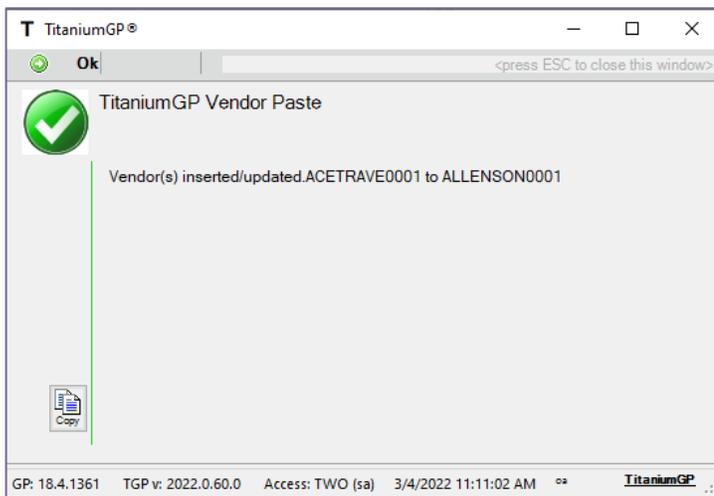
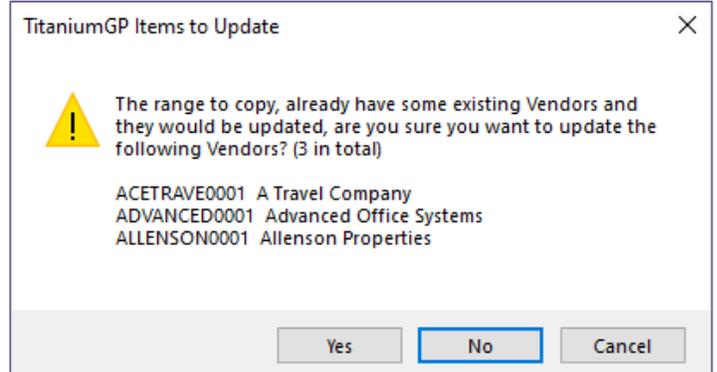
Once you have input the information, select the entire table including the headers and copy it into your clipboard.

Note: With one of the cells in the table selected, you can click **Ctrl+A** to select the entire table.

Step 7

Return to the GP card and once again select the “**Additional**” drop-down menu and click “**TGP-Paste**”, or simply use the keyboard shortcut **Ctrl+T**.

Note: If the information already exists, TitaniumGP® will warn you and ask if you wish to update it.



Step 8

Your information will now be pasted into the correct fields.



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Hours

M-F: 8am - 5pm (PST)

S-S: Closed



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