

CAL Connect2014 ***Dynamics GP User Event***



A SIMPLE WAY TO CHANGE SMARTLIST REPORTS WITH SMARTLIST DESIGNER

Presented by:
Brenda Willey
GP Consultant/Implementation Specialist



CAL Connect2014
Dynamics GP User Event



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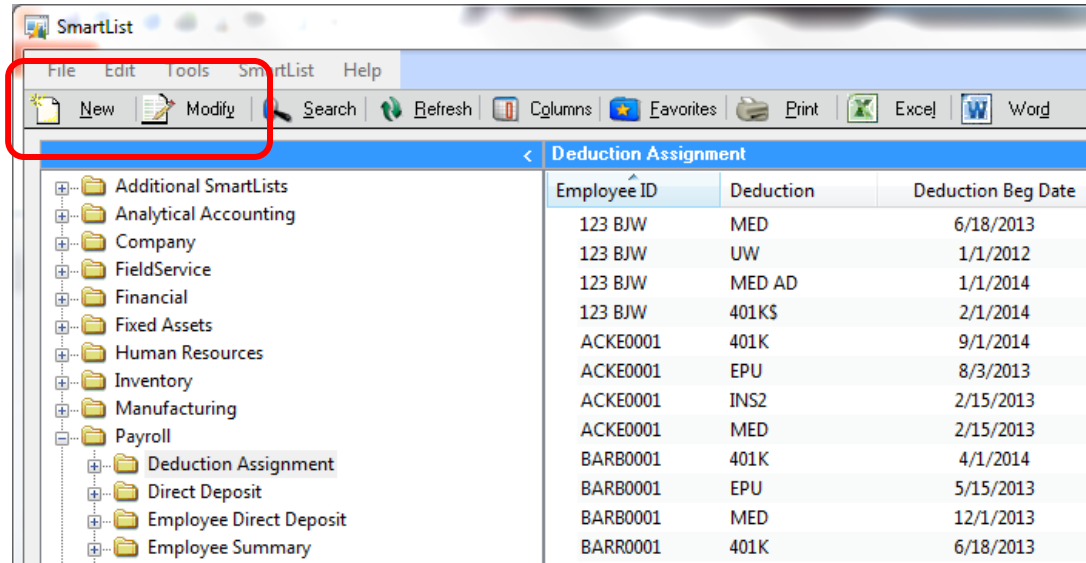
SMARTLIST DESIGNER FEATURES

- Explore Database tables and views
- Add or remove the fields from Smartlist
- Create and Modify calculated fields
- Select a format for a currency field
- Specify relationships between tables
- Specify filters to restrict data
- Preview your results

HOW TO GET TO SMARTLIST DESIGNER

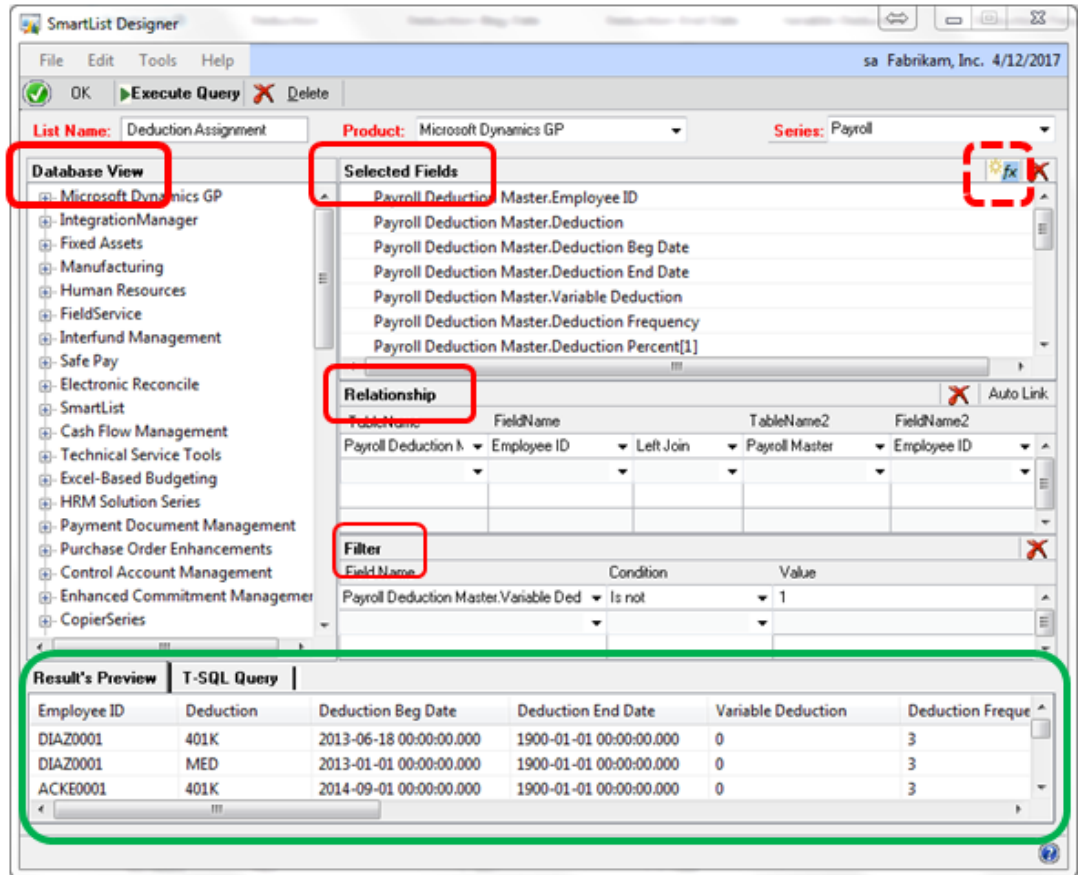
There are two new buttons in Smartlist.

- New – to create a new Smartlist.
- Modify – to modify and existing Smartlist.



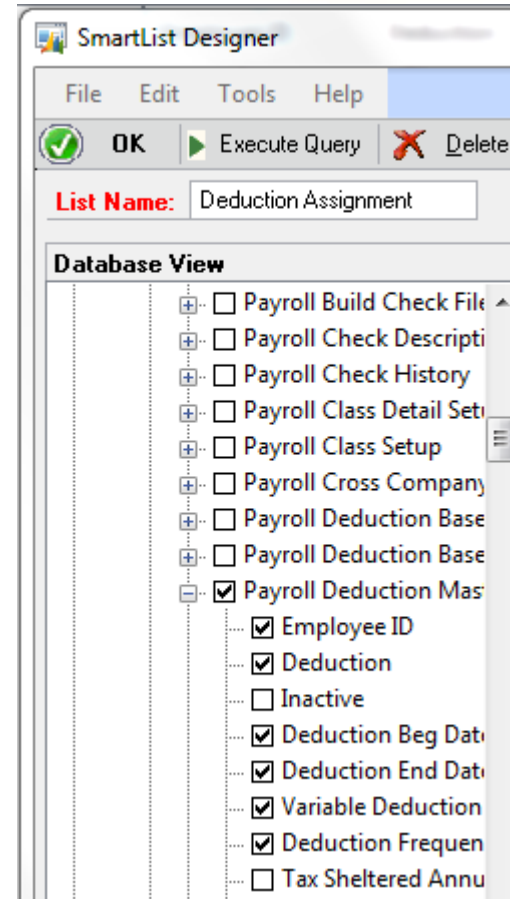
COMPONENTS OF SMARTLIST DESIGNER

- Database view
- Selected Fields
- Relationships
- Filter
- Calculated Field
- Results Preview Pane



DATABASE VIEW

Displays a tree view that shows the tables and views that are associated with the company. To add or remove fields from the Selected Fields area, you can mark or unmark the fields in a table or view.



SELECTED FIELDS

Displays all of the fields you selected


- Create from existing Smartlist – it will display all of the default fields in the current Smartlist
- New Smartlist – you can use the select tables and view in the Database View area to create a query.

Database View	Selected Fields
<input checked="" type="checkbox"/> Payroll Deduction Mas	Payroll Deduction Master.Employee ID
<input checked="" type="checkbox"/> Employee ID	Payroll Deduction Master.Deduction
<input checked="" type="checkbox"/> Deduction	Payroll Deduction Master.Deduction Beg Date
<input type="checkbox"/> Inactive	Payroll Deduction Master.Deduction End Date
<input checked="" type="checkbox"/> Deduction Beg Date	Payroll Deduction Master.Variable Deduction
<input checked="" type="checkbox"/> Deduction End Date	Payroll Deduction Master.Deduction Frequency
<input checked="" type="checkbox"/> Variable Deduction	Payroll Deduction Master.Deduction Percent[1]
<input checked="" type="checkbox"/> Deduction Frequen	

RELATIONSHIP






Use to create a relationship between the tables and the views that are selected in the Database View area.

Auto Link button tries to create a relationship between the tables selected in the Select Fields List. You should verify that the links in the relationship are valid. IF it cannot, you will need to link manually.

Relationship						Auto Link
TableName	FieldName		TableName2	FieldName2		
Payroll Deduction M	Employee ID	Left Join	Payroll Master	Employee ID		

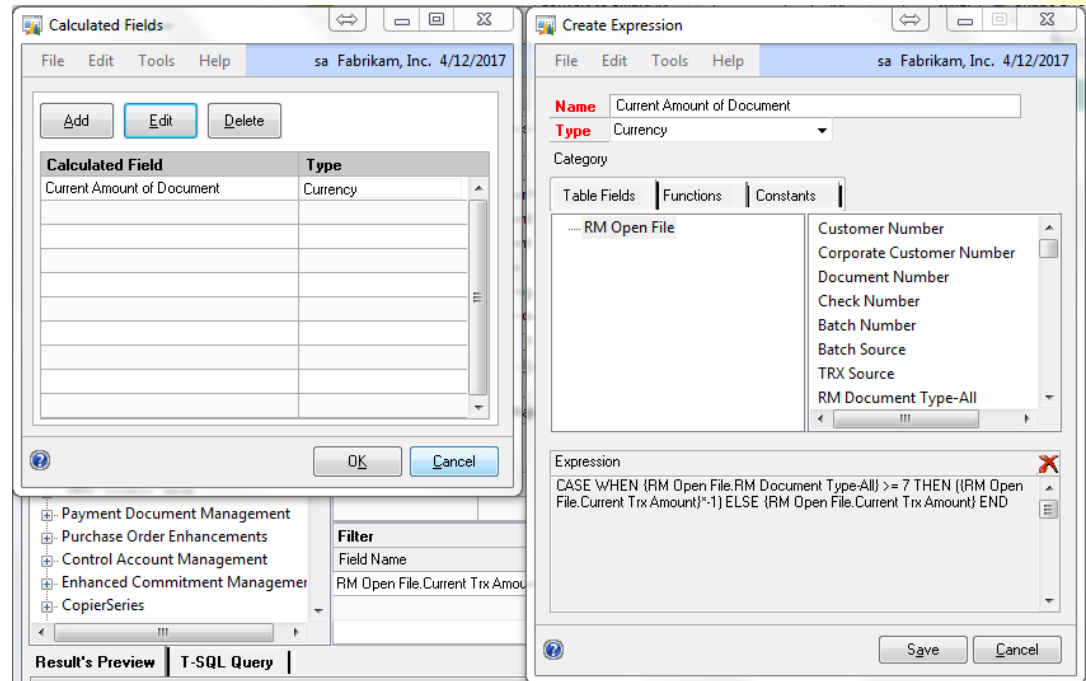
FILTERS

Filters in the Designer work exactly like the search filters in Smartlist. This feature allows you to expand on the four in Smartlist.

Filter 		
Field Name	Condition	Value
Payroll Deduction Master.Variable Ded 	Is not 	1
		

CALCULATED FIELDS

Allows IF/Then Statements,
Text strings, or arithmetic
calculations.



DEMO

Paycode Assignment Smartlist

SMARTLIST DESIGNER VS SMARTLIST BUILDER

Smartlist Builder is a third party product from eOne Solutions .

- Smartlist Builder features....
 - Multi-Company
 - Re-order of Columns
 - Go-To's – drill down functionality
 - Import/Export
 - Extender
 - SQL Objects
 - Restrictions
 - Matched Tables
 - Column Display
 - Account Indexes & Note Indexes
 - Formatting
 - Security
 - Excel Report builder, Navigation List Builder, Drill Down Builder
 - Calculated fields in Smartlist Builder are more powerful
 - Excel Report Builder & Navigation List Builder are included and can only be purchased with Smartlist Builder.



RESOURCES

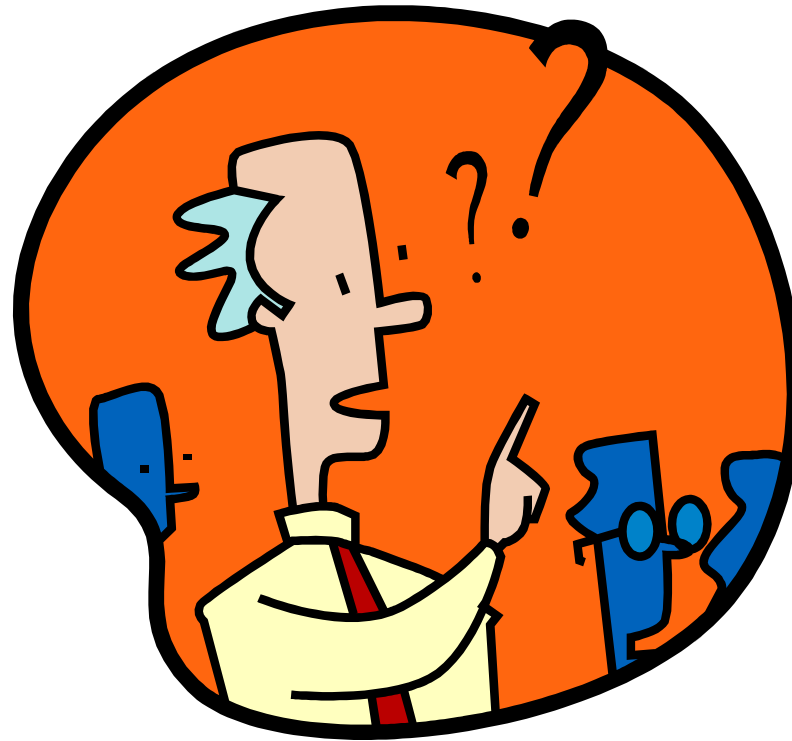
Customer Source
GP User Group
Victoria Yudin

<http://mbs.microsoft.com/customersource>

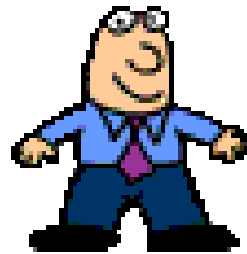
<http://www.gpug.com/>

<http://victoriayudin.com/>

Q & A



THE END



Don't forget to fill out your Evaluation Forms