

SmartLists Everyone Should Have

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Introductory Remarks

- Quick Question: How many of you use SmartLists?
- Smartlists might just be the single best feature of GP
- The more you use them, the more ways you will find to use them
- Don't feel bashful if you don't, I've noticed many people haven't over the years
- These are ones EVERYONE should have in their arsenal

First things first....

- You gotta add Smartlist to your Toolbar. Here's how:
- Unlock toolbar. Right-click, unmark
- Click Customize. Microsoft Dynamics – Smartlist
- Click Modify Selection. Text Only
- Lock toolbar. Right-click, unmark

Two ways to modify a Smartlist

1. Make a Favorite within a folder
2. Modify the Defaults under Smartlist Options
 1. NOTE: Need System Password to do this

Accounts Smartlist

- Add Main Segment
- Add Typical Balance
- Add Posting Type

Speaking of Accounts....

- It's THE ONLY way to look at your chart of accounts
- Make a favorite for Profit and Loss Accounts and Balance Sheet Accounts

Tired of all your Accounts not showing up in Defaults (or Vendors, Customers, etc)?

- Change it. Administrative Page – System - Smartlist Options
- Maximum records. Pick a number more than your chart of accounts.
- Don't do this for Transactions Smartlist. Will slow your system down

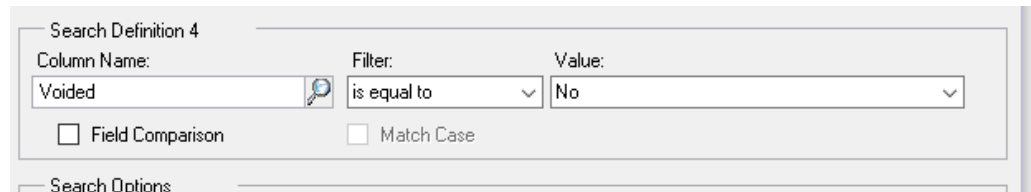
Payables Transactions

- Add Document Amount
- Take off Current Amount. It's misleading
- Add Vendor Name

Fix the d*** Past Due Payables Favorite

- Does it look like you have a bazillion dollars past due?
- Out of box GP (past versions) included Voids—from the beginning of time.

- Add Search
- filter



The screenshot shows a window titled "Search Definition 4". It contains a table with three columns: "Column Name", "Filter", and "Value". The "Column Name" field contains "Voided" with a magnifying glass icon to its right. The "Filter" field contains "is equal to" with a dropdown arrow. The "Value" field contains "No" with a dropdown arrow. Below the table, there are two checkboxes: "Field Comparison" and "Match Case", both of which are currently unchecked. At the bottom of the window, there is a section labeled "Search Options".

Column Name:	Filter:	Value:
Voided	is equal to	No

Field Comparison Match Case

- Remember to click Modify on Favorite

Active/Inactive Vendors & Customers

- Vendors. Add Vendor Status.
- Customers and Employees. Add Inactive

Vendor and Customer Balances

- Add Search filter: Current Balance \neq 0

Receivables Transactions

- Add Document Amount
- Remove Sales Amount

Fixed Asset Books

- One of my favorites
- Add LTD Depreciation (a/k/a Accumulated Depreciation)
- Add Basis
- Add Depreciated To Date
- Add Orig life Years/Days

Custom Smartlists for Payroll

- If you can't find fields you want in regular Smartlists, create your own using Smartlist Designer
- Especially good for payroll and HR
- To use Smartlist Designer, click New icon after opening Smartlists
- Then, find the fields you want and add them.
- Need to assign separate security so people can see them.

Pay Codes

- Table: Payroll Pay Code Setup

The screenshot shows the SmartList Designer interface for the 'Payroll Pay Code Setup' table. The window title is 'SmartList Designer - TWO (sa)'. The interface includes a toolbar with icons for OK, Execute Query, Delete, Create Go To, File, Tools, and Help. Below the toolbar, the 'List Name' is 'Pay Codes', the 'Product' is 'Microsoft Dynamics GP', and the 'Series' is 'Payroll'. The 'Database View' shows a tree structure with 'Payroll Pay Code Setup' expanded, listing various fields with checkboxes. The 'Selected Fields' list includes 'Pay Record', 'Description', 'Inactive', and 'Pay Type'. The 'Relationship' section is empty.

SmartList Designer - TWO (sa)

OK Execute Query Delete Create Go To File Tools Help

List Name: Pay Codes Product: Microsoft Dynamics GP Series: Payroll

Database View

- Payroll Pay Code Setup
 - Pay Record
 - Description
 - Inactive
 - Pay Type
 - Base Pay Record
 - Pay Rate Amount
 - Pay Unit
 - Pay Unit Period
 - Pay Period
 - Pay Per Period
 - Max Pay Per Period

Selected Fields

- Payroll Pay Code Setup.Pay Record
- Payroll Pay Code Setup.Description
- Payroll Pay Code Setup.Inactive
- Payroll Pay Code Setup.Pay Type

Relationship

TableName	FieldName	TableName2	FieldName2

Hourly/Salary Employees with Pay Rates

- Tables: Payroll Pay Code Master and Payroll Master

SmartList Designer - TWO (sa)

List Name:
Product:
Series:

Database View

- [-] Microsoft Dynamics GP
- [-] Fixed Assets
- [-] Human Resources
- [-] FieldService
- [-] Interfund Management
- [-] Revenue Expense Deferrals
- [-] Safe Pay
- [-] SmartList
- [-] Cash Flow Management
- [-] Technical Service Tools
- [-] Excel-Based Budgeting
- [-] HRM Solution Series
- [-] Purchase Order Enhancements
- [-] Control Account Management
- [-] Enhanced Commitment Managemer
- [-] CopierSeries
- [-] Advanced Security
- [-] Analytical Accounting
- [-] Encumbrance Management

Selected Fields

- Payroll Pay Code Master.Employee ID
- Payroll Master.Last Name
- Payroll Master.First Name
- Payroll Pay Code Master.Pay Record
- Payroll Pay Code Master.Pay Rate Amount

Relationship

TableName	FieldName	Relationship	TableName2	FieldName2
Payroll Pay Code M	Employee ID	Inner Join	Payroll Master	Employee ID

Filter

Field Name	Condition	Value
Payroll Pay Code Master.Pay Record	Is	HOUR

Miscellaneous Tips

- PUT YOUR FAVORITES IN CAPS
- Get rid of the asterisk ones you don't use
- Be descriptive. "Ann's Vendors", "Mark's Items that need balancing at month-end"
- You can password-protect changes
- Put popular favorites on your Home Page

THE ULTIMATE END

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