

The logo for CAL Connect 2010 Dynamics GP User Event. It features the text "CAL Connect 2010" in a large, bold, blue, italicized font. Below it, "Dynamics GP User Event" is written in a smaller, blue, italicized font. A yellow swoosh arches over the text, and a blue circular icon with a white dot is positioned at the end of the swoosh.

CAL Connect 2010
Dynamics GP User Event

SMARTLIST BUILDER

Matthew Zurosky

Application Support Technician

mattz@calszone.com

WHAT IS SMARTLIST BUILDER

- Key Features
- What does it look like?
- Data Source Options
- Benefits Vs. Other Products

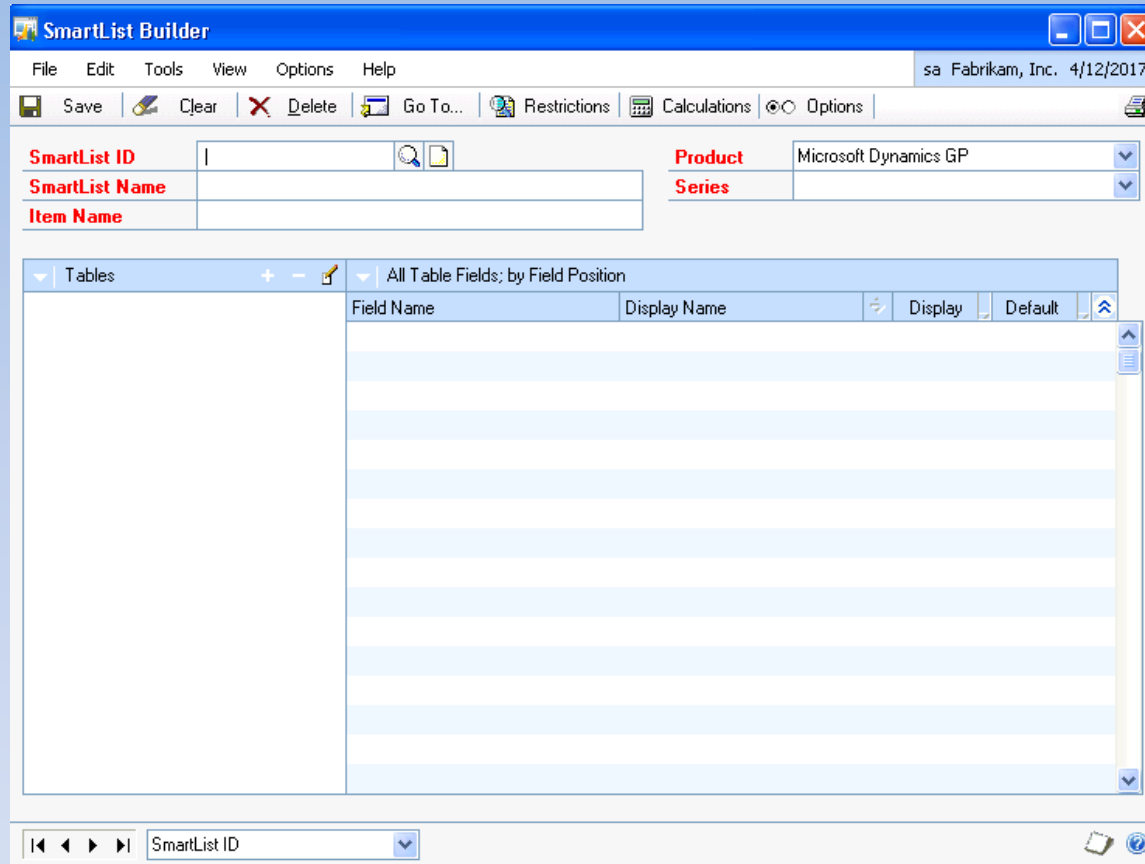


KEY FEATURES

- Quickly link data from up to 32 separate tables, including 3rd Parties and external data sources.
- Create calculated fields to quickly analyze specific data sets.
- Display fields in specific formats such as Phone Numbers, Zip Codes, additional decimal places, proper signs for Debit and Credit Amounts.
- See only the information that you need by setting up restrictions on fields and also users.
- Create Go To buttons to drill down to a window, including windows from any third-party product or to open other smartlists, websites, and files.
- Create smartlists that can pull data across GP companies for quick analysis without having to switch between companies.
- Templates and Smartlist Objects available to download from Microsoft to build a base off of.



MAIN WINDOW FOR SMARTLIST BUILDER



ADD GP TABLES BY DISPLAY NAME

Add Table 4/12/2017 >>

File Edit Tools View Options Help

Product	Microsoft Dynamics GP
Series	Purchasing
Table	PM Paid Transaction History File

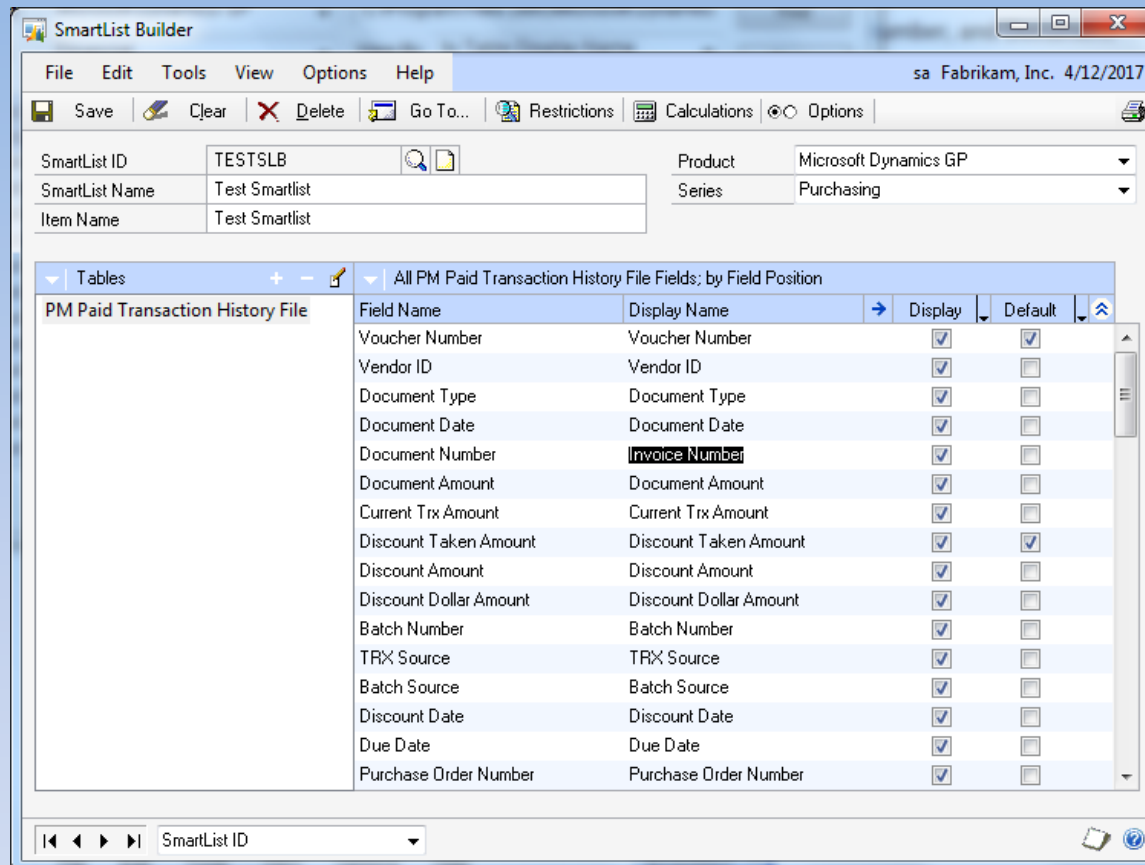
Key Fields + -

Document Type
Voucher Number

Matched Tables Save Cancel

- GP provides preset Key fields
- Link up to 32 Tables from Various data sources

COLUMNS ARE POPULATED FROM THE TABLE



- Select Fields to Display/Restrict to End Users
- Select Fields to Default
- Change the Display Name of the Columns

CREATE GO TO WINDOWS FOR DRILLING INTO DATA

File Edit Tools Help sa Fabrikam, Inc. 4/12/2017

SmartList ID: TESTSMB
SmartList Name: Test SmartList

Description	Product	Go To Type
Payables Zoom	Microsoft Dynamics GP	Payables Transaction Inquiry

Default Go To: Payables Zoom

OK

- Link directly to transactions Inquiry windows
- Add additional Go To windows for various other quick links such as other smartlists, 3rd party windows, and files.

SET RESTRICTIONS AND LIMIT USER ACCESS TO SPECIFIC DATA

Restrictions

File Edit Tools View Options Help sa Fabrikam, Inc. 4/12/2017

SmartList ID: TESTSMB
SmartList Name: Test SmartList

Field	Restriction	Value
Document Type	Is Equal To	Voucher

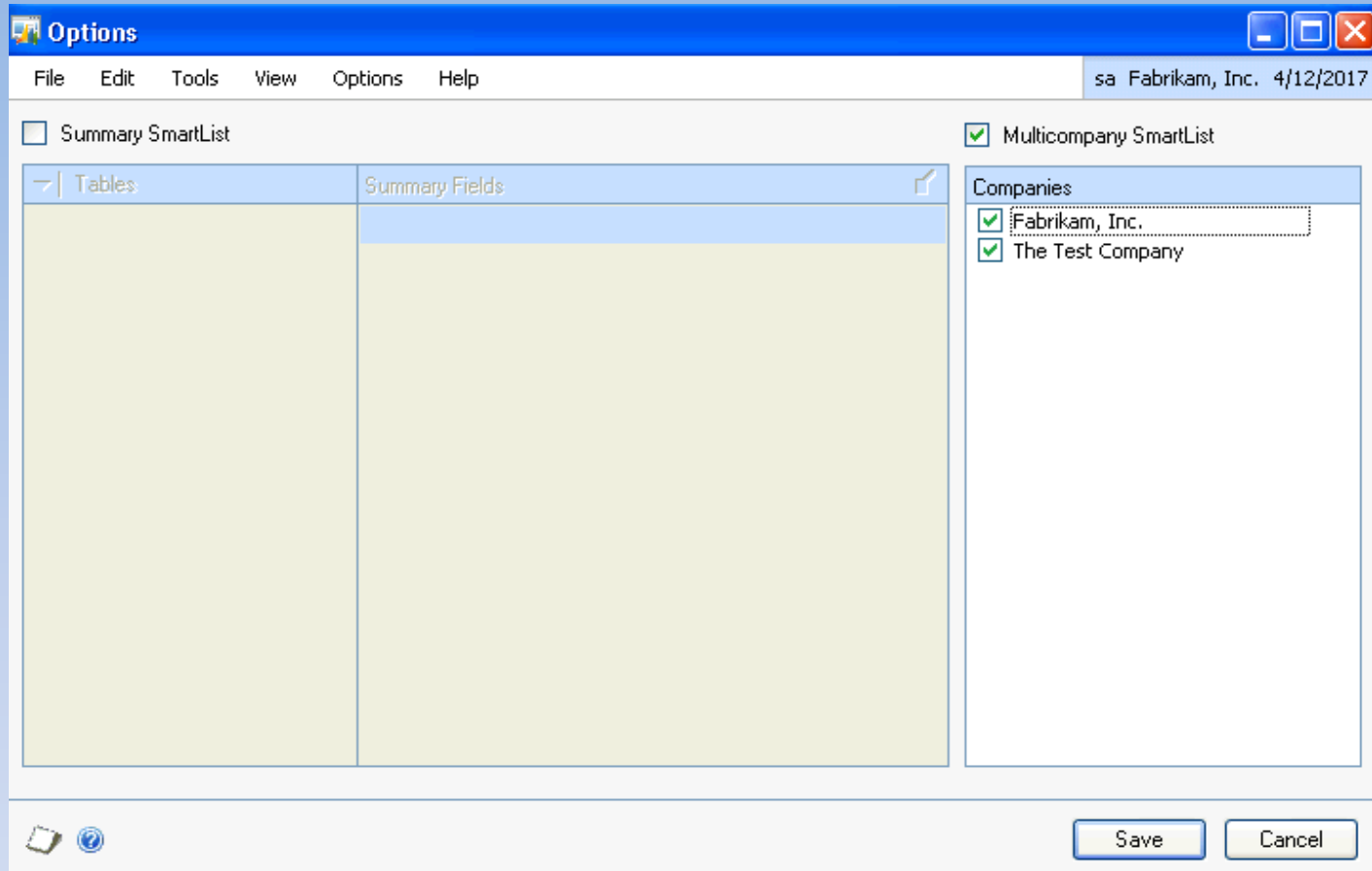
Apply Restriction To: Selected Users [v] [Mark All] [Unmark All]

User ID	User Name
<input type="checkbox"/> LESSONUSER2	LESSONUSER2
<input checked="" type="checkbox"/> matt	matt
<input type="checkbox"/> sa	sa
<input type="checkbox"/> Test	Test
<input type="checkbox"/> training	training

OK

- Restrict data from within Smartlist Builder to free up search criteria slots
- Restrict sensitive data to specific users

SUMMARY SMARTLISTS AND MULTI-COMPANY CAPABILITY



- Design Specific Smartlists to group or sum data
- Ability to pull data across multiple companies

WHAT A CUSTOM SMARTLIST LOOKS LIKE

SmartList

File Edit Tools SmartList Additional Help sa Fabrikam, Inc. 4/12/20

Search Refresh Columns Favorites Print Exce| Word

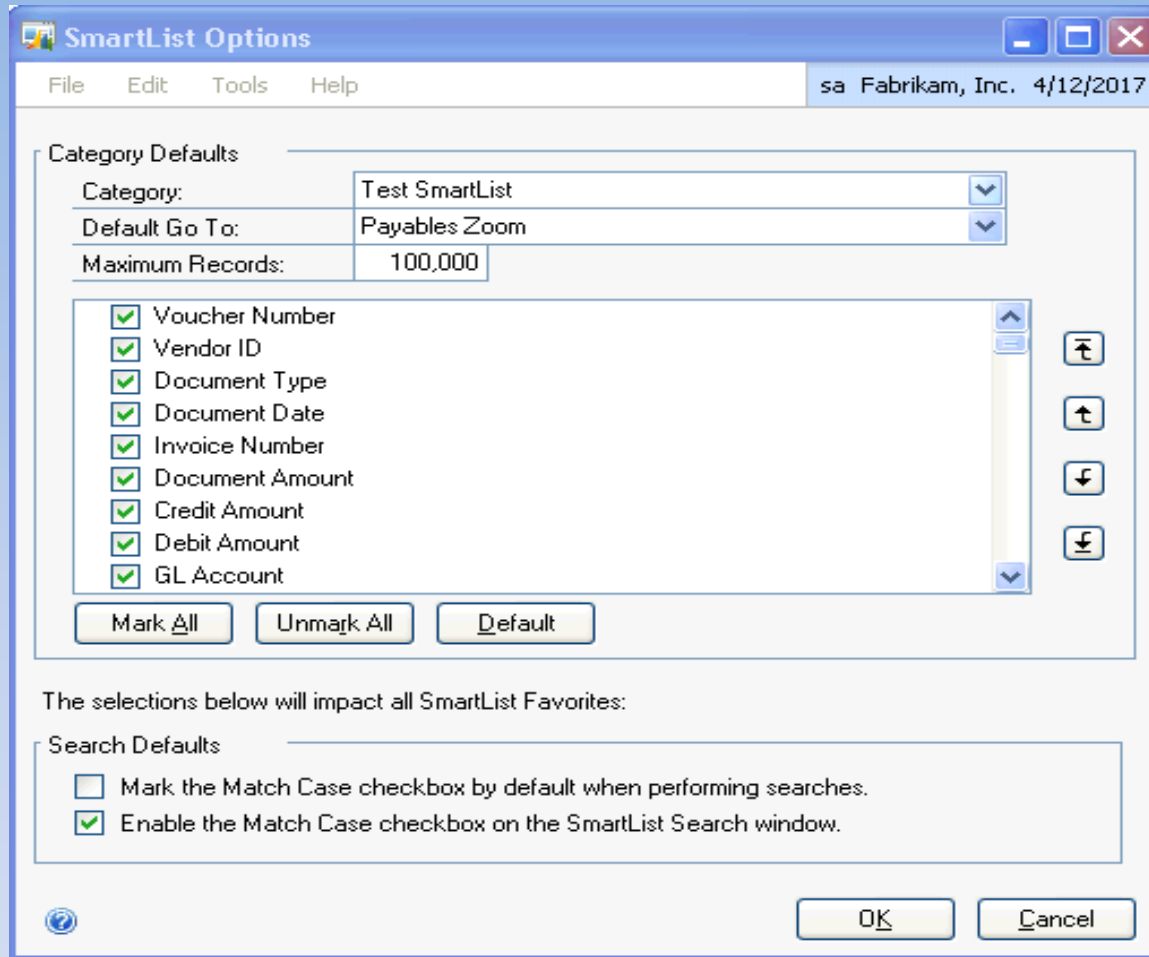
- Company
- FieldService
- Financial
- Fixed Assets
- Human Resources
- Inventory
- Payroll
- Purchasing
 - Paid PO's
 - Payables Transactions
 - Purchase Line Items
 - Purchase Orders
 - Receivings Line Items
 - Receivings Transactions
 - Test SmartList**
 - Vendor Addresses
 - Vendors
- Sales

Test SmartList				
Voucher Number	Vendor ID	Document Type	Document Date	Invoice N
00000000000000075	HILLSBR0001	Voucher	10/29/2013	5001
00000000000000075	HILLSBR0001	Voucher	10/29/2013	5001
00000000000000075	HILLSBR0001	Voucher	10/29/2013	5001
00000000000000075	HILLSBR0001	Voucher	10/29/2013	5001
00000000000000075	HILLSBR0001	Voucher	10/29/2013	5001
00000000000000075	HILLSBR0001	Voucher	10/29/2013	5001
00000000000000076	DISTANTI0001	Voucher	11/5/2013	6000
00000000000000076	DISTANTI0001	Voucher	11/5/2013	6000
00000000000000076	DISTANTI0001	Voucher	11/5/2013	6000
00000000000000076	DISTANTI0001	Voucher	11/5/2013	6000
00000000000000076	DISTANTI0001	Voucher	11/5/2013	6000
00000000000000076	DISTANTI0001	Voucher	11/5/2013	6000
00000000000000076	DISTANTI0001	Voucher	11/5/2013	6000
00000000000000076	DISTANTI0001	Voucher	11/5/2013	6000
00000000000000077	DISTANTI0001	Voucher	12/15/2013	6001
00000000000000077	DISTANTI0001	Voucher	12/15/2013	6001
00000000000000077	DISTANTI0001	Voucher	12/15/2013	6001
00000000000000077	DISTANTI0001	Voucher	12/15/2013	6001
00000000000000077	DISTANTI0001	Voucher	12/15/2013	6001
00000000000000077	DISTANTI0001	Voucher	12/15/2013	6001
00000000000000077	DISTANTI0001	Voucher	12/15/2013	6001
00000000000000077	DISTANTI0001	Voucher	12/15/2013	6001
00000000000000087	CIRCUITD0001	Voucher	10/7/2013	1001

00 Test SmartList Completed First 1000 records with no search criteria.



ABILITY TO SET THE MAX RECORD COUNT



- Tools > Setup > System > Smartlist Options
- Speed up data generated in the Smartlist

DATA SOURCE OPTIONS

- GP Tables and Views
- Custom Tables and Views
- External Data Sources via ODBC – Excel, Access, other SQL DB's



SLB VS. COMPETITION

- Crystal
 - Requires technical user to develop reports
 - Data generated outside of GP
- SSRS
 - Requires technical development
 - Internal website needed to deploy reports
- GP Report Writer
 - Limited Functionality
 - Only one modified report available



COMMENTS, QUESTIONS

- Under e-learning there is a training session on Smartlist Builder (ID# 8687).
- User Documentation can be found under the Install Folder.

