



SmartList Builder

for Microsoft Dynamics GP 10.0

Including: SmartList Builder, Excel Report Builder,
Navigation List Builder and Drill Down Builder

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SECTION 1: INTRODUCTION

Welcome to SmartList Builder, a Microsoft Dynamics GP add-on that allows you to create your own SmartLists and Microsoft® Excel® Reports.

Overview

The SmartList Builder product contains two different modules, SmartList Builder and Excel Report Builder.

SmartList Builder

SmartList Builder makes sure that you can access every piece of data ever entered into GP as well as from other SQL databases via SmartList.

Excel Report Builder

Excel Report Builder has similar functionality to SmartList Builder, but rather than generating a SmartList, it generates an Excel Spreadsheet with a live connection back to the Microsoft Dynamics GP data. Excel Report Builder allows you to give all access to any of your Microsoft Dynamics GP data to anyone in the organization via Excel without having to use a Microsoft Dynamics GP User License.

Benefits

Some of the benefits of using SmartList Builder are as follows:

- **Simple to learn** – this product is straightforward and takes minimal time to learn.
- **No SQL Scripting knowledge** – the user only needs to know what type of information to display. When adding the tables, the fields are pulled in for the user.
- **No code to write** – SmartList Builder provides the user interface to create the GoTo's, Calculations, etc.

SECTION 2: INSTALLING INTO A NEW ENVIRONMENT

This section covers the installation of SmartList Builder into an environment for Microsoft Dynamics GP 10.0 that it has never been installed into before. It will also cover the registration for SmartList Builder.

System Requirements

The system requirements for SmartList Builder are the same as those for Microsoft Dynamics GP 10.0.

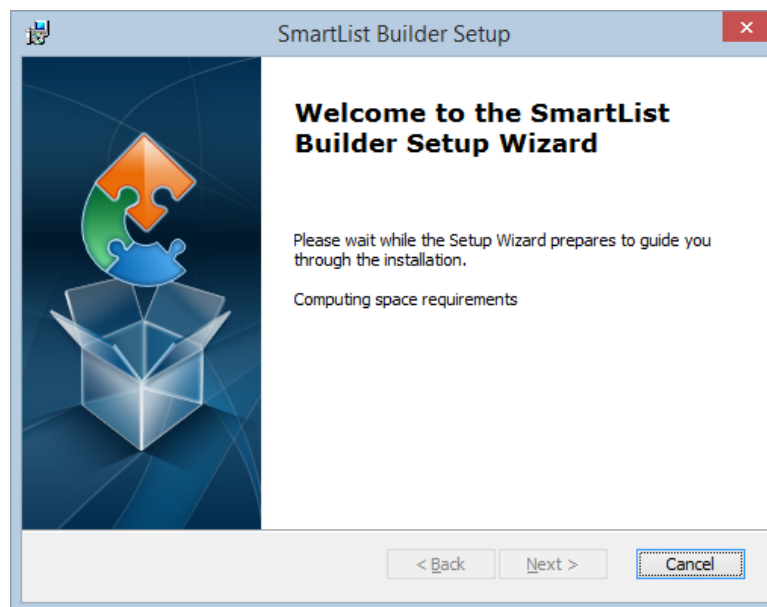
Prerequisites

Installing SmartList Builder 10.0 on Microsoft Dynamics GP does not require any particular build of Microsoft Dynamics GP 10.0.

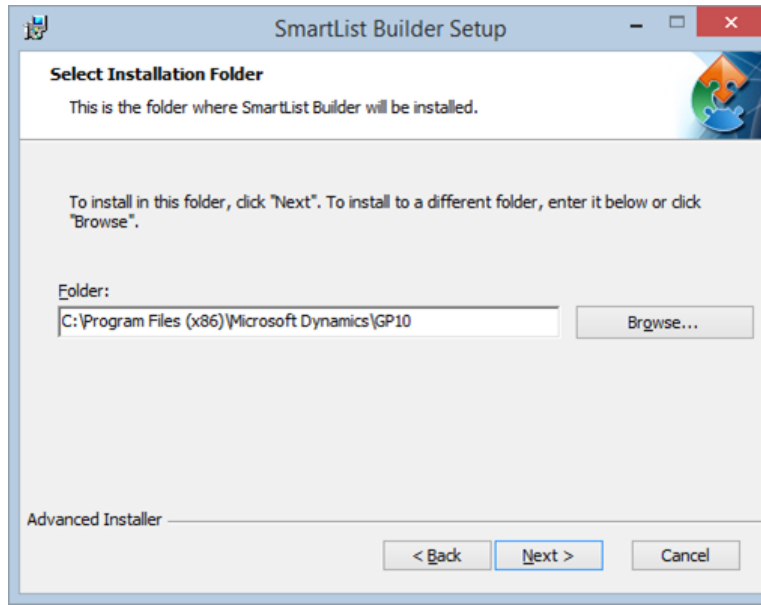
Installation

To install SmartList Builder:

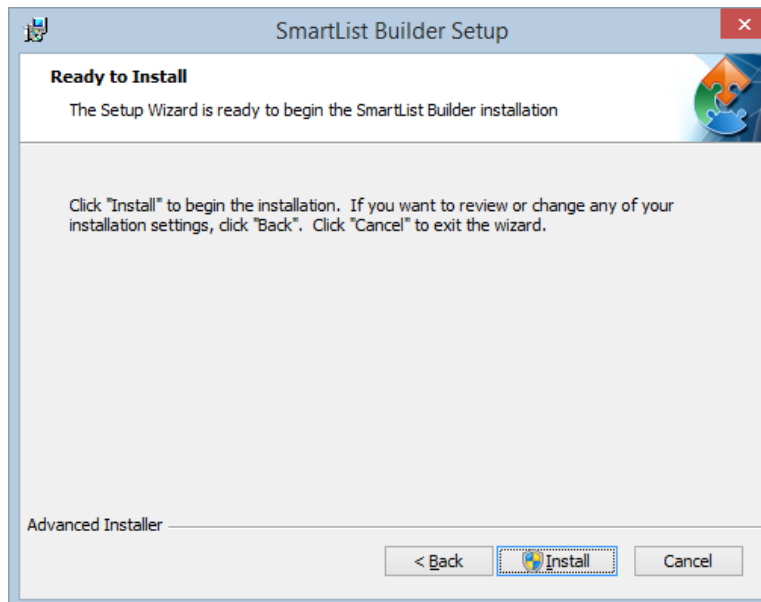
1. Start the SmartList Builder Installation by running the SmartListBuilder10.msi.
2. Click on the Next button to continue.



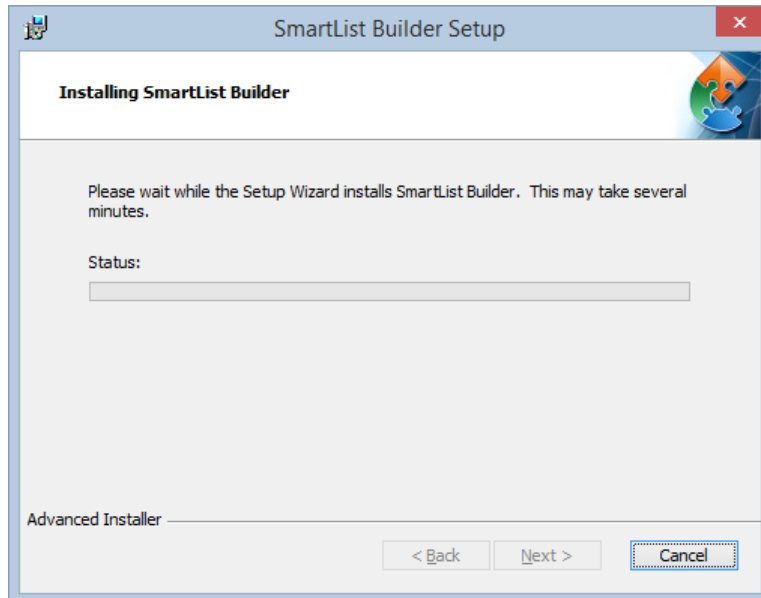
3. Select the location where your Microsoft Dynamics GP program is installed using the Browse button.



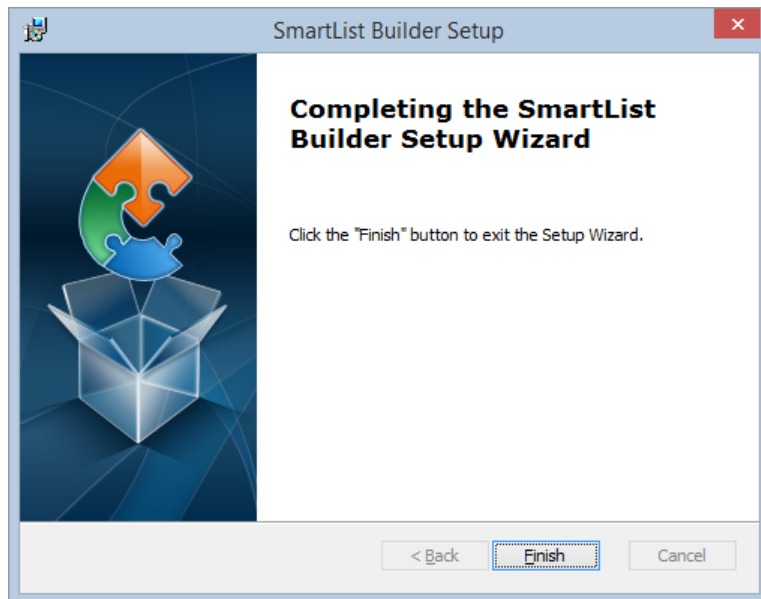
4. Click on the Next button to continue.
5. Click on the Install button to begin the installation.



- The SmartList Builder Installation will run. It may take a few minutes for this to complete.

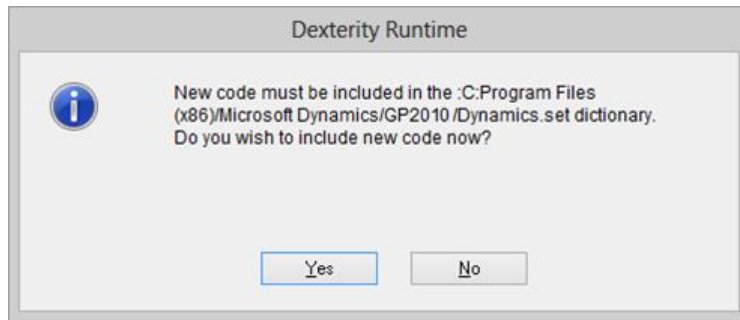


- Click on the Finish button to complete the installation.



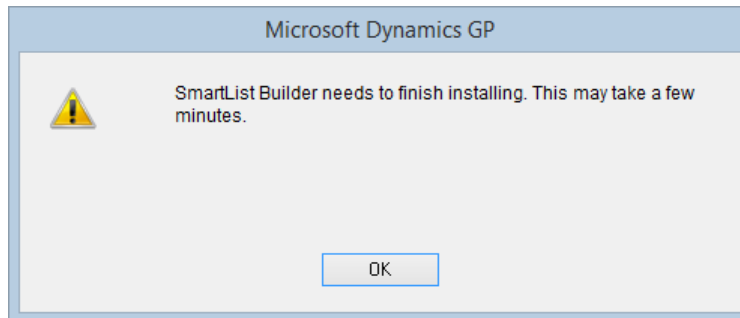
- Launch Microsoft Dynamics GP.

- Click on the Yes button to include the SmartList Builder code into your Microsoft Dynamics GP workstation application. If you click on the No button, you will not be able to access the SmartList Builder application.



If you the User Account Control setting in Windows is turned on, you may need to launch Microsoft Dynamics GP using the 'Run as Administrator' option in Windows to be able to successfully include the new code.

- Log into Microsoft Dynamics GP as the 'sa' user and into any company. You will then receive the following message.



- Click OK. At this point, it will create the SmartList Builder SQL Objects needed for all companies.
- Complete the installation process by enter registration keys. [Section 5](#) outlines this process.



Steps 1-9 will need to be completed on each workstation that is running Microsoft Dynamics GP to update the SmartList Builder application files.

SECTION 3: INSTALLING INTO AN EXISTING 10.0 ENVIRONMENT

This section covers the installation of SmartList Builder into an environment for Microsoft Dynamics GP 10.0 that it is currently installed in. It will also cover the registration for SmartList Builder.

System Requirements

The system requirements for SmartList Builder are the same as those for Microsoft Dynamics GP 10.0.

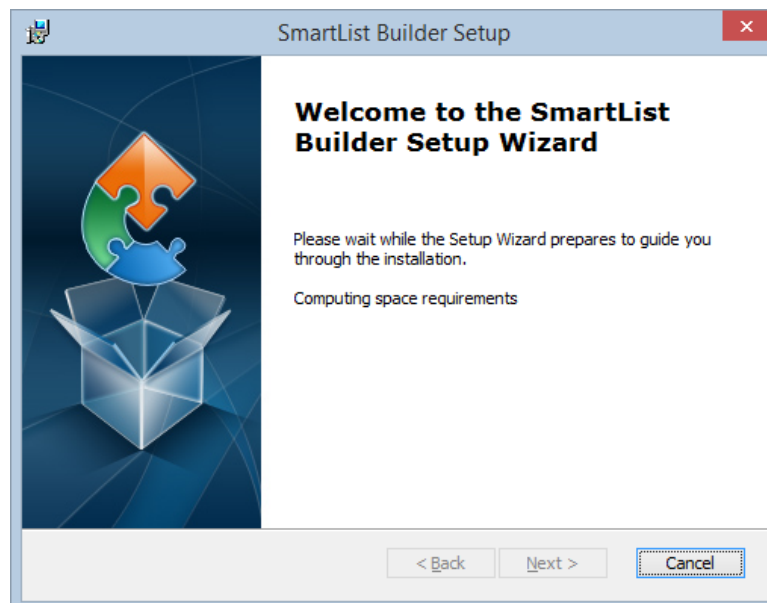
Prerequisites

Installing SmartList Builder 10.0 on Microsoft Dynamics GP does not require any particular build of Microsoft Dynamics GP 10.0.

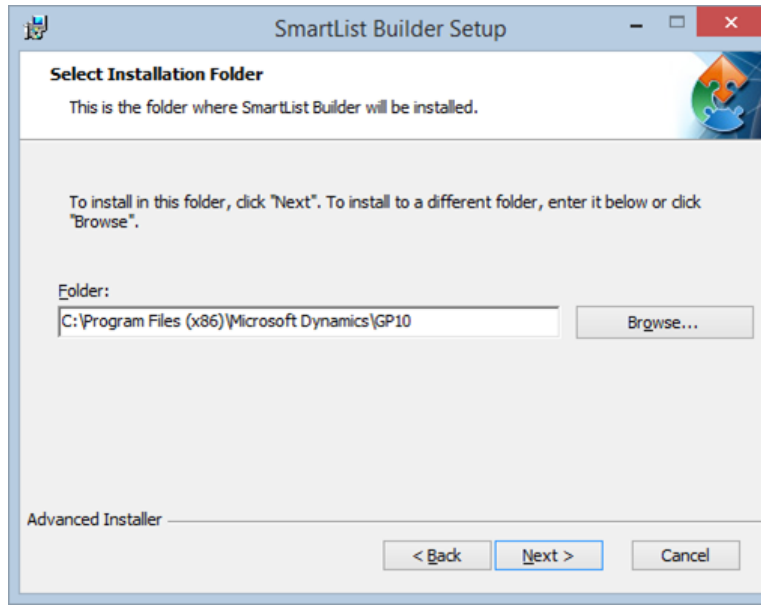
Installation

To install SmartList Builder:

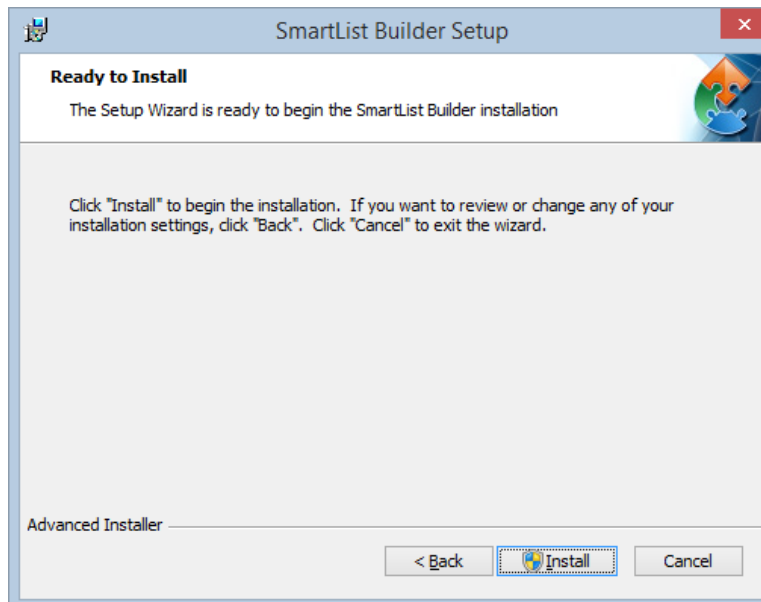
1. Start the SmartList Builder Installation by running the SmartListBuilder11.msi.
2. Click on the Next button to continue.



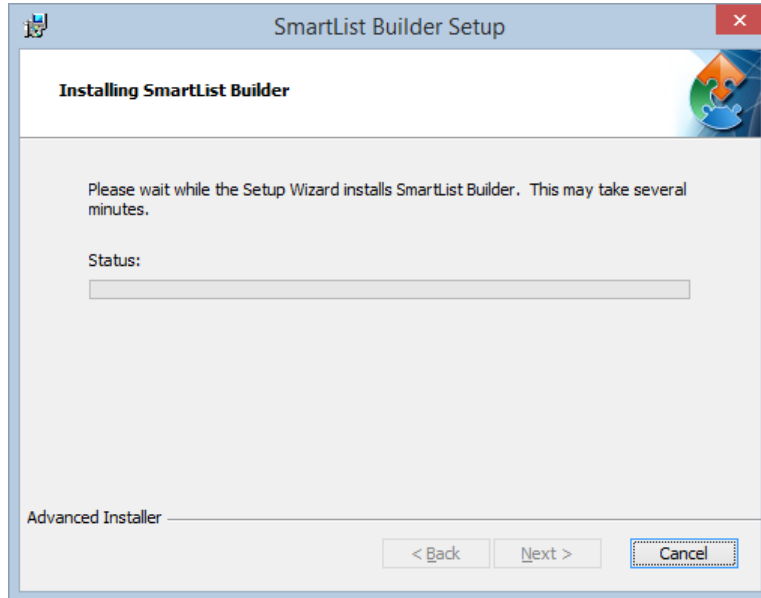
3. Select the location where your Microsoft Dynamics GP program is installed using the Browse button.



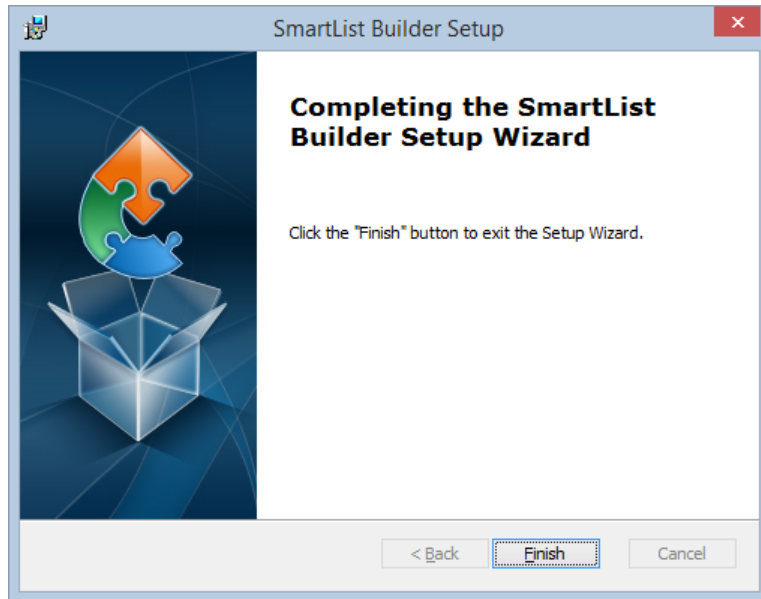
4. Click on the Next button to continue.
5. Click on the Install button to begin the installation.



- The SmartList Builder Installation will run. It may take a few minutes for this to complete.

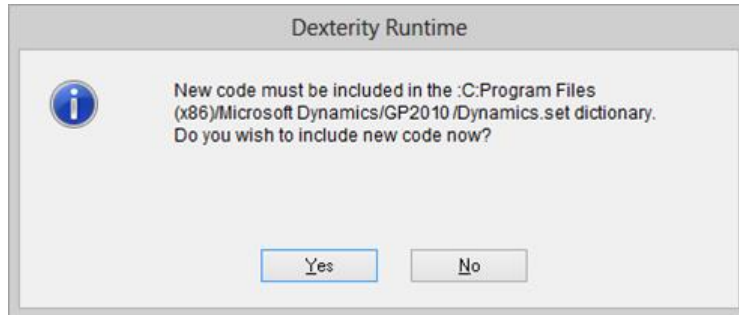


- Click on the Finish button to complete the installation.



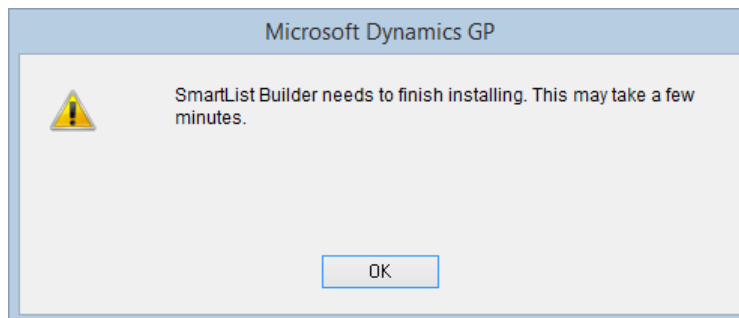
- Launch Microsoft Dynamics GP.

- Click on the Yes button to include the SmartList Builder code into your Microsoft Dynamics GP workstation application. If you click on the No button, you will not be able to access the SmartList Builder application.



If you the User Account Control setting in Windows is turned on, you may need to launch Microsoft Dynamics GP using the 'Run as Administrator' option in Windows to be able to successfully include the new code.

- Log into Microsoft Dynamics GP as the 'sa' user and into any company. You will then receive the following message.



- Click OK. At this point, it will create the additional SmartList Builder SQL Objects needed for all companies.
- Complete the installation process by enter registration keys. [Section 5](#) outlines this process.



Steps 1-9 will need to be completed on each workstation that is running Microsoft Dynamics GP to update the SmartList Builder application files.

SECTION 4: UPGRADING FROM MICROSOFT DYNAMICS GP 8.0 OR 9.0

This section covers the Upgrade process to update your SmartList Builder data and resources from Microsoft Dynamics GP 8.0 or 9.0.



If you are already using SmartList Builder on Microsoft Dynamics GP 10.0 and are just updating to a newer version, do not run through the update process. This process is only for those coming from Microsoft Dynamics GP 8.0 and 9.0.

The SmartList Builder upgrade follows the supported upgrade paths from 8.0 and 9.0 that are available for Microsoft Dynamics GP. You can find these on [PartnerSource](#) or [CustomerSource](#) in the Upgrading to Microsoft Dynamics GP 10.0 Hot Topic.

As in any upgrade process, we recommend that you use a test environment to walk through the upgrade process. By doing this, you can identify and resolve any potential issues that may occur in the upgrade process. A test upgrade also allows you to lean the new features in SmartList Builder before putting it into production.

System Requirements

The system requirements for SmartList Builder are the same as those for Microsoft Dynamics GP 10.0.

Prerequisites

Installing SmartList Builder 10.0 on Microsoft Dynamics GP does not require any particular build of Microsoft Dynamics GP 10.0.

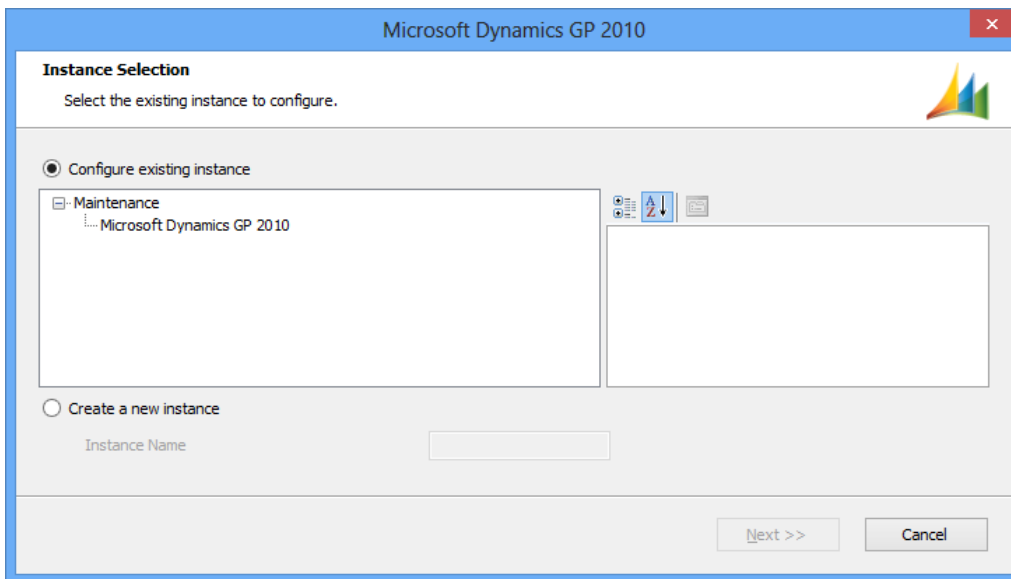
Upgrading SmartList Builder

Use Microsoft Dynamics GP Utilities to upgrade SmartList Builder to Microsoft Dynamics GP 10.0. Once this is complete, install the SmartList Builder update from eOne.

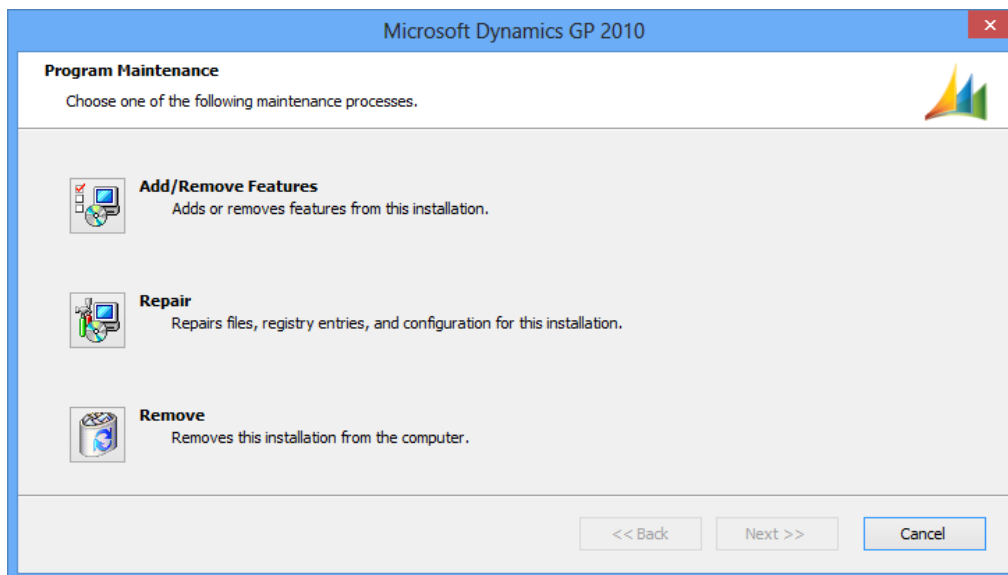
To upgrade SmartList Builder:

1. SmartList Builder first needs to be updated from Microsoft Dynamics GP 8.0 or 9.0 to Microsoft Dynamics GP 10.0 using the upgrade process included in Microsoft Dynamics GP Utilities. If this has already been done, proceed to step 19.
2. To update SmartList Builder in Microsoft Dynamics GP, verify that Service Pack 2 is installed and then start the Microsoft Dynamics GP 10.0 installation wizard. You can use either of the following methods.

- a. Open the Control Panel > Programs and Features or Uninstall a program. Select the Microsoft Dynamics GP 10.0 installation. Click Change to open the Program Maintenance window.
- b. Double click the Setup.exe in the Microsoft Dynamics GP 10.0 installation media. This will open the Microsoft Dynamics GP installation window. Select Microsoft Dynamics GP under the Install section. Select the existing instance of Microsoft Dynamics GP in the Instance Selection window and click Next.



3. Click Add/Remove Features.



4. In the Select Features window, select to install SmartList Builder using the Run from My Computer option. When you install a new feature, you won't reinstall features that have been installed previously. Click Next.

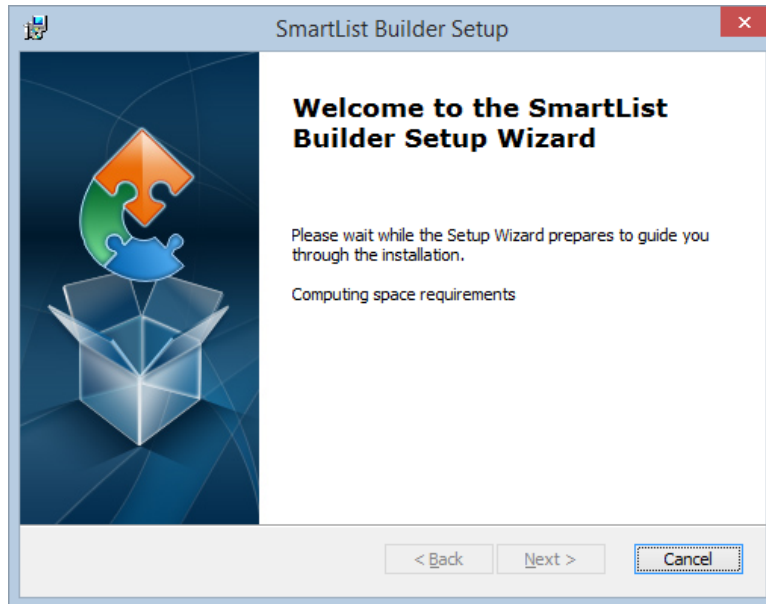
5. In the Install Program window, click Install.
6. The Installation Progress window opens so that you can view the status of the install.
7. In the Installation Complete window, click Exit to finish the install.
8. Start Microsoft Dynamics GP 10.0 Utilities. Choose Start - All Programs - Microsoft Dynamics - GP 10.0 - GP Utilities.



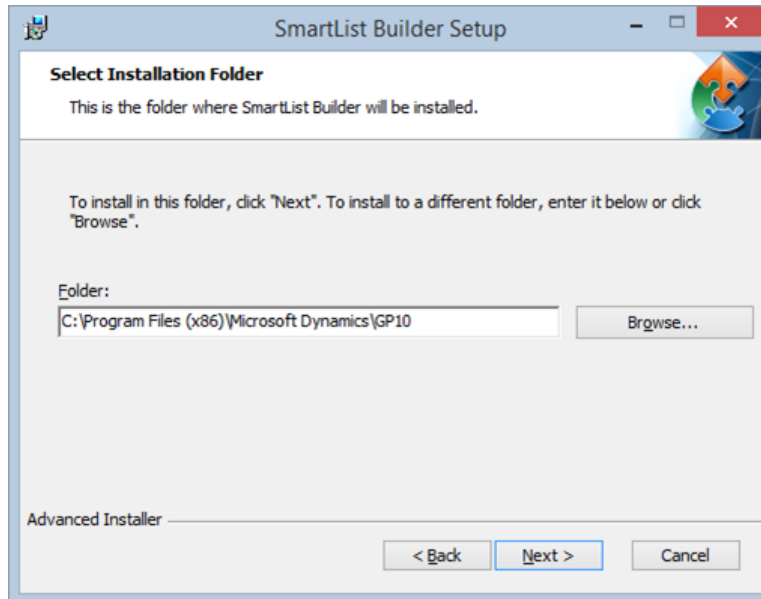
To run Microsoft Dynamics GP Utilities, the appropriate user permissions are needed. Generally this requires the user to be a part of the Administrators group in Windows. If the User Account Control (UAC) enabled, you may be prompted to run Utilities as an Administrative user.

9. Log into Microsoft Dynamics GP 10.0 Utilities as the 'sa' user or another GP user with administrative privileges in Microsoft SQL Server.
10. The Welcome To Microsoft Dynamics GP Utilities window appears. Click Next.
11. If it detects that SmartList Builder is at a previous, you will get the option to update it. Click Next to start the update.
12. The Server Installation Progress window opens to show you the update progress of the system database.
13. Once the system database is complete, you the Upgrade these companies window opens with a list of the companies to update. Select all of the listed companies and click Next.
14. You will receive a Confirmation window to verify the companies to be updated for SmartList Builder. If it is correct, click Finish.
15. The Server Installation Progress window will appear again and show the progress of the update for each company.
16. Once the update is complete, the Additional Tasks window opens. From here you can Launch Microsoft Dynamics GP or Exit Utilities.
17. Log into Microsoft Dynamics GP 10.0 and verify that SmartList Builder has updated to 10.0.
18. Close Microsoft Dynamics GP 10.0.
19. Install the eOne SmartList Builder 10.0 update by running the SmartListBuilder10.msi you downloaded.

20. Click on the Next button to continue.

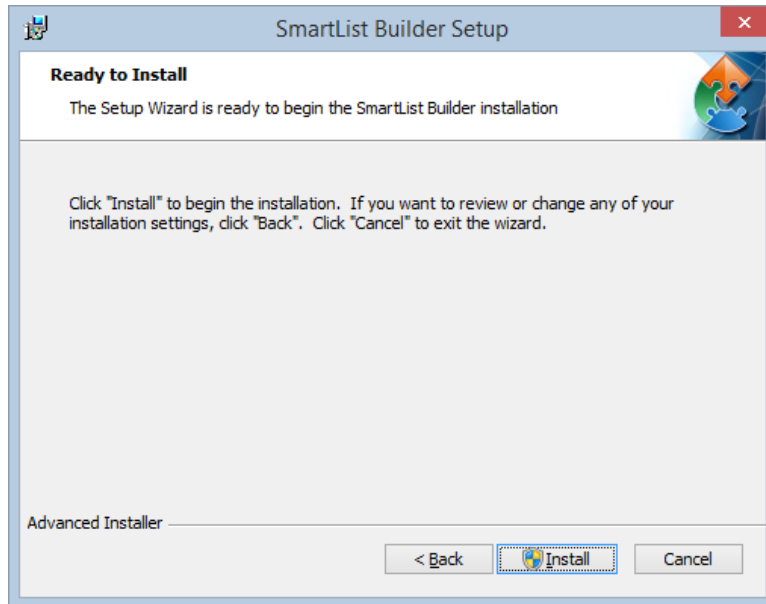


21. Select the location where your Microsoft Dynamics GP program is installed using the Browse button.

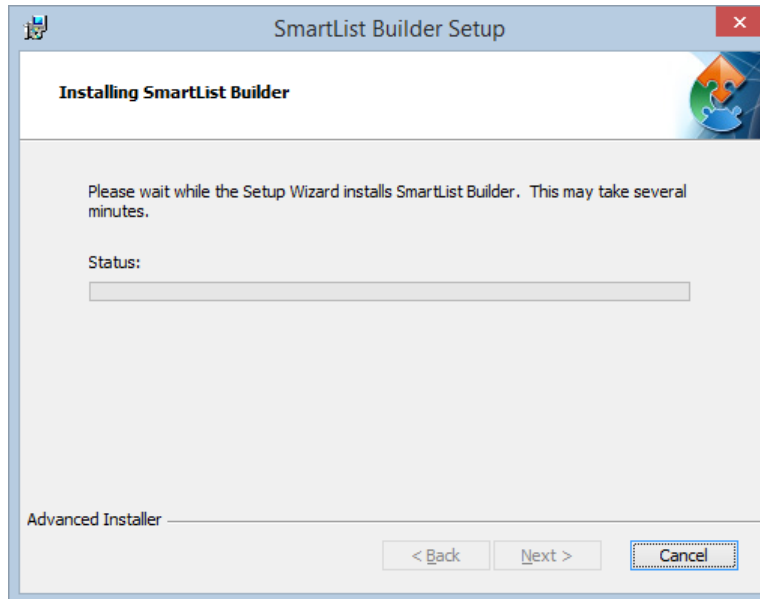


22. Click on the Next button to continue.

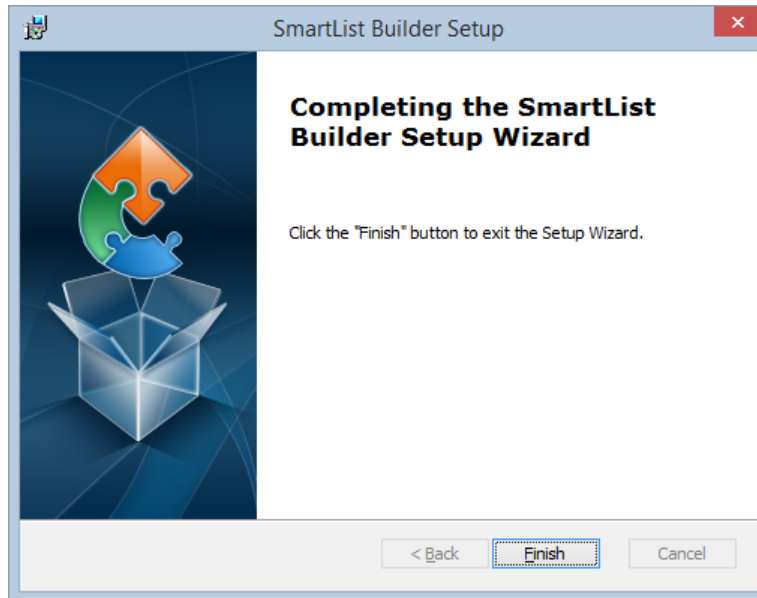
23. Click on the Install button to begin the installation.



24. The SmartList Builder Installation will run. It may take a few minutes for this to complete.

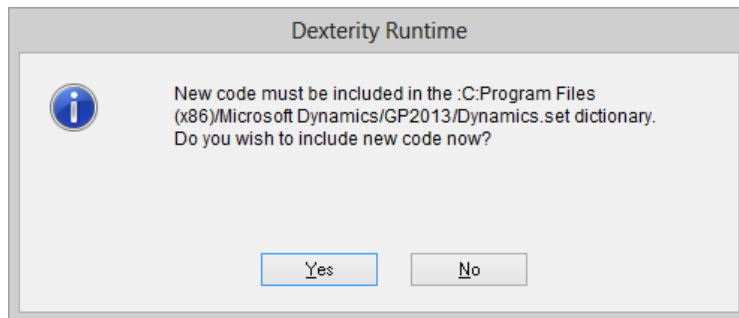


25. Click on the Finish button to complete the installation.



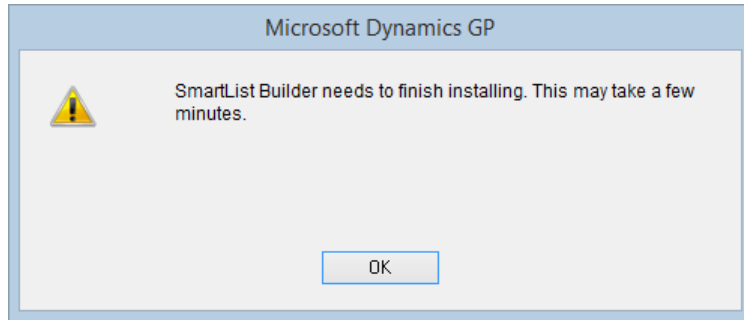
26. Launch Microsoft Dynamics GP.

27. Click on the Yes button to include the new SmartList Builder code into your Microsoft Dynamics GP workstation application.



If you the User Account Control setting in Windows is turned on, you may need to launch Microsoft Dynamics GP using the 'Run as Administrator' option in Windows to be able to successfully include the new code.

28. Log into Microsoft Dynamics GP as the 'sa' user and into any company. You will then receive the following message.



29. Click OK. It will create the SmartList Builder SQL Objects needed for all companies.
30. Complete the installation process by enter registration keys. [Section 5](#) outlines this process.



Steps 19-27 will need to be completed on each workstation that is running Microsoft Dynamics GP to update the SmartList Builder application files.

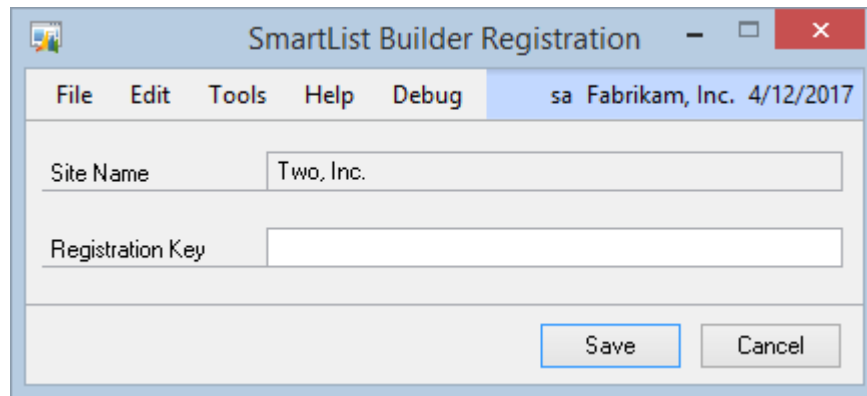
SECTION 5: REGISTERING SMARTLIST BUILDER 10.0

Once SmartList Builder is completely installed/updated in Microsoft Dynamics GP 10.0, registration keys will need to be entered.

Registration

To register SmartList Builder:

1. Open the SmartList Builder Registration window (Microsoft Dynamics GP – Tools – SmartList Builder – Register SmartList Builder).
2. Enter your supplied Registration Key.



The screenshot shows a Windows-style dialog box titled "SmartList Builder Registration". The window has a menu bar with "File", "Edit", "Tools", "Help", and "Debug". The title bar includes the text "sa Fabrikam, Inc. 4/12/2017". The main area contains two text input fields: "Site Name" with the value "Two, Inc." and "Registration Key" which is currently empty. At the bottom right, there are two buttons: "Save" and "Cancel".

3. Click on the Save button.

SECTION 6: SMARTLIST BUILDER

Please refer to the SmartList Builder User Guide that ships with Microsoft Dynamics GP 10.0 for additional information on the usage of SmartList Builder 10.0. The guide (SmartListBuilderUsersGuide.pdf) can be found in the Documentation folder in your Microsoft Dynamics GP installation or as a download option at the following URL.

https://mbs.microsoft.com/customersource/documentation/userguides/gp10_userguides.htm?printpage=false