USER MANUAL

SmartPost



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What is SmartPost

SmartPost is the tool for everyone that is tired of hitting the post button. It is the set and forget tool that will look after your Microsoft Dynamics GP posting for you. You decide which batches you want automatically posted, define the rules for your team and SmartPost does the rest. Whether you are importing records after hours that you need posted, or you have 30 people entering batches and people forget to post them, SmartPost will automate that job.

How it Works

First you need to set up a posting user and leave them logged into Microsoft Dynamics GP all the time. This can be on a server or on a machine sitting in the corner dedicated to your posting robot. This is a bit of a pain, we know, but it is much better than posting yourself. The robot then watches your defined schedule and when required grabs all the batches you asked it to find and posts them. The robot follows all the posting rules of Microsoft Dynamics GP and will post To or Through as well as ensure approvals and check that the digits are correct. The robot will then generate posting reports (if you asked for them) and email them to you.

Batches it will Post

- Financial
  - General Entry
  - Clearing Entry
  - Budget Transactions
- Sales
  - Sales Transaction Entry
  - Invoice Entry
  - Cash Receipts Entry
  - Transaction Entry
- Purchasing
  - Manual Payment
  - Payables Transaction Entry
  - Receivings Transaction Entry
  - Purchasing Invoice Entry
  - Returns Transactions Entry
- Inventory
  - Transaction Entry
  - Transfer Entry

Assembly Entry

SmartPost Features

Feature	Description
Multi Company	SmartPost will post across all of your Microsoft Dynamics GP companies. Whether you have one company or one hundred – SmartPost will log into each one and do your posting for you.
After Hours	Post while your team is asleep and never slow them down again.
After Import	If you use SmartConnect or Integration Manager to import data – set SmartPost to post all those records when the import is complete.
Schedule	Schedule posting to be instant, every 30 minutes, hourly, daily or monthly.
Define	Define which batches from which series should be posted.

Installing SmartPost

Information about installing SmartPost is divided into the following sections:

- System Prerequisites
- Installation
- Registration

System Requirements

The system requirements for SmartPost are the same as those for Microsoft Dynamics GP. You can review the Microsoft Dynamics GP System Requirements documentation on CustomerSource or PartnerSource.

SmartPost is not compatible with the Microsoft Dynamics GP Web Client.

Prerequisites

Installing SmartPost on Microsoft Dynamics GP requires that the Microsoft Dynamics GP version 18.8.xxxx or higher. This is available in the Microsoft Dynamics GP October 2025 Release.

Release Notes

The SmartPost upgrade follows the supported upgrade paths from 2018 and 2016 that are available for Microsoft Dynamics GP. You can find these on PartnerSource or CustomerSource in the Upgrading to Microsoft Dynamics GP Hot Topic.

Installation

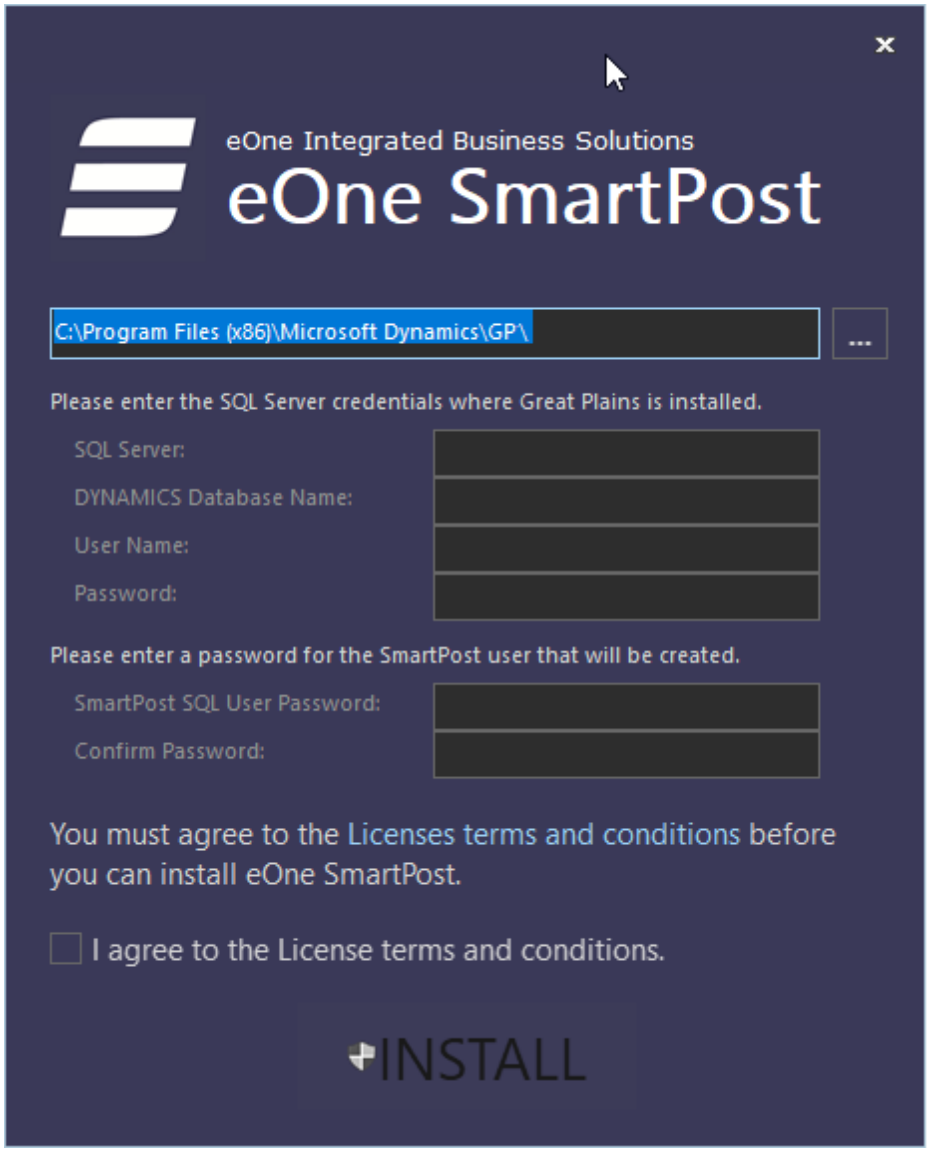
The SmartPost installation will need to be run on the server/workstation where GP is installed and the automated posting process is to run.

To install SmartPost:

1. Run the SmartPost installer by executing the SmartPost.exe file.
2. On the SmartPost installation screen enter the following:
    a. Verify the path to the Microsoft Dynamics GP installation directory. If needed, correct the path.
    b. Enter in the name of the SQL Server where the Microsoft Dynamics GP databases reside.
    c. Enter in the name of the Dynamics system Database.
    d. Enter in a SQL Login information for a login that has enough permissions to create SQL objects. We recommend 'sa'.
    e. Enter in a password for the installation to set on the SmartPost SQL login it

will create.

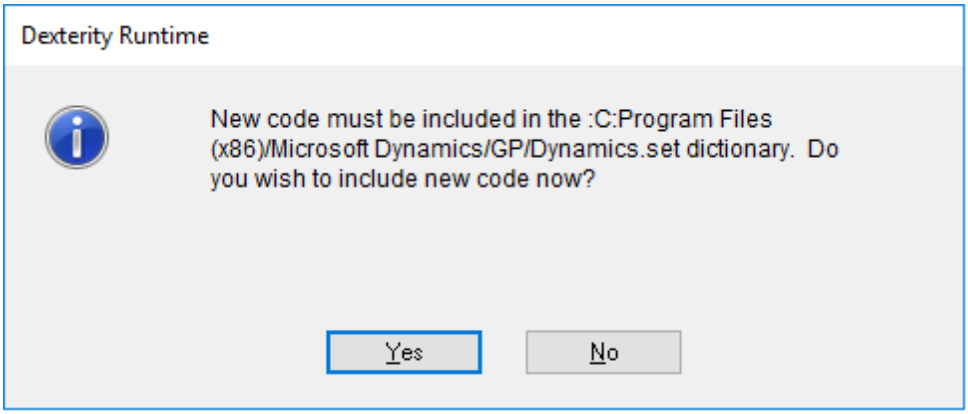
f. Mark the checkbox to agree to the License terms and conditions.
g. Click Install.



3. If prompted, click Yes to allow the SmartPost installation to make changes to the computer.
4. The installation will process for a few seconds.
5. When the installation is done, click Finish.



6. Launch Microsoft Dynamics GP and select Yes when prompted to include new code.



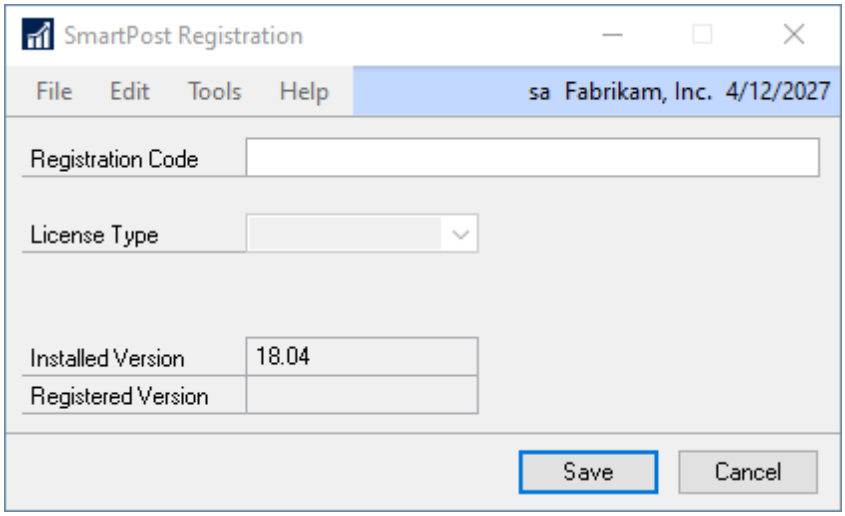
Upgrade

If you are upgrading to Microsoft Dynamics GP from Microsoft Dynamics GP 2018 or 2016, there is no separate update process that needs to be completed for SmartPost . For SmartPost, you will want to follow the steps in the Installation section on the machine where you want to run SmartPost. This will install the SmartPost application into your Microsoft Dynamics GP installation and the update will be completed automatically in that process.

Registration

To Register SmartPost:

1. Open the SmartPost Registration window by going to Microsoft Dynamics GP - Tools - SmartPost - Registration.
2. Enter in the Registration Code.



3. Click Save to save the registration information.

Setup

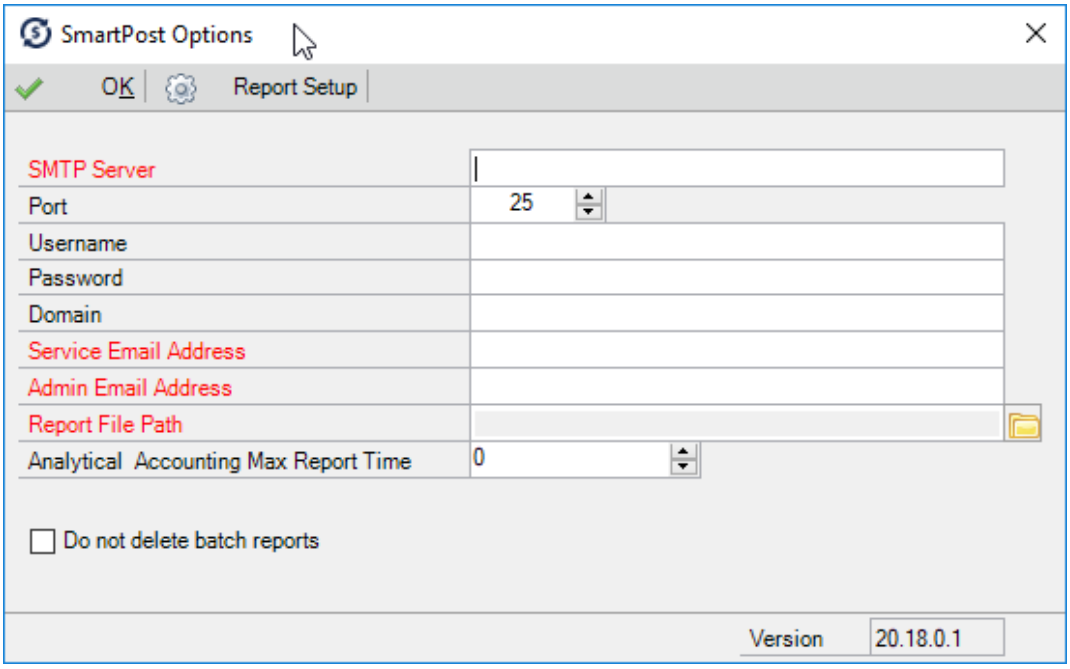
The setup information is divided into the following topics:

- SmartPost Options
- SmartPost Report Options
- Posting Routines
- Scheduling
- Analytical Accounting

SmartPost Options

To setup the SmartPost Options:

1. Open the SmartPost setup window. Using the Microsoft Dynamics GP interface go to Microsoft Dynamics GP - Tools - SmartPost - Setup.



2. To enable emails within SmartPost enter a SMTP server (This could be a SMTP Url or the exchange server).
3. Enter the Username, Password, and Domain for the user that will be used to e-mail the reports.
4. Service Email Address : The user that all emails in the system will be sent as.
5. Admin Email Address : This is the user that will receive emails if there are anything that went wrong while posting or trying to post a batch.
6. Report File Path : The path where all batch reports will be created.
7. Set the Analytical Accounting Max Report Time. This is used as a timeout for the

reports if they don't generate in the time given, it will quit trying.

8. Do not delete batch reports: Select this flag if you want to keep the batch reports after they have been emailed to the specified user.

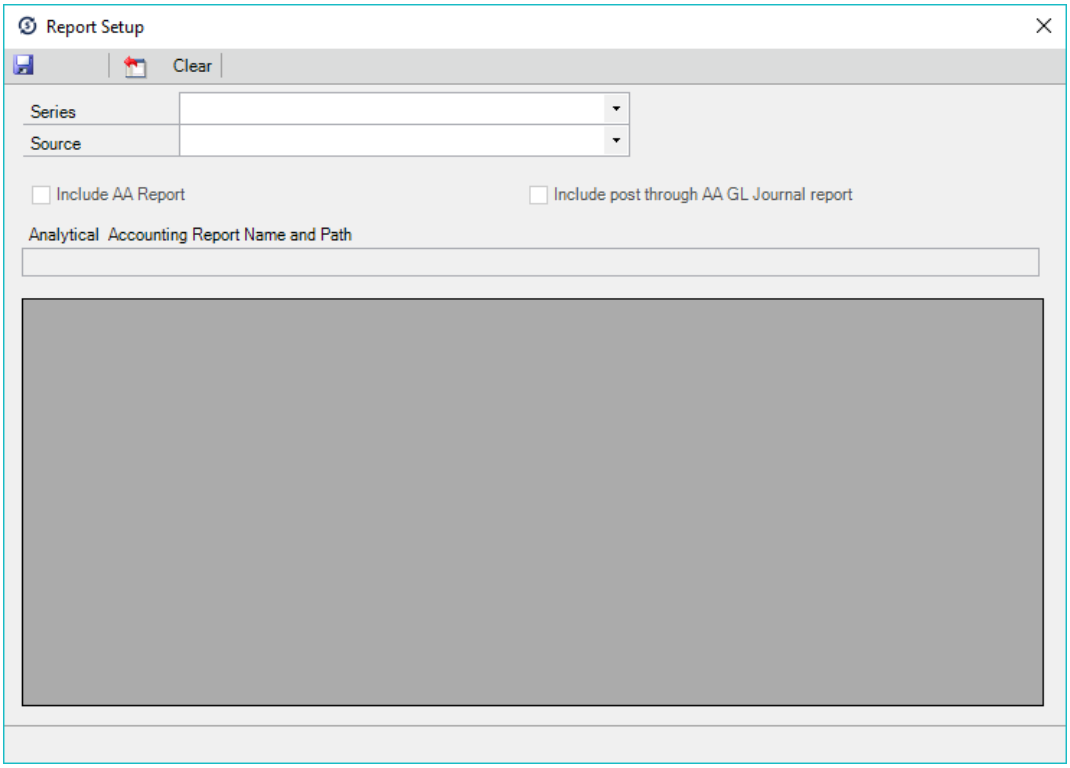


To allow SSL to be used for the SMTP server, you will need to open the eOne.SmartPost.dll.config file in the AddIns folder of your Microsoft Dynamics GP installation. In this file, you will need to change the line "<add key="UseSSL" value="false"/>" from false to true and save the file. Then relaunch Microsoft Dynamics GP and it should allow for an SSL site to be used.

SmartPost Report Setup

To setup the SmartPost Report Options:

1. Open the SmartPost setup window. Using the Microsoft Dynamics GP interface go to Microsoft Dynamics GP - Tools - SmartPost - Setup.
2. Click on the Report Setup button.



3. Select the Batch Series and Source.
4. Mark the Include AA Report and Include post through AA GL Journal report if appropriate. Please see the section on the Analytical Accounting Setup for more information.
5. Select the reports you would like to print and mail when the selected batch type

gets posted.

6. Click Save to save the selection.

Report Output

The ReportOutput defaults to HTML but it can be set to other options as well.

The options available for the report output are:

- pdf
- txt
- tab
- csv
- htm

If you have pdf but don't have full Adobe installed, it will revert back to html output.

To change the Report Output:

1. Close Microsoft Dynamics GP if if it open on the machine.
2. Open the eone.SmartPost.dll.config file that can be found in the AddIns folder of the Microsoft Dynamics GP install directory. By default this is: C:\Program Files (x86)\Microsoft Dynamics\GP\AddIns
3. Locate the key listed as follows: <add key="ReportOutput" value="htm"/>
4. Change the htm value to one of the other available options.
5. Save the eone.SmartPost.dll.config file
6. Launch Microsoft Dynamics GP and SmartPost will now use the new report option.
7. This setting will need to be changed on each machine where SmartPost is being run.

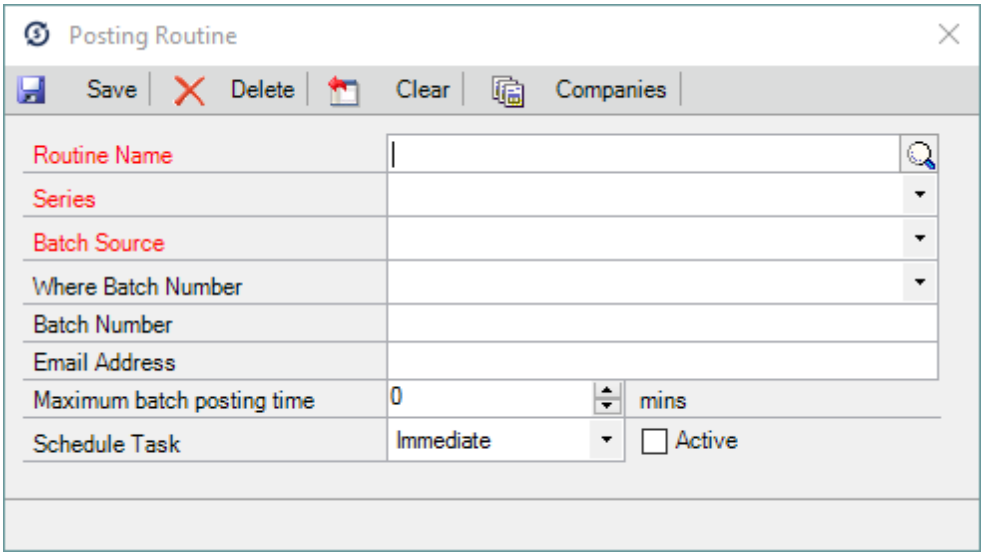


The pdf option requires that the full Adobe Acrobat installed and not just Adobe Reader.

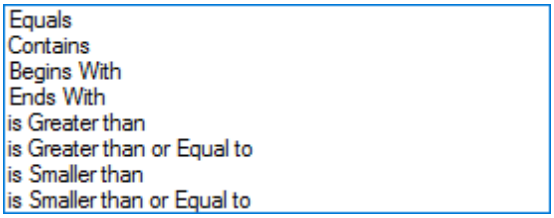
Posting Routines

To setup the Posting Routine:

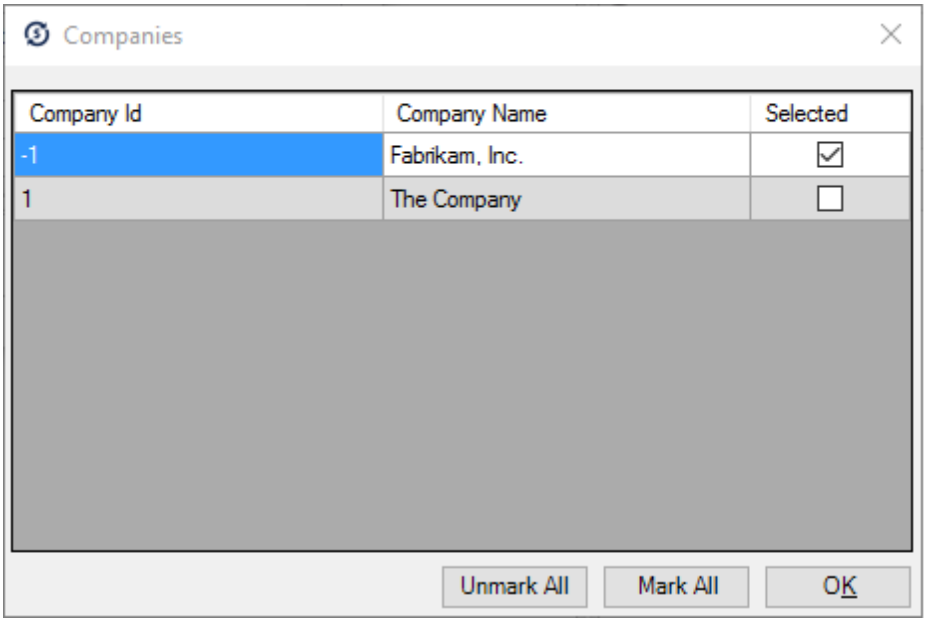
1. Open the Posting Routines window by going to Microsoft Dynamics GP - Tools - Setup - SmartPost - Posting Routine.



2. Enter a Routine name.
3. Select the Batch Series and Source for this routine.
4. Select a search type on the batch number.
5. Enter the what the search type should look for. (For example if i selected "Begins With" and enter "AA" in the Batch Number field, the routine will find all batches that begin with "AA")



6. Enter the email address of the person that will receive the reports when this posting routines posts a batch.
7. Set the Schedule. For more information, see the Scheduling section.
8. The active flag specifies whether the Routine is active or not.
9. Click the Companies button and select all the companies that the routine must find batches and post.



10. Click OK to close the Companies window.
11. Click the Save button to save the routine.

SmartPost Scheduling

SmartPost Routines may be scheduled to run immediately, daily, weekly, monthly, and once only.

The SmartPost scheduling information has been divided into the following topics:

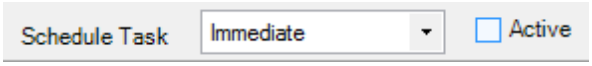
- Immediate
- Daily schedules
- Weekly schedules
- Monthly schedules
- Scheduling to run once

Immediate

A Routine scheduled to run immediately will look for batches and as soon as they are found they will be posted.

To schedule a Routine once:

1. Open the SmartPost Routine setup window by going to Microsoft Dynamics GP - Tools - Setup - SmartPost - Posting Routine.
2. Select 'Immediate' as the schedule task option.



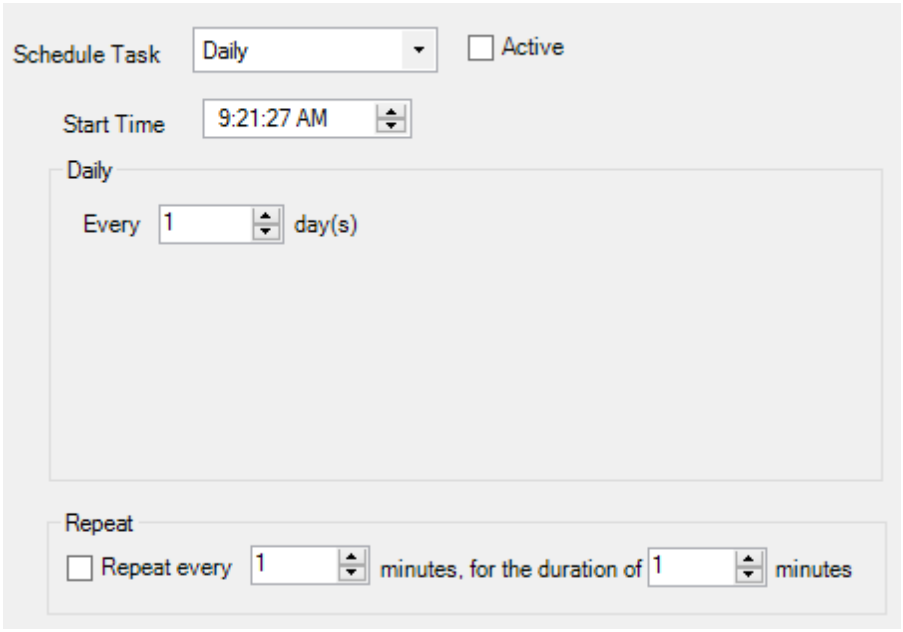
3. Click save to save the Routine changes.

Daily Schedules

A daily schedule sets a Routine to run every x days, at the selected time.

To schedule a Routine to run daily:

1. Open the SmartPost Routine setup window by going to Microsoft Dynamics GP - Tools - Setup - SmartPost - Posting Routine.
2. Select 'Daily' as the schedule task option.



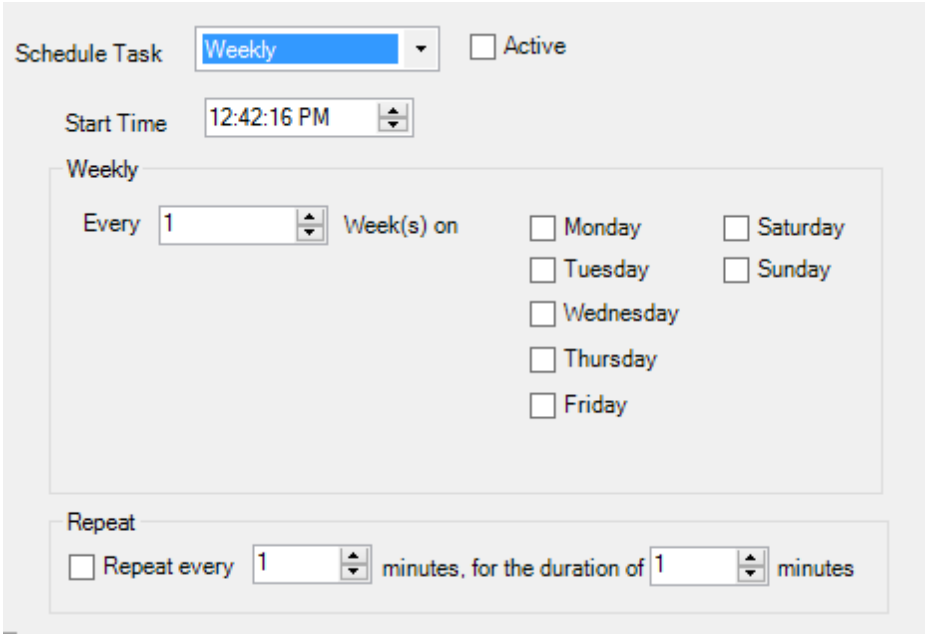
3. Enter the start time for the routine.
4. Enter the number of days between each run of the Routine.
5. If the routine is to be repeated, setup the following:
    a. Mark the Repeat every... checkbox.
    b. Select the time in minutes between each run.
    c. Select the minutes between the start time and the time before which the last daily run should start.
6. Click save to save the Routine amendments.

Weekly Schedules

A weekly schedule sets a Routine to run every x weeks, on selected days, at the selected time.

To schedule a Routine to run weekly:

1. Open the SmartPost Routine setup window by going to Microsoft Dynamics GP - Tools - Setup - SmartPost - Posting Routine.
2. Select 'Weekly' as the schedule task option.



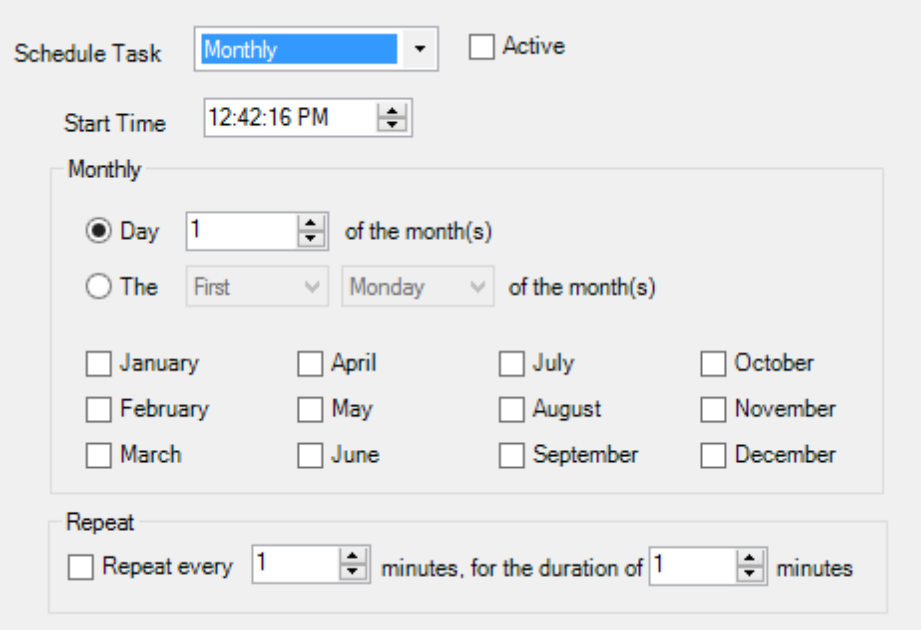
3. Enter the time that the Routine run should start.
4. Enter the number of weeks between each run of the Routine.
5. Select the day(s) of the week where the Routine is to be run.
6. If the Routine is required to be run multiple times each day it is run, mark the Repeat every... checkbox and enter the minutes between the start time and the time before which the last daily run should start.
7. Click save to save the Routine amendments.

Monthly Schedules

A monthly schedule sets a Routine to run on a certain day of the month for the selected months, at a specified time.

To schedule a Routine to run monthly:

1. Open the SmartPost Routine setup window by going to Microsoft Dynamics GP - Tools - Setup - SmartPost - Posting Routine.
2. Select 'Monthly' as the schedule task option.



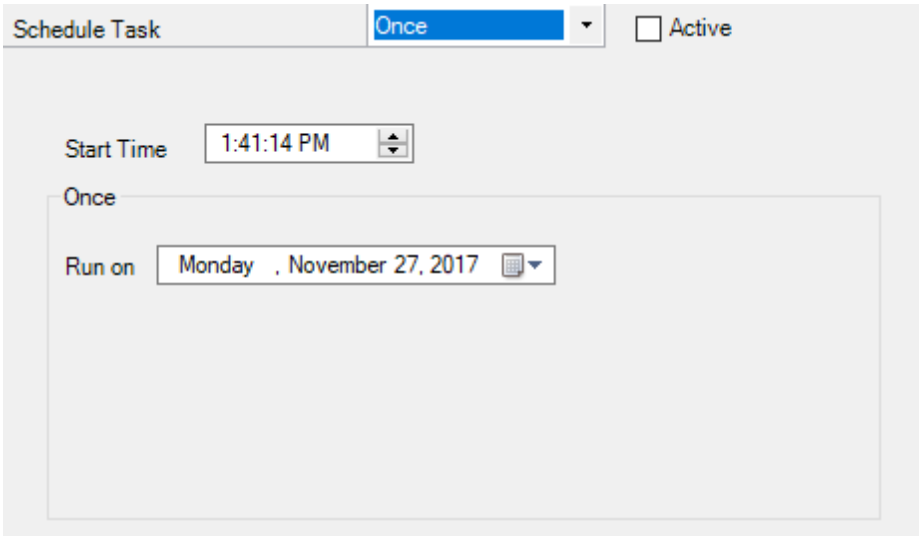
3. Enter the time that the Routine run should start.
4. Enter the day of the month that you want to run the Routine.
5. Select the months where the Routine is to be run.
6. If the Routine is required to be run multiple times each day it is run, check the Repeat every... checkbox and enter the minutes between the start time and the time before which the last daily run should start.
7. Click save to save the Routine amendments.

Run Once

A Routine scheduled to run once will be run only once at the date and time specified by the schedule. This schedule will be automatically deactivated after the Routine has been run once.

To schedule a Routine once:

1. Open the SmartPost Routine setup window by going to Microsoft Dynamics GP - Tools - Setup - SmartPost - Posting Routine.
2. 2. Select 'Once' as the schedule task option.

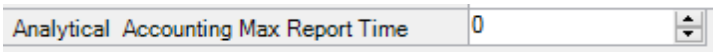


3. Enter the time that the Routine should run.
4. Enter the date that that the Routine should run.
5. Click save to save the Routine amendments.

Analytical Accounting

SmartPost require a few manual setups to be completed for AA to work. If AA is installed these steps need to be followed for each batch series and batch source that SmartPost will post regardless of whether you want to print and email the AA reports or not.

On the SmartPost Options window we have added a default AA report timeout.



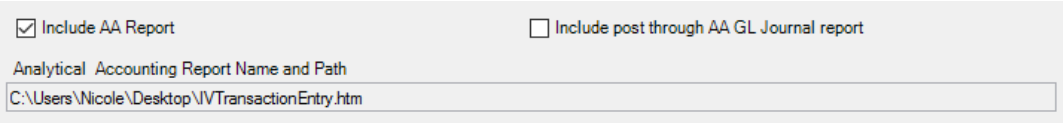
When SmartPost is posting a batch with an AA report, it will wait for the report to print in the specified folder as setup below. SmartPost will wait for this report to be printed and continue when it has waited longer than the time specified. (If the time is set to 0, SmartPost will wait for a default time of 5 min)

Please Note: When you have Post through General Ledger setup in Great Plains you will need to follow the steps in the Financial section on General Entry.

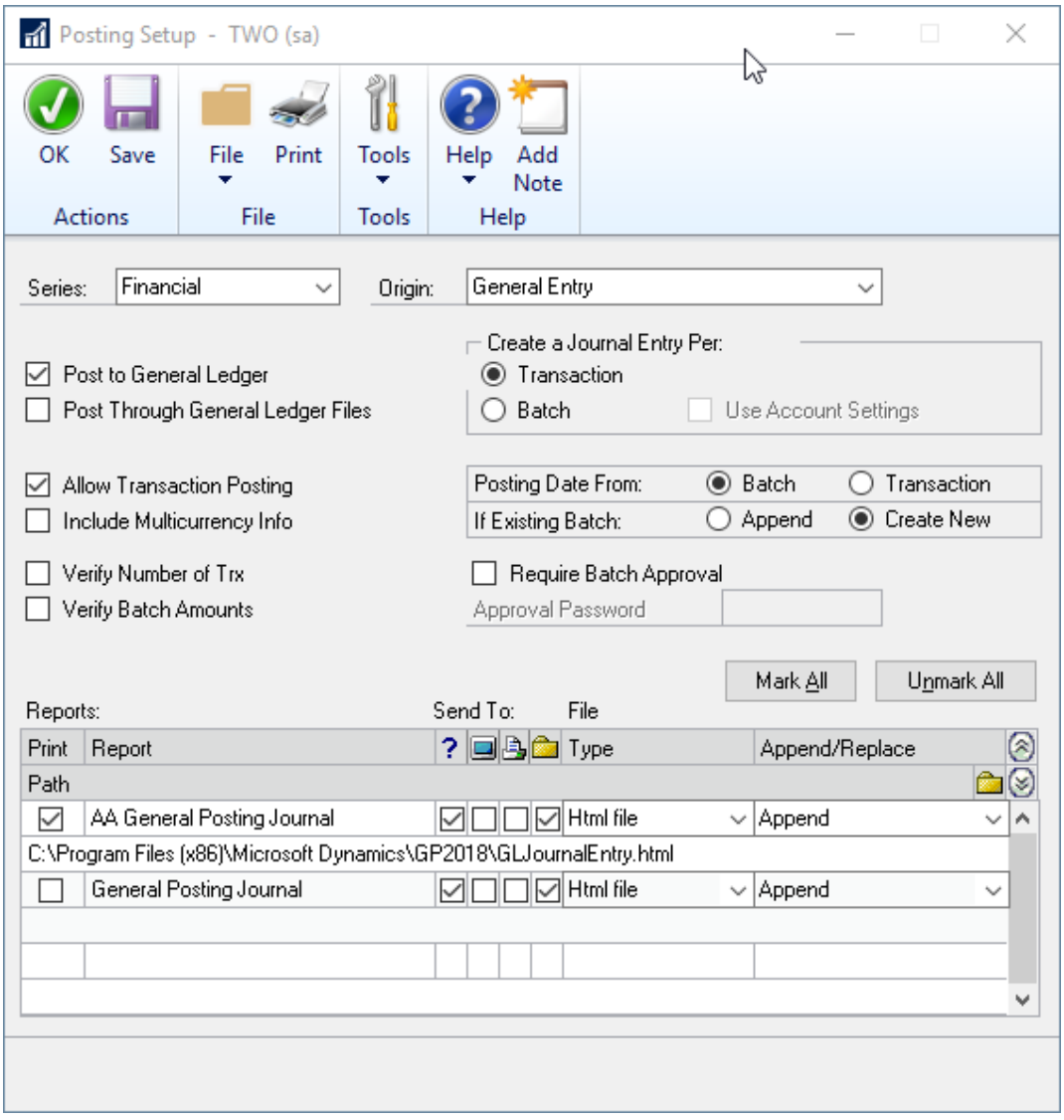
If you want to print or email AA reports:

1. Open the Report Setup window by going to Microsoft Dynamics GP - Tools - SmartPost - Setup and click the Report Setup button.
2. Select the Batch Series and Source that you want to print or email the AA reports for.
3. Select the "Include AA Report" option on the Report Setup window in SmartPost

for the desired Batch Series and Source. If you are using the Post Through General Ledger Files option in the Microsoft Dynamics GP Posting Setup window and you want it to send the General Ledger report as well as the Sales, Inventory, or Purchasing report, mark the Include post through AA GL Journal report checkbox.



4. Below this check box a report name will be displayed. This is the path and name of the report that we will need to setup in Great Plains Posting Setup.
5. Now we need to change the AA Report Printing Options in the report Setup for Great Plains. To do this go to Microsoft Dynamics GP - Tools - Setup - Posting - Posting.



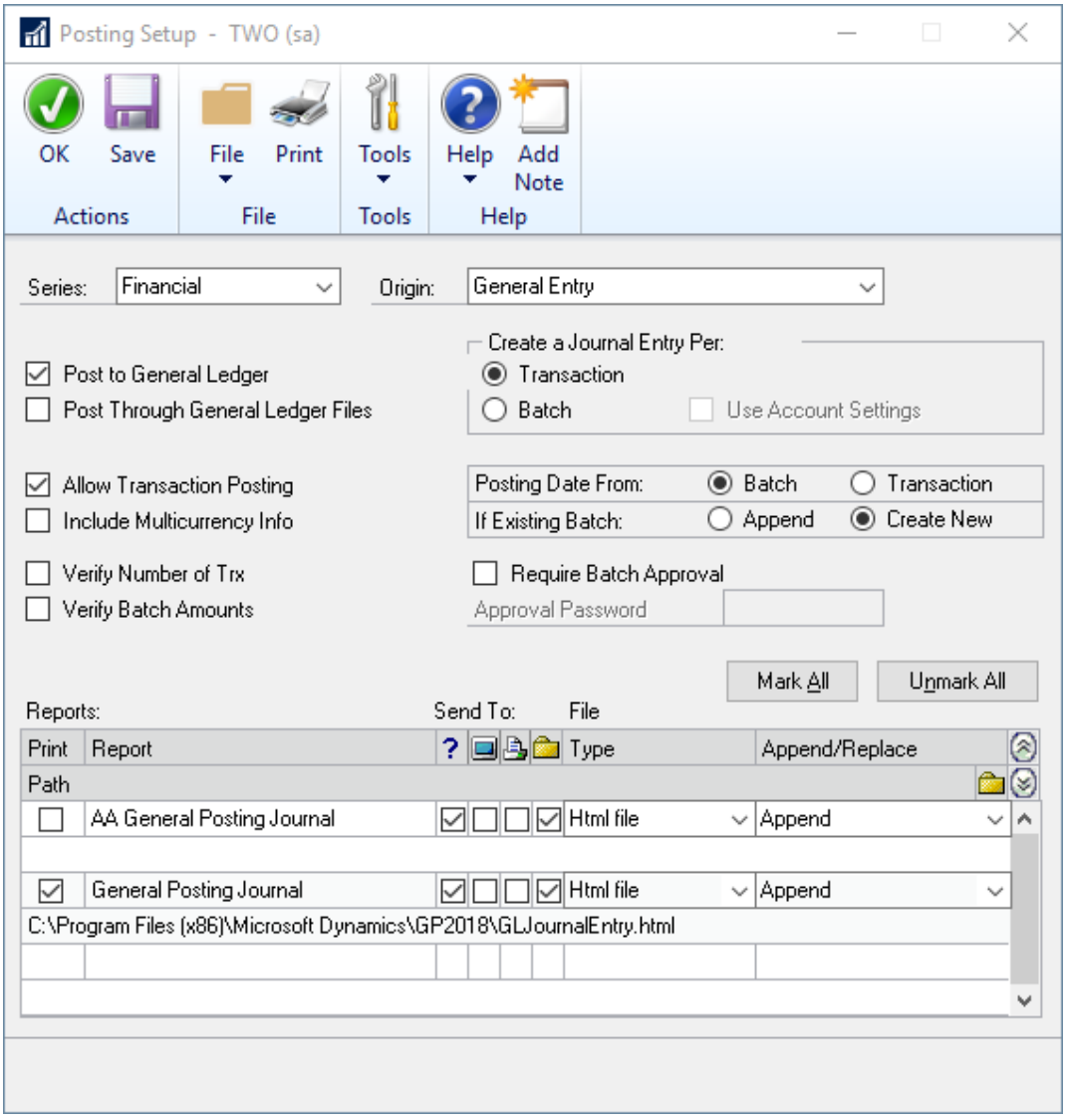
6. Select the series and origin as selected in step 2.
7. Select the file option for this AA report.
8. Change the Type drop down to Html file.
9. The file and path selected in the path field of this window MUST be the same name and path as in step 4.
10. Please follow steps in the following links to make sure you change the correct reports for each Series.
    a. Financial
    b. Sales
    c. Purchasing
    d. Inventory

If you do not want to print or email AA reports:

1. Open the Report Setup window by going to Microsoft Dynamics GP - Tools - SmartPost - Setup and click the Report Setup button.
2. Select the Batch Series and Source that you don't want to print or email the AA reports for.
3. De-select the "Include AA Report" option.



4. Now we need to turn off the AA Report Printing Options window in the report Setup for Great Plains. To do this go to Microsoft Dynamics GP - Tools - Setup - Posting - Posting.



5. Select the series and origin as selected in step 2.
6. De-select the AA report in the scrolling window.
7. Please follow the steps in the following links to make sure you turn off the correct reports for each Series.
    a. Financial
    b. Sales
    c. Purchasing
    d. Inventory

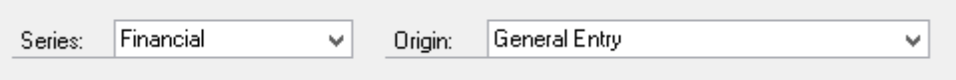
Financial

To setup the Analytical Accounting Posting Reports for the financial series:

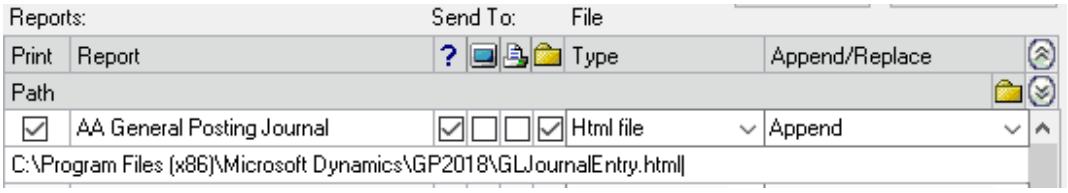
1. Open the Great Plains Report Setup window by going to Microsoft Dynamics GP - Tools - Setup - Posting - Posting.
2. If you are turning off the AA reporting options then de-select the reports below instead of adding the file paths.
3. We will be changing the Series and Origin for the options below to change the required AA report.

General Entry

1. Select the Series of Financial and the Origin of General Entry.



2. Mark the AA General Posting Journal report.



3. Select the file type checkbox and change the type to Html.
4. The report path needs to be the same as the path in the Report Setup window of SmartPost and the report name should be GLJournalEntry.htm. (Please note that this report path and name needs to be exact for SmartPost to pickup the report and mail it.)

Sales

To setup the Analytical Accounting Posting Reports for the Sales series:

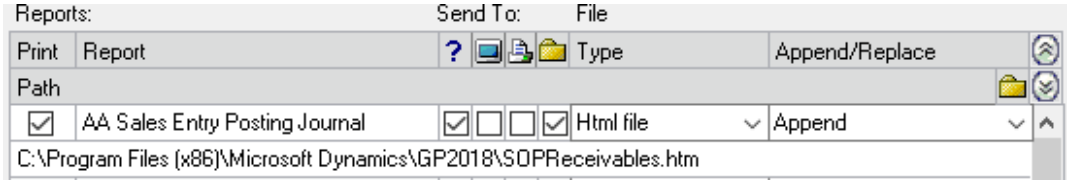
1. Open the Great Plains Report Setup window b going to Microsoft Dynamics GP - Tools - Setup - Posting - Posting.
2. If you are turning off the AA reporting options then de-select the reports below instead of adding the file paths.
3. We will be changing the Series and Origin for the options below to change the required AA report.

Sales Transaction Entry

1. Select the Series of Sales and the Origin of Receivables Sales Entry.



2. Mark the AA Sales Entry Posting Journal report.



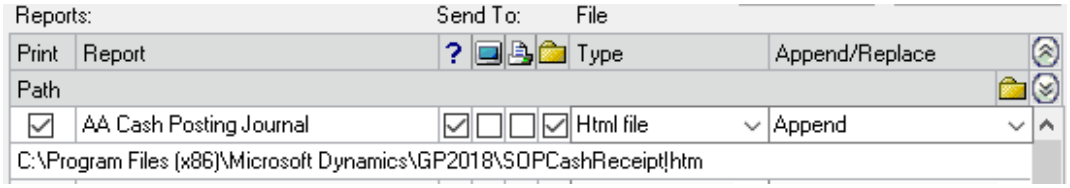
3. Select the file type checkbox and change the type to Html
4. The report path needs to be the same as the path in the Report Setup window of SmartPost and the report name should be SOPReceivables.htm. (Please note that this report path and name needs to be exact for SmartPost to pickup the report and mail it.)

Cash Receipts Entry

1. Select the Series of Sales and the Origin of Receivables Cash Receipts.



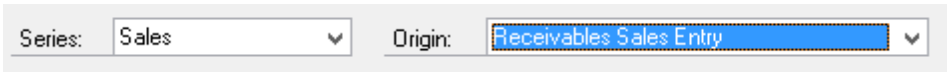
2. Mark the AA Cash Posting Journal.



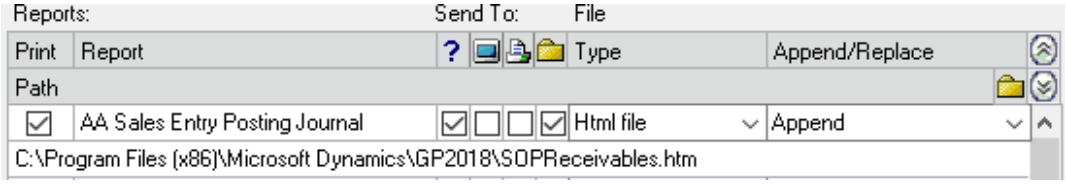
3. Select the file type checkbox and change the type to Html
4. The report path needs to be the same as the path in the Report Setup window of SmartPost and the report name should be SOPCashReceipt.htm. (Please note that this report path and name needs to be exact for SmartPost to pickup the report and mail it.)

Transaction Entry

1. Select the Series of Sales and the Origin of Receivables Sales Entry.



2. Mark the AA Sales Entry Posting Journal report.



3. Select the file type checkbox and change the type to Html
4. The report path needs to be the same as the path in the Report Setup window of SmartPost and the report name should be SOPReceivables.htm. (Please note that this report path and name needs to be exact for SmartPost to pickup the report and mail it.)

Purchasing

To setup the Analytical Accounting Posting Reports for the purchasing series:

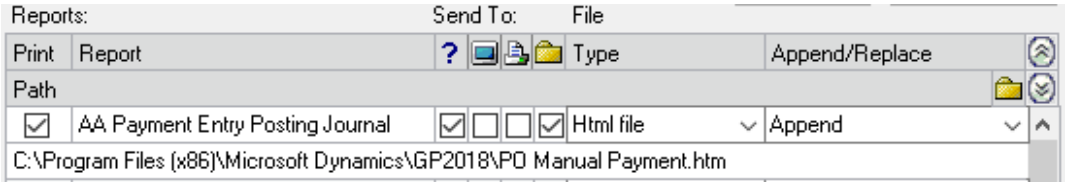
1. Open the Great Plains Report Setup window b going to Microsoft Dynamics GP - Tools - Setup - Posting - Posting.
2. If you are turning off the AA reporting options then de-select the reports below instead of adding the file paths.
3. We will be changing the Series and Origin for the options below to change the required AA report.

Manual Payment

1. Select the Series of Purchasing and the Origin of Payment Entry.



2. Mark the AA Payment Entry Posting Journal report.



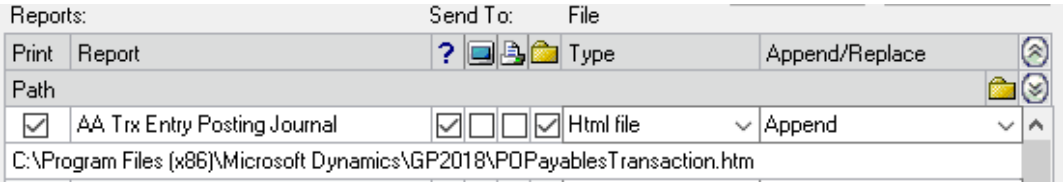
3. Select the file type checkbox and change the type to Html.
4. The report path needs to be the same as the path in the Report Setup window of SmartPost and the report name should be POManualPaymanet.htm. (Please note that this report path and name needs to be exact for SmartPost to pickup the report and mail it.)

Payables Transaction Entry

1. Select the Series of Purchasing and the Origin of Payables Trx Entry.



2. Mark the AA Trx Entry Posting Journal report.



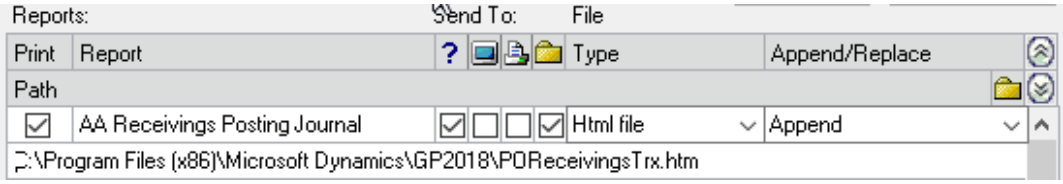
3. Select the file type checkbox and change the type to Html.
4. The report path needs to be the same as the path in the Report Setup window of SmartPost and the report name should be POPayablesTransaction.htm. (Please note that this report path and name needs to be exact for SmartPost to pickup the report and mail it.)

Receivings Transaction Entry

1. Select the Series of Purchasing and the Origin of Receivings Trx Entry.



2. Mark the AA Receivings Posting Journal report.



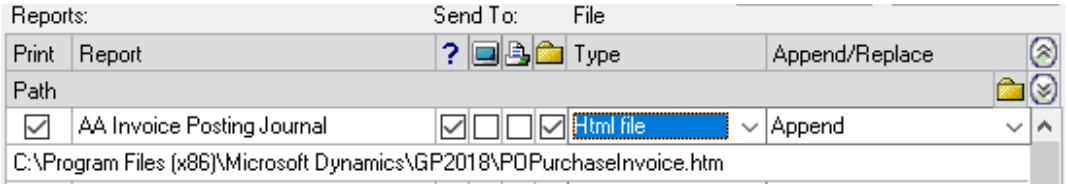
3. Select the file type checkbox and change the type to Html
4. The report path needs to be the same as the path in the Report Setup window of SmartPost and the report name should be POReceivingsTrx.htm. (Please note that this report path and name needs to be exact for SmartPost to pickup the report and mail it.)

Purchasing Invoice Entry

1. Select the Series of Purchasing and the Origin of Purchasing Invoice Entry.



2. Mark the AA Invoice Posting Journal report.



3. Select the file type checkbox and change the type to Html
4. The report path needs to be the same as the path in the Report Setup window of SmartPost and the report name should be POPurchaseInvoice.htm. (Please note that this report path and name needs to be exact for SmartPost to pickup the report and mail it.)

Inventory

To setup the Analytical Accounting Posting Reports for the inventory series:

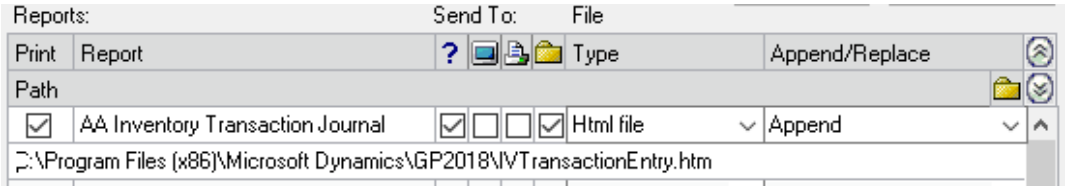
1. Open the Great Plains Report Setup window b going to Microsoft Dynamics GP - Tools - Setup - Posting - Posting.
2. If you are turning off the AA reporting options then de-select the reports below instead of adding the file paths.
3. We will be changing the Series and Origin for the options below to change the required AA report.

Transaction Entry

1. Select the Series of Inventory and the Transaction Entry.



2. Mark the AA Inventory Transaction Journal report.



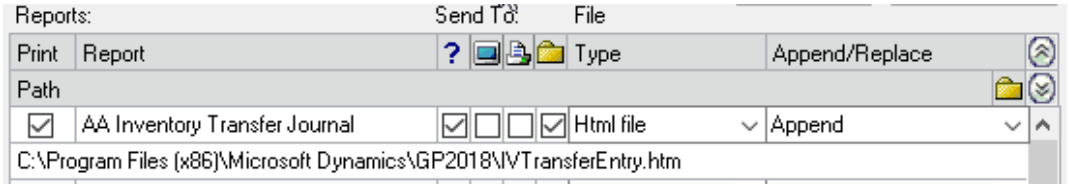
3. Select the file type checkbox and change the type to Html.
4. The report path needs to be the same as the path in the Report Setup window of SmartPost and the report name should be IVTransactionEntry.htm. (Please note that this report path and name needs to be exact for SmartPost to pickup the report and mail it.)

Transfer Entry

1. Select the Series of Inventory and the Origin of Transfer Entry.



2. Mark the AA Inventory Transfer Journal report.



3. Select the file type checkbox and change the type to Html.
4. The report path needs to be the same as the path in the Report Setup window of SmartPost and the report name should be IVTransferEntry.htm. (Please note that this report path and name needs to be exact for SmartPost to pickup the report and mail it.)

Processing

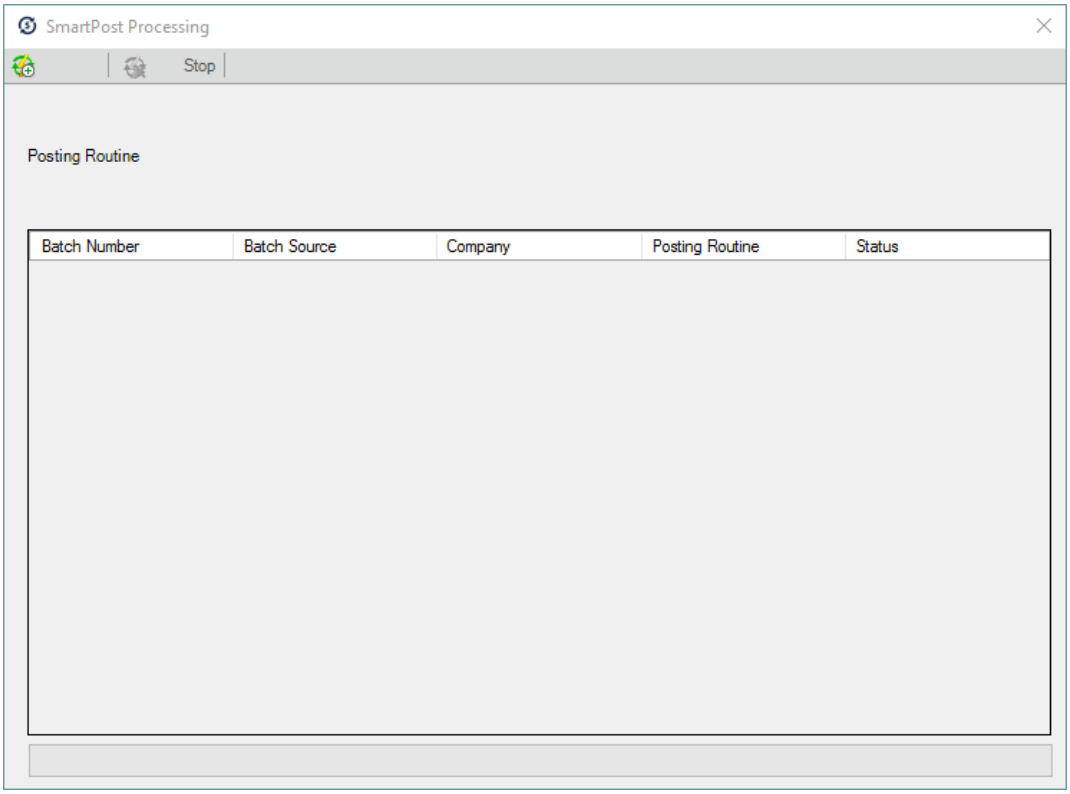
The SmartPost processing window is where the running of routines and posting of batches occur.

When logged into Microsoft Dynamics GP, the user that you are logged in as, will be the user that all batched will be posted as.

Please ensure that this user has access to post all batches Setup in your Posting Routines.

To Start the SmartPost Processing:

1. Open the SmartPost Processing window by going to Microsoft Dynamics GP - Tools - SmartPost - Processing.



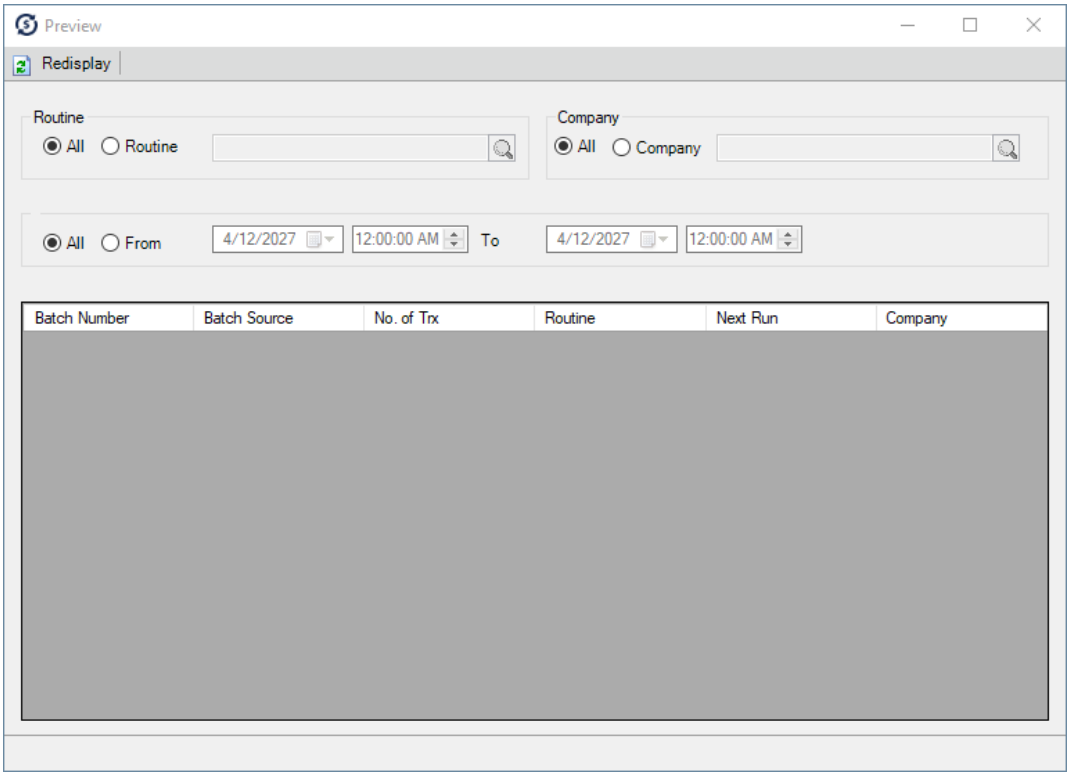
2. Click on the Start Button.
3. SmartPost will start looking for batches on all companies for all routines setup.
4. Once a batch or batches are found SmartPost will display these batches in the processing window and start posting them one by one.
5. When you click on the Stop Button and SmartPost is in the process of posting a batch, it will finish the posting of that batch before the window can be closed or the Start button becomes available again.

Preview

The preview window can be used to show the batches that are available to post based on the posting routines that you have setup.

To view the available batches:

1. Open the Preview window by going to Microsoft Dynamics GP - Tools - SmartPost - Preview.



2. Select the Routines, Companies, and dates you want to view the batches for.
3. Click Redisplay.

Enhancements

- Release 18.9.19.0

18.9.19.0

This release is a compatibility release for SmartPost 18.9. It allows SmartPost to be compatible with Microsoft Dynamics GP 18.9.xxxx. It will contain the same features/fixes as the SmartPost 18.8 build 18.8.18.0 for Microsoft Dynamics GP 18.8 as well as the following fix.

Problem Reports Fixed in Build 18.9.19.0

- Updating the E1REG table can leave an open SQL connection

Release Date: 11/6/2026
Compatible GP Versions: Microsoft Dynamics GP (18.9.xxxx)