



# **SmartSort User Guide**

*For Microsoft Dynamics GP 2016*

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## Overview

EthoTech SmartSort speeds up your inquiries - and your data entry - by **eliminating as many as 3 mouse clicks per lookup**. Now you can automatically sort lookup information YOUR way! Quickly find the information you need by customizing your own view based on built-in advanced sorting options or SmartList favorites. And... you can use SmartSort with **over 40** Dynamics GP lookup windows, including all that are SmartList-enabled. For example, sort Customer lookups by Customer Name or Sales Territory instead of Customer ID, which may not easily identify the customer.

- Automatically sort lookups based on advanced sorting options or SmartList favorites.
- Assign sorting defaults per lookup window at the following levels: System, Company, User Class and User.

*SmartSort works with EthoTech Next Numeric Collection to accelerate data entry and eliminate errors by providing the ability to sort master records by meaningful user-defined criteria. Please refer to The EthoSeries product manual or the EthoTech web site ([www.ethotech.com](http://www.ethotech.com)) for more information on Next Numeric Collection.*



*Note that throughout this manual the word Application, Applications, and Dynamics GP will be used to mean Microsoft Dynamics™ GP and refers to whichever version of the system you have installed.*

## Advanced Lookups

SmartSort works in conjunction with Microsoft Dynamics GP SmartList and takes advantage of Advanced Lookups custom sorting options, which is part of Dynamics GP System Manager. Setting security to allow access to the alternate Dynamics GP lookup windows made available by SmartList is required in order to take advantage of SmartSort features. Removing security access to these windows will inactivate SmartSort functionality.

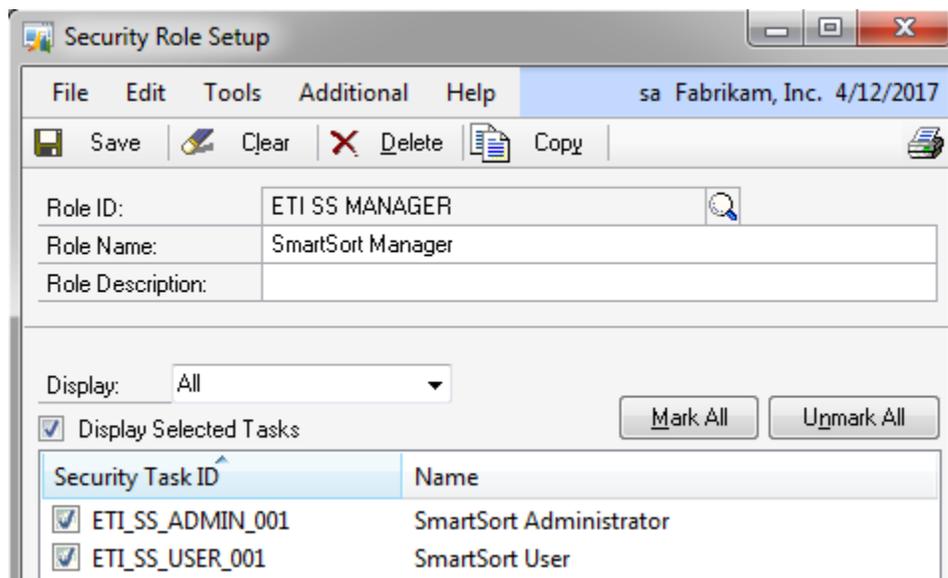


*For details on setting up security for Dynamics GP SmartList alternate windows please see your Dynamics GP documentation.*

## Security

EthoTech provides default tasks and roles for SmartSort. Roles must be assigned to each user to grant the appropriate level of access to the product, and SmartSort default tasks and rolls begin with ETI SS.

The default tasks and roles only address SmartSort resources, and do not modify security settings for Dynamics GP windows, files, or reports. These default tasks and roles may not be a perfect match to your company's operating procedures. You can modify the default tasks and roles as needed, as well as create roles to suit your needs.



The ETI SS USER role grants access to all windows, files, and reports required to access SmartSort functionality. This role should be assigned to all users who should have access to SmartSort.

The ETI SS MANAGER role grants access to the SmartSort setup windows, files, and reports. This role should be assigned to all users who will set up and maintain SmartSort.

This module uses SmartSort windows created by EthoTech. SmartSort windows are automatically assigned to your Dynamics GP navigation during installation. Use the Dynamics GP Security window to grant or remove access to these windows.

### SmartSort Windows

- SmartSort Setup
- SmartSort User Options

### Alternate Dynamics GP Windows

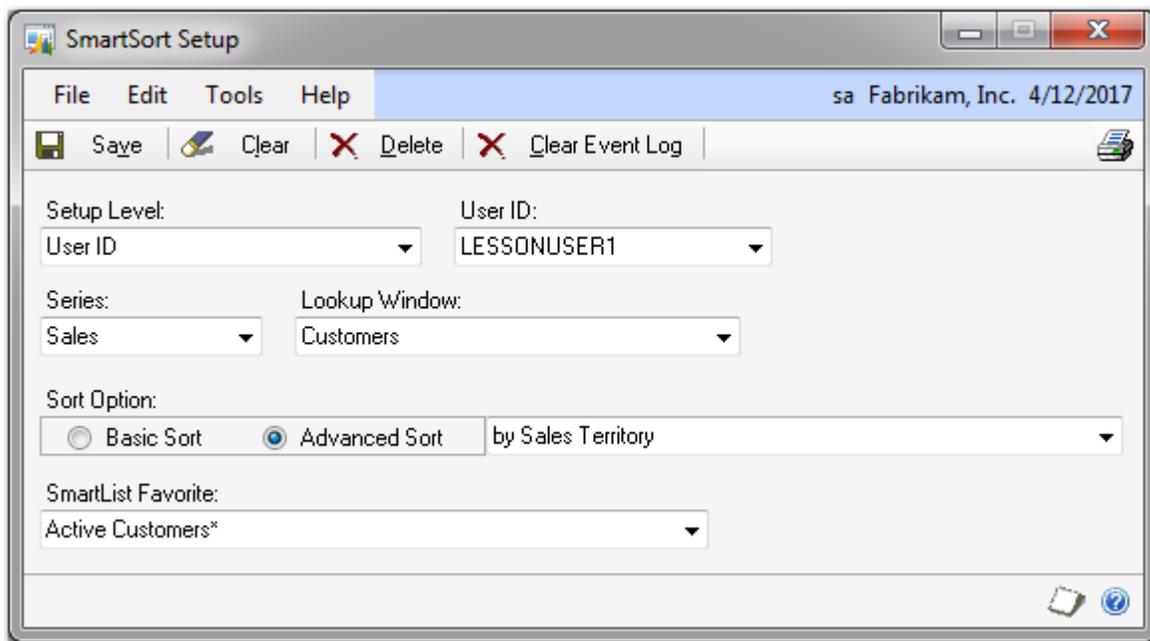
SmartSort works in conjunction with Dynamics GP SmartList and takes advantage of Advanced Lookups custom sorting options, which is part of Dynamics GP System Manager. Setting security to allow access to the alternate Dynamics GP lookup windows made available by SmartList is required in order to take advantage of SmartSort features. The default setting is for security to be set to these alternate lookup windows. Removing security access to these windows will inactivate SmartSort functionality.



*For details on setting up security for Dynamics GP SmartList alternate windows please see your Dynamics GP documentation.*

## Setup

Use the SmartSort Setup window to define your default sorting options for Dynamics GP lookup windows. The Sort Option and SmartList Favorite selections define a SmartSort setup for a given Setup Level, Series and Lookup Window. To open the SmartSort Setup window, select *Microsoft Dynamics GP >> Tools >> Setup >> System >> SmartSort >> SmartSort Setup*.



### Setup Level

The Setup Level drop down list contains the levels for which you can define your default sorting options. The following setup levels can be defined: System, Company, User Class, and User ID. When multiple Setup Levels are defined for a lookup window, the SmartSort hierarchy is as follows: User ID → User Class → Company → System. Please refer to the [Opening a Lookup Window](#) section of this manual for more details.

### User ID

The User ID drop down list contains all users with access to the current Dynamics GP Company and is **only available when the User ID Setup Level is selected**. SmartSort setup information applied to the User ID is only available in the company where they were created.

### Class ID

The Class ID drop down list contains the available User Class ID's and is **only available when the Class ID Setup Level is selected**. SmartSort setup information applied to the Class ID is only available in the company where they were created.

### Series

The Series drop down list contains the available Dynamics GP Series for which SmartSort setups may be defined.

### Lookup Window

The Lookup Window drop down list contains the Dynamics GP lookup windows for which SmartSort setups may be defined. Over 40 lookup windows are available, including all SmartList-enabled lookup windows. See [Appendix A](#) for a complete list of lookup windows supported by SmartSort.

## Sort Option

The Sort Option radio button determines the sorting options available in the Sort Option drop down list. If Advanced Sort is selected, the drop down list will be filled from the appropriate Advanced Lookups sort by fields. Advanced Lookups are defined using the Advanced Lookup Setup window. To open this window, select Microsoft Dynamics GP >> Tools >> Setup >> Company >> Advanced Lookups.



*For details on setting up Dynamics GP Advanced Lookups, please see your Dynamics GP documentation.*

If Basic Sort is selected, the drop down list will contain all the sorting fields available in the selected Lookup Window.

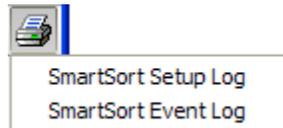
*SmartSort Advanced Sorts and SmartList Favorites are only available for SmartList-enabled lookup windows, and Advanced Sorts are not available for the System Setup Level.*

## SmartList Favorite

The SmartList Favorite drop down list contains the available SmartList Favorites for the selected Setup Level and Lookup Window.

## Print

The toolbar Print drop down button allows you to print either the SmartSort Setup Log or the SmartSort Event Log.



The SmartSort Setup Log contains all saved setup information. The SmartSort Event Log contains all updates to your setup information resulting from changes made to Advanced Lookups sorting options or SmartList Favorites.

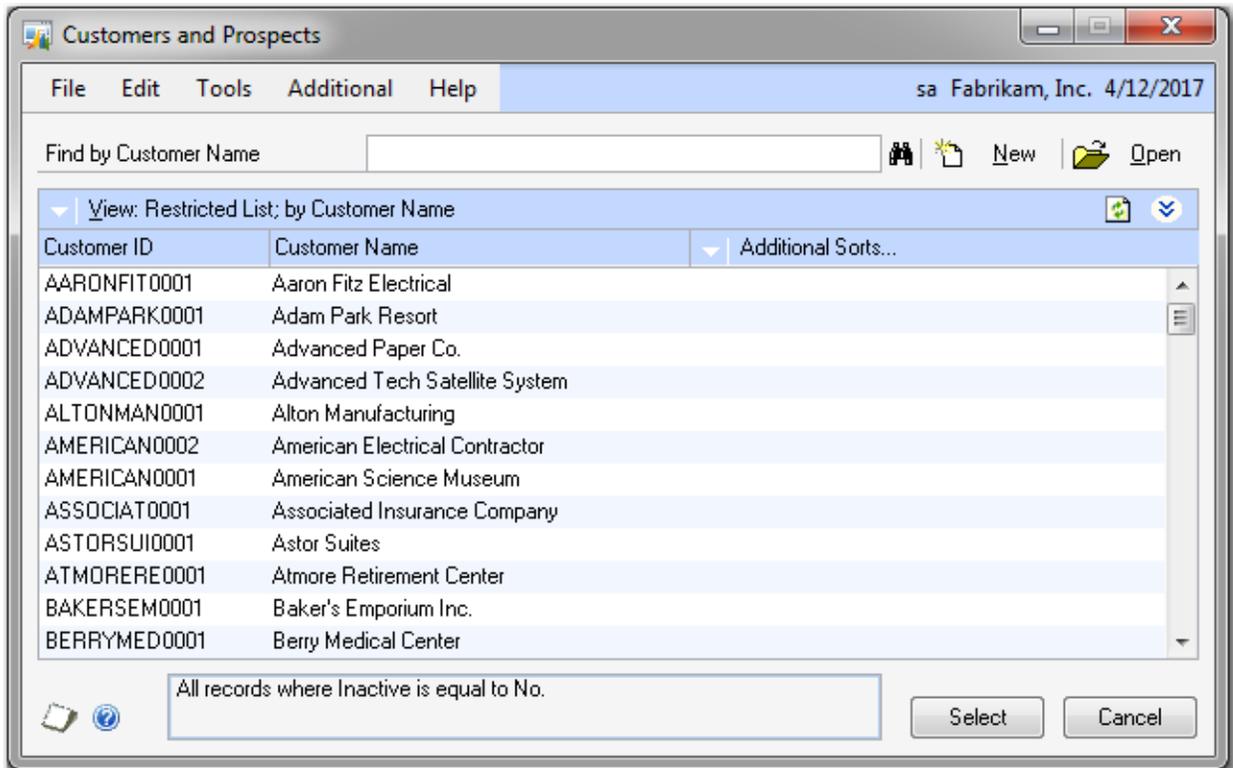
## Clear Event Log

The Clear Event Log button clears the SmartSort Event Log.

### Opening a Lookup Window

When a Dynamics GP lookup window is opened for which SmartSort setups are defined, the records will be sorted in the following manner.

1. If a setup exists for the current User ID, then the User ID SmartSort setup is used to sort the records in the lookup window.
2. If a setup does not exist or is invalid for the User ID and a setup exists for the current user's User Class, then the User Class SmartSort setup is used to sort the records in the lookup window.
3. If a setup does not exist or is invalid for the Class ID and User ID and a setup exists for the Company, then the Company SmartSort setup is used to sort the records in the lookup window.
4. If a setup does not exist or is invalid for the Company, Class ID and User ID and a setup exists for the System, then the System SmartSort setup is used to sort the records in the lookup window.
5. If a setup does not exist or is invalid for the System, then the lookup window is sorted using the standard Dynamics GP sort for the window (typically the Master Record ID).



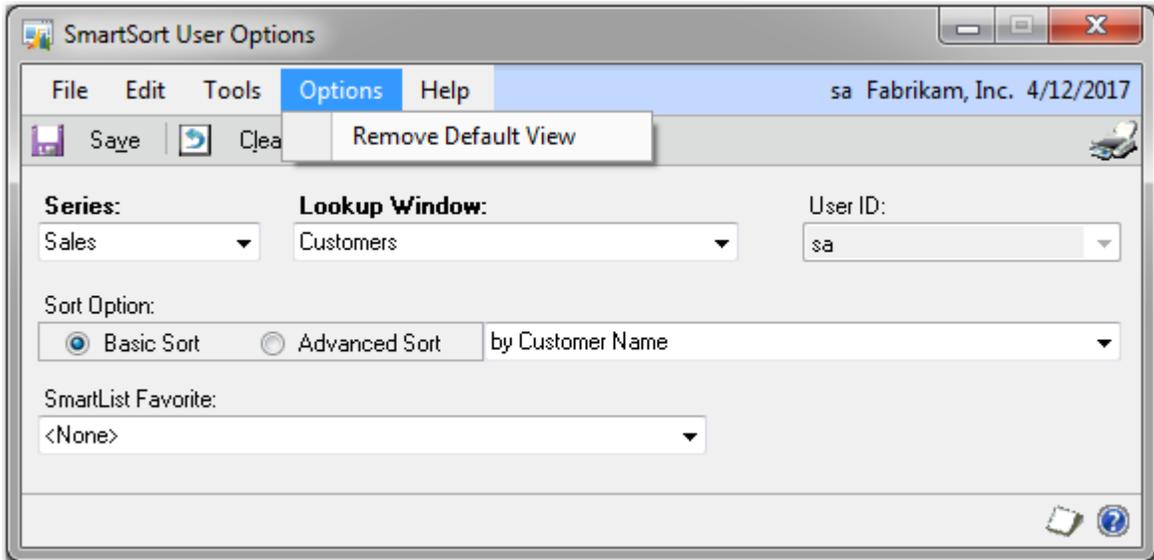
The above screenshot shows the Customers and Prospects lookup window sorted by **Sales Territory ID** and filtered by a SmartList Favorite named **Active Customers**. SmartList Favorite **Active Customers** restricts the lookup to customers who are not marked *Inactive*.



For details on setting up SmartList favorites, please see your Dynamics GP documentation.

## SmartSort User Options

The SmartSort User Options window is a variation of the SmartSort Setup window that is restricted to the current user. This window may be accessed from the available Dynamics GP lookup windows and User Preferences window via the Additional Menu.



Other Setup Levels may not be accessed from the SmartSort User Options window. This window is specifically used to define sorting options for an individual user of Dynamics GP. Sorting defaults defined in this window will override all other Setup Levels (User Class, Company and System).

For many lookup windows, Dynamics GP now allows the user to set a default sorting option by selecting the Set as Default View option within the lookup window. This default sorting option overrides the SmartSort setup. To remove the Dynamics GP default sorting option for a lookup window, select **Options > Remove Default View** within the SmartSort User Options window.

## **Product Support**

### Contacting Support

EthoTech Product Support is available Monday through Friday from 9:00 am to 5:00 pm EST.

Product Support can be reached in the following ways:

**678.384.7500**

[support@ethotech.com](mailto:support@ethotech.com)

<http://www.ethotech.com>

Before contacting Product Support, please gather information about your Microsoft Dynamics GP system and your EthoTech product. This information will assist our Product Support team in servicing your support needs in a timely and effective manner. Use the following list of questions to help you prepare for contacting Product Support.

1. Describe the process you were following when the error occurred. Please include the module you were in, the windows you were using, what you were doing when you received the error message and list the exact error message.
2. What version of Dynamics GP are you using? Please include the service pack number as well.
3. What version of your EthoTech product are you using?
4. Are there other 3<sup>rd</sup> Party products installed? If so, please list them.
5. Have you attempted to resolve the situation? What have you done so far?
6. Does this problem occur on any other workstation?
7. Does this problem occur for other users of your software?
8. Can you recreate the problem? How? Please list the steps.
9. Do you have a valid backup that can be restored if necessary?

When you call or email EthoTech for product support, please include the following information:

- Your name, company name and phone number.
- The information gathered from the above list of questions.
- In addition, have this manual available when you are connected with Product Support - you may be directed to various pages in the manual as you are helped with your problem.

## Registration Information

The EthoTech Registration window provides version and build information for all EthoTech products. The Dynamics GP system password is required to access this window.

You can access the window via the Additional Menu that appears on the About Microsoft Dynamics GP window, or by choosing EthoTech Registration from the System Setup menu. If you open the EthoTech Registration window from the System Setup menu, you will need to click the Series Name lookup icon on the registration window and choose SmartSort.

The screenshot shows the 'EthoTech Registration - TWO14 (sa)' window. It features a menu bar with 'Register', 'Options', 'File', 'Tools', and 'Help'. Below the menu is a 'Series Name' field containing 'SmartSort' and a 'Product Version' field containing 'Dynamics GP 14.00.001'. A 'Series Name' lookup icon is visible on the right side of the 'Series Name' field. Below these fields is a section titled 'Site Name must match your registration form exactly' with a 'PreviewKeys' field. A table displays registration details:

Registration Key 1	1892241900	Total Users Allowed	Unlimited
Registration Key 2	463910629	Expiration Date	None

There is a checkbox for 'Suppress Registration Warning'. Below this is a table of registered modules:

Module	Registered
SmartSort	<input checked="" type="checkbox"/>

At the bottom, contact information for EthoTech, Inc. is provided: 12195 Highway 92, Suite 114-305, Woodstock, GA 30188, USA. Phone: 678-384-7500, E-Mail: support@ethotech.com, Web: http://www.ethotech.com.

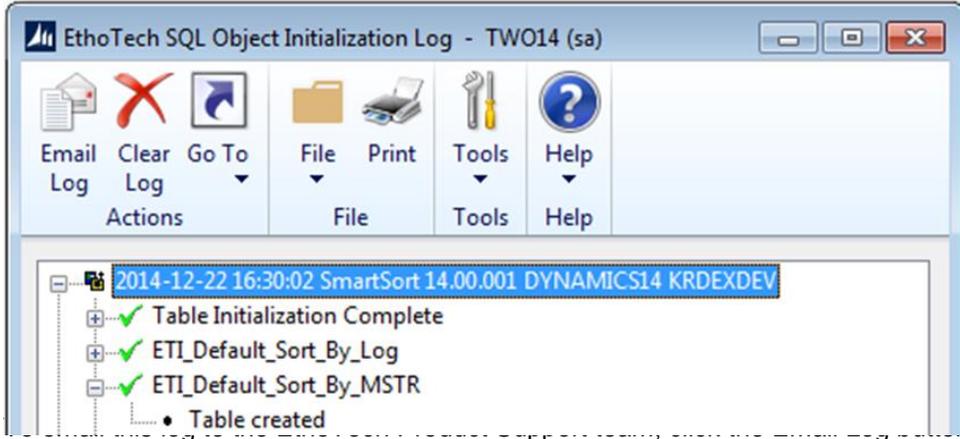
Click the **Series Name** lookup icon to select other installed EthoTech products for registration.

To view registration information, enter valid registration keys in the Registration Key 1 and Registration Key 2 fields.

If you are testing the product within the Dynamics GP sample company and do not wish to receive registration messages when logging into production companies, mark the Suppress Registration Warning checkbox and click Register.

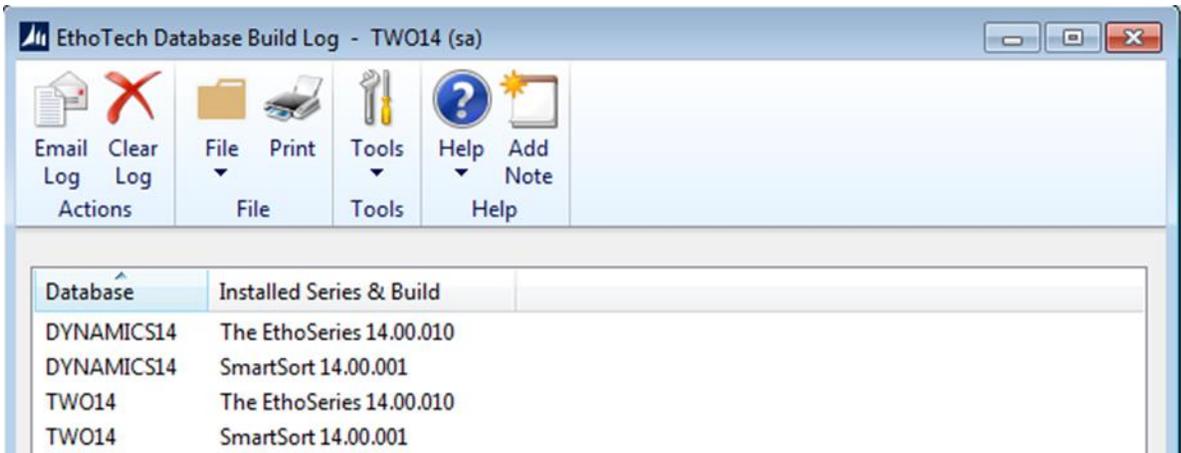
### EthoTech SQL Object Initialization Log

The EthoTech SQL Object Initialization Log contains table creation and update information. This information is used to troubleshoot table conversation issues. To open this window, select *Inquiry > System > EthoTech SQL Object Initialization Log* – you will be prompted to enter the Dynamics GP system password.



### EthoTech Database Build Log

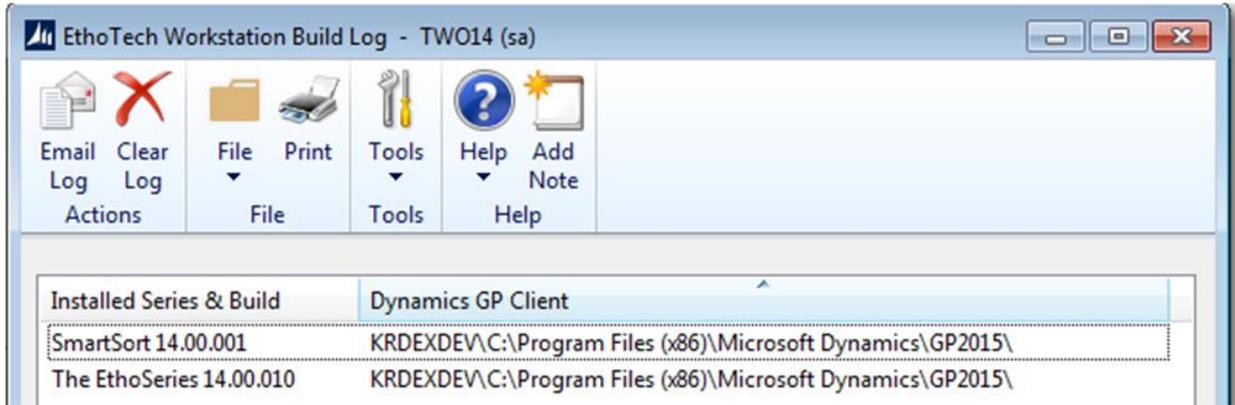
For each installed EthoTech product, the EthoTech Database Build Log contains the build number for each Dynamics GP database. For a given product, all databases should display the same build number.



To email this log to the EthoTech Product Support team, click the Email Log button.

### EthoTech Workstation Build Log

For each installed EthoTech product, the EthoTech Workstation Build Log contains the build number for each Dynamics GP client. For a given product, all Dynamics GP clients should display the same build number.



To email this log to the EthoTech Product Support team, click the Email Log button.

## Appendix A - Supported Lookup Windows

Series	Lookup Window	SmartList-Enabled	Opens From Window Example	Opens From Field Example
Company	Company Addresses		Company Setup	Address ID
Company	Tax Details		Tax Detail Maintenance	Tax Detail ID
Company	Users		User Setup	User ID
Financial	Accounts	Yes	Account Maintenance	Account
Financial	Journal Entry		Transaction Entry	Journal Entry
Inventory	Assembly Audit Trail Codes		Remove Assembly History	From
Inventory	Assembly Document Numbers		Assembly Document Inquiry	From
Inventory	Items	Yes	Item Maintenance	Item Number
Inventory	Stock Counts		Stock Count Entry	Stock Count ID
Payroll	1099-R Employees		Print 1099-R Forms	Employee ID: From
Payroll	Addresses		Employee Maintenance	Address ID
Payroll	Employees	Yes	Employee Maintenance	Employee ID
Payroll	Select Payroll Checks to Void		Void Payroll Checks	From
Payroll	W-2 Employees		Print W-2 Forms	Employee ID: From
Payroll	Workers' Compensation Codes		Workers' Compensation Setup	Workers' Comp Code
Purchasing	Historical Purchasing Batch IDs		Purchasing Posting Journal Options	From
Purchasing	Manual Payment Lookup		Payables Manual Payment Entry	Payment Number
Purchasing	Open Payables Documents	Yes	Edit Payables Transactions	Number
Purchasing	Paid Transaction Lookup		Void Historical Payables Transactions	From
Purchasing	Payables Schedules		Payables Scheduled Payment Entry	Schedule Number
Purchasing	Purchase Orders	Yes	Purchase Order Entry	PO Number
Purchasing	Purchasing Audit Trail Codes		Remove Purchasing History	From
Purchasing	Purchasing Receipt Numbers		Receivings Transaction Entry	Receipt No
Purchasing	Vendor Addresses	Yes	Vendor Address Maintenance	Address ID
Purchasing	Vendors	Yes	Vendor Maintenance	Vendor ID
Purchasing	Vouchers	Yes	Payables Transaction Entry	Voucher No
Sales	Addresses	Yes	Customer Address Maintenance	Address ID
Sales	Cash Documents		Cash Receipts Entry	Receipt
Sales	Customers and Prospects	Yes	Customer Maintenance	Customer ID
Sales	Invoices and Returns		Invoicing Document Inquiry	From
Sales	Invoicing Audit Trail Codes		Sales History Report Options	From
Sales	National Accounts		National Accounts Maintenance	Parent Customer ID
Sales	Open Cash Documents		Apply Sales Documents	Document Number
Sales	Open Documents	Yes	Cash Receipts Entry	Document
Sales	Prospects	Yes	Sales Prospect Maintenance	Prospect ID
Sales	Receivables Schedules		Receivables Scheduled Payment Entry	Schedule Number
Sales	Sales Audit Trail Codes		Sales History Report Options	From
Sales	Sales Document Numbers	Yes	Sales Order Processing Document Entry	Document Number
Sales	Sales Documents	Yes	Receivables Transaction Entry	Number
Sales	Salespeople		Salesperson Maintenance	Salesperson ID
Sales	Territories		Sales Territory Maintenance	Territory ID
System	Exchange Tables		Multicurrency Exchange Rate Table Setup	Exchange Table ID
System	Intercompany Accounts		Intercompany Setup	Originating Company Due To

This Appendix contains a list of all Dynamics GP lookup windows that include SmartSort functionality and one **example** of an originating window where the lookup can be opened. This is NOT considered a complete list of examples.



A SmartSort-enabled lookup window will automatically be sorted and filtered regardless of the originating window used to open the lookup window. For example: If SmartSort is setup to sort the 'Customers and Prospects' lookup window by Customer Name, the data in this lookup window will sort by the Customer Name field if it is opened from Customer Maintenance, Sales Transactions Entry or any other window containing access to this lookup window.