USER MANUAL

SmartView



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Introduction

SmartView provides an alternate, fast and flexible interface to all default SmartLists. SmartView leverages all the power of SmartList and SmartList Builder inside a very flexible and easy to use interface. Like all eOne tools, SmartView is configurable to your specific business needs and will work across all Dynamics GP modules as well as displaying data from outside of Dynamics GP (when used in conjunction with SmartList Builder).

SmartView is a replacement for SmartList. As well as significant performance improvements in retrieving and exporting data, SmartView contains many functional improvements over SmartList, including unlimited search criteria, more search methods, grouping, totals and subtotals.

You can use SmartView to create customized inquiries to provide easier, faster access to information stored in the Microsoft Dynamics GP system. With SmartView, you can create an unlimited number of filters. SmartView also allows you to group lists and display totals and subtotals.

SmartView is designed to work with the default Microsoft Dynamics GP SmartLists as well as those created with SmartList Builder.

Some of the benefits of using SmartView are as follows:

- Access to the GP SmartLists
- Display any SmartList Builder list
- Faster Lists
- Better Filtering
- Groups and Totals
- Familiar Environment
- Fastest Path to Excel

SmartView has two different modules to it, SmartView for the Microsoft Dynamics GP client (also known as SmartView Internal) and SmartView Standalone Windows Client (also knows as SmartView External). SmartView for the Microsoft Dynamics GP client runs from within Microsoft Dynamics GP, just like SmartList does. The SmartView Standalone Windows Client allows you to run SmartView from your desktop without having to log into Microsoft Dynamics GP. This means everyone inside your organization can now share in and benefit from easy access to the Microsoft Dynamics GP data without having to have a Microsoft Dynamics GP user license.

SmartView Internal

Installing Smartview Internal

This section covers the installation of SmartView in your Microsoft Dynamics GP environment. It will also cover the registration for SmartView. You will need to have sufficient (administrative) privileges to complete this process correctly.

System Requirements

The system requirements for SmartView are the same as those for the version of Microsoft Dynamics GP you are using. You can review the Microsoft Dynamics GP System Requirements documentation on Microsoft's CustomerSource or PartnerSource sites.

SmartView for the Microsoft Dynamics GP Client does not run in the Microsoft Dynamics GP Web Client. When using the Web Client, you would need to use the SmartView External (Standalone Windows Client).

If you are using SmartList Builder with Microsoft Dynamics GP in conjunction with SmartView, it is recommended that you be on the latest version of both products for the release of Microsoft Dynamics GP being used.

System Prerequisites

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

.NET Framework 4.5.1 must be installed on the client machine

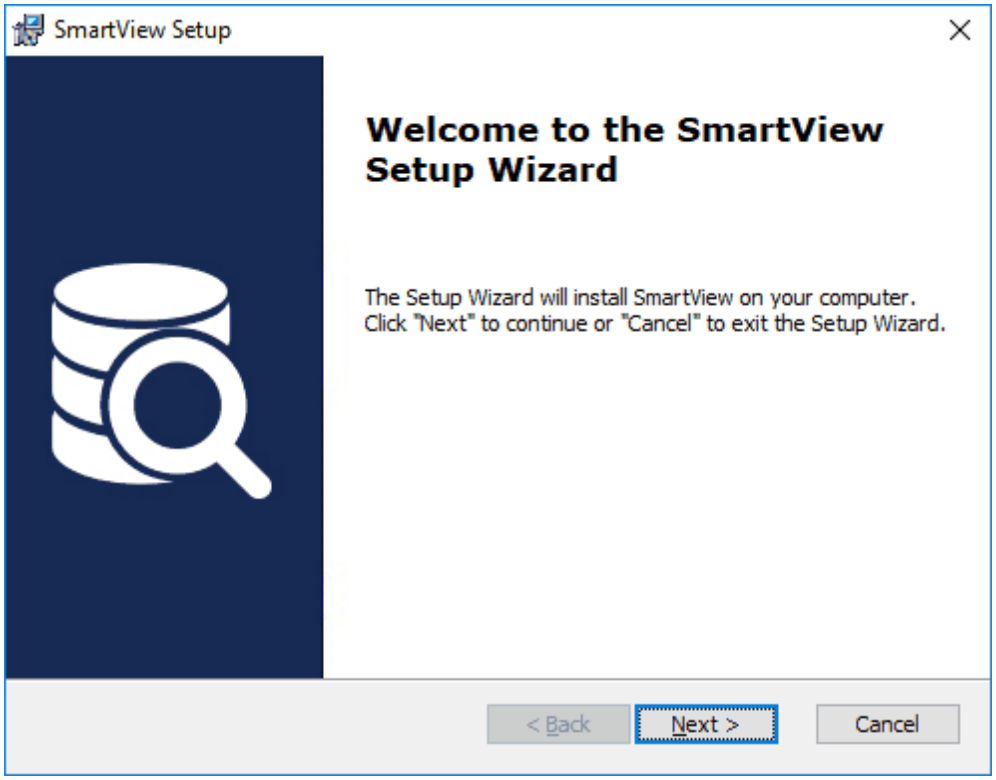
Release Notes

The SmartView 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.

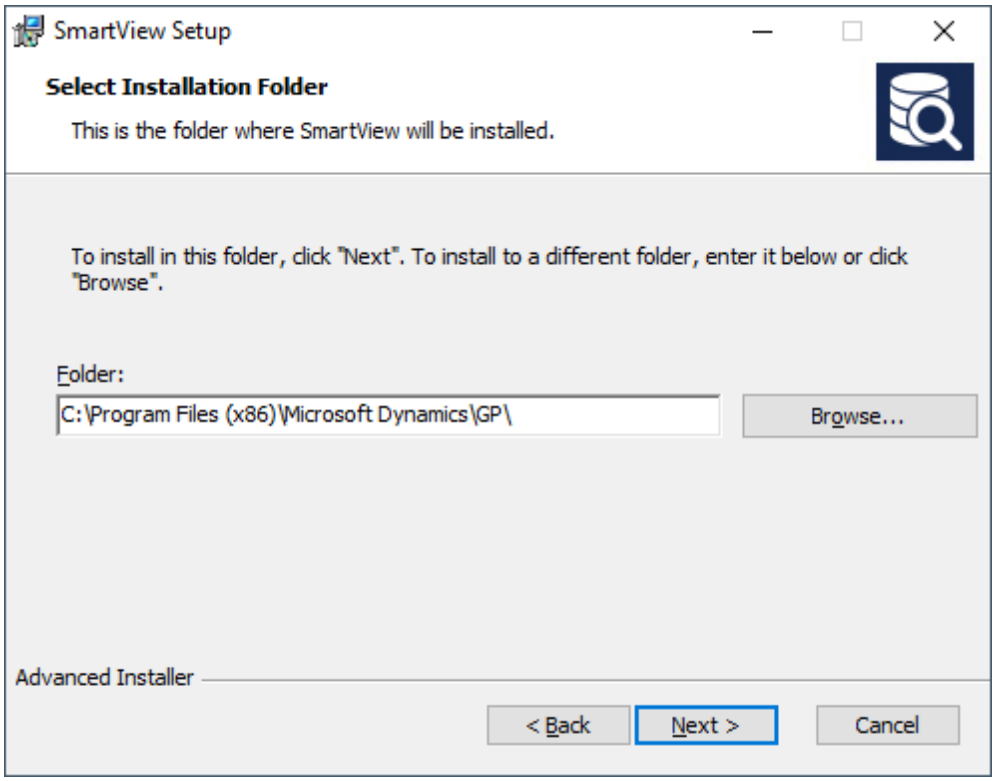
Installation

To install SmartView:

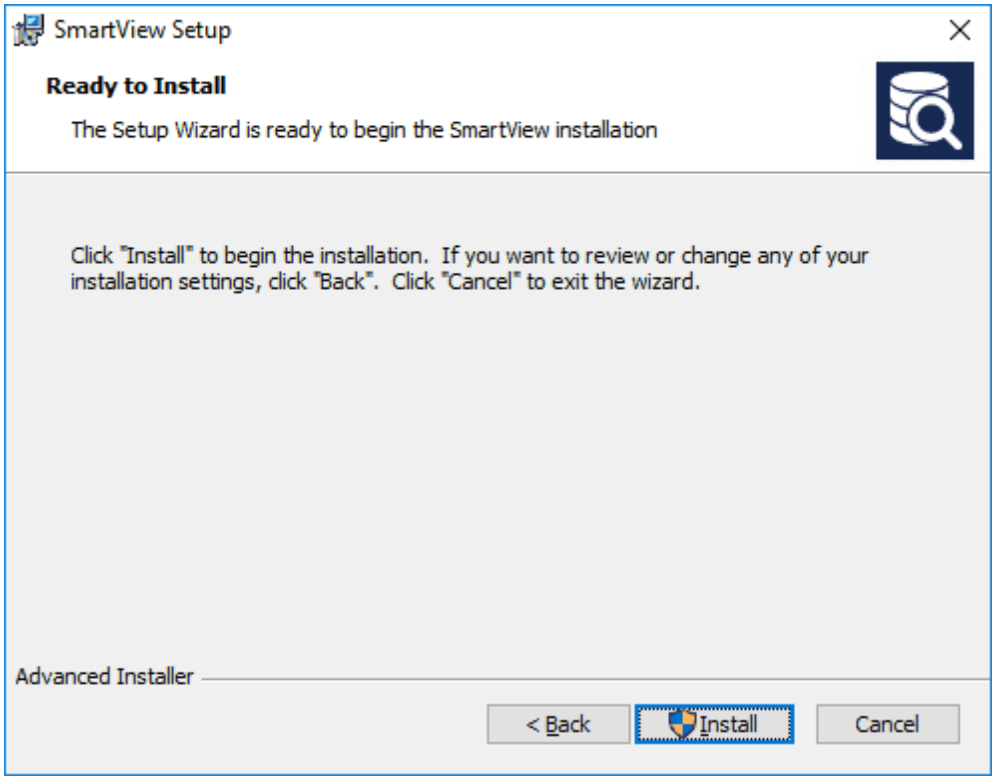
1. Run the setup executable, SmartView.msi, which will start the SmartView installation.
2. Click on the Next button to continue.



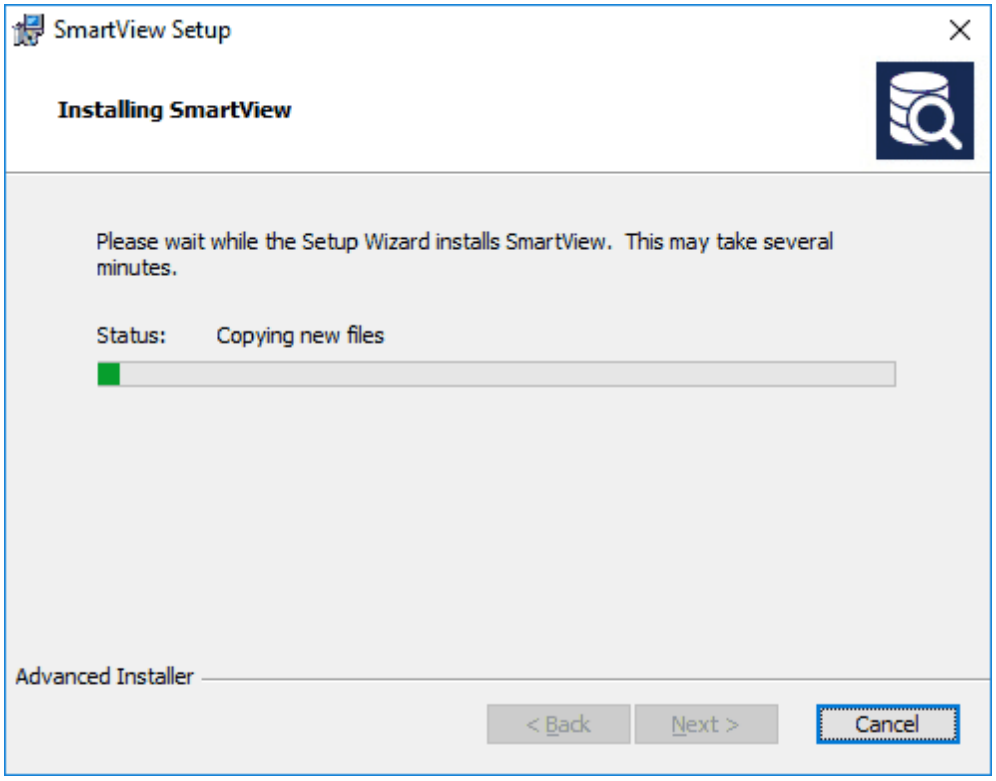
3. Select the location where your Microsoft Dynamics GP program is installed using the Browse button.



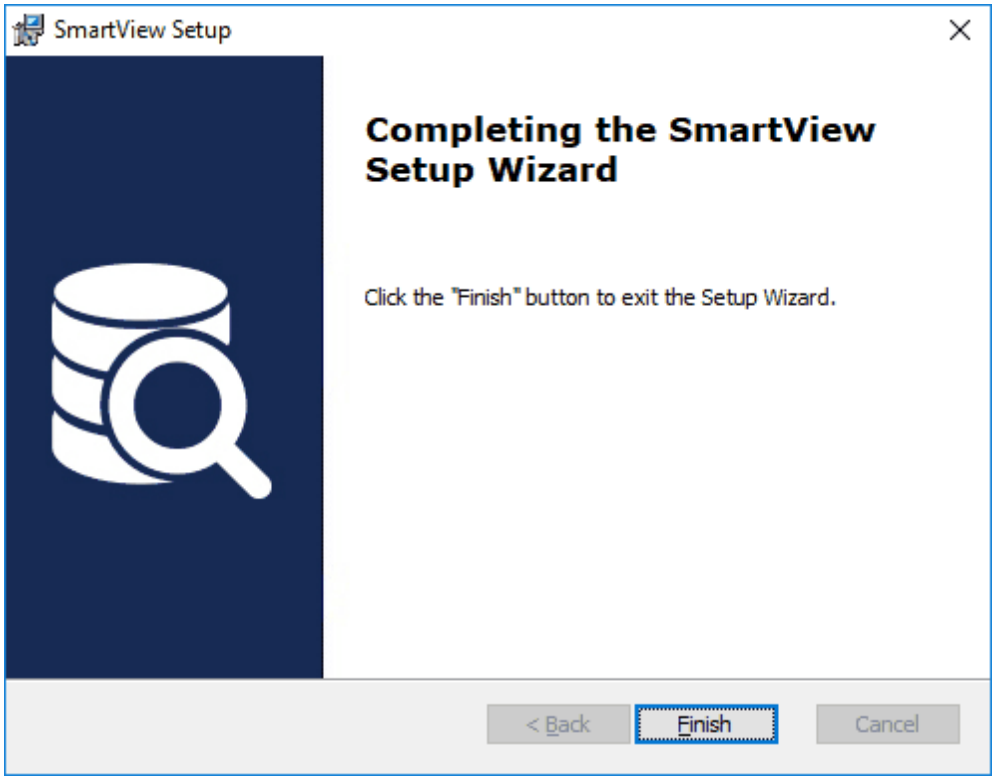
4. Click on the Next button to continue.
5. Click on the Install button to begin the installation.



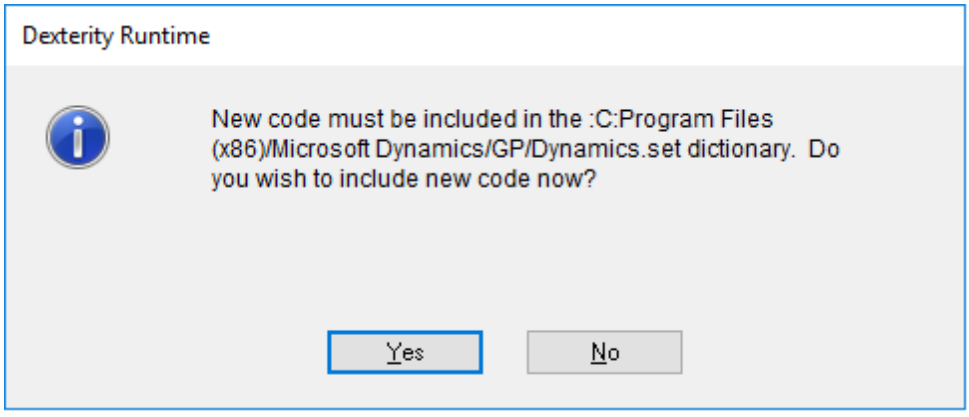
6. The SmartView Installation will run. It may take a few minutes for this to complete.



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



8. Launch Microsoft Dynamics GP.
9. Click on the Yes button to include the SmartView code into your Microsoft Dynamics GP workstation application. If you click on the No button, you will not be able to access the SmartView application.

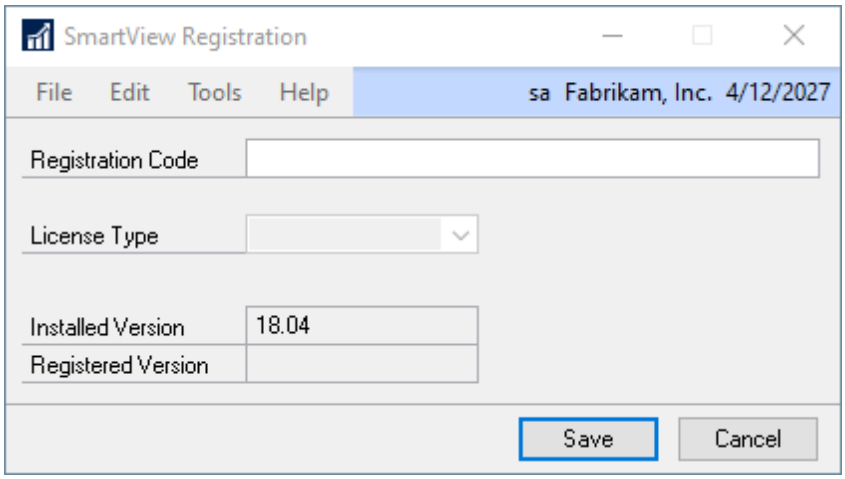


If you the User Account Control setting in Windows is turned on, you may need to launch Microsoft Dynamics GP using the 'Run as Administrator' option in Windows to be able to successfully include the new code.

Registration

To register SmartView:

1. Open the SmartView Registration window (Microsoft Dynamics GP - Tools - SmartView - Registration).



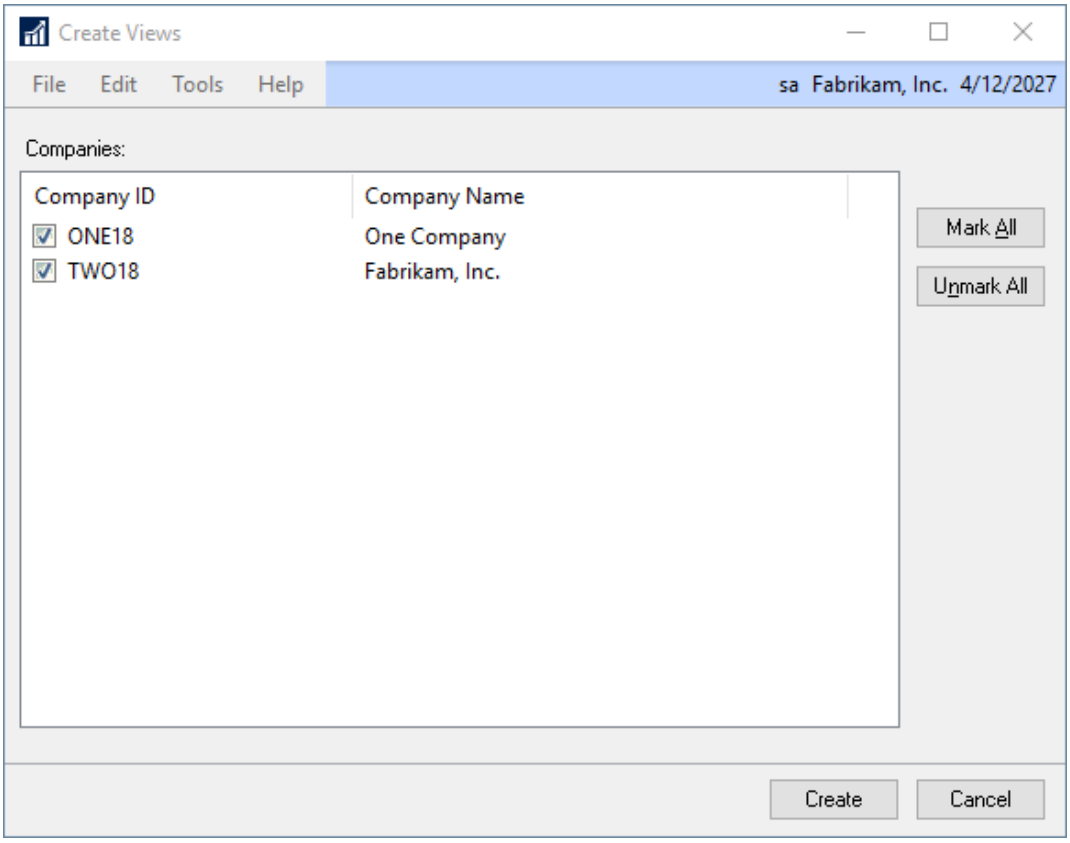
2. Enter your supplied Registration Code.
3. Click on the Save button.

Updating

If you have a previous release of SmartView installed or are updating from SmartView 2018 or 2016, there are additional steps that need to be completed to update the SmartView SQL objects. If you have already completed these steps with the SmartView External install, you do not need to complete them again.

To update the SQL Objects:

1. In Microsoft Dynamics GP, go to Microsoft Dynamics GP – Tools – SmartView – Create Views.



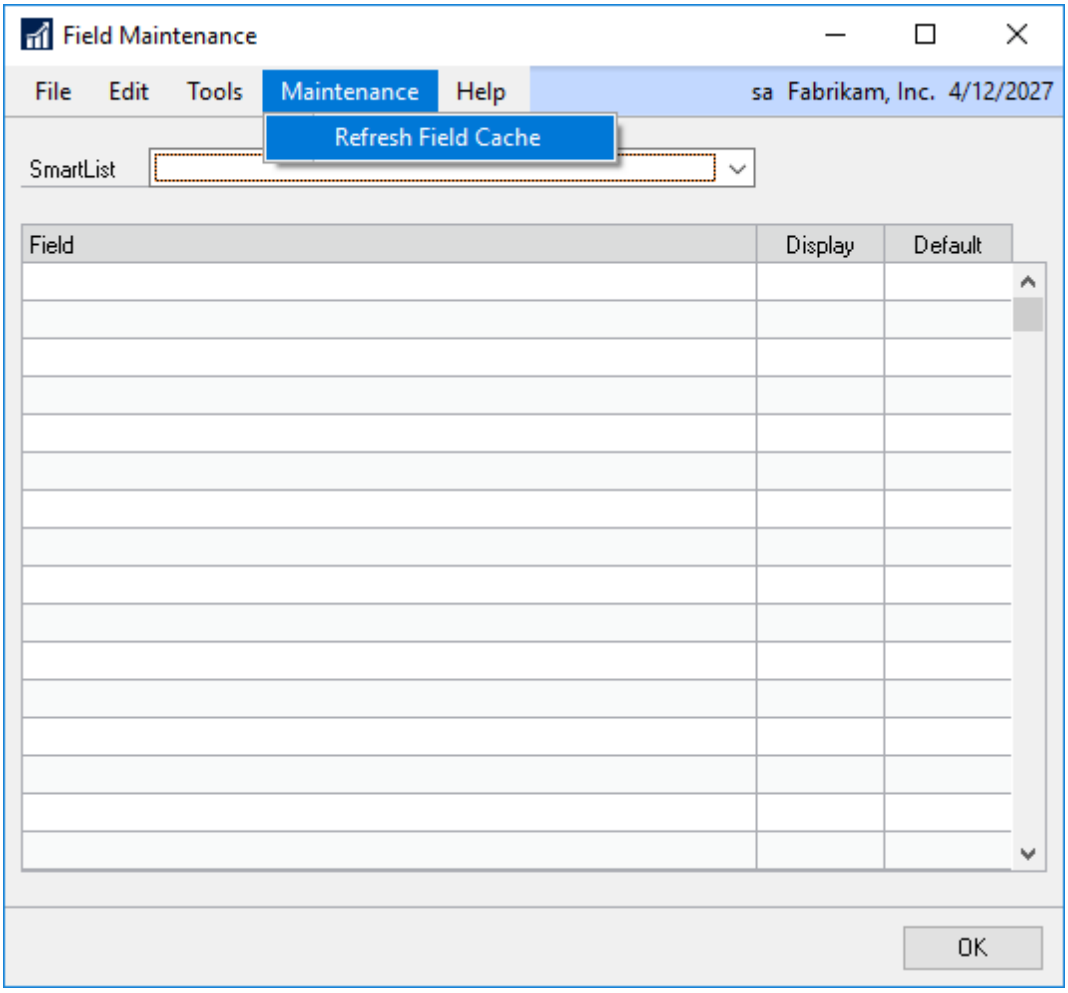
2. Mark all the companies listed if they aren't already marked.
3. Click Create.



By running the Create Views process, it will drop and recreate all of the SmartView SQL Views in each company database. If you have modified any of those views, those modifications will be lost.

To update field cache:

1. Run the Refresh Field Cache process by navigating to Microsoft Dynamics GP – Tools – Field Maintenance in Microsoft Dynamics GP.
2. Once in the Field Maintenance window, go to Maintenance – Refresh Field Cache.



3. There isn't a window that open for this, but you will see that it processes for a minute or two, and once it is done, you can navigate around the Field Maintenance window again.
4. Click OK on the Field Maintenance window.

Using SmartView Internal

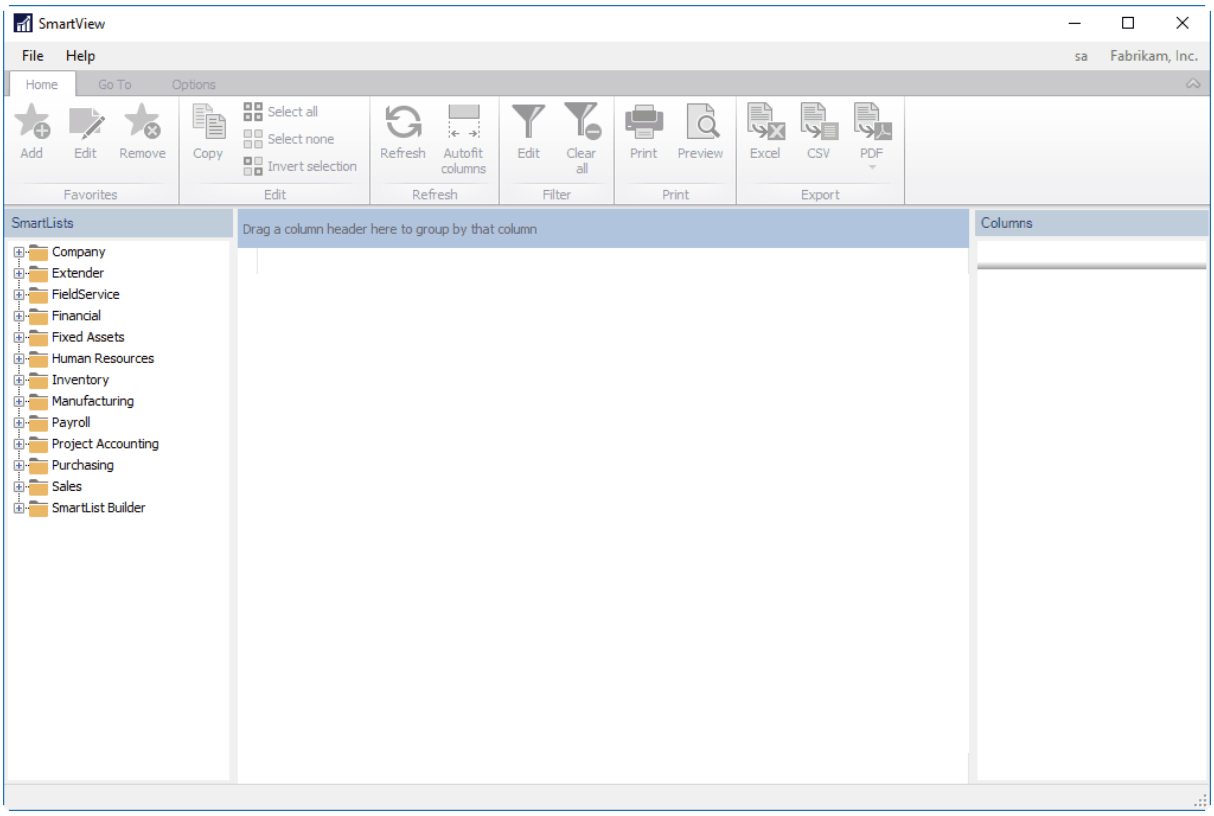
This section covers the navigation of SmartView as well as how to use it to return data. It will walk through adding search criteria, grouping, and totals to your SmartList. This section discusses how to create Favorites to save your setups as well as how to print and export them.

SmartView Navigation

This module covers the navigation of Smartview as well as how to use it to return data.

Opening SmartView

Once SmartView is installed, it can be accessed by going to Microsoft Dynamics GP - SmartView.

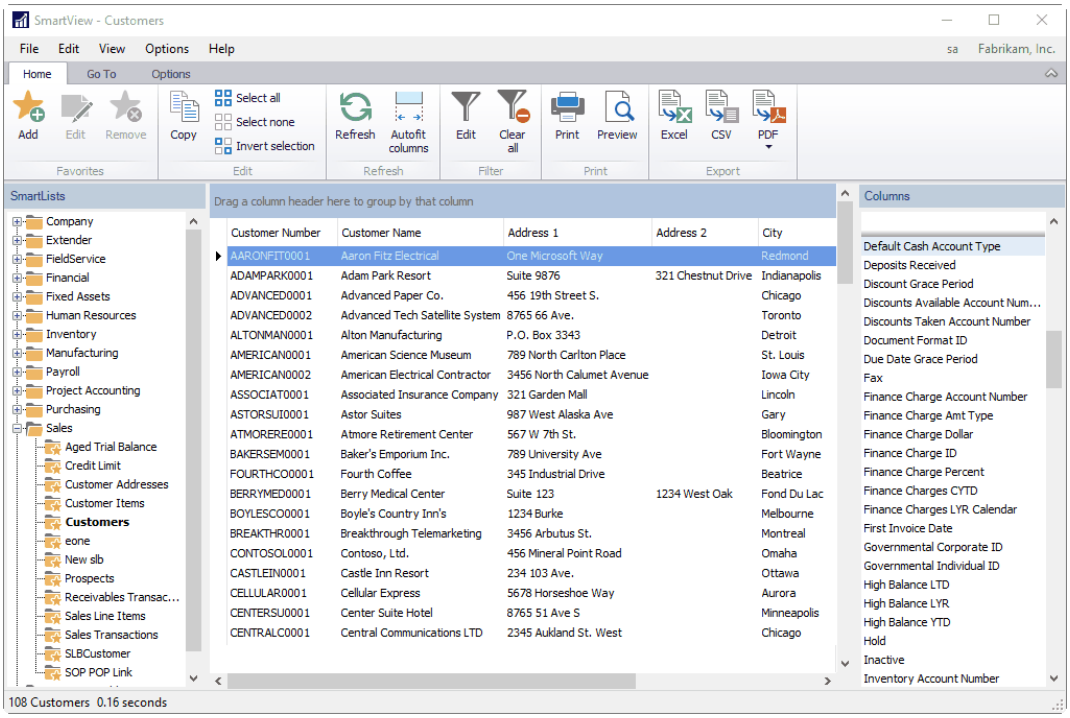


Displaying Data

The SmartView window is broken out into multiple sections. On the left, you will see the list of SmartLists available. They will be broken out into the different series available. SmartView, by default, will include the predefined searches, called favorites, which come with the Microsoft Dynamics GP SmartLists.

To display a list of data:

1. Open the SmartView window (Microsoft Dynamics GP - SmartView).
2. Expand the Series the favorite you would like to view is in.
3. Select the favorite you would like to display the data for.



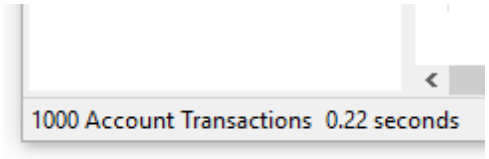
Maximum Records

By default, the maximum records displayed is set to 1,000. This can be changed to show more or fewer records.

When displaying more than 1,000 records, there may be a performance lag when adding new fields or performing searches. It is recommended that you keep the number of records under 1,000 until all search parameters and fields have been selected.

To set the number of maximum records:

1. Click on the status message at the bottom of the SmartView window that displays the number of records.



2. Enter the number of records that you would like to display. Set the maximum records value to 0 to return an unlimited number of records.



3. Click the green check button to save the records setting.

Fields

This module describes how to change the columns displayed in SmartView.

Fields

When a SmartList is selected, the default set of fields is automatically displayed in their default order. The selected fields and the order can be changed.

To Add Fields:

1. To add a field, drag the field from the Fields list on the right side of the SmartView window onto the data display grid where you want it to appear.
    a. If the Fields list isn't displayed, mark the Fields checkbox 

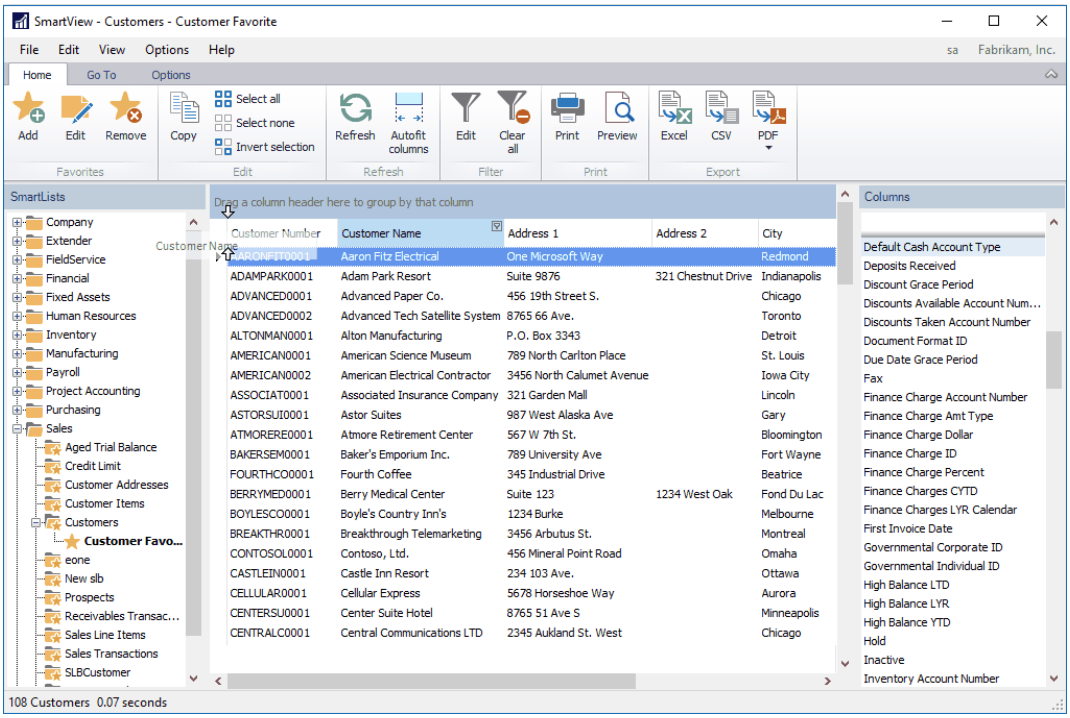
in the options tab.

To Remove Fields:

1. To remove a field, drag the field header from the header row down to the display grid portion of SmartView until an X appears and then release and it will be removed.

To Reorder Fields:

1. To reorder the fields, click on a field header and drag and drop it to the new position.

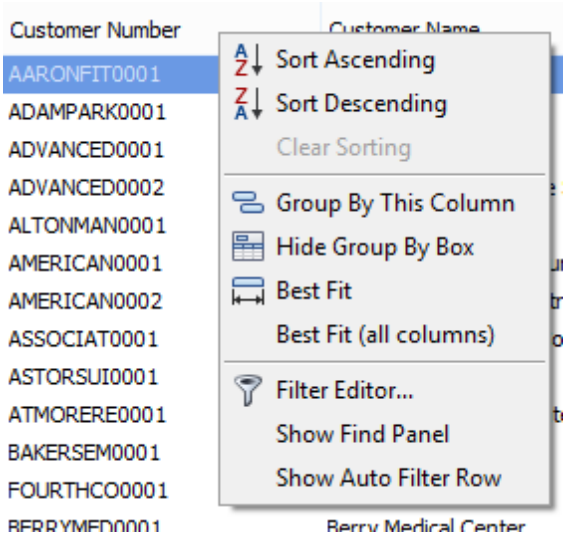


To Sort Fields:

1. To sort records by a field's values and replace existing sort conditions that are applied to the current or other fields, click the target field's header, until an UP or Down Arrow icon is displayed within the header. The Up and Down Arrows indicate ascending and descending sort orders respectively.

State	Customer Name
IA	Comtel-Page Inc.
IA	Healthy Concepts
IA	Multitech Office Components
IA	American Electrical Contractor
IA	Comtel-Page Inc.
IA	Healthy Concepts
IA	Multitech Office Components
IA	American Electrical Contractor

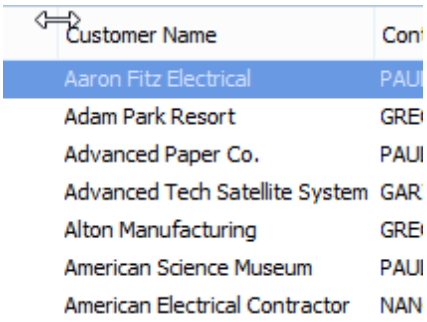
2. To sort records by a field's values while preserving existing sort conditions, do one of the following:
   a. Click a field header while holding the SHIFT key down, until an Up or Down Arrow icon is displayed within the header.
   b. Right-click a field header and select ‘Sort Ascending’ or ‘Sort Descending’ from the context menu.



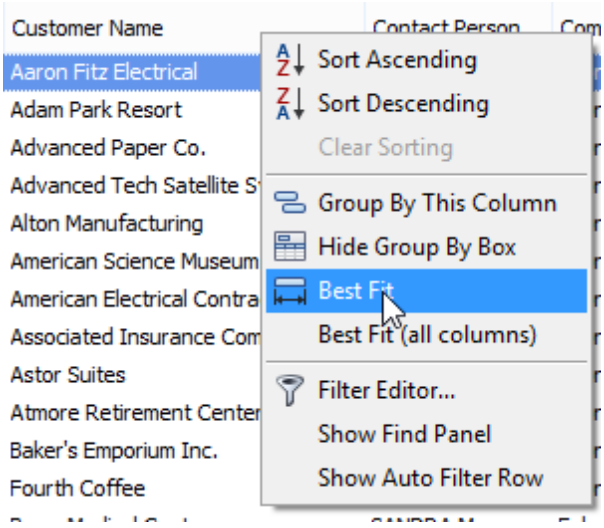
3. To remove sorting by a field, click a field header while holding the CTRL key down or select ‘Clear Sorting’ from the context menu.

To Resize Fields:

1. To resize fields and bands, drag the right edge of the target field header.



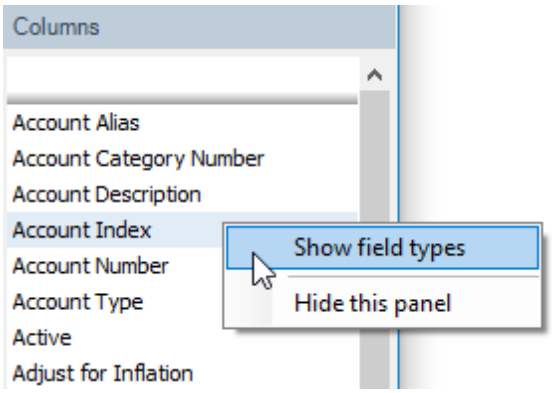
2. To change a field's width so that it displays its contents in their entirety, right-click the field's header and select ‘Best Fit’ or double click the right edge of the target field header.



3. To change the widths of all fields so that they all display all of their contents, right-click the header of any field and select 'Best Fit (all fields)'.

To Display Field Types:

1. To display the field type, right click somewhere in the fields list on the right side of the SmartView window. Select Show field types.

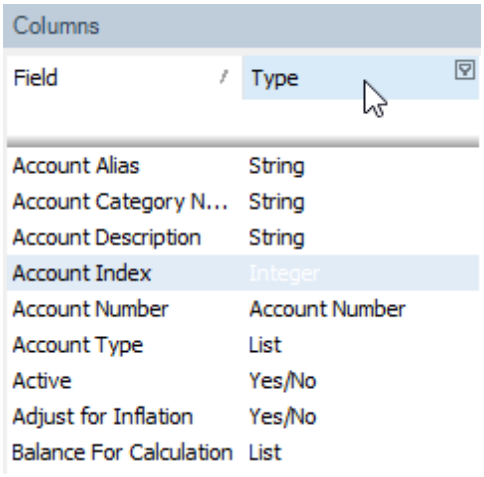


   a. If the Fields list isn't displayed, mark the Fields checkbox 

in the options tab.

To Sort by Field Types:

1. To sort by the field type, click on the Type field header in the fields list on the right side of the SmartView window.



a. If the Fields list isn't displayed, mark the Fields checkbox 

in the options tab.

2. To change the sort order between ascending and descending, click on the Type field header again.

Searching

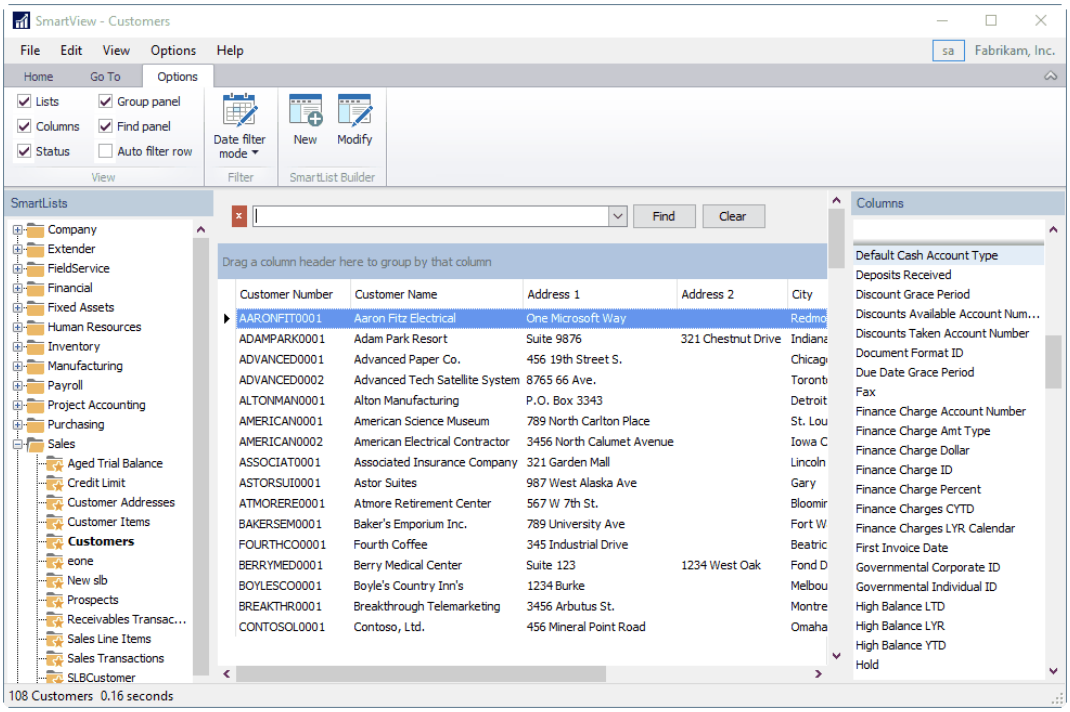
This module describes how to Search the results displayed in SmartView.

Quick Find

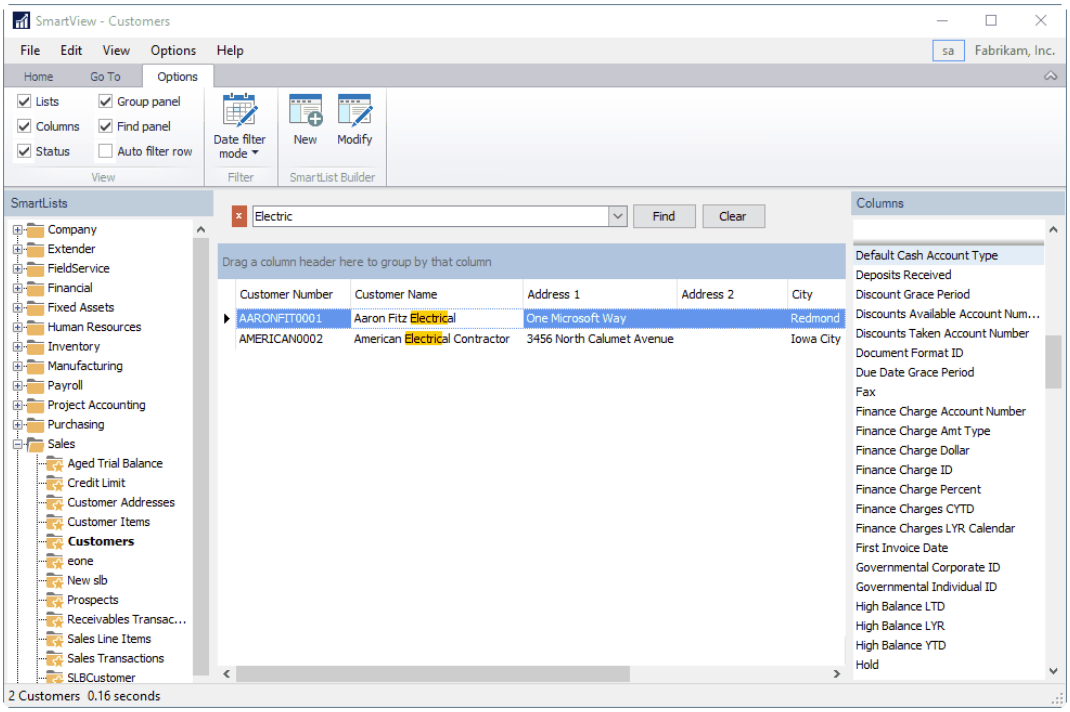
The Quick Find bar filters the records displayed by finding all values that contain the string entered.

To search using Quick Find:

1. To access the quick find function hit CTRL+F or navigate to Edit and check the Find panel option in the View section of the menu.



2. Enter a string value into the quick find field.
3. Click the find button to search across all records in the list. The records found will be highlighted in yellow within your list.



To cancel a Quick Find:

1. Click the  icon to close the search window.



Please note that if you leave the Quick Find window open, when you change lists the same search will be applied. This is great functionality in the situation where you search for a SOP Number within Sales Line items, and then want to find the matching header record. By switching to the Sales Transaction list the same search is applied.

The Quick find search function can also be used for much more complex search functions.

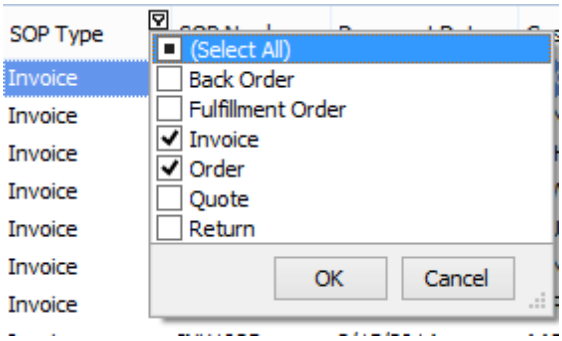
1. Enter multiple words into the search field to search for all of those words across all columns of data. For example, in the sample database if you enter Aaron Park, it will return Aaron Fitz Electrical as well as Adam Park Resort, or if you enter Aaron Chicago, SmartView External will return all customers in Chicago and all those with the word Aaron in its name.
2. Enter a phrase in quotations for SmartView External to search for just that phrase and not the individual words contained in the phrase
3. Enter a minus sign to exclude terms from a search. For example, in the sample database, if you enter Electrical -American, you will just get Aaron Fitz Electrical and not American Electrical Contractor.
4. Enter a plus sign to only show records that have that search term. For example, in the sample database, if you enter Redmond +Resort, you will just get Kensington Gardens Resort, and not all companies in the city of Redmond.
5. Search individual columns by putting the name of the column before the search term and separated by a colon. For example, in the sample database, "Customer Name":red will return just Red's Food Market and no customers from Redmond. Note, when you have a space in the column name, you must enclose it in quotes. You can also combine this with the minus operator to filter all values with that search term. For example, in the sample database, -"Customer Name":red will return everyone but Red's Food Market)

Filters

You can use SmartView to filter records that contain specific values in the SmartList.

To filter on a column name:

1. Click on the filter button ( ) in the column header.
2. Mark the values that you want to filter on.

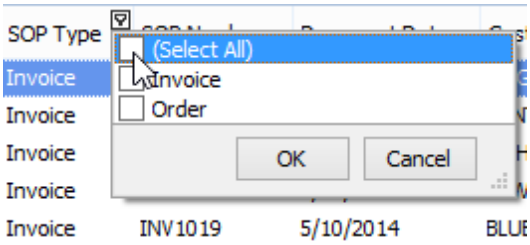


When filtering is applied, the filter dropdown will only display the values which match the current filter criteria. If the (Select All) is unchecked, the filters will be removed and all values will be returned.

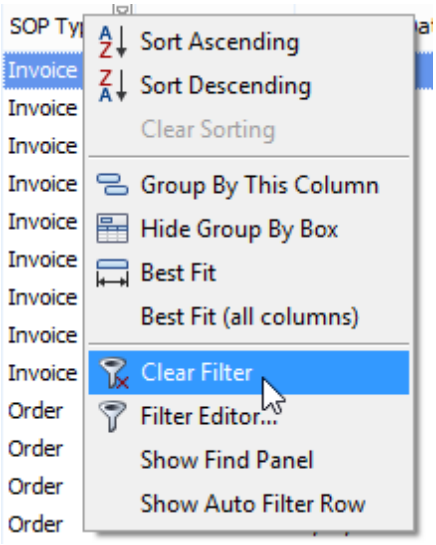
3. Click OK to close the filter dropdown list and apply the filter.

To remove a filter:

1. To clear the filter applied to a specific column, do one of the following:
   a. Select the filter dropdown list and unmark (Select All).



   b. Right-click the column header and select 'Clear Filter'.



2. To clear all filters for the view, do one of the following:
   a. Click the Close Filter button at the bottom of the window.

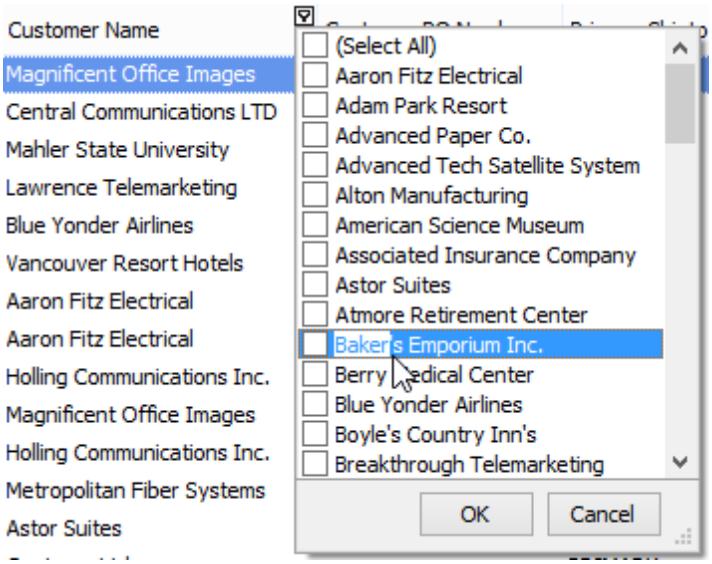


   b. Click the Clear all button from the Filter section of the Home ribbon.



Incremental Search in Filters

Click on the Filter icon in Column Filter dropdown list and start the search by typing the text. SmartView will search for a string you entered and will highlight the record that matches it. This can be useful when you have to search for an item in long lists.

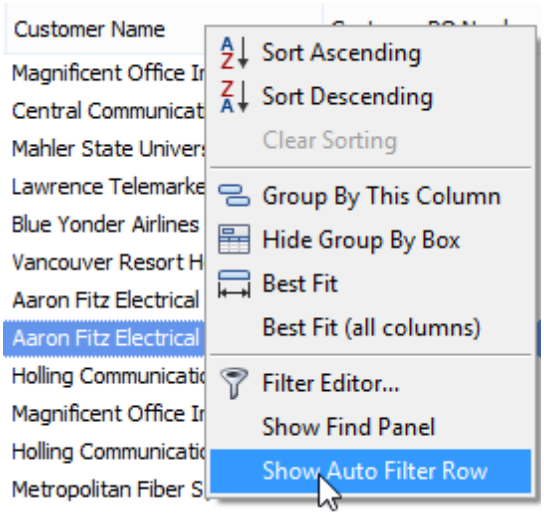


Auto Column Filters

Auto Filters are the free text version of the drop down filters described in the previous section.

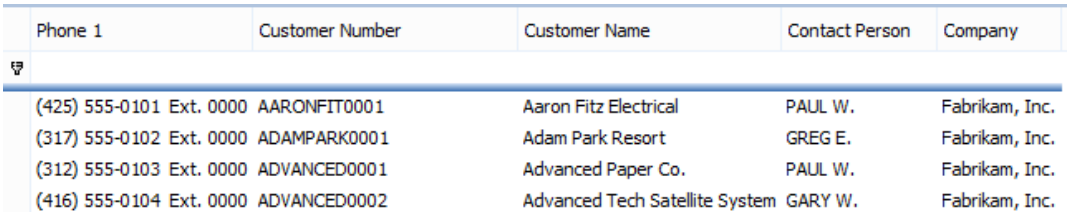
To activate the Auto Filter Row right click on any column heading and select Show Auto Filter Row. This will add a blank row as the first row in your SmartList.

Note – this type of filter works best in text based searches.



To apply an Auto Filter:

1. Select Show Auto Filter Row as described above

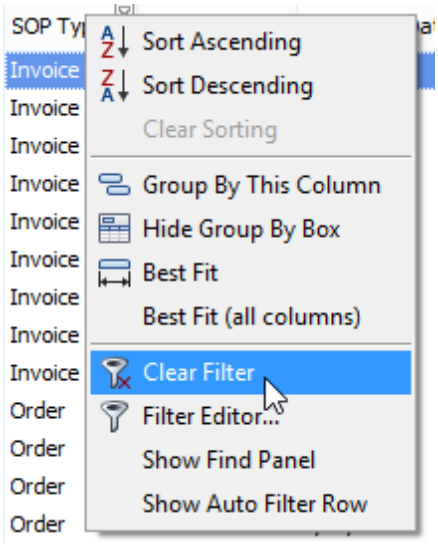


Phone 1	Customer Number	Customer Name	Contact Person	Company
(425) 555-0101 Ext. 0000	AARONFIT0001	Aaron Fitz Electrical	PAUL W.	Fabrikam, Inc.
(317) 555-0102 Ext. 0000	ADAMPARK0001	Adam Park Resort	GREG E.	Fabrikam, Inc.
(312) 555-0103 Ext. 0000	ADVANCED0001	Advanced Paper Co.	PAUL W.	Fabrikam, Inc.
(416) 555-0104 Ext. 0000	ADVANCED0002	Advanced Tech Satellite System	GARY W.	Fabrikam, Inc.

2. Enter some text into the column that you wish to search and hit the tab key.
3. This is a ‘starts with’ Search type – so records will be filtered for records that begin with the string entered.

To remove an Auto Filter:

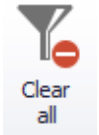
1. To clear the filter right-click the column header and select ‘Clear Filter’.



2. To clear all filters for the view, do one of the following:
   a. Click the Close Filter button at the bottom of the window.



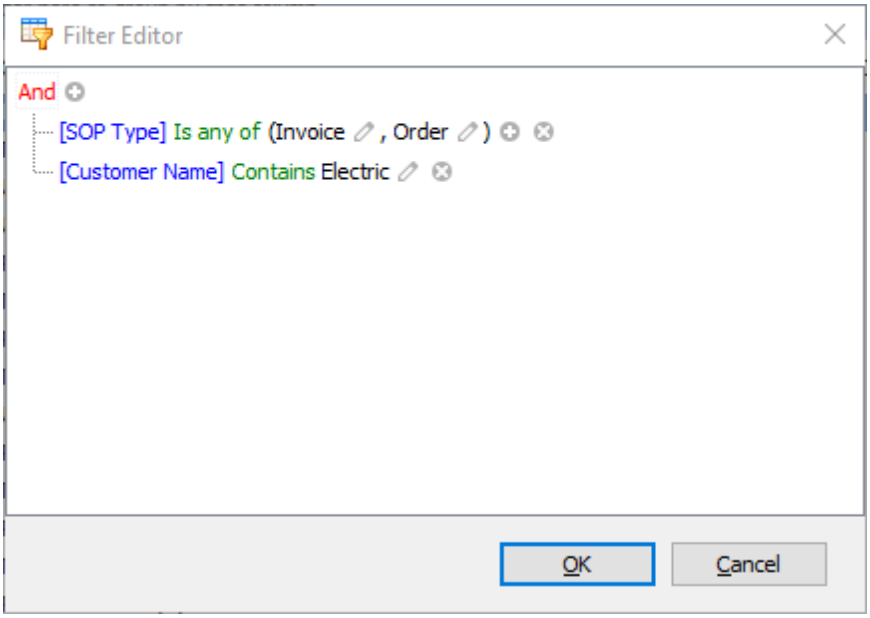
   b. Click the Clear all button from the Filter section of the Home ribbon.



Advanced Filters

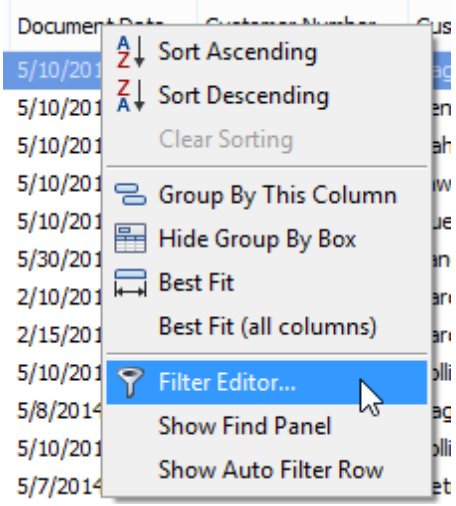
You can use the Filter Editor to visually create advanced filters that contain multiple and/or clauses and advanced comparisons.

If you have a case sensitive database, the values in the filter editor you are searching for must be an exact match of those that are stored in the database. So if the SOP type is stored as 'Invoice', search for 'invoice' may return no result.

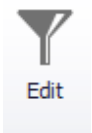


To open the Filter Editor:

1. Select Options - Filter Editor – or –
2. Right-click on the column header and select 'Filter Editor' – or –

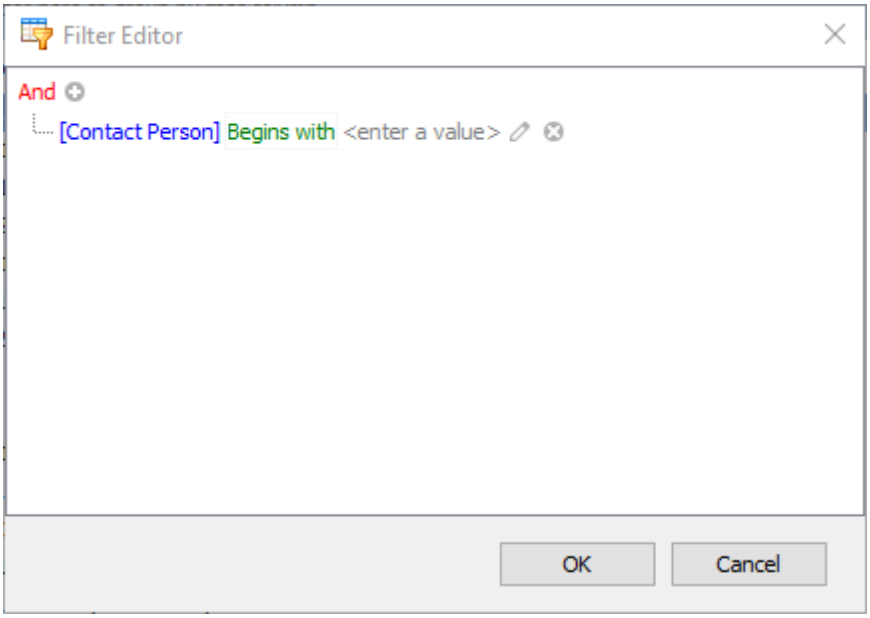


3. Click the Edit filter button in the Filter section on the Home ribbon.

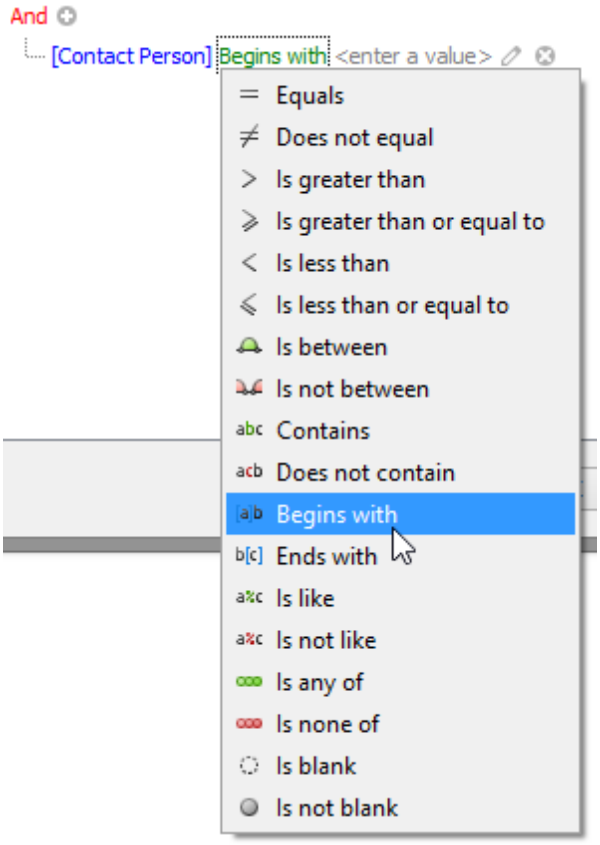


To add a filter condition:

1. Click the Add ( ) button.
2. Select a column.



3. Select a comparison operator. The comparison operator list displays only those operators that are supported by the current column's data type. For instance, when selecting a numeric field, the operator list doesn't display the 'Begins with' operator and other operators that are related to strings.



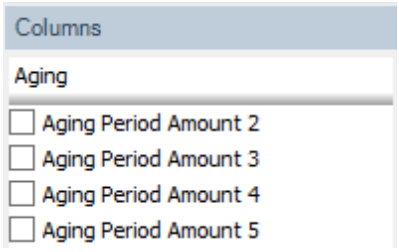
4. Enter a value or click on the comparison button ( ) and select another column to compare the column to.
5. Click OK.

Source Column Filter Editor

Source Column filters can be added in SmartView. This can help in finding the column you are looking for when the list contains many of them.

To add a Source Column Filter:

1. Enter your filter criteria in the filter text box to filter your source columns.



2. Click the Edit Filter button at the bottom of the Columns pane to open the advanced filter editor for the source columns.



Grouping

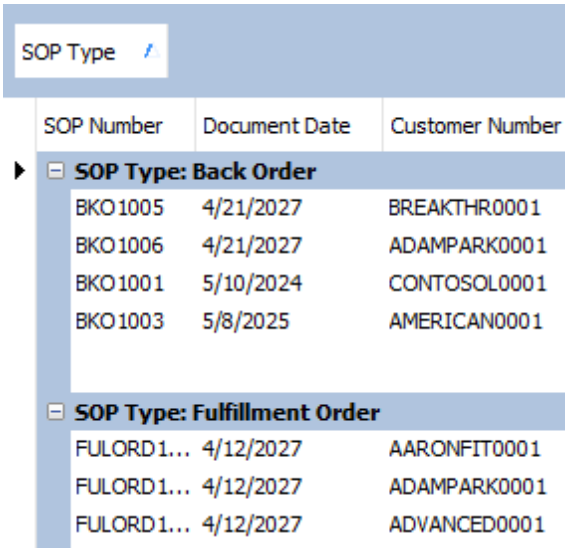
This module describes how to create groups for a view.

Groups

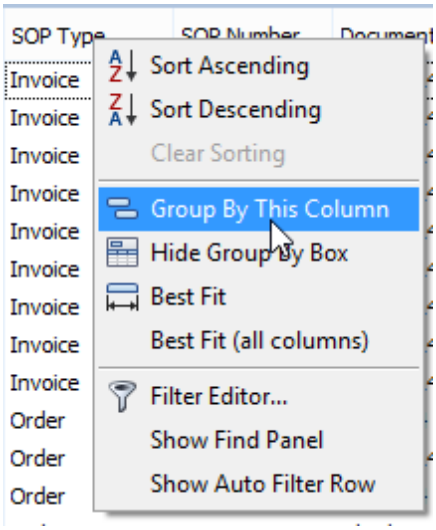
A group allows you categorize data by specifying the column(s) that you want to see the data grouped by. You will then see all the data that corresponds to the value in the column(s) you selected for the group under that group. There will be a total for each group as well.

To group a view on a column:

1. Dragging and dropping a column to the grouping area. – or –



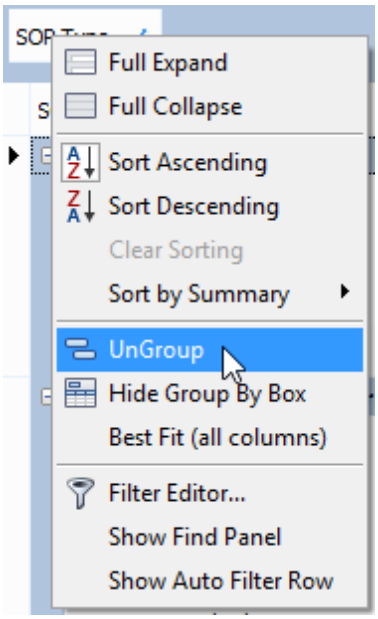
2. Right-click a column header and select ‘Group By This Column’ from the context menu.



3. You can add more columns to the grouping area to create subgroups.

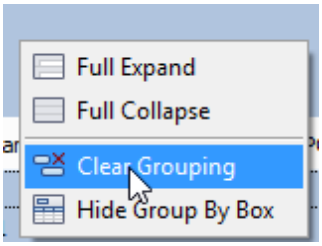
To remove a grouping:

1. Drag and drop the group back to the column header. – or –
2. Right-click on the group and select 'UnGroup'.

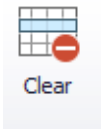


To remove all groups:

1. Select Options - Clear groups.
2. Right-click the group area and select 'Clear Grouping' from the context menu.



3. Click Clear in the Groups section on the Home Ribbon.

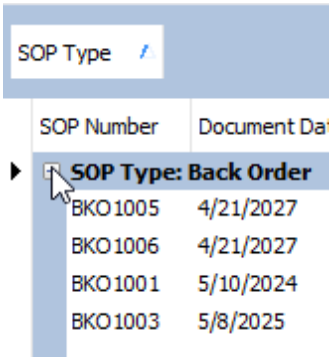


Expanding and Collapsing

By default all groups will be expanded when a grouping is created.

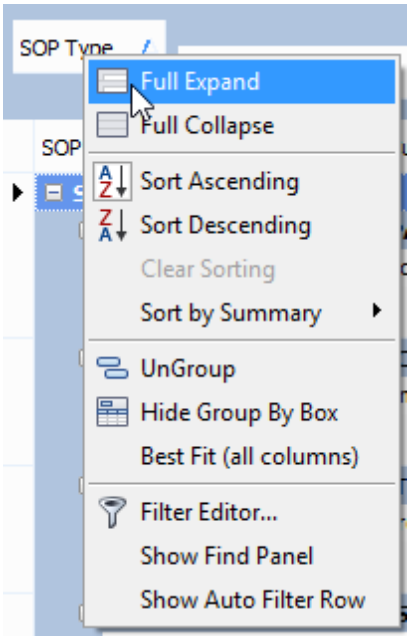
To expand or collapse a single group:

1. Click on the expansion button in the group header.



To expand all groups:

1. Select Options - Expand all groups. – or –
2. Right-click on the grouping field and select ‘Full Expand’. – or –

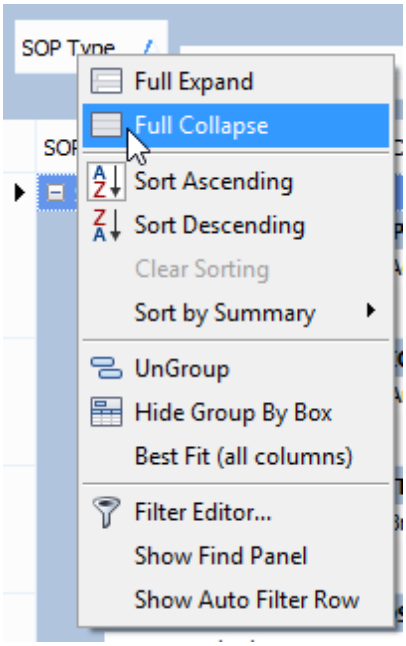


3. Click the Expand all button in the Groups section of the Home Ribbon.

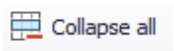


To collapse all groups:

1. Select Options - Collapse all groups. – or –
2. Right-click on the grouping field and select 'Full Collapse'. – or –



3. Click the Collapse all button in the Groups section of the Home Ribbon.



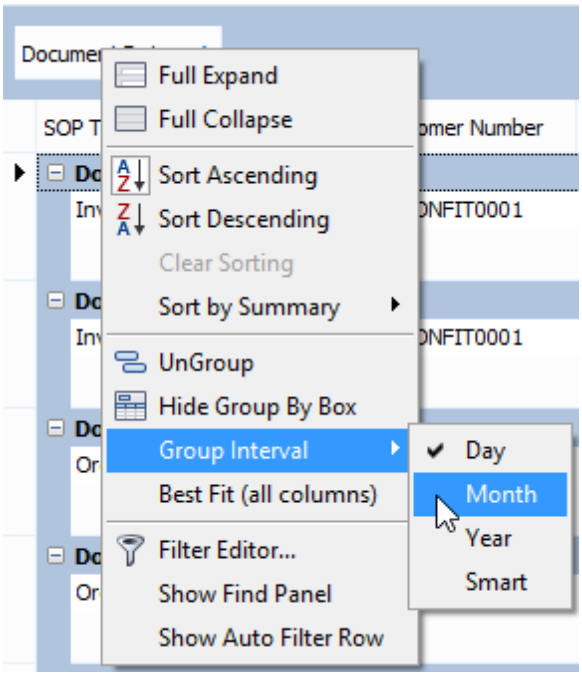
Date Group Intervals

When grouping by a date field, the grouping interval can be changed to:

- Day
- Month
- Year
- Smart – will group into one of Today, Tomorrow, Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Next Week, Two Weeks Away, Three Weeks Away, Next Month, Beyond Next Month, Yesterday, Last Week, Two Weeks Ago, Three Weeks Ago, Last Month, Older.

To change the date interval:

1. Right-click on the date grouping field and select an option from the Group Interval menu.

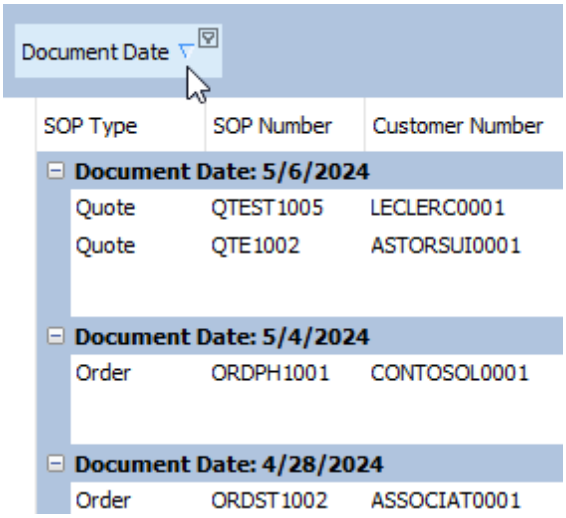


Group Sorting

When a group is added, the group can be sorted by the value of the column.

To sort by the group value:

1. Click on the group field until an Up or Down Arrow icon is displayed within the field.
2. The Up and Down Arrows indicate ascending and descending sort orders respectively.



Totals

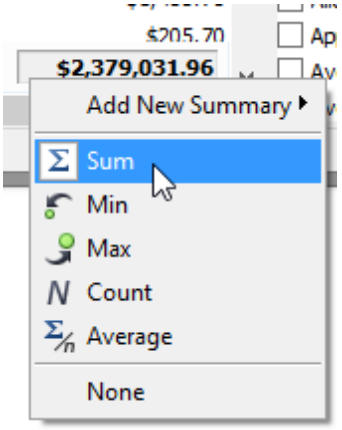
This module describes how to create Totals for a view.

Totals

By default, all numeric fields are automatically summed when they are added to the view. You can change the fields that are totaled and the summary method that is used for each column.

To add or change a total:

1. To add a total or change the type of summary for a specific column, right-click on the column footer and select the summary method from the menu.



To remove a total:

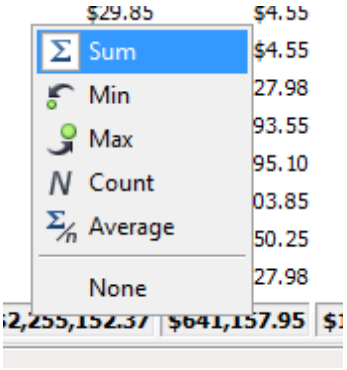
1. To remove a total, right-click on the column footer and select 'None' from the menu.

Subtotals

By default all numeric fields are automatically subtotaled when a group is created for the view. You can change the fields that are subtotaled and the summary method that is used for each column.

To add or change a subtotal:

1. To add a subtotal or change the type of summary for a specific column, right-click on the group footer and select the summary method from the menu.



To remove a subtotal:

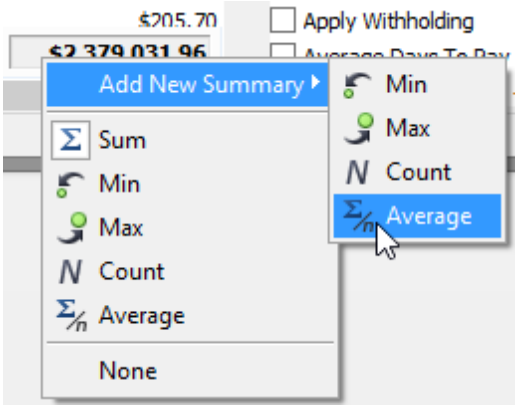
1. To remove a subtotal, right-click on the group footer and select 'None' from the menu.

Multiple Totals

You can have multiple summaries on any column.

To add a new total:

1. Right-click on the group footer and select a summary type from the Add New Summary menu.

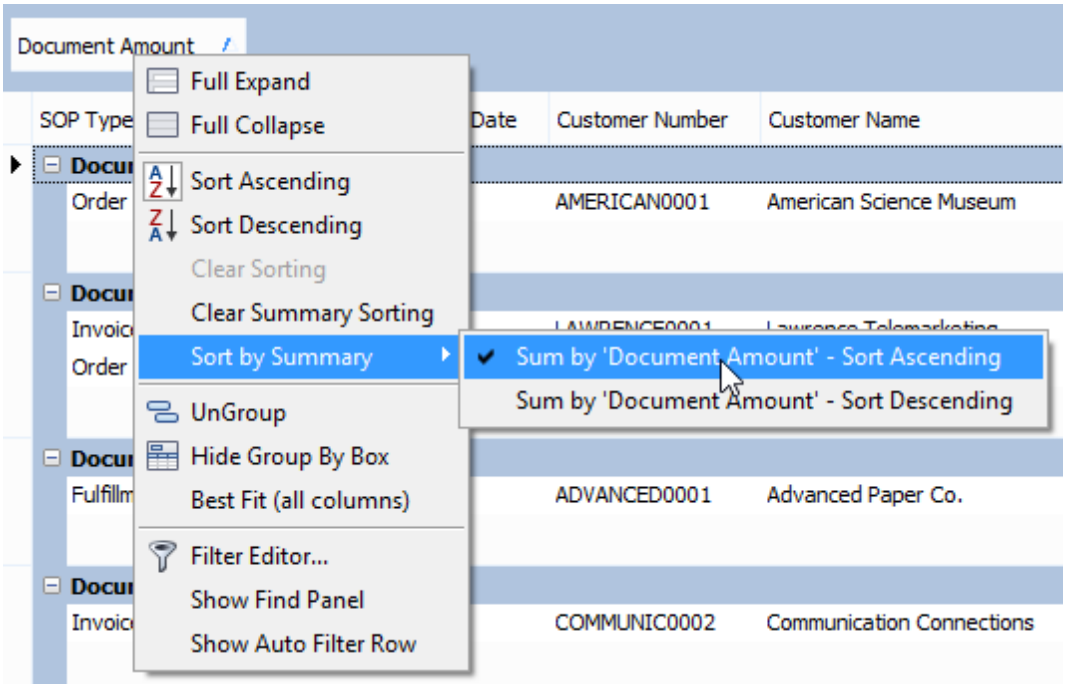


Total Sorting

When a group is added, the group can be sorted by any of the summary values being displayed in the view.

To sort by a total value:

1. Right-click on the group field and select an option from the Sort by Summary menu.



Favorites

This module describes how to use SmartView Favorites. Favorites are used to store a set of defined views for each SmartList. These views contain information about the filters, fields and grouping for the SmartList. Favorites can be applied to a group of companies and users.

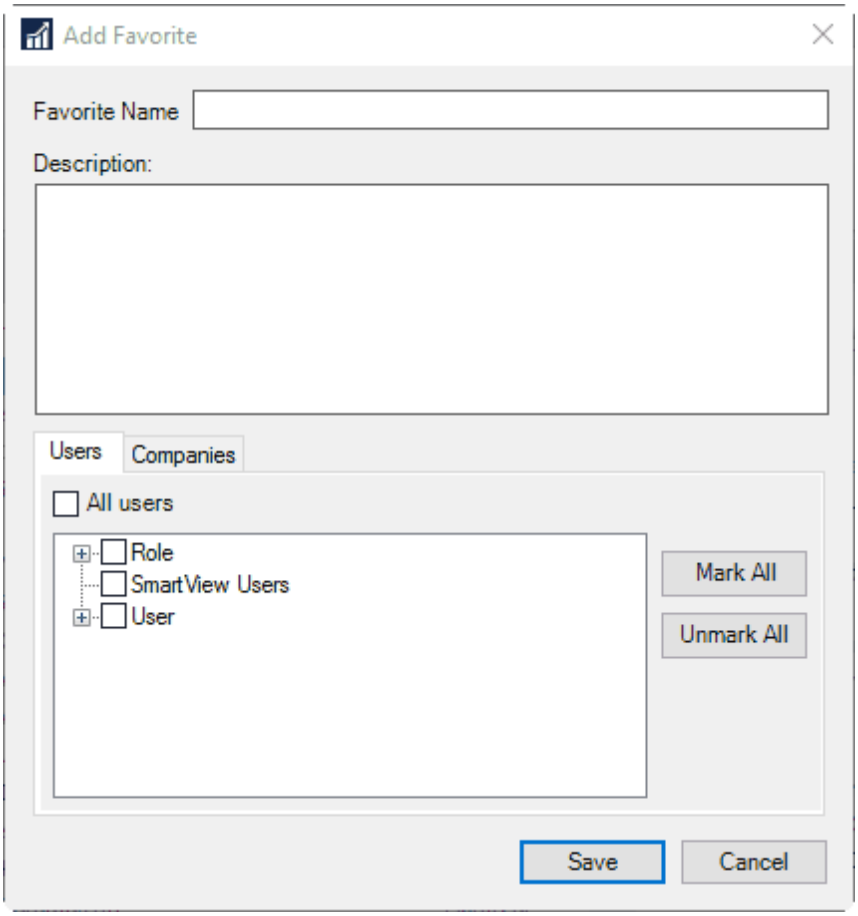
Creating SmartView Favorites

You can use the Add Favorite window to add and update SmartView favorites.

To create a new SmartList favorite:

1. Click the Add button in the Favorites section of the Home Ribbon or right-click a

SmartList and select ‘Add Favorite’.



2. Enter the Favorite Name. You can also add some notes text in the Description box.
3. Select the users and roles that will have access to the Favorite. By default the current user will be automatically marked.
4. If you want the favorite to be available to all users and new users that have not yet been created, mark the All users checkbox.
5. If you want the favorite to be available in all companies and new companies that have not yet been created, mark the All companies checkbox.
6. Select the companies that will have the Favorite. By default, the current company will be automatically marked.
7. Click Save.

To update an existing favorite:

1. Select the favorite and click the Edit button in the Favorites section of the Home Ribbon or right-click a favorite and select ‘Edit’.
2. Enter the new details for the favorite.

3. Click Save.

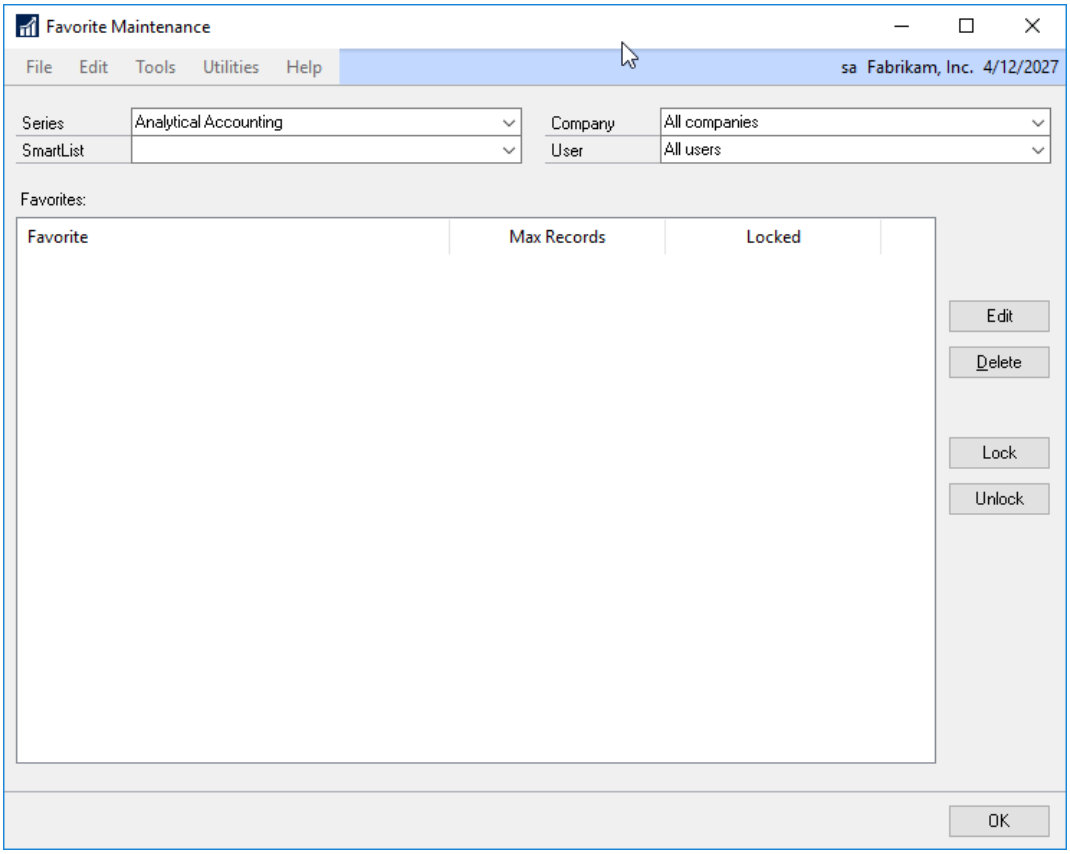
To delete a favorite:

1. Select the favorite and click the Remove button in the Favorites section of the Home Ribbon or right-click a favorite and select ‘Delete’.

Favorite Maintenance

The Favorite Maintenance window can be used to edit existing SmartView Favorites. You can also lock and unlock favorites which dictates whether they can be edited through SmartView. The Favorite Maintenance window is also where you would delete a favorite.

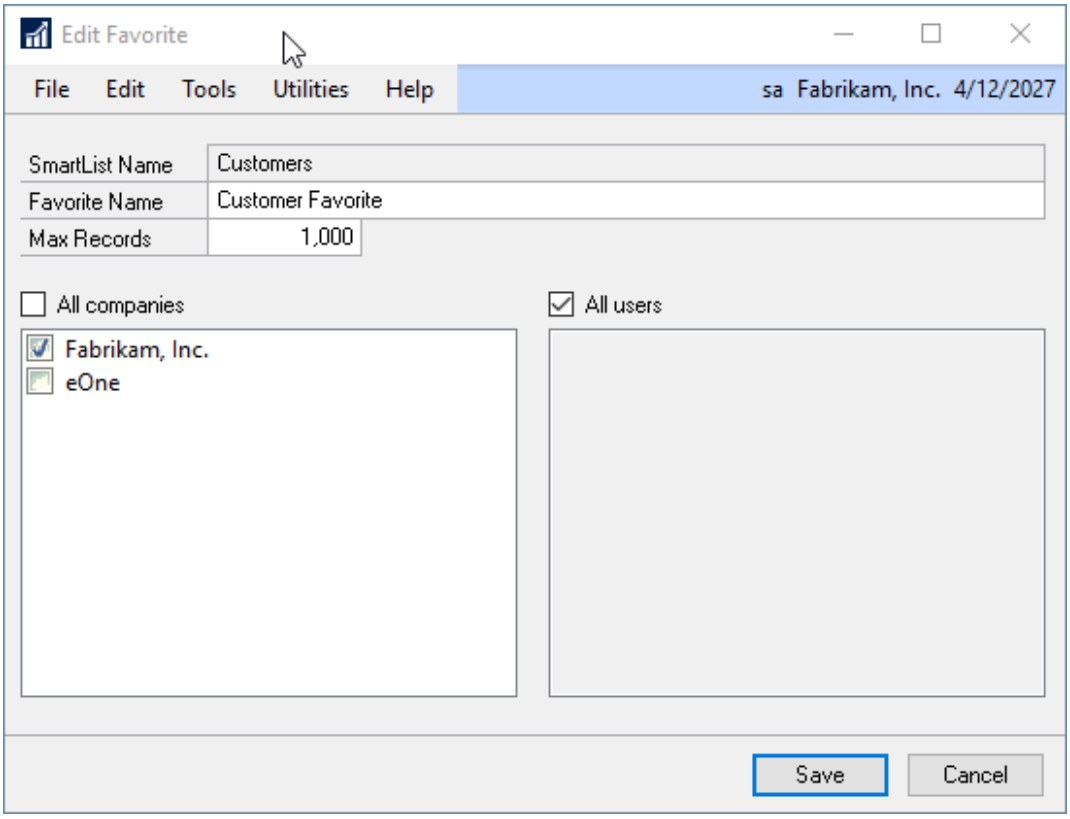
The Favorites can be displayed by Series, SmartList, Company and User.



To edit a favorite:

1. Open the Favorite Maintenance window by going to Microsoft Dynamics GP - Tools - SmartView - Favorite Maintenance.
2. Select the Series, SmartList, Company, and/or User to view the favorites you want to edit.

3. Highlight the favorite to edit and click Edit.
4. In the Edit Favorite window, you can edit the Favorite name, change the maximum number of records returned, and copy to favorite to other users and GP companies.
5. Click Save to change the edits.



To delete a favorite:

1. Open the Favorite Maintenance window by going to Microsoft Dynamics GP - Tools - SmartView - Favorite Maintenance.
2. Select the Series, SmartList, Company, and/or User to view the favorites you want to delete.
3. Highlight the favorite to delete and click Delete.

To lock a favorite:

1. Open the Favorite Maintenance window by going to Microsoft Dynamics GP - Tools - SmartView - Favorite Maintenance.
2. Select the Series, SmartList, Company, and/or User to view the favorites you want to lock.
3. Highlight the favorite to lock and click Lock.

To unlock a favorite:

1. Open the Favorite Maintenance window by going to Microsoft Dynamics GP -

Tools - SmartView - Favorite Maintenance.

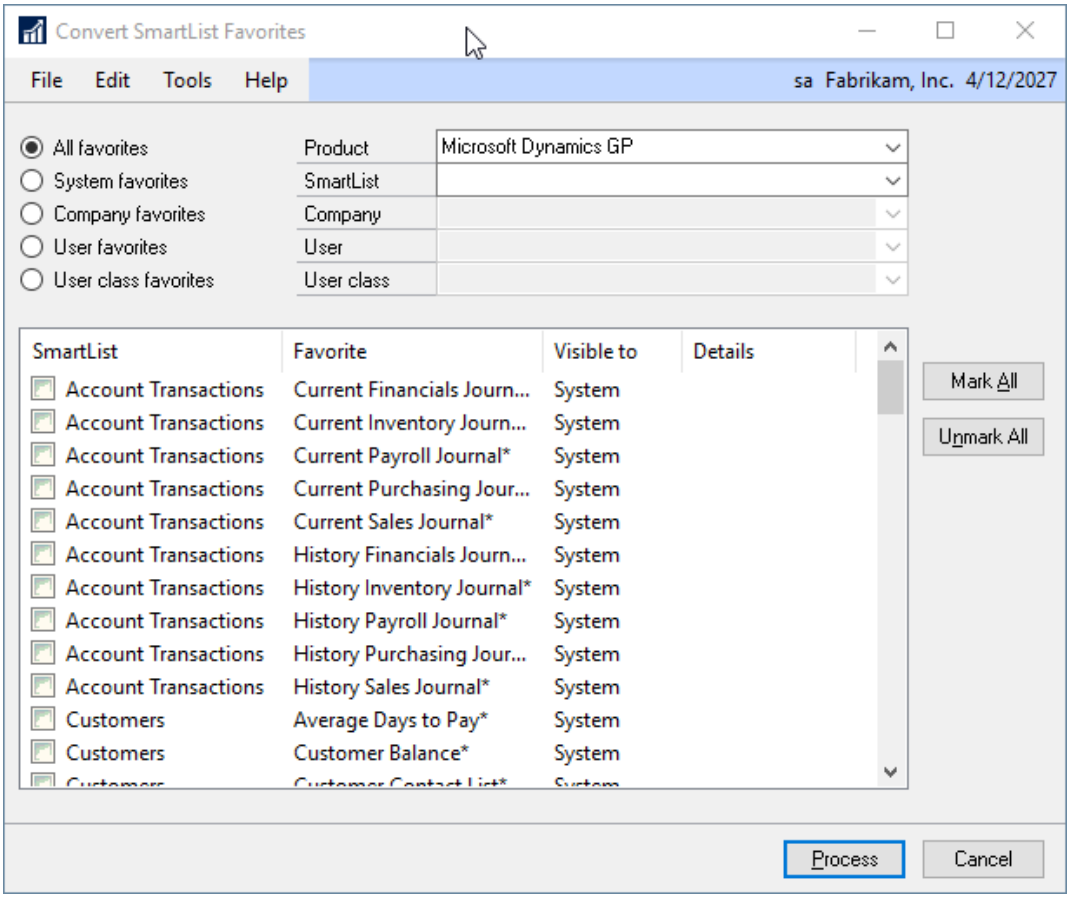
2. Select the Series, SmartList, Company, and/or User to view the favorites you want to unlock.
3. Highlight the favorite to unlock and click Unlock.

Converting SmartList Favorites

The Convert SmartList Favorites window can be used to convert existing favorites from SmartList to SmartView.

To convert a favorite:

1. Open the Favorite Maintenance window by going to Microsoft Dynamics GP - Tools - SmartView - Favorite Maintenance.
2. Go to Utilities - Convert Favorites.
3. By default all SmartList favorites are displayed. Use the filter function to restrict the list of favorites by user, company, SmartList etc.



4. Select the favorites you wish to convert to SmartView by marking the checkboxes next to the Favorites.
5. Select Process

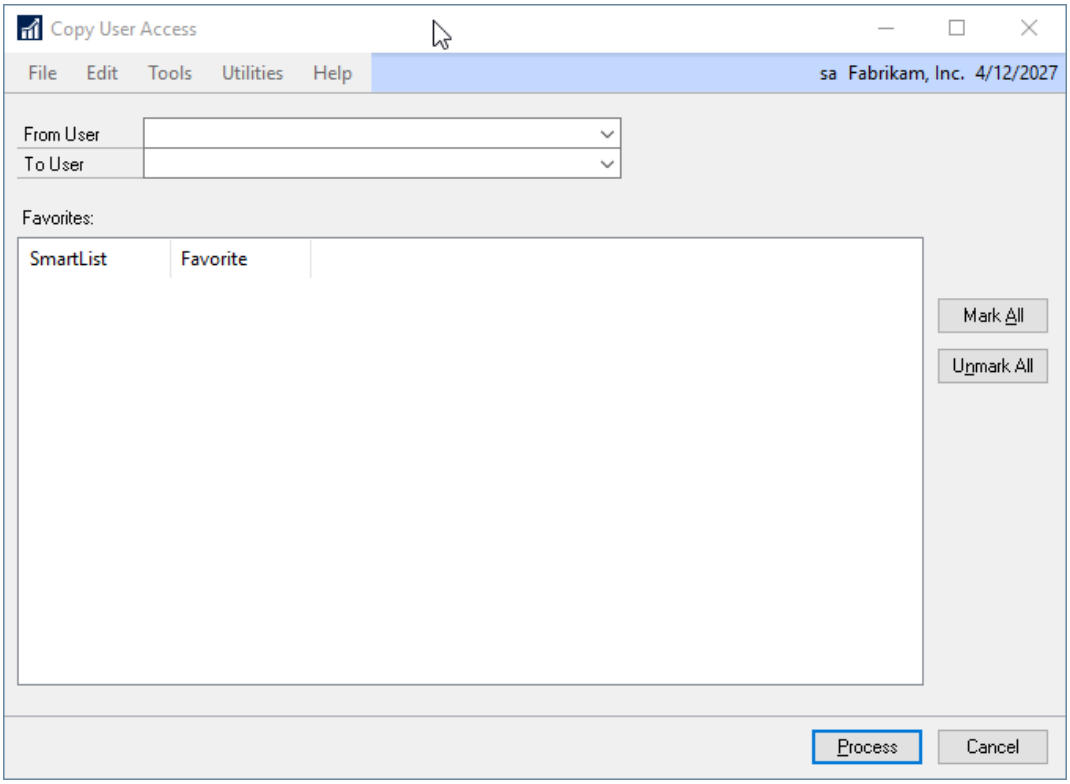
- It is not recommended to convert all favorites across to SmartView. Most companies using Microsoft Dynamics GP have a large list of favorites that aren't ever used. There is no need to clutter up SmartView with all of these lists. Choose carefully and only convert the favorites you will need. If you don't convert a favorite the first time, you can always come back and convert it later.
- Often times it is better to build new favorites in SmartView rather than converting any favorites. There is better functionality available in SmartView and simply moving the lists across is not taking advantage of the better, more flexible ways of displaying data in SmartView.
- Not all favorites will convert perfectly. You must review the new list in SmartView to determine if it has come across correctly to SmartView. The easiest way is to compare lists and ensure the same number of records is displayed in each. If your list does not convert correctly, simply modify the filters to accurately match the converted favorite in SmartView.

Copy User Access

The copy a SmartList Favorites from one user to another, you can use the Copy User Access window. Note that if you have access to this window, you can only see your own favorites and not those owned by other SmartView users.

To copy user access:

1. Open the Favorite Maintenance window by going to Microsoft Dynamics GP - Tools - SmartView - Favorite Maintenance.
2. Go to Utilities - Copy User Access.
3. Select the From and To User.
4. Mark the SmartList Favorite(s) that you wish to copy to another user.



5. Click Process.

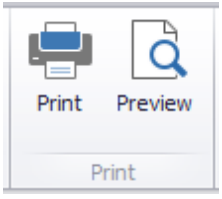
Printing and Exporting

This module describes how to print and export from SmartView.

Printing

To print a view:

1. Select Print from the Print section of the Home Ribbon. – or –



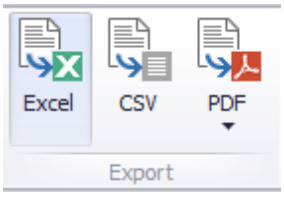
2. Select File - Print.

Exporting

SmartView can export files in three formats; CSV, Excel and PDF.

To export a view:

1. Click on one of the export formats in the Export section of the Home Ribbon. If Export to PDF is selected, select the additional option of Portrait or Landscape.



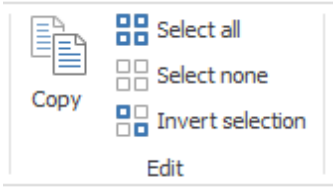
2. Select where to save the export file and change the file name if desired.
3. Click Save.

Copying to the Clipboard

Records selected in the SmartView window can be copied to the clipboard and pasted into other applications. The records are copied to the clipboard as tab delimited text including the column headers. When this is copied into an Excel file, the records are automatically formatted into columns.

To copy records to the clipboard:

1. Select the records to copy using one of the following methods:
    a. Use the Select all, Select none, or Invert selection buttons on the Home ribbon.



    b. Select the individual records to copy by holding down the CTRL key and selecting each record.
    c. Select a range of records by clicking on the first record in the range, holding down the Shift key and selecting the last record in the range.
2. Copy the selected records using one of the following methods:
    a. Click the Copy button in the Edit section of the Home ribbon.
    b. Press CTRL + C key combination.

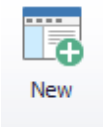
3. The records can now be pasted in the destination location.

Create and Modify SmartLists with SmartList Builder

This module describes how to access SmartList Builder directly from SmartView. This will only function in SmartList Builder is installed in the same client installation of Microsoft Dynamics GP.

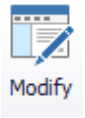
To create a new SmartList:

1. Click on the New button in the SmartList Builder section of the Options ribbon.



To modify an existing SmartList:

1. Select the SmartList you want to modify.
2. Click on the Modify button in the SmartList Builder section of the Options ribbon.



Internal Enhancements

- Release 18.9.44

18.9.44

This release is a compatibility release for SmartView 18.9. It allows SmartView to be compatible with Microsoft Dynamics GP 18.9.xxxx. It will contain the same features/fixes as the SmartView 18.8 build 18.8.43 for Microsoft Dynamics GP 18.8.

Problem Reports Fixed in Build 18.9.44

- If you use the "Sales Aged Trial Balance" and click the "Show Details" checkbox, when you export it to Excel, the details are missing.
- Search with a specific combination of letters and numbers fails to find the record.
- Updating the E1REG table can leave an open SQL connection
- Filter value corrupted if filter contains number char followed by s or m

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

SmartView External

Installing Smartview External

This section covers the installation of SmartView External in your Microsoft Dynamics GP environment. It will also cover the registration for SmartView External. You will need to have sufficient (administrative) privileges to complete this process correctly.

System Requirements

The base system requirements for SmartView External are the same as those for the version of Microsoft Dynamics GP you are using. You can review the Microsoft Dynamics GP System Requirements documentation on Microsoft's CustomerSource or PartnerSource sites.

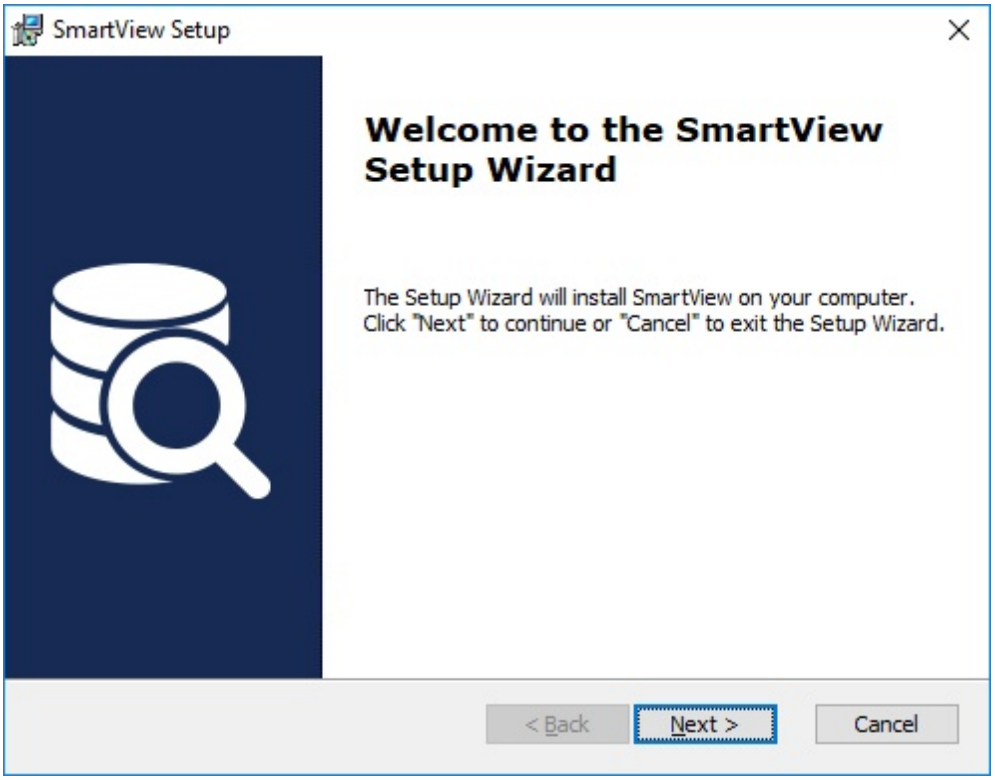
Additionally, you must have the following installed before installing SmartView External

- SmartView for Microsoft Dynamics GP must be installed and must be at least on version 14.0.6 for GP 2015, 16.0.1 for GP 2016, 18.0.1 for GP 2018, 18.2.3 for GP (October 2019), 18.3.25 for GP (October 2020), 18.4.30 for GP (October 2021), 18.5.35 for GP (October 2022), 18.6.40 for GP (October 2023), 18.7.41 for GP (October 2024) or 18.8.43 for GP (October 2025).
    - SmartView internal does not have to be registered, it just has to be installed as it is used to create the database objects and do some of the setup for SmartView External
- .NET Framework 4.5 must be installed on the client machine

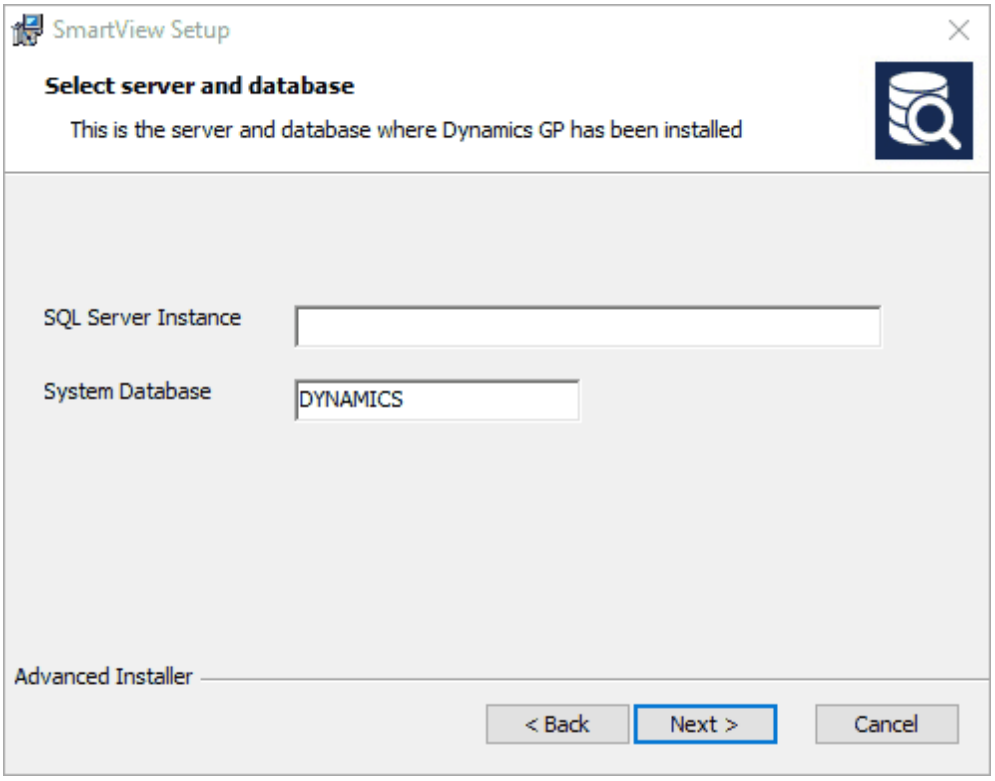
Installation

To install SmartView External:

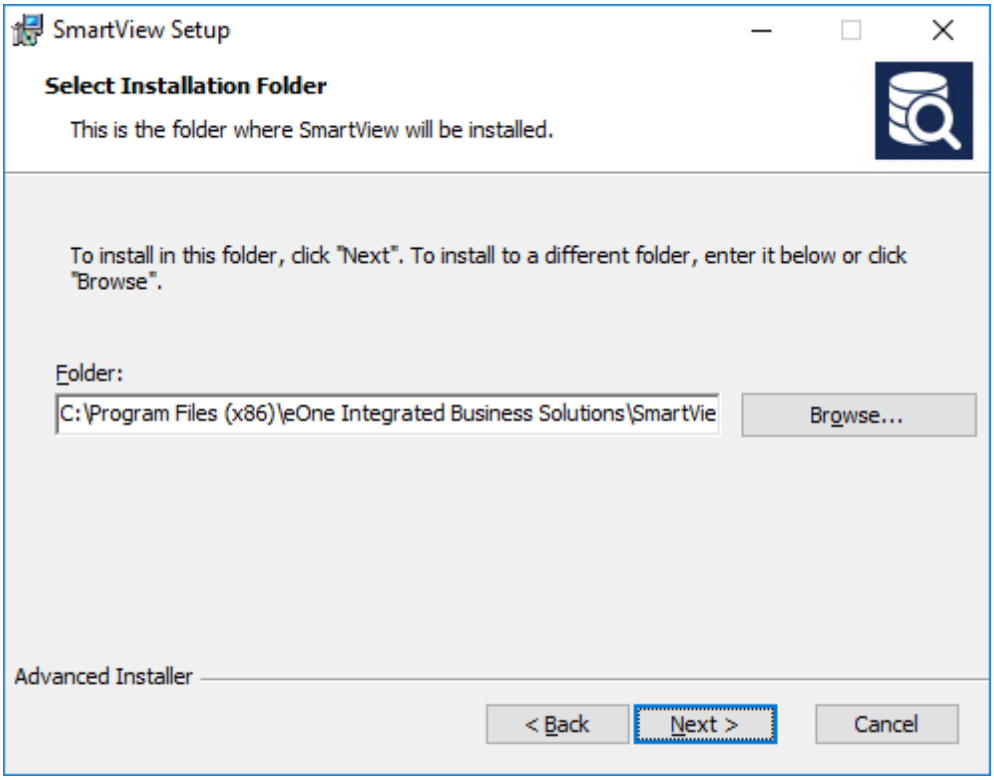
1. Run the setup executable, SmartViewWinClient.msi, which will start the SmartView External installation.
2. Click on the Next button to continue.



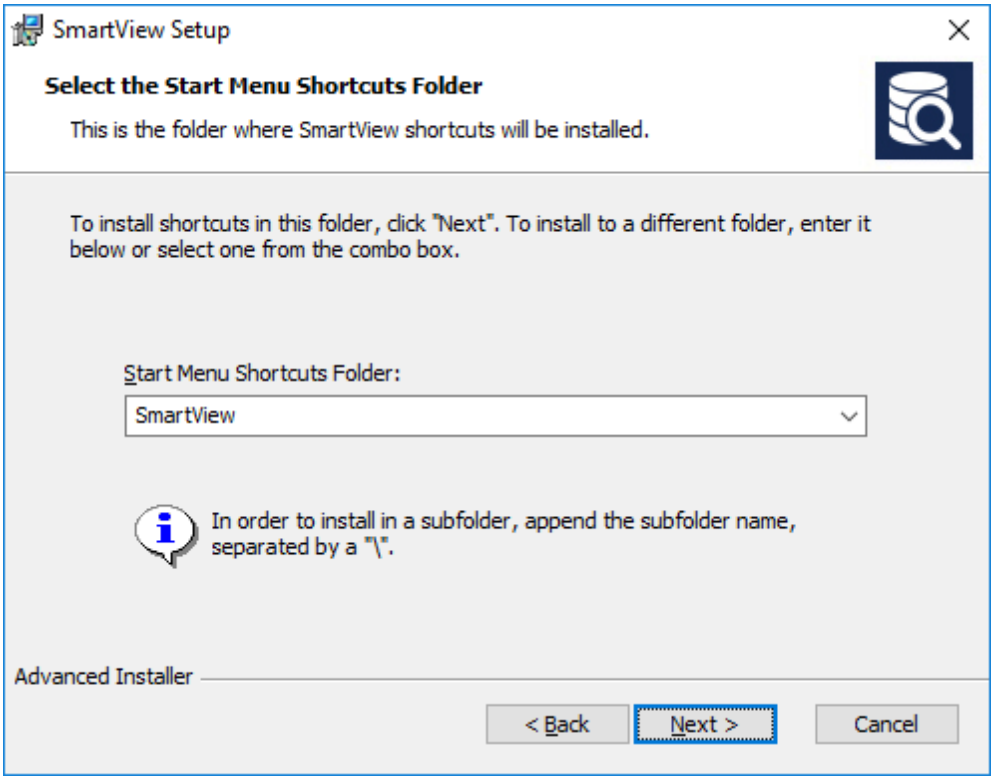
3. Enter in the SQL Server Instance of the SQL Server where the Microsoft Dynamics GP databases are stored. Enter the System Database name. It will default to DYNAMICS. Click Next.



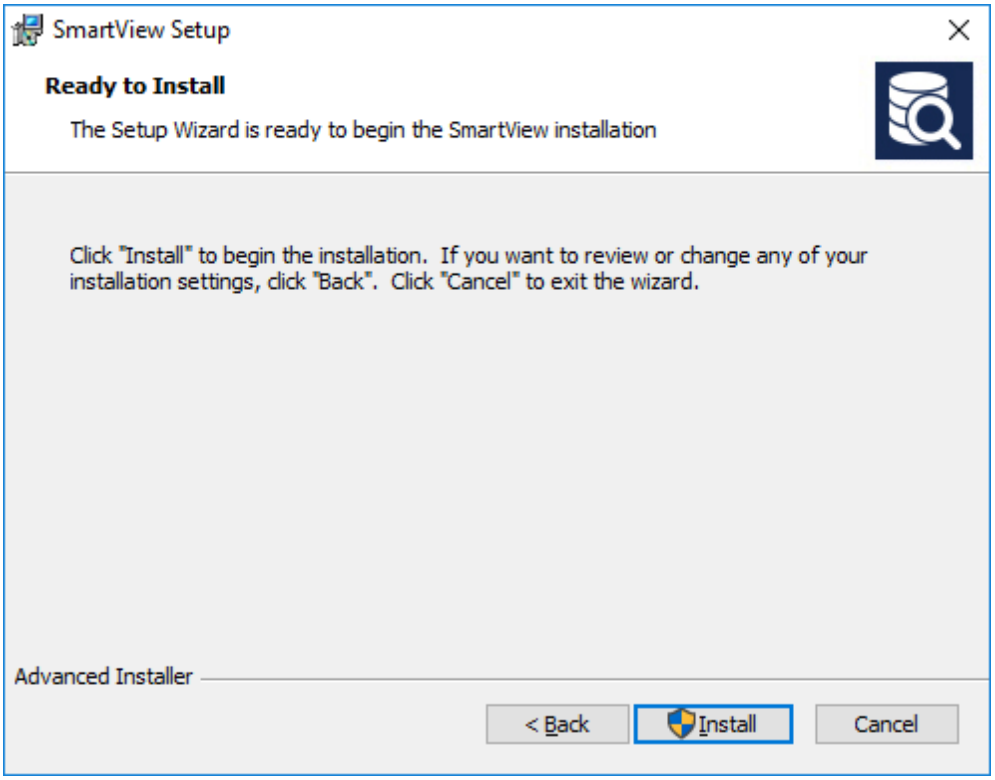
4. Select the location where you would like SmartView installed and click Next.



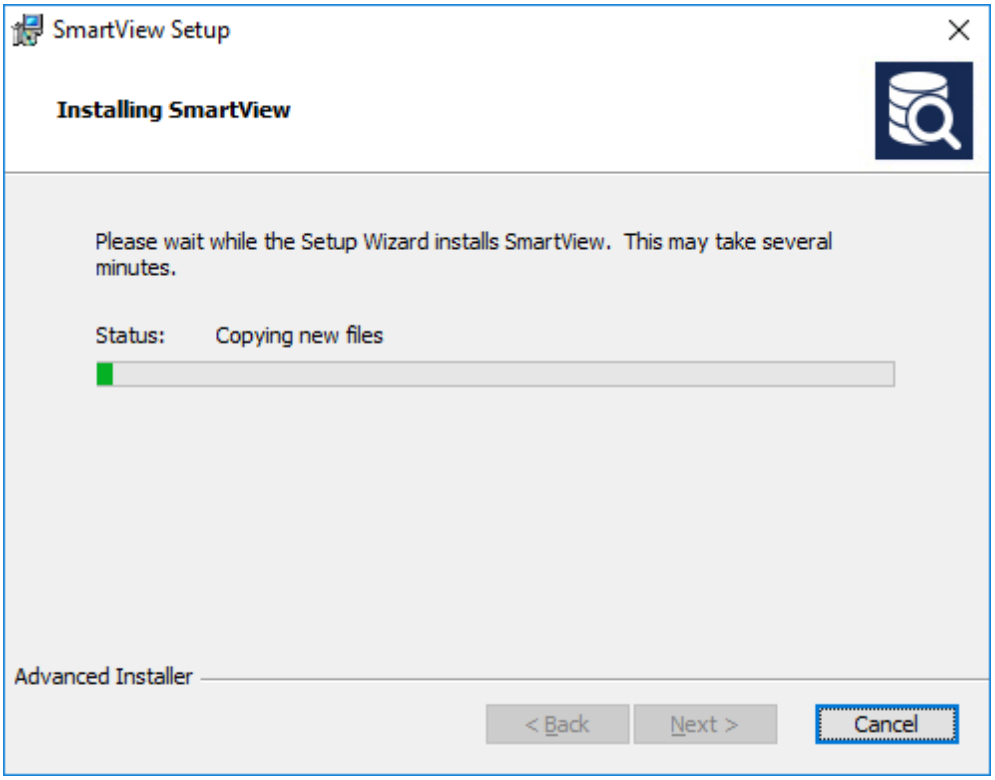
5. Select the Start Menu Shortcut Folder to add SmartView External too. Click Next.



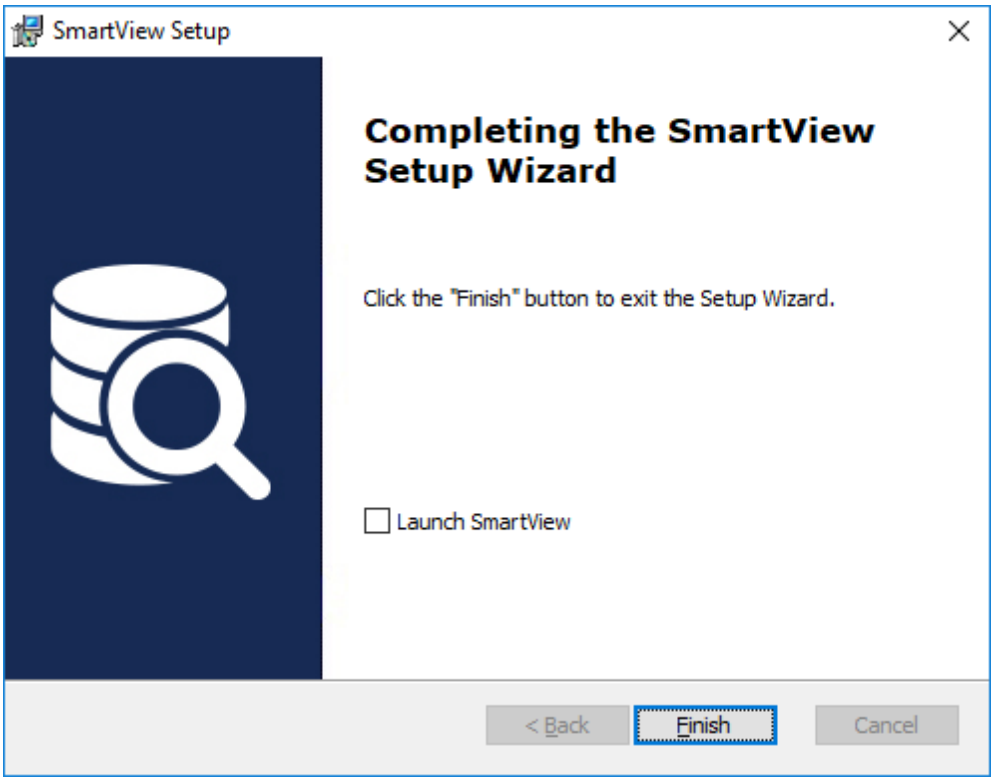
6. Click on the Install button to begin the installation.



7. The SmartView External Installation will run. It may take a few minutes for this to complete.



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



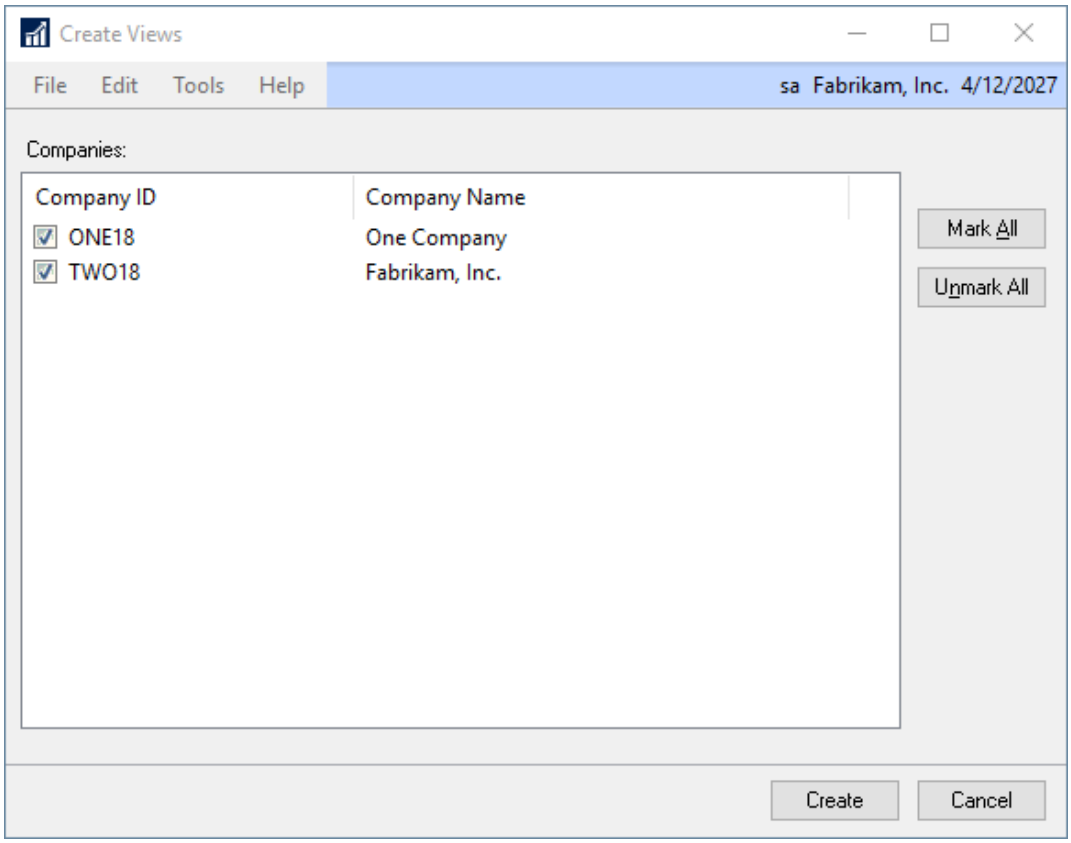
Updating

If you have a previous release of SmartView External installed, there are additional steps that need to be completed to update the SmartView SQL objects. If you have already completed these steps with the SmartView Internal install for Microsoft Dynamics GP, you do not need to complete them again.

If SmartView External release 2.0.44 or prior is being updated to SmartView External release 2.0.51 or newer, please take note of any Favorites that are being used in SmartView External with the Grouping Feature. Any favorites that have the grouping feature included in them, may have to be altered. A fix has been released to match up the grouping fields between Internal and External, but this may cause the favorites in External to group on incorrect fields.

To update the SQL Objects:

1. In Microsoft Dynamics GP, go to Microsoft Dynamics GP – Tools – SmartView – Create Views.

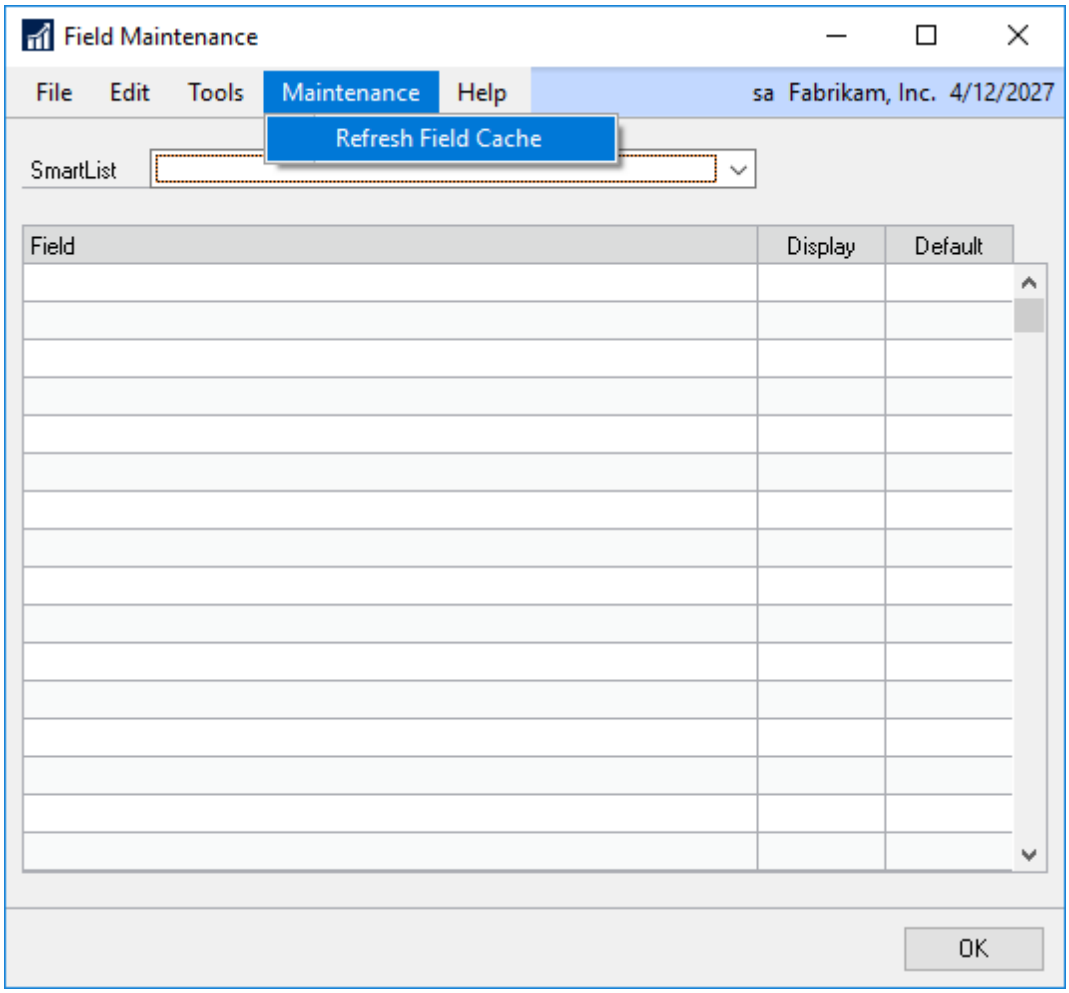


2. Mark all the companies listed if they aren't already marked.
3. Click Create.

By running the Create Views process, it will drop and recreate all of the SmartView SQL Views in each company database. If you have modified any of those views, those modifications will be lost.

To update field cache:

1. Run the Refresh Field Cache process by navigating to Microsoft Dynamics GP – Tools – Field Maintenance in Microsoft Dynamics GP.
2. Once in the Field Maintenance window, go to Maintenance – Refresh Field Cache.



3. There isn't a window that open for this, but you will see that it processes for a minute or two, and once it is done, you can navigate around the Field Maintenance window again.
4. Click OK on the Field Maintenance window.

Using SmartView External

This section covers the Navigation of SmartView External as well as how to use it to return data. It will walk through adding search criteria, grouping, and totals to your SmartList. This section discusses how to create Favorites to save your setups as well as how to print and export them.

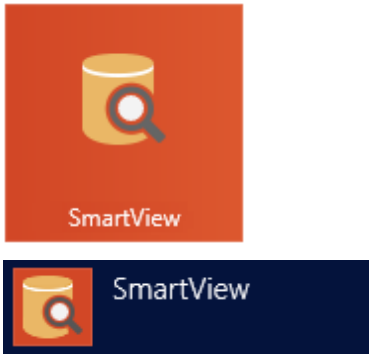
SmartView External Navigation

This module covers the Navigation of SmartView External as well as how to use it to return data.

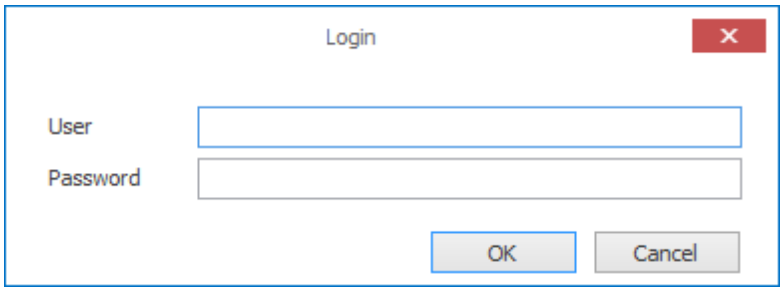
Login to the Application

To login into SmartView External:

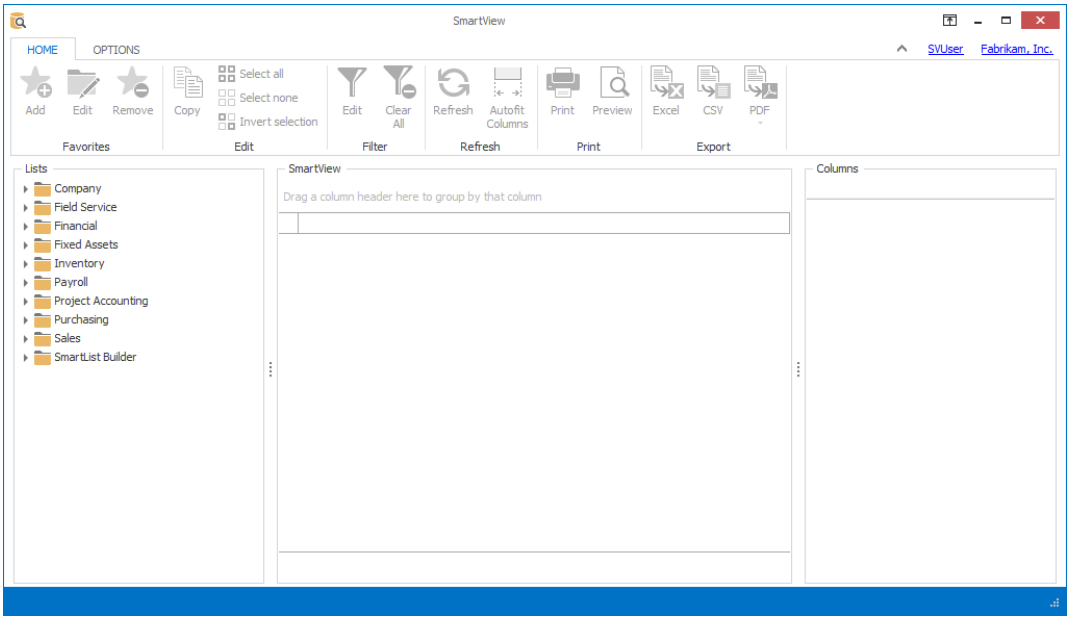
1. Launch SmartView External using the shortcut on the Start Menu/Screen.



2. Enter the external user's credentials in the dialog box.



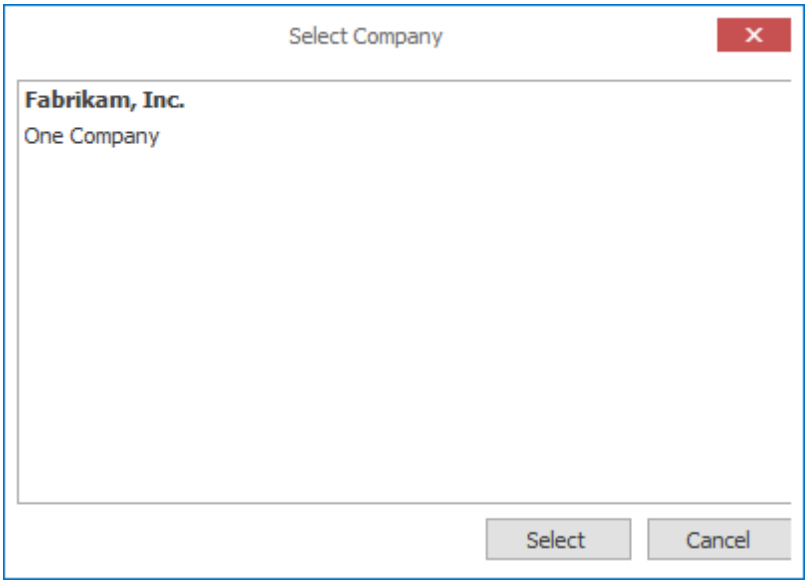
3. The user can now access the same lists as the GP user or role it was linked to.



Switching Companies

To switch to a different company:

1. To view the data from a different Microsoft Dynamics GP database, click on the Company Name link in the top right hand corner and select another company.



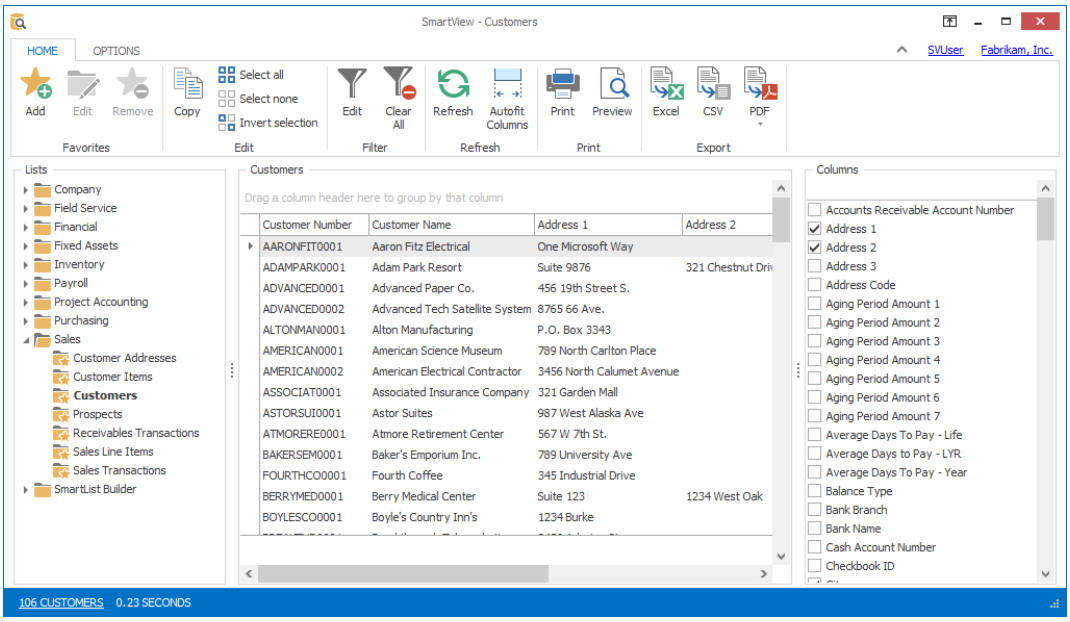
Displaying Data

The SmartView External window is broken out into multiple sections. On the left, you will see the list of SmartLists available. They will be broken out into the different series available. SmartView External, by default, will include the predefined searches, called Favorites, that come with the Microsoft Dynamics GP SmartLists. In the center, you will see the data that is

returned by the selected SmartList. On the right, you will see the columns available to view in that SmartList. The default columns will be marked.

To display a list of data:

1. Open the SmartView External window.
2. Expand the Series the favorite you would like to view is in.
3. Select the favorite you would like to display the data for.



Maximum Records

By default, the maximum records displayed is set to 1,000. This can be changed to show more or fewer records.

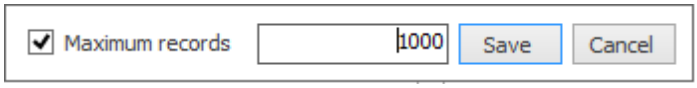
When displaying more than 1,000 records, there may be a performance lag when adding new fields or performing searches. It is recommended that you keep the number of records under 1,000 until all search parameters and fields have been selected.

To set the number of maximum records:

1. Click on the status message in the bottom left corner that displays the number of records.



2. Enter the number of records that you would like to display. Leave the maximum records value blank to return an unlimited number of records.



3. Click Save.

Columns

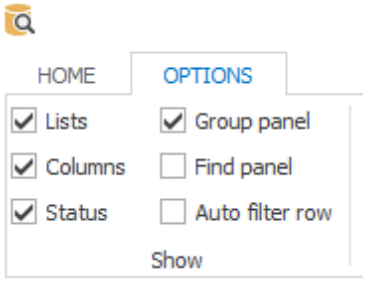
This module describes how to change the columns displayed in SmartView External.

Columns

When a SmartList is selected, the default set of columns is automatically displayed in their default order. The selected columns and the order can be changed.

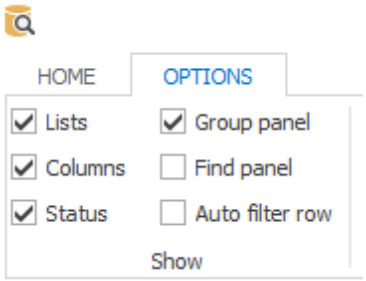
To Add Columns:

1. To add a column, mark the column to display in the Columns list on the right side of the SmartView External window. If the Columns list isn't displayed, go to the Options ribbon and check the Columns option.



To Remove Columns:

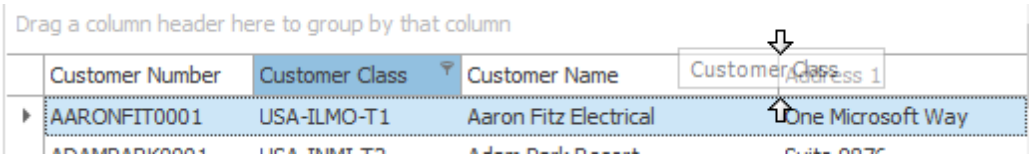
1. To remove a column, unmark the column to display in the Columns list on the right side of the SmartView External window. If the Columns list isn't displayed, go to the Options ribbon and check the Columns option.



To Reorder Columns:

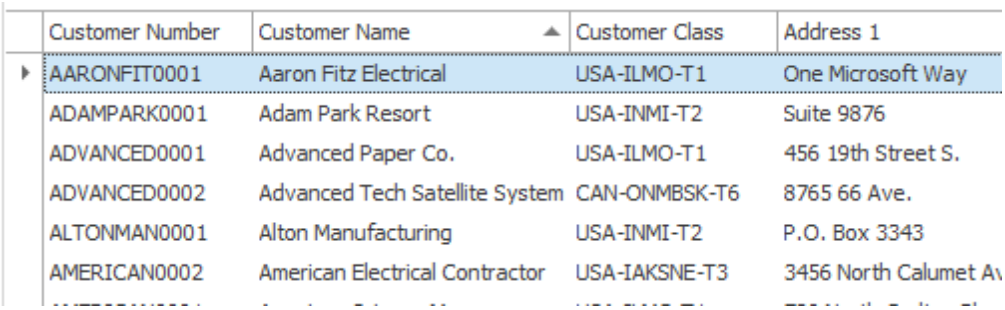
1. To reorder the columns, click on a column header and drag and drop it to the new

position.

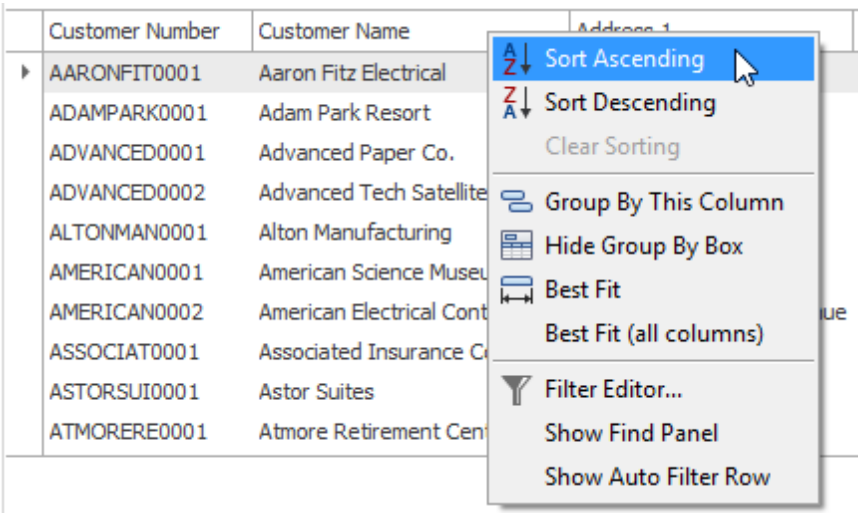


To Sort Columns:

1. To sort records by a column's values and replace existing sort conditions that are applied to the current or other columns, click the target column's header, until an UP or Down Arrow icon is displayed within the header. The Up and Down Arrows indicate ascending and descending sort orders respectively.



2. To sort records by a column's values while preserving existing sort conditions, do one of the following:
    a. Hold down the SHIFT key and click the column header, until an Up or Down Arrow icon is displayed within the header.
    b. Right-click a column header and select ‘Sort Ascending’ or ‘Sort Descending’ from context menu.



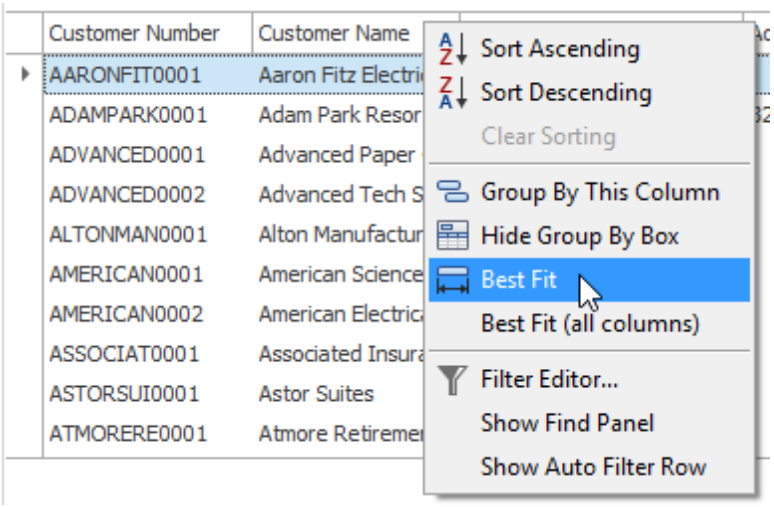
3. To remove sorting by a column, hold down the CTRL key and click the column header.

To Resize Columns:

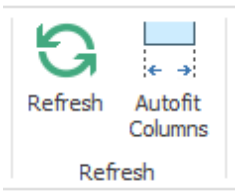
1. To resize columns, drag the right edge of the target column header.



2. To change a column's width so that it displays its contents in their entirety do one of the following:
    a. Hover over the right edge of the target column header. Once you have the double arrow, double click and it should resize the column to fit the contents in all rows of that column.
    b. Right-click the column's header and select 'Best Fit'.

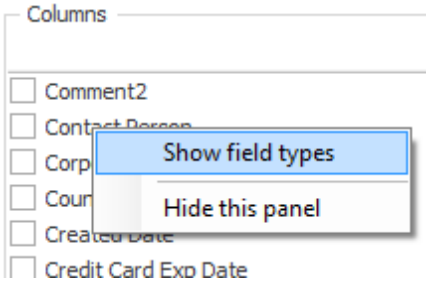


3. To change the widths of all columns so that they all display all of their contents, right-click the header of any column and select 'Best Fit (all columns)'.



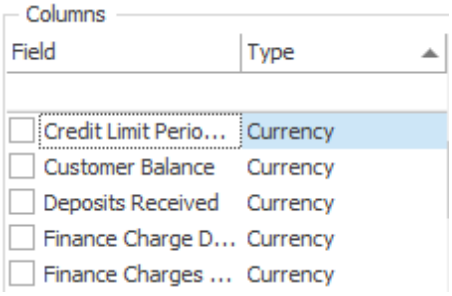
To Display Field Types:

1. To display the field type, right click somewhere in the Columns list on the right side of the SmartView External window. Select Show field types. If the Columns list isn't displayed, go to the Options ribbon and check the Columns option.



To Sort by Field Types:

1. To sort by the field type, click on the Type column header in the Columns list on the right side of the SmartView External window. If the Columns list isn't displayed, go to the Options ribbon and check the Columns option.



2. To change the sort order between ascending and descending, click on the Type column header again.

Searching

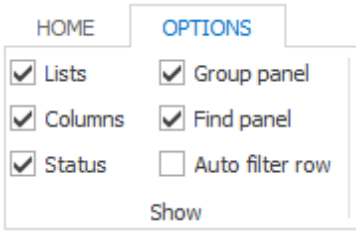
This module describes how to Search the results displayed in SmartView External.

Quick Find

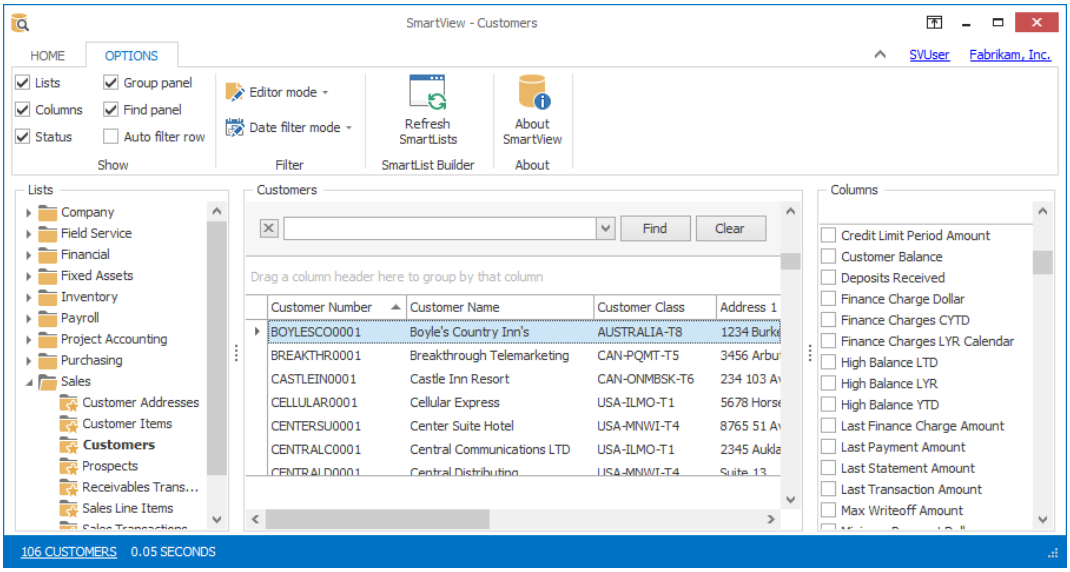
The Quick Find bar filters the records displayed by finding all values that contain the string entered.

To search using Quick Find:

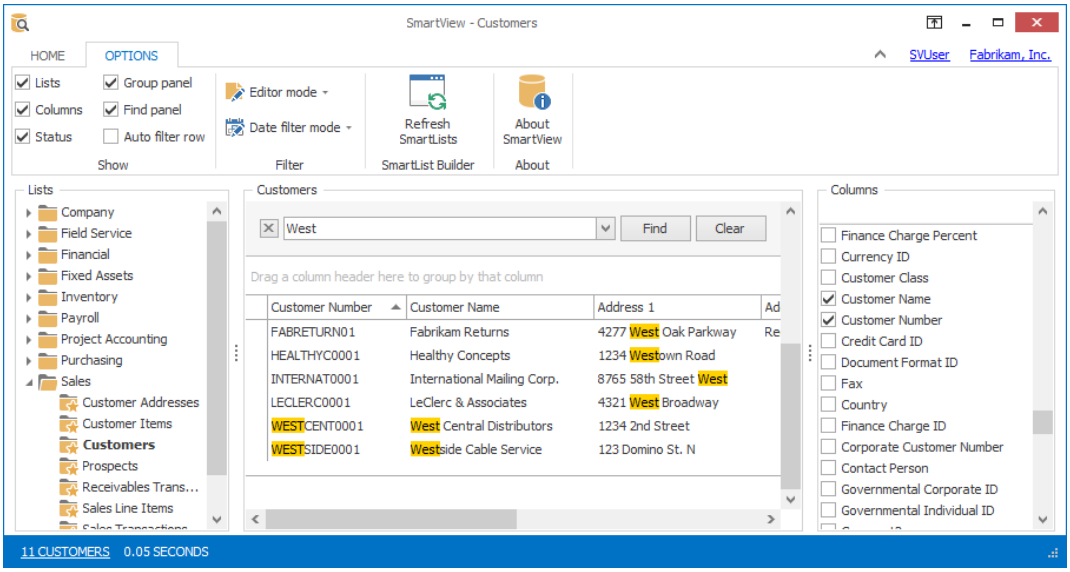
1. To access the quick find function turn on the Find panel by going to the Options ribbon and checking the Find Panel Checkbox.



2. Enter a string value into the quick find field.



3. Click the find button to search across all records in the list. The records found will be highlighted in yellow within your list.



To cancel a Quick Find:

1. Click the icon to close the search window.

Please note that if you leave the Quick Find window open, when you change lists the same search will be applied. This is great functionality in the situation where you search for a SOP Number within Sales Line items, and then want to find the matching header record. By switching to the Sales Transaction list the same search is applied.

The Quick find search function can also be used for much more complex search functions.

1. Enter multiple words into the search field to search for all of those words across all columns of data. For example, in the sample database if you enter Aaron Park, it will return Aaron Fitz Electrical as well as Adam Park Resort, or if you enter Aaron Chicago, SmartView External will return all customers in Chicago and all those with the word Aaron in its name.
2. Enter a phrase in quotations for SmartView External to search for just that phrase and not the individual words contained in the phrase
3. Enter a minus sign to exclude terms from a search. For example, in the sample database, if you enter Electrical -American, you will just get Aaron Fitz Electrical and not American Electrical Contractor.
4. Enter a plus sign to only show records that have that search term. For example, in the sample database, if you enter Redmond +Resort, you will just get Kensington Gardens Resort, and not all companies in the city of Redmond.

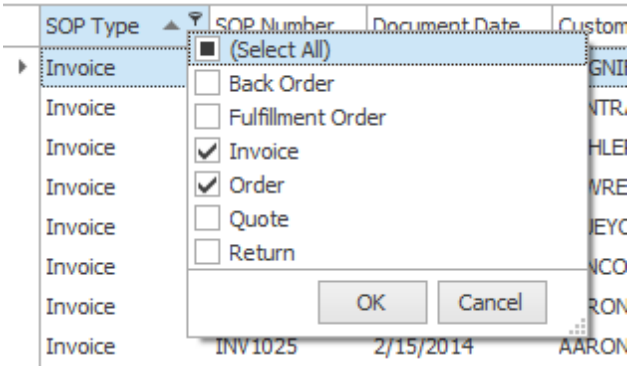
5. Search individual columns by putting the name of the column before the search term and separated by a colon. For example, in the sample database, "Customer Name":red will return just Red's Food Market and no customers from Redmond. Note, when you have a space in the column name, you must enclose it in quotes. You can also combine this with the minus operator to filter all values with that search term. For example, in the sample database, -"Customer Name":red will return everyone but Red's Food Market)

Filters

You can use SmartView External to filter records that contain specific values in the SmartList.

To filter on a column name:

1. Click on the filter button ( ) in the column header.
2. Mark the values that you want to filter on.

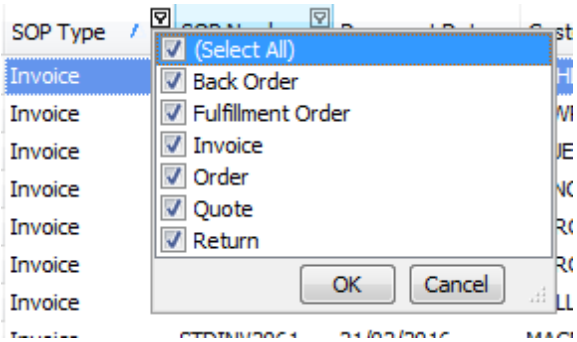


When filtering is applied, the filter dropdown will only display the values which match the current filter criteria. If the (Select All) is unchecked, the filters will be removed and all values will be returned.

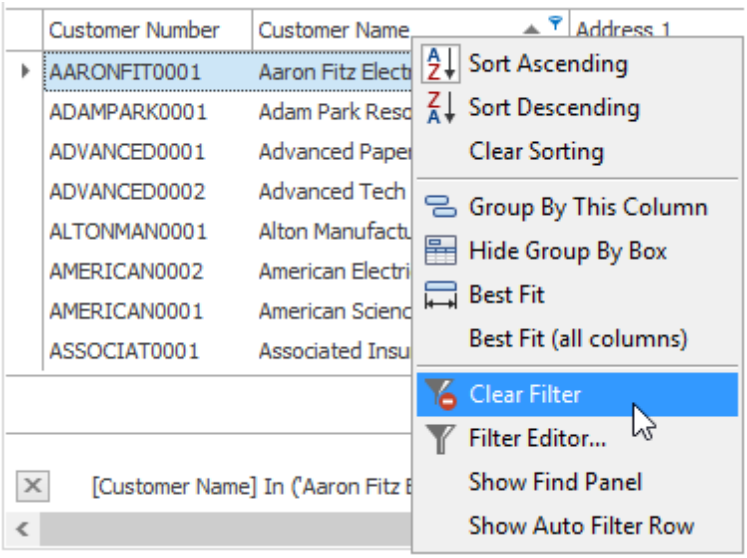
3. Click OK to close the filter dropdown list and apply the filter.

To remove a filter:

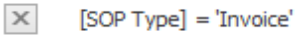
1. To clear the filter applied to a specific column do one of the following:
    a. Select the filter dropdown list and unmark (Select All).



b. Right-click the column header and select 'Clear Filter'.



2. To clear all filters for the view, do one of the following:
   a. Click the Close Filter button below the data results.

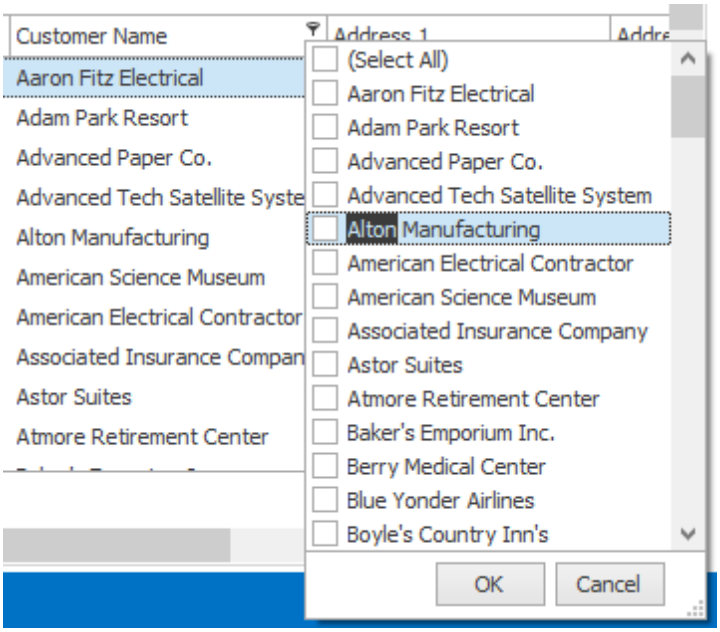


   b. Click the Clear All button on the Home ribbon.



Incremental Search in Filters

Click on the Filter icon in Column Filter dropdown list and start the search by typing the text. SmartView External will search for a string you entered and will highlight the record that matches it. This can be useful when you have to search for an item in long lists.

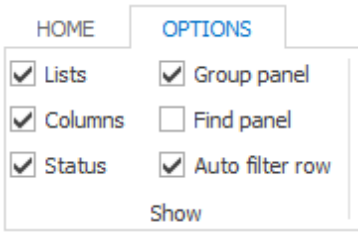


Auto Column Filters

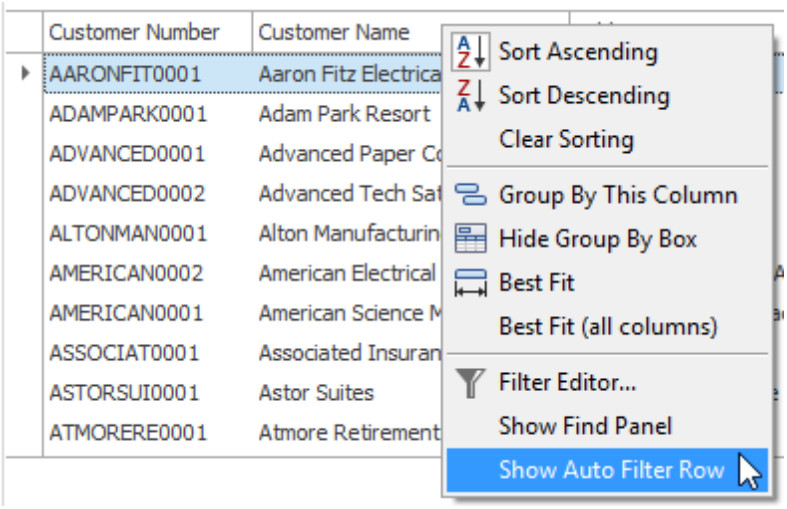
Auto Filters are the free text version of the drop down filters described in the previous section.

To apply an Auto Filter:

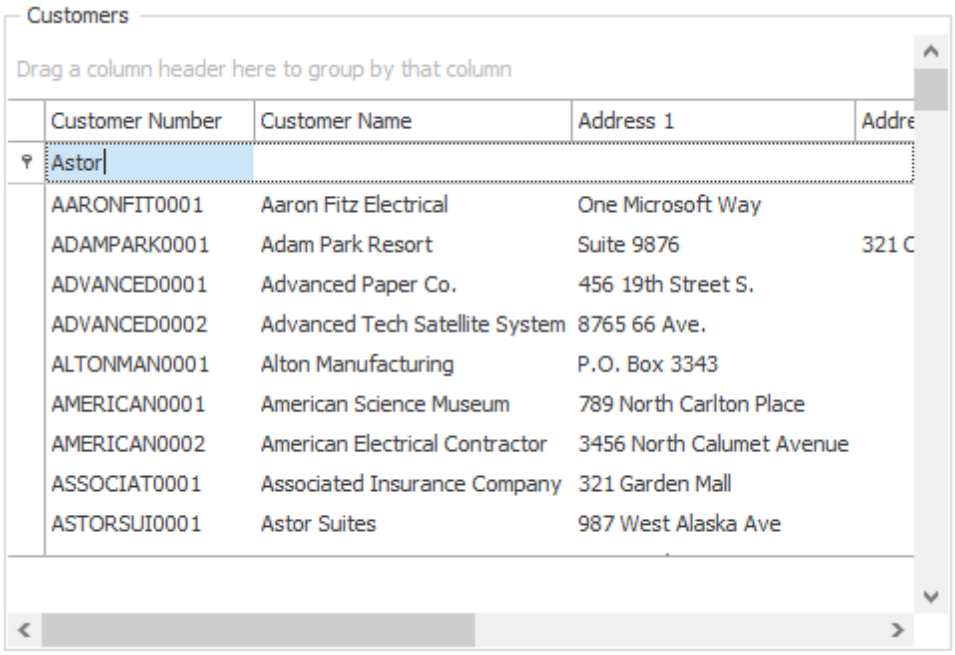
1. Select Show Auto Filter Row using one of the following:
    a. Selecting Auto filter row on the Options ribbon. The Auto Filter box will show below the column headers.



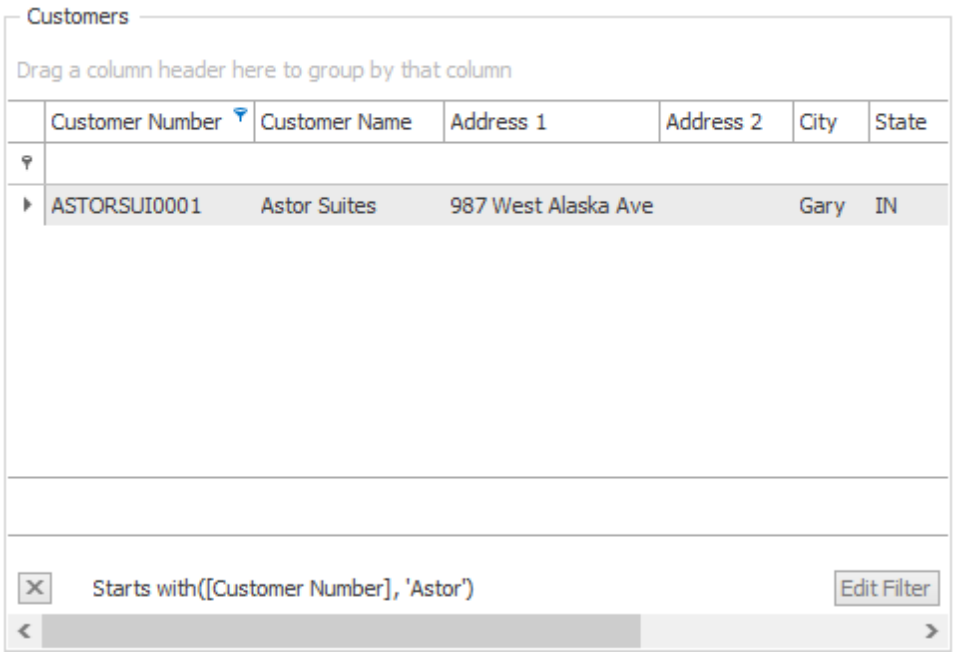
    b. Right-clicking on any column header and selecting ‘Show Auto Filter Row’.



2. Enter some text into the column that you wish to search and hit the tab key.



3. Hit the Tab key to apply the filter.



This is a 'begins with' Search type – so records will be filtered for records that begin with the string entered.

To remove an Auto Filter:

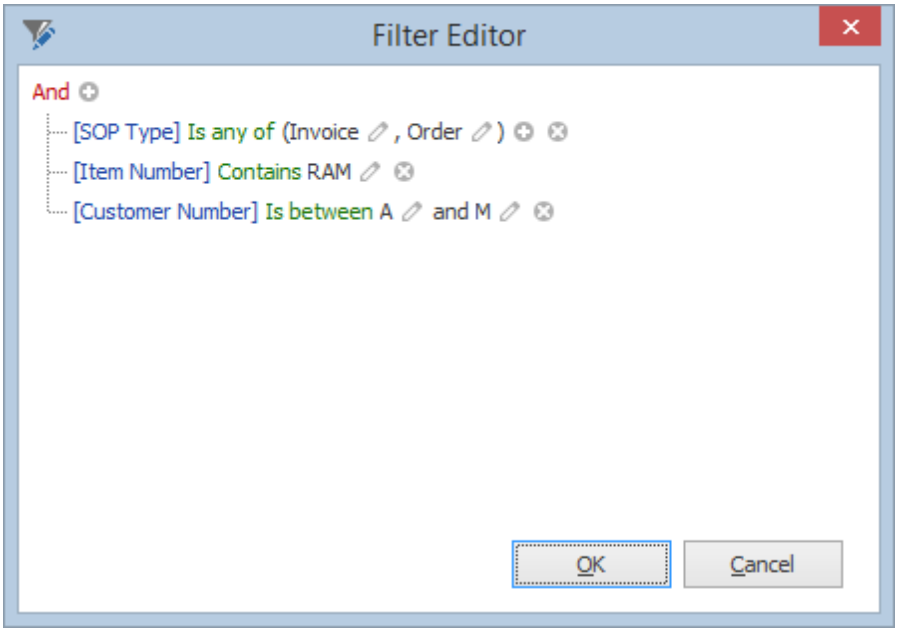
1. Click the Close Filter button below the data results.



Advanced Filters

You can use the Filter Editor to visually create advanced filters that contain multiple and/or clauses and advanced comparisons.

If you have a case sensitive database, the values in the filter editor you are searching for must be an exact match of those that are stored in the database. So if the SOP type is stored as Invoice, a search for 'invoice' may return no result.

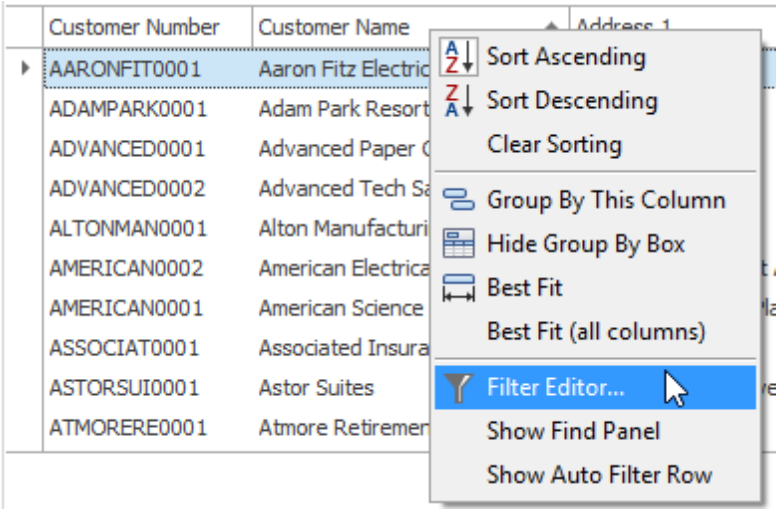


To open the Filter Editor:

1. Click the Edit button on the Home ribbon in the Filter section – or –

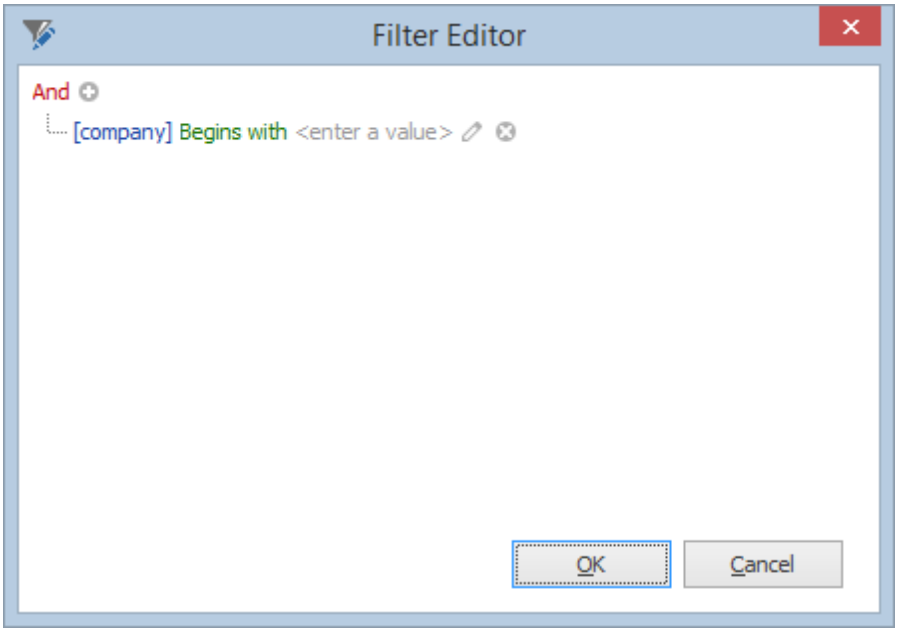


2. Right-click on the column header and select 'Filter Editor'.

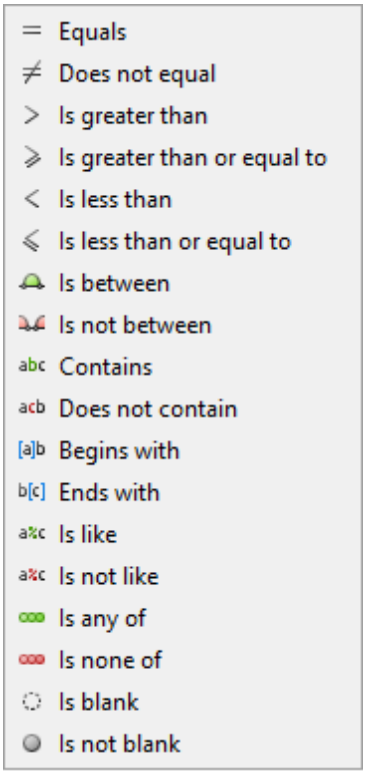


To add a filter condition:

1. Click the Add ( ) button.
2. Select a column.



3. Select a comparison operator. The comparison operator list displays only those operators that are supported by the current column's data type. For instance, when selecting a numeric field, the operator list doesn't display the 'Begins with' operator and other operators that are related to strings.



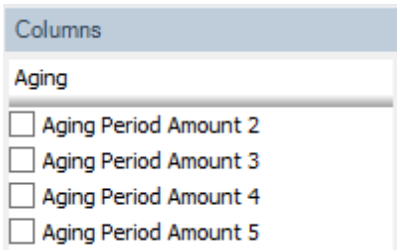
4. Enter a value or click on the comparison button ( ) and select another column to compare the column to.
5. Click Apply or OK.

Source Column Filter Editor

Source Column filters can be added in SmartView External. This can help in finding the column you are looking for when the list contains many of them.

To add a Source Column Filter:

1. Enter your filter criteria in the filter text box to filter your source columns.



2. Click the Edit Filter button at the bottom of the Columns pane to open the advanced filter editor for the source columns.



Grouping

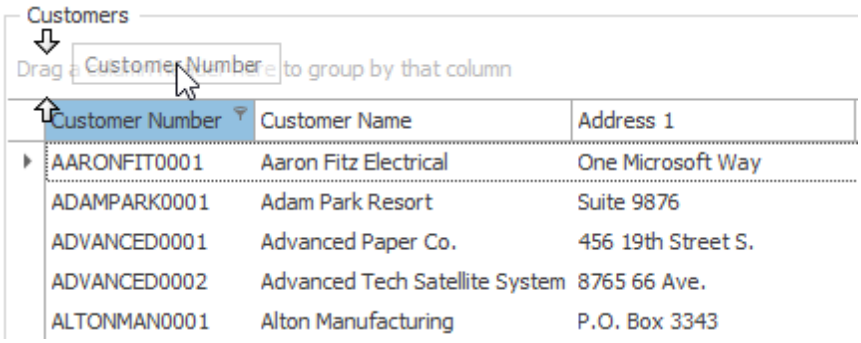
This module describes how to create groups for a view.

Groups

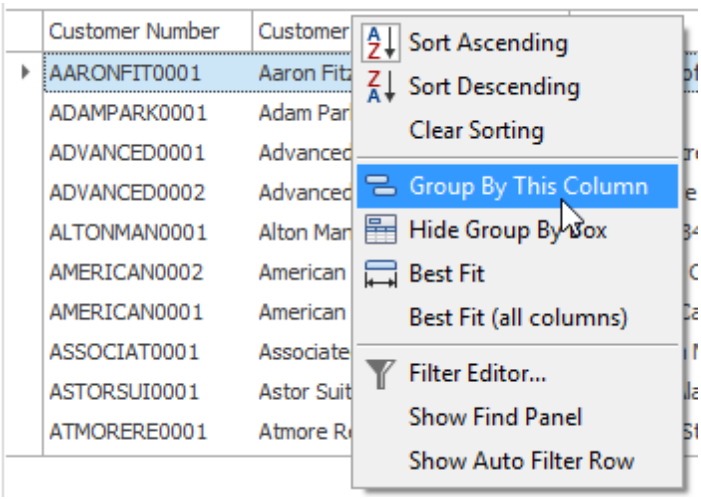
A group allows you categorize data by specifying the column(s) that you want to see the data grouped by. You will then see all the data that corresponds to the value in the column(s) you selected for the group under that group. There will be a total for each group as well.

To group a view on a column:

1. Drag and drop a column to the grouping area. – or –



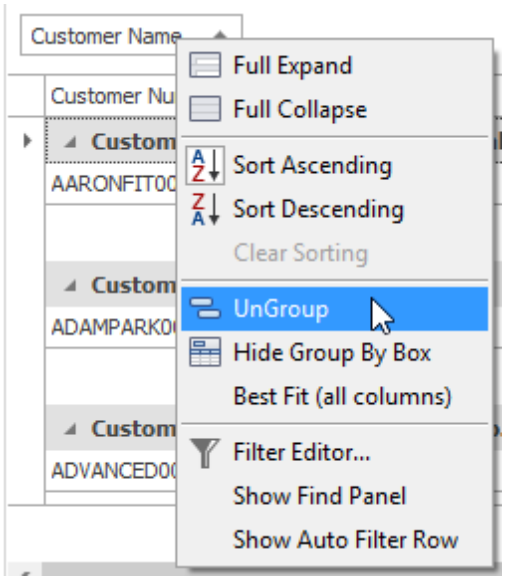
2. Right-click a column header and select 'Group By This Column' from the context menu.



3. You can add more columns to the grouping area to create subgroups.

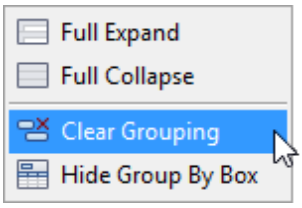
To remove a grouping:

1. Drag and drop the group back to the column header row. – or –
2. Right click on the group and select 'UnGroup'.



To remove all groups:

1. Right-click the group area and select 'Clear Grouping' from the context menu.

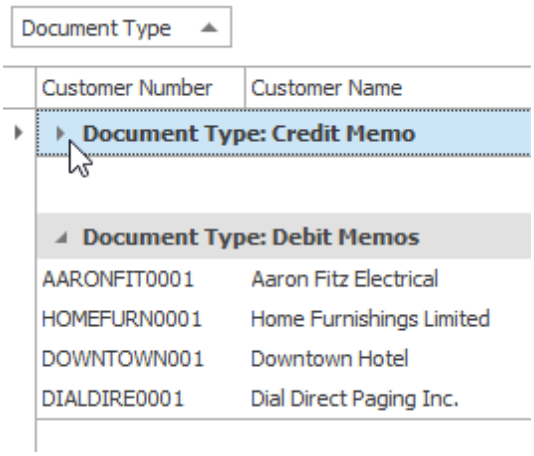


Expanding and Collapsing

By default all groups will be expanded when a grouping is created.

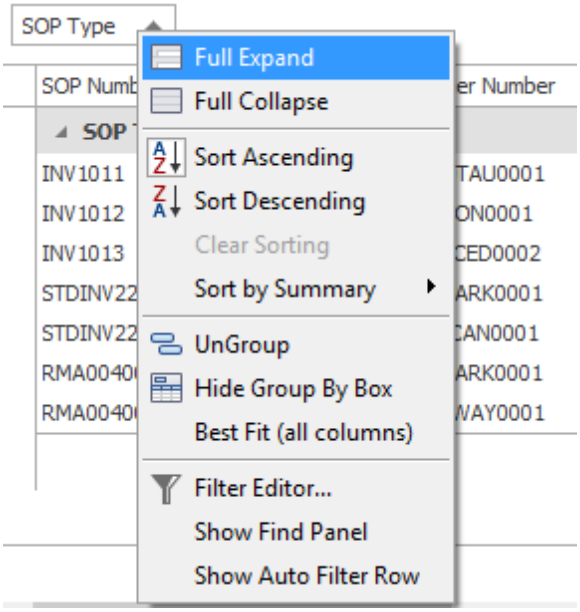
To expand or collapse a single group:

1. Click on the expansion button in the group header.



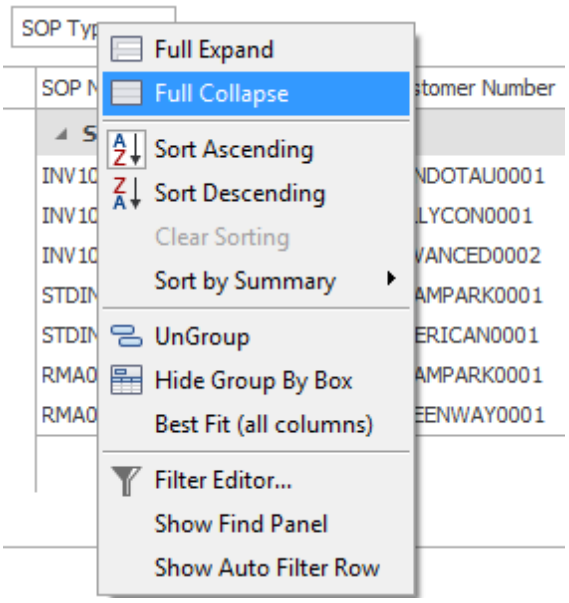
To expand all groups:

1. Right-click on the grouping field and select ‘Full Expand’.



To collapse all groups:

1. Right-click on the grouping field and select ‘Full Collapse’.



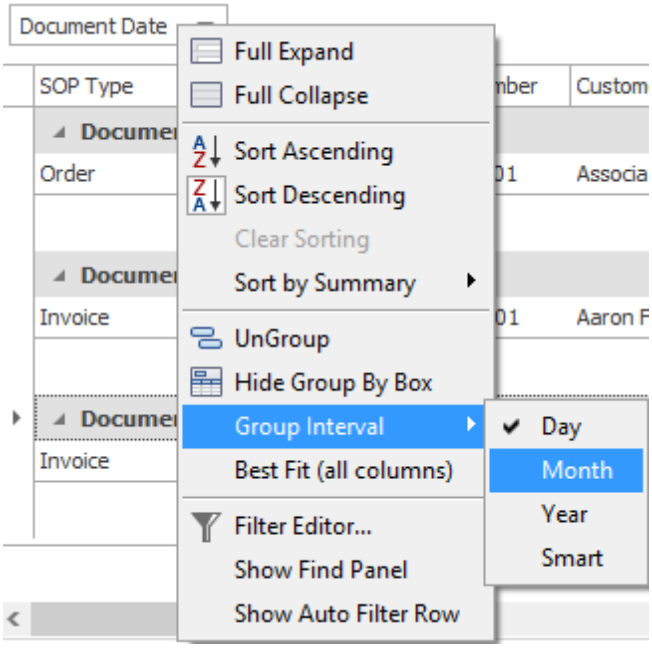
Date Group Intervals

When grouping by a date field, the grouping interval can be changed to:

- Day
- Month
- Year
- Smart – will group into one of Today, Tomorrow, Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Next Week, Two Weeks Away, Three Weeks Away, Next Month, Beyond Next Month, Yesterday, Last Week, Two Weeks Ago, Three Weeks Ago, Last Month, Older.

To change the date interval:

1. Right-click on the date grouping field and select an option from the Group Interval menu.

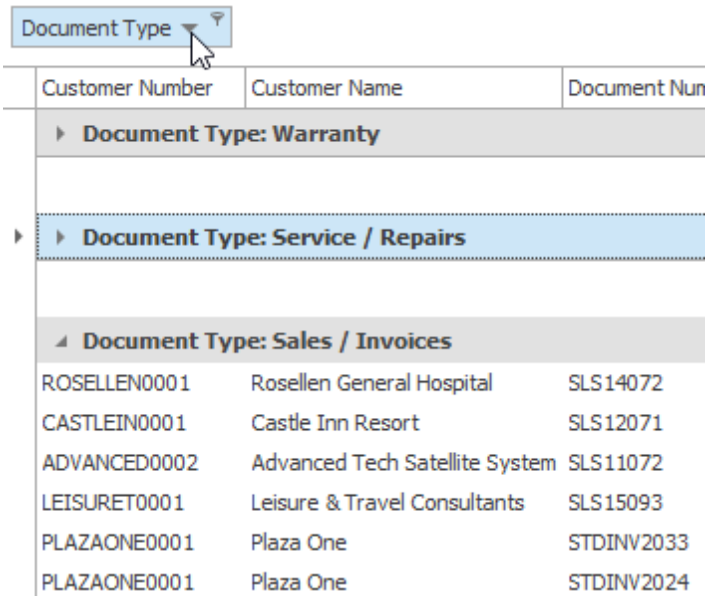


Group Sorting

When a group is added, the group can be sorted by the value of the column.

To sort by the group value:

1. Click on the group field until an Up or Down Arrow icon is displayed within the field.
2. The Up and Down Arrows indicate ascending and descending sort orders respectively.



Totals

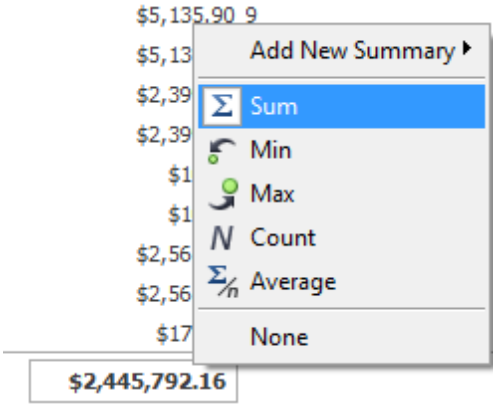
This module describes how to create Totals for a view.

Totals

By default, all numeric fields are automatically summed when they are added to the view. You can change the fields that are totaled and the summary method that is used for each column.

To add or change a total:

1. To add a total or change the type of summary for a specific column, right-click on the column footer and the summary method from the menu.



To remove a total:

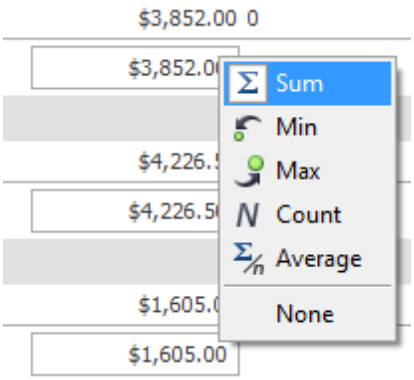
1. To remove a total, right-click on the column footer and select ‘None’ from the menu.

Subtotals

By default all numeric fields are automatically subtotaled when a group is created for the view. You can change the fields that are subtotaled and the summary method that is used for each column.

To add or change a subtotal:

1. To add a subtotal or change the type of summary for a specific column, right-click on the group footer and select the summary method from the menu.



To remove a subtotal:

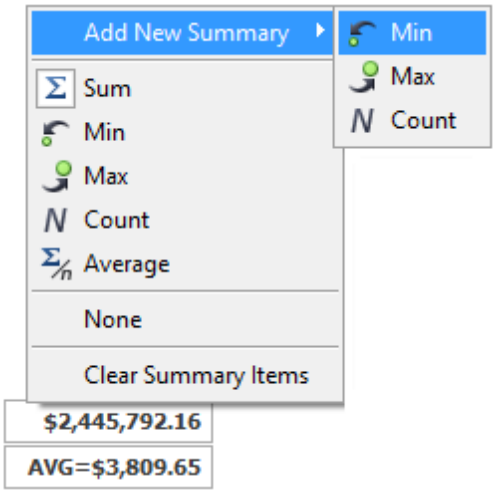
1. To remove a subtotal, right-click on the group footer and select 'None' from the menu.

Multiple Totals 2

You can have multiple summaries on any column.

To add a new total:

1. Right-click on the group footer and select a summary type from the Add New Summary menu.

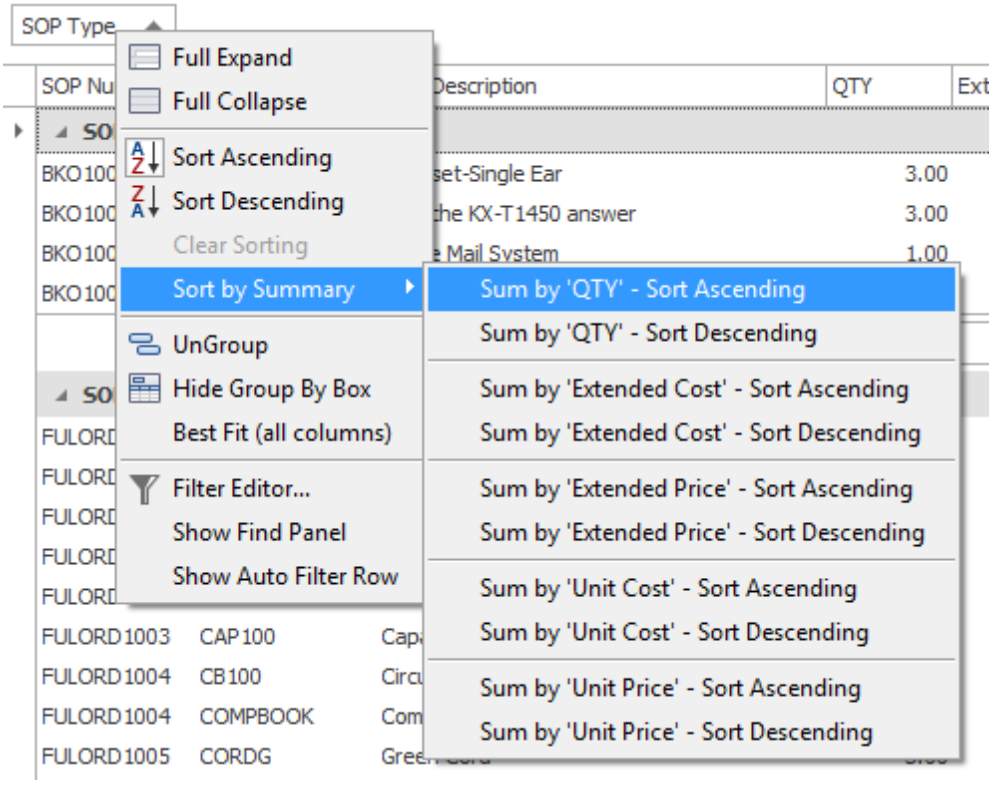


Total Sorting

When a group is added, the group can be sorted by any of the summary values being displayed in the view.

To sort by a total value:

1. Right-click on the group field and select an option from the Sort by Summary menu.



Favorites

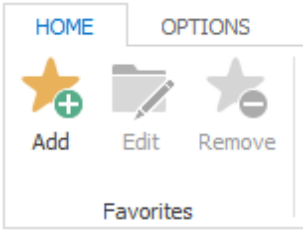
This module describes how to use SmartView External Favorites. Favorites are used to store a set of defined views for each SmartList. These views contain information about the filters, fields and grouping for the SmartList. Favorites can be applied to a group of companies and users.

Creating SmartView External Favorites 2

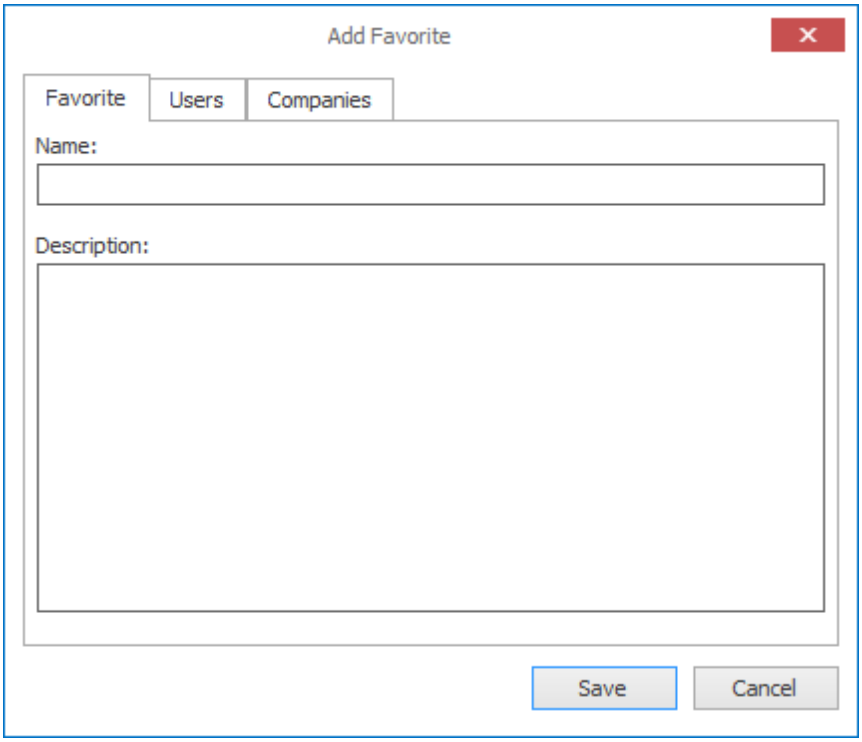
You can use the Add Favorite window to add and update SmartView External favorites.

To create a new favorite:

1. On the Home ribbon, click the Add button in the Favorites section.



2. Enter the Favorite Name. You can also add some notes text in the Description box.



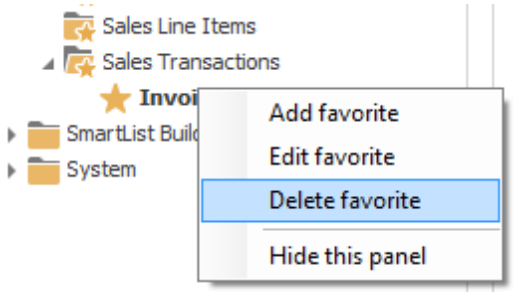
3. On the Users tab, select the users and roles that will have access to the Favorite. By default the current user will be automatically marked.
4. If you want the favorite to be available to all users and new users that have not yet been created, mark the All users checkbox.
5. On the Companies tab, Select the companies that will have the Favorite. By default, the current company will be automatically marked.
6. If you want the favorite to be available in all companies and new companies that have not yet been created, mark the All companies checkbox.
7. Click Save.

To update an existing favorite:

1. Click the Favorites button and select 'Edit' from the menu.
2. Enter the new details for the favorite.
3. Click Save.

To delete a favorite:

1. Select the favorite from the SmartList tree.
2. Right-click on the favorite and select 'Delete'.

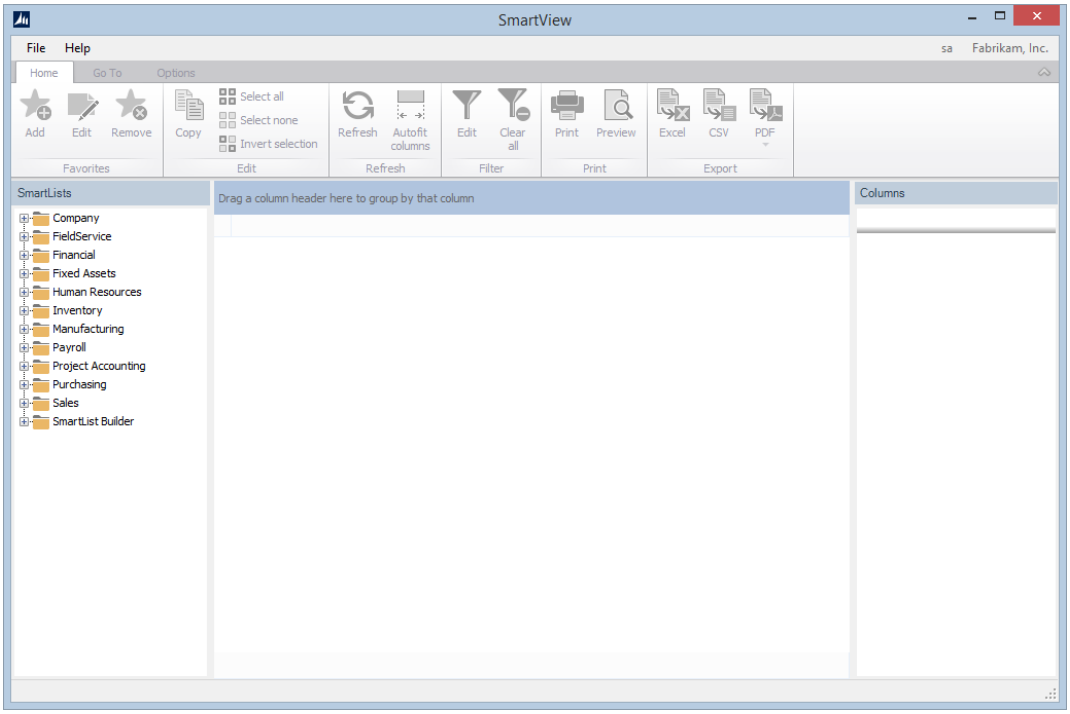


Converting SmartList Favorites

The Convert SmartList Favorites window can be used to convert existing favorites from SmartList to SmartView External.

To convert a favorite:

1. Open the Favorite Maintenance window by going to Microsoft Dynamics GP - Tools - SmartView - Favorite Maintenance.
2. Go to Utilities - Convert Favorites.
3. By default all SmartList favorites are displayed. Use the filter function to restrict the list of favorites by user, company, SmartList etc



4. Select the favorites you wish to convert to SmartView External by marking the checkboxes next to the Favorites.
5. Select Process

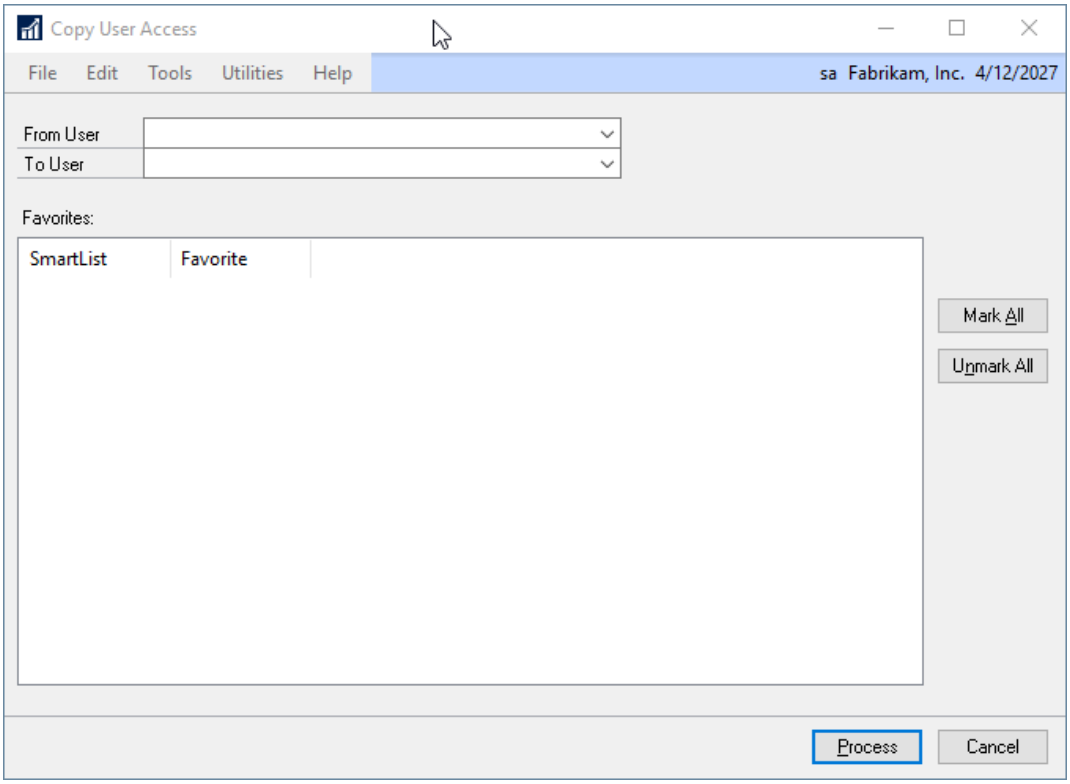
- It is not recommended to convert all favorites across to SmartView External. Most companies using Microsoft Dynamics GP have a large list of favorites that aren't ever used. There is no need to clutter up SmartView External with all of these lists. Choose carefully and only convert the favorites you will need. If you don't convert a favorite the first time, you can always come back and convert it later.
- Often times it is better to build new favorites in SmartView External rather than converting any favorites. There is better functionality available in SmartView External and simply moving the lists across is not taking advantage of the better, more flexible ways of displaying data in SmartView External.
- Not all favorites will convert perfectly. You must review the new list in SmartView External to determine if it has come across correctly to SmartView External. The easiest way is to compare lists and ensure the same number of records is displayed in each. If your list does not convert correctly, simply modify the filters to accurately match the converted favorite in SmartView External.

Copy User Access

The copy a SmartList Favorites from one user to another, you can use the Copy User Access window. Note that if you have access to this window, you can only see your own favorites and not those owned by other SmartView External users.

To copy user access:

1. Open the Favorite Maintenance window by going to Microsoft Dynamics GP - System - SmartView External - Favorite Maintenance.
2. Go to Utilities - Copy User Access.
3. Select the From and To User.
4. Mark the SmartList Favorite(s) that you wish to copy to another user.



5. Hit Process.

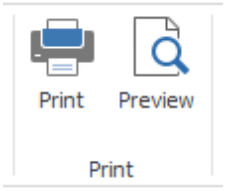
Printing and Exporting

This module describes how to print and export from SmartView External.

Printing

To print a view:

1. Select Print from the Home ribbon.



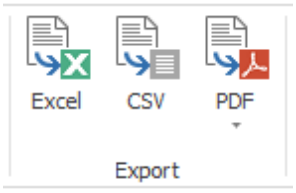
Exporting

SmartView External can export files in three formats; CSV, Excel and PDF.

To export a view:

1. Click on the Export button on the Home ribbon for the file type you wish to export

to. If Export to PDF is selected, select the additional option of Portrait or Landscape.



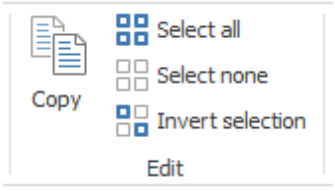
2. Select where to save the export file and change the file name if desired.
3. Click Save.

Copying to the Clipboard

Records selected in the SmartView External window can be copied to the clipboard and pasted into other applications. The records are copied to the clipboard as tab delimited text including the column headers. When this is copied into an Excel file, the records are automatically formatted into columns.

To copy records to the clipboard:

1. Select the records to copy using one of the following methods:
    a. Use the Select all, Select none, Invert selection buttons on the Home ribbon.



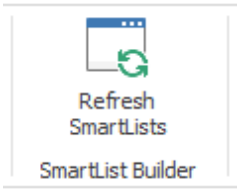
    b. Select the individual records to copy by holding down the CTRL key and selecting each record.
    c. Select a range of records by clicking on the first record in the range, holding down the Shift key and selecting the last record in the range.
2. Copy the selected records using one of the following methods:
    - Click the Copy button in the Edit section of the Home ribbon.
    - Press CTRL + C key combination.
3. The records can now be pasted in the destination location.

Refresh SmartList Builder SmartLists

This module describes how to refresh the SmartList Builder lists that are displayed in SmartView External. This can be useful if a change is made in SmartList Builder to bring those changes into SmartView External without re-launching SmartView External.

To refresh SmartLists:

1. On the Options ribbon, click the Refresh SmartLists button.



2. This will process for a few seconds and then the cursor will become available again.

External Enhancements

- Release 2.0.44
- Release 2.0.53
- Release 2.0.54
- Release 2.0.56
- Release 2.0.57
- Release 2.0.64
- Release 2.0.65
- Release 2.0.67
- Release 2.0.70
- Release 2.0.71
- Release 2.0.72
- Release 2.0.74

2.0.44

This release is a compatibility release to allow SmartView External to be compatible with Microsoft Dynamics GP 2018. There are no additional enhancements included.

Release Date: 12/15/2017

2.0.53

New Features in Build 2.0.53

- Column order on default lists

Problem Reports Fixed in Build 2.0.53

- Blank Date Fields
- Ambiguous column name XXXXX
- Blank Date Fields
- Can't filter on "Notes" column in SmartView
- Incorrect syntax using filter grouping
- INet field in Vendor Addresses does not display the saved email address
- Is Blank Filter
- Saving a favorite with a grouping in one version does not work in the other
- SmartList Builder restrictions for users in External
- Crashing Great Plains 2015 on Surface Book machines
- Using a Modified SLB list - adding favorite with groups does not save grouping correctly
- External does not run query the same way as internal.
- External gives different number of results that Internal on a SmartList Builder list
- Installer - SQL Server Name shown as 'Server Name'
- Always uses "and" for the multiple search criteria instead of defined by SLB10000.ASI_Search_Type
- Logging in as sa pulls SY00300 data from the TWO db and not the real lesson company db
- Filters don't work when Hold is in the name
- Pulls wrong account number on Account Transactions multi-company report
- Search using a note index gives an error "Invalid column name 'e Index'."
- Select Company window Cancel button cut off
- Throws "Out of memory" errors trying to display or export to excel/pdf with many rows or columns

Release Date: 4/6/2018

2.0.54

Problem Reports Fixed in Build 2.0.54

- Changing SmartView Filter fails with errors such as Starts With is not a recognized built-in function name.
- SmartView External throws Index out of range error when click on SmartView Favorite and then a "main root" such as "Sales" or "Purchasing"

Release Date: 4/20/2018

2.0.56

Problem Reports Fixed in Build 2.0.56

- Add SmartList Builder Custom Series to SmartView External

Release Date: 7/3/2018

2.0.57

Problem Reports Fixed in Build 2.0.57

- Brackets in where clause being set incorrectly

Release Date: 10/4/2018

2.0.64

Problem Reports Fixed in Build 2.0.64

- GP Receivings Line Items list pulling wrong POP Type
- Quotes for prospects not returning
- Multidimensional Analysis SmartView report duplicates data
- Account segments not showing for new company
- Receivings Transaction does not show Purchase Receipt for new vendors (without PM00201 summary record)
- Control Type field Values
- If a SmartList is not set to Display in the SmartList Maintenance, still shows in SmartView External
- Sales Transaction SmartView - Sales Document Status not defined
- Document Status differs between SmartView and SmartList for Purchase Line Items

- Field Service > RMA Lines SmartView dates are displayed as 1/1/1900
- Field Service RTV Lines SmartView RTV Status is incorrect
- Field Service RTV SmartView Void Status does not match the SmartList Void Status
- Field Service RTVs SmartView displays the Vendor ID in the Entry Date field
- Field Service Work Orders SmartView SVC_Depot_Priority field is formatted as currency
- Field Service Work Orders SmartView Total Labor Hours field is formatted as currency
- Hold field differs between SmartView and SmartList Purchase Orders
- Human Resources Employee Benefit SmartView populates Eligibility Date field with 1/1/1900
- If Account Category Number field is blank in SQL, in SmartView the field is populating as blank and in SmartList the field is populating as 0
- In the default Financial Account Summary SmartView the credit and debit columns are in reverse order of the default SmartList
- In the Field Service > RMA Lines SmartView the Line SEQ Number fields are being formatted as currency
- Inventory Transactions in SmartView
- Line SEQ Number field for the Field Service Contract Lines SmartView is being formatted as currency
- Post Date on SmartView PA Timesheet Historical Trx report is formatted as currency and not date
- The data in RMA Status column of RMA Lines SmartView does not match the data in the RMA Lines SmartList
- Conversion failed when converting the varchar value '1.0000' to data type int using Extender Integration with List field
- SmartView External Shows wrong values in Drop List for Extender List fields with SmartList Integration

Release Date: 1/24/2019

2.0.65

Problem Reports Fixed in Build 2.0.65

- Account segment names do not show in SmartView
- Restriction_Text in SV00100 does not get updated when Field name is changed in Field Maintenance
- SmartView shows incorrect Tree types for two Analytical Accounting Trees

- SLB Multi-Company doesn't work in SmartView when using SmartList table type

Release Date: 4/5/2019

2.0.67

Problem Reports Fixed in Build 2.0.67

- Inventory Transaction SmartView report not showing Batch Number for Posted transactions
- Modified non-GP Smartlists show twice in SmartView External
- SmartView External locks up if you click OK on a blank filter
- Using Company Name in SLB calculated field throws error when report runs in SmartView

Release Date: 10/11/2019

2.0.70

Problem Reports Fixed in Build 2.0.67

- External user login not working on Binary SQL

Release Date: 10/9/2020

2.0.71

New Features in Build 2.0.71

- Track Last Run date on Favorites

Problem Reports Fixed in Build 2.0.71

- Receivables Transactions smartview report for Posted Date shows blank for all documents
- When Creating a favorite in SmartView, the current user is not marked as default

Release Date: 7/30/2021

2.0.72

This release is a compatibility release for SmartView External. It allows SmartView External to be compatible with Microsoft Dynamics GP 18.4.xxxx, 18.5.xxxx, 18.6.xxxx, 18.7.xxxx, and 18.8.xxxx. It will contain the same features/fixes as the SmartView External build 2.0.71.

Release Date: 10/6/2021

Compatible GP Versions: Microsoft Dynamics GP 2015, 2016, 2018, 18.2, 18.3, 18.4, 18.5, 18.6, 18.7, and 18.8

2.0.74

Problem Reports Fixed in Build 2.0.74

- SmartView External throws error when trying to save tracking information and the Default Language is set to British English
- SVE gives SQL Error and fails when trying to display Vacation Available from Modified Employees SmartList

Release Date: 10/7/2025
Compatible GP Versions: Microsoft Dynamics GP 2015, 2016, 2018, 18.2, 18.3, 18.4, 18.5, 18.6, 18.7, 18.8, 18.9

Security

This section walks through how to grant or deny security to SmartView resources. SmartView resources can be added to existing Microsoft Dynamics GP security tasks or new security tasks can be created. These tasks can be added to Microsoft Dynamics GP security roles, which are then assigned to users.

It also walks through how to setup SmartView External users and grant them access to the appropriate lists and companies.
SmartView External requires a user be setup for each SmartView External user. SmartView External does not allow Microsoft Dynamics GP users to log in with that account.
The SmartView External user is linked to either a Microsoft Dynamics GP user or role for the security access to the lists that the SmartView External user can view.

Setting access to SmartView

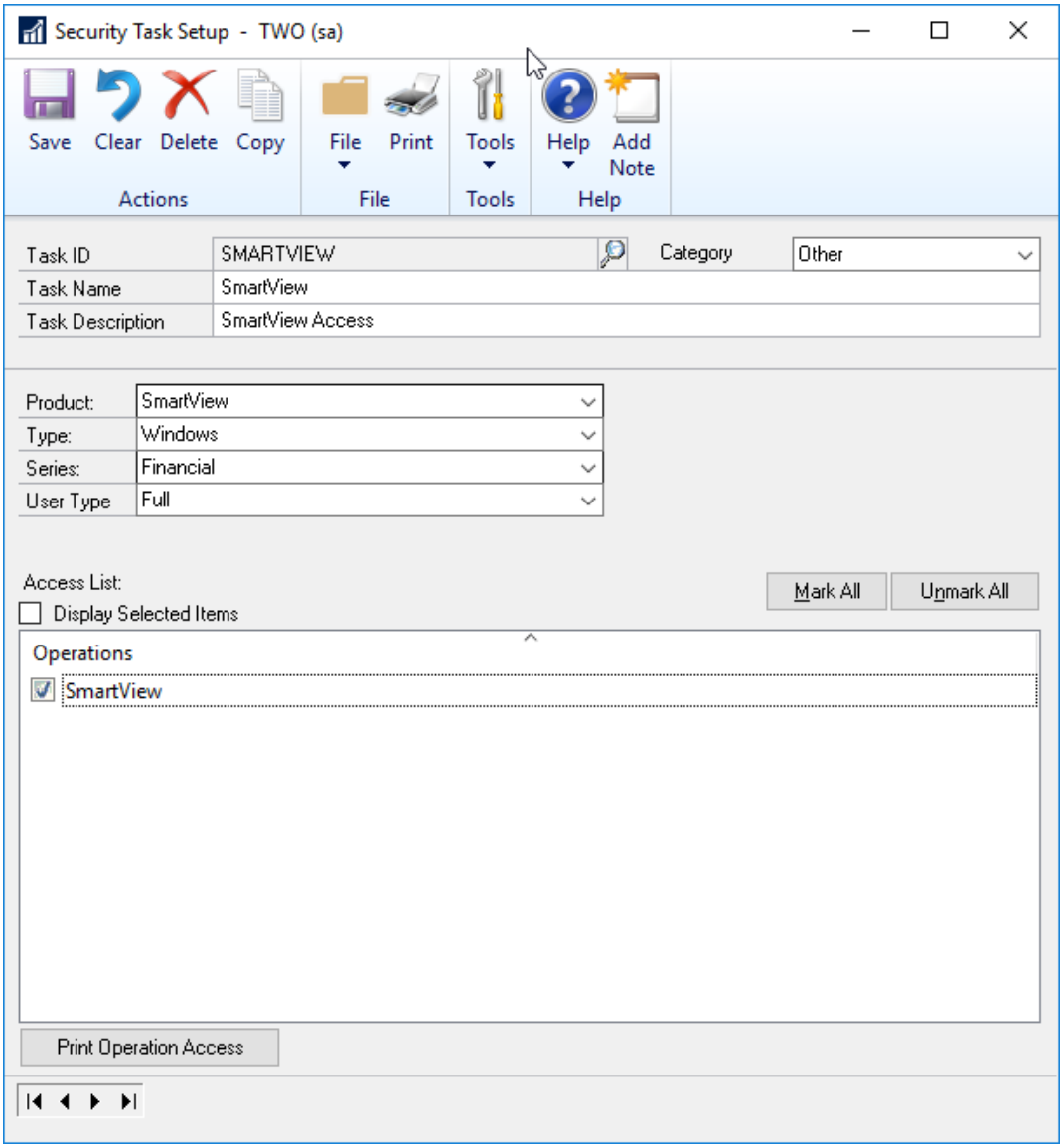
This module describes how to grant access to SmartView.

Adding SmartView to Security Tasks

When installing SmartView, only PowerUsers will have access by default. You can give additional users access to SmartView as well by adding it to a new or existing Microsoft Dynamics GP security task.

To add SmartView to a security task:

1. Open the Security Task Setup window (Microsoft Dynamics GP- Tools - Setup - System - Security Tasks).



2. Enter the Task ID of an existing task, or enter details for a new security task.
3. Select SmartView as the Product.
4. Select Windows as the Type.
5. Select the Financial as the Series.
6. Mark the SmartView Operation in the Access List.
7. Repeat steps 5 and 6 for all of the resource types that you want to grant access to. Others can be found under System and 3rd Party series.

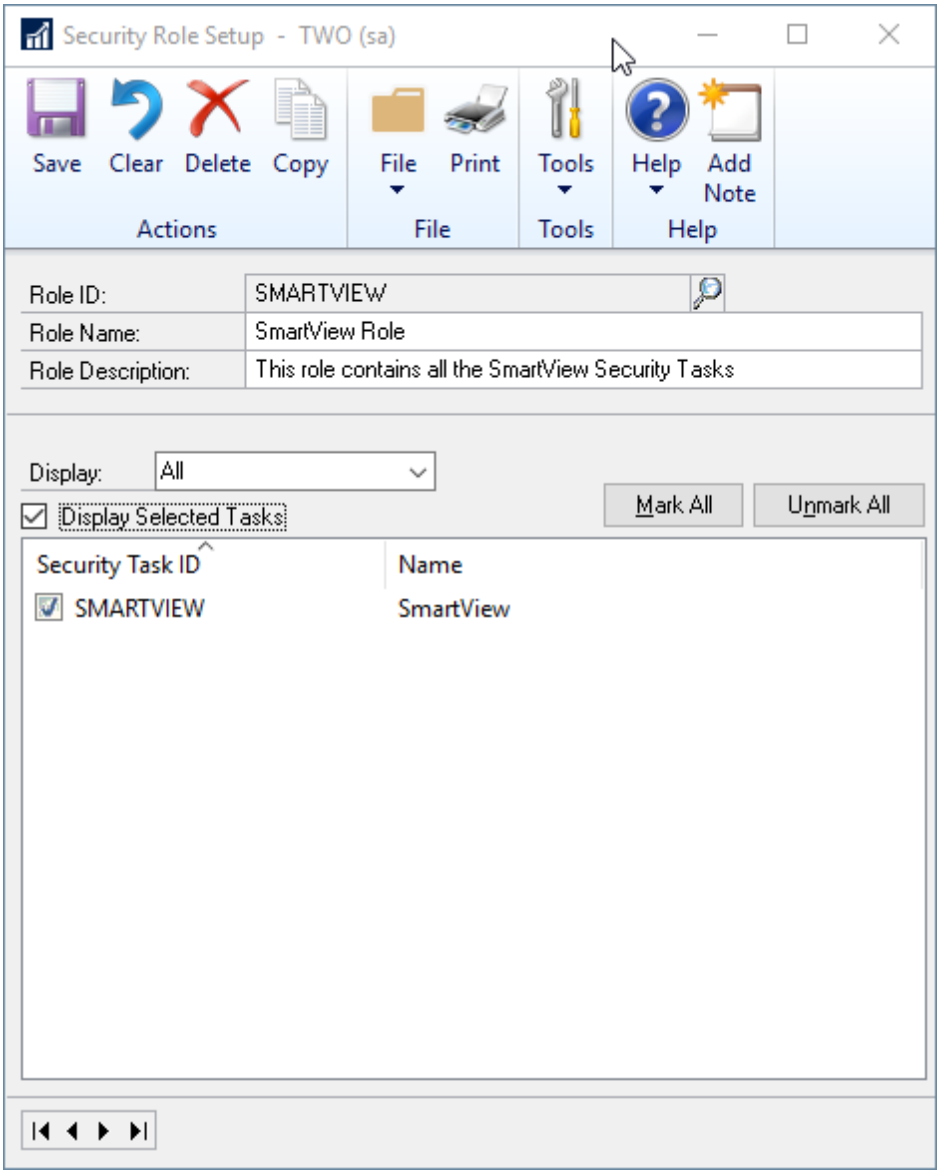
Adding SmartView Security Tasks to Security Roles

Security roles contain one or more Security Tasks. A role is created and then assigned to a user in order to provide them access to a group of Security Tasks in SmartView. All your

Security Tasks should be created before starting to create your Security Roles. If the security task(s) you assigned SmartView to are new tasks, they will need to be assigned to a security role.

To add a security task to a security role:

1. Open the Security Role Setup window (Microsoft Dynamics GP - Tools - Setup - System- Security Roles)
2. Type in a Role ID, Role Name, and Role Description.
3. Check off the Tasks that you wish to assign to this Role.



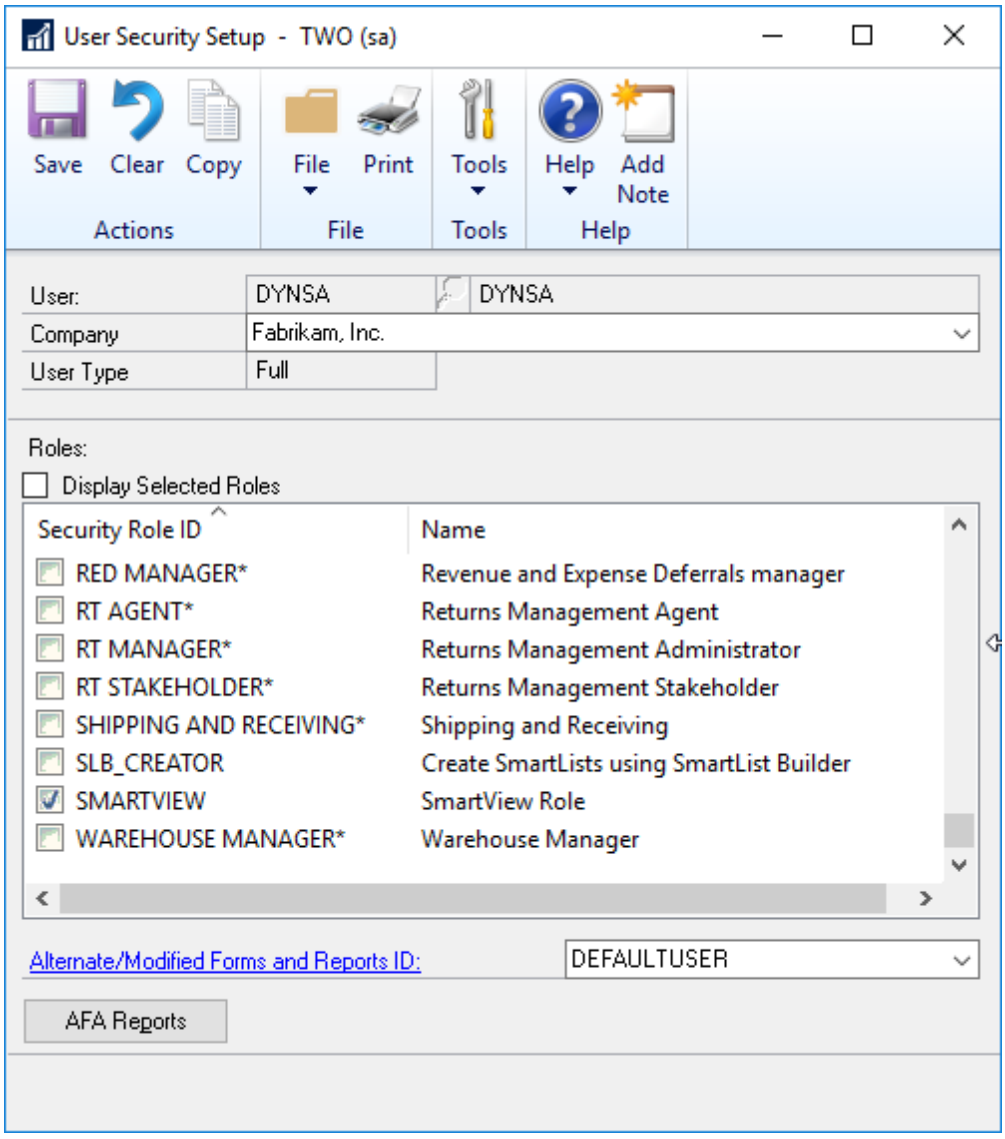
4. Click Save

Setting Individual User Security

After creating the Security Role(s), the last step is to add the Security Role(s) to Individual users.

To set the user security for the role:

1. Open the User Security Setup window (Microsoft Dynamics GP - Tools - Setup - System- User Security)
2. Enter the user and company that you want to give access to the SmartView Security Role.
3. Check off the Role(s) that you want to give the user access to.



4. Click Save.

Setting SmartView List Security

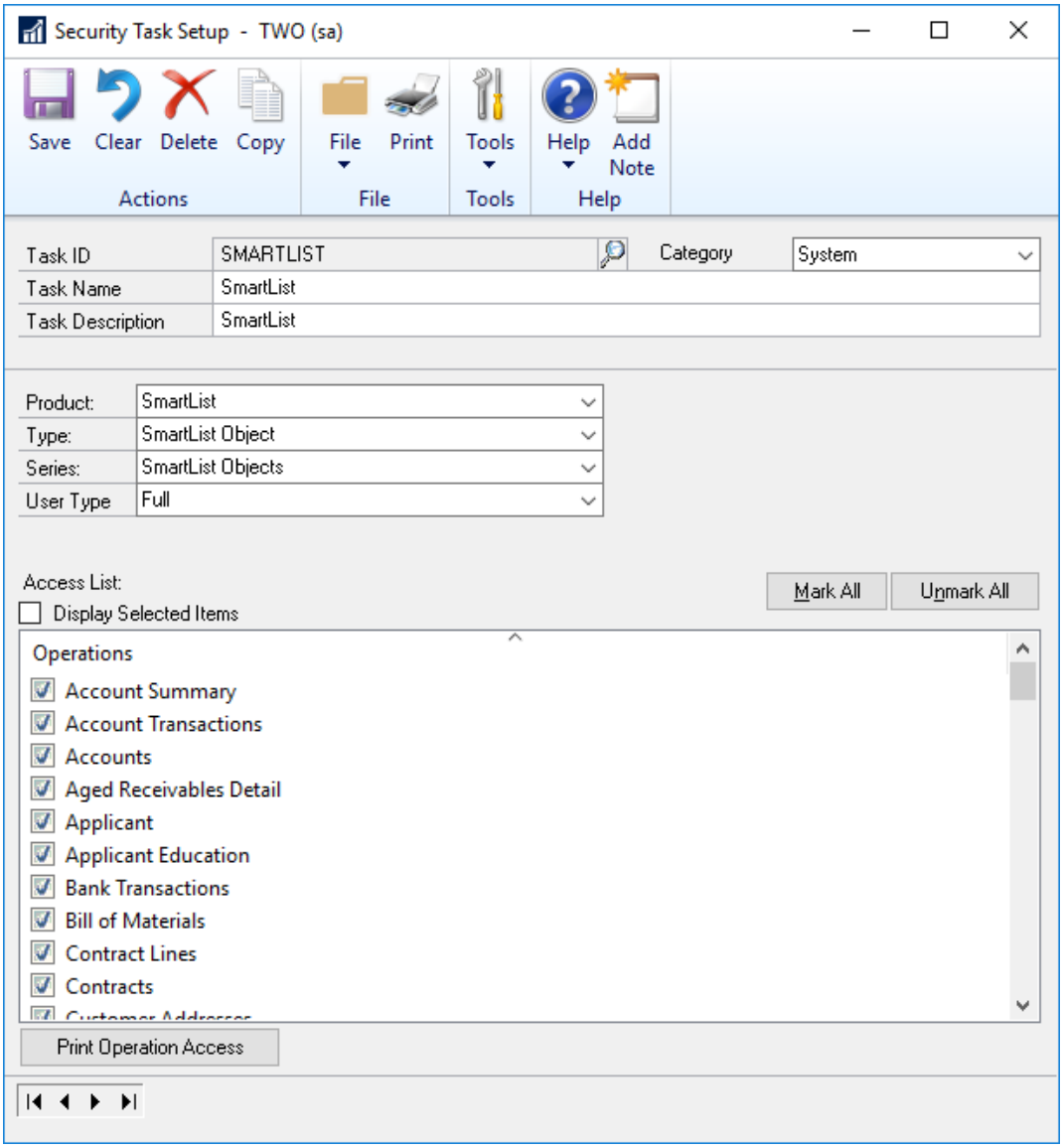
Security for the SmartView Lists is based upon Microsoft Dynamics GP SmartList security. If a user has access to a SmartList within GP security they will also see this list within SmartView. There is no user level security to SmartView lists within SmartView itself.

Adding SmartView Lists to Security Tasks

When installing SmartView, only PowerUsers will have access to the SmartView lists by default. You can give additional users access to the lists as well by adding it to a new or existing Microsoft Dynamics GP security task.

To add SmartView to a security task:

1. Open the Security Task Setup window (Microsoft Dynamics GP - Tools- Setup - System - Security Tasks).



2. Enter the Task ID of an existing task, or enter details for a new security task.
3. Select SmartList as the Product.
4. Select SmartList Object as the Type.
5. Select the SmartList Objects as the Series.
6. Mark the SmartList lists in the Access List.

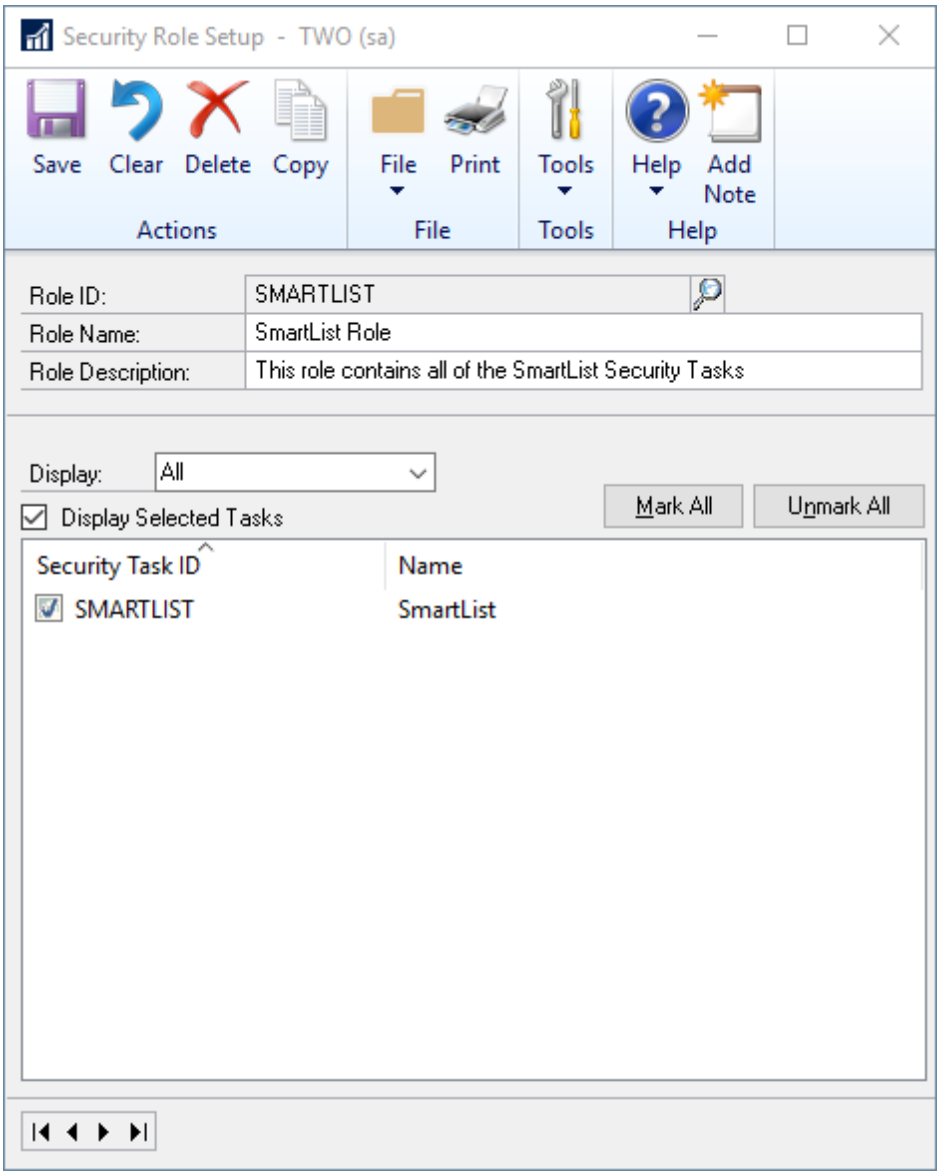
Adding SmartList List Security Tasks to Security Roles

Security roles contain one or more Security Tasks. A role is created and then assigned to a user in order to provide them access to a group of Security Tasks in SmartView. All your Security Tasks should be created before starting to create your Security Roles. If the security task(s) you assigned SmartList lists to are new tasks, they will need to be assigned

to a security role.

To add a security task to a security role:

1. Open the Security Role Setup window (Microsoft Dynamics GP - Tools - Setup - System- Security Roles)
2. Type in a Role ID, Role Name, and Role Description.
3. Check off the Tasks that you wish to assign to this Role.



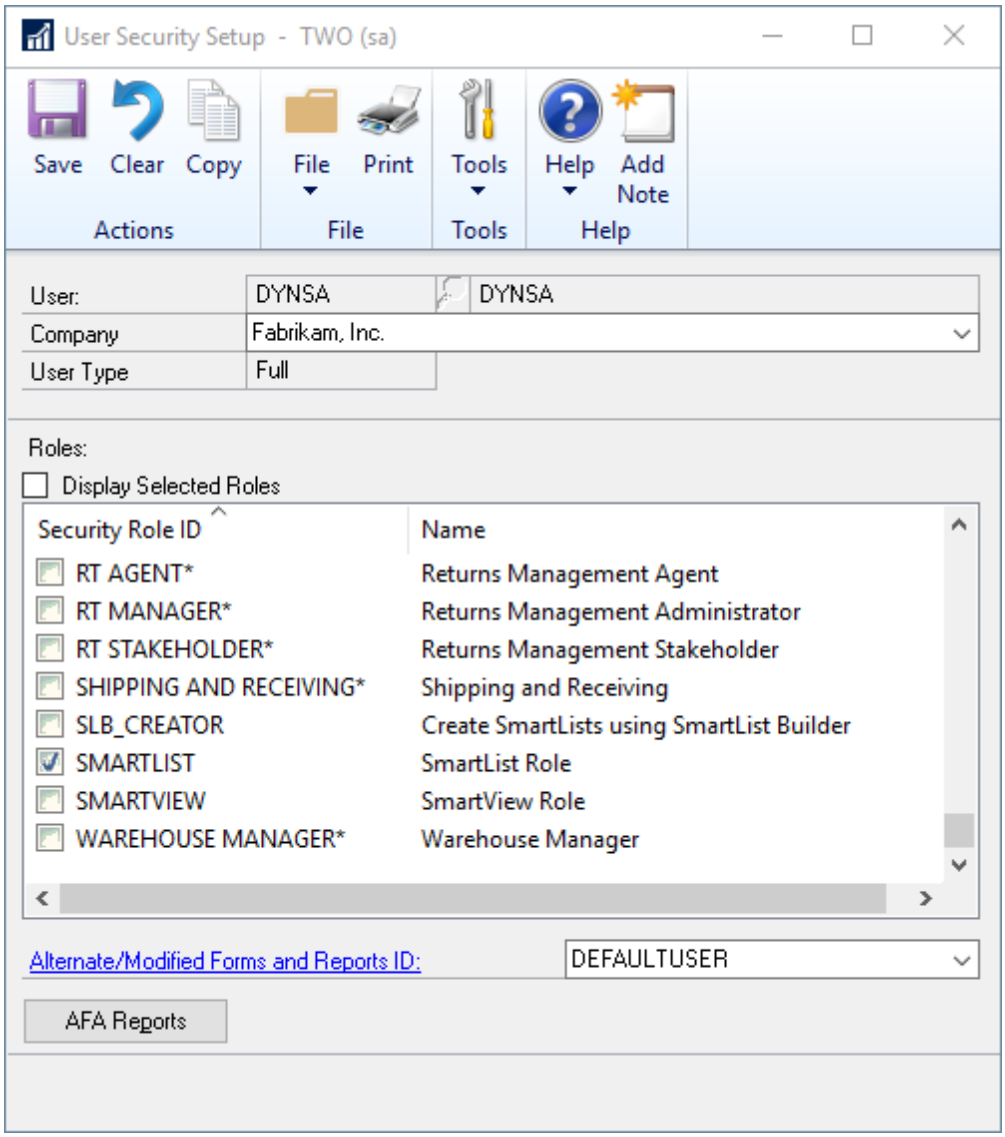
4. Click Save

Setting Individual User Security

After creating the Security Role(s), the last step is to add the Security Role(s) to Individual users.

To set the user security for the role:

1. Open the User Security Setup window (Microsoft Dynamics GP - Tools - Setup - System- User Security)
2. Enter the user and company that you want to give access to the SmartList Security Role.
3. Check off the Role(s) that you want to give the user access to.



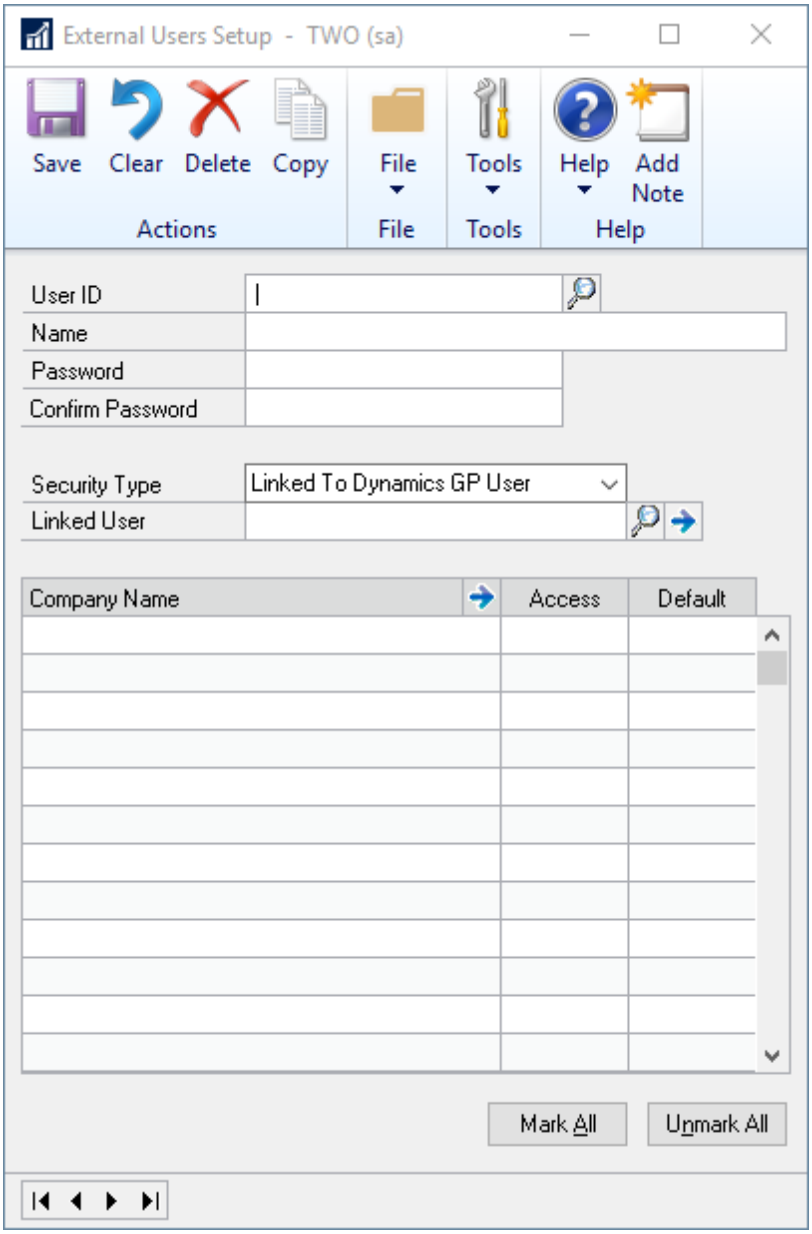
4. Click Save.

If a list is built off an external view or table, ensure that it is assigned to DYNGRP database role and the select permission is granted.

Create New External User Account

To create a new external user account:

1. In Microsoft Dynamics GP, go to Microsoft Dynamics GP - Tools - SmartView - External Users.



2. Enter a User ID, Name and Password. This will create a SQL Login, so it cannot be the same as any other SQL Login that exists on the SQL Server.
3. Select the Security Type. You can link it to a Dynamics GP User or a Dynamics GP Role to set the security to the SmartLists the user will have available to them.
4. Select the Linked User or Role to use for the Security.
5. Mark the Access field checkbox for each company you want the user to have

access to in SmartView External.

6. Mark the Default field checkbox for the company that you want to be the default for the user when they login to SmartView External.

Maintenance

This section will cover the Maintenance available with SmartView.

SmartView Maintenance

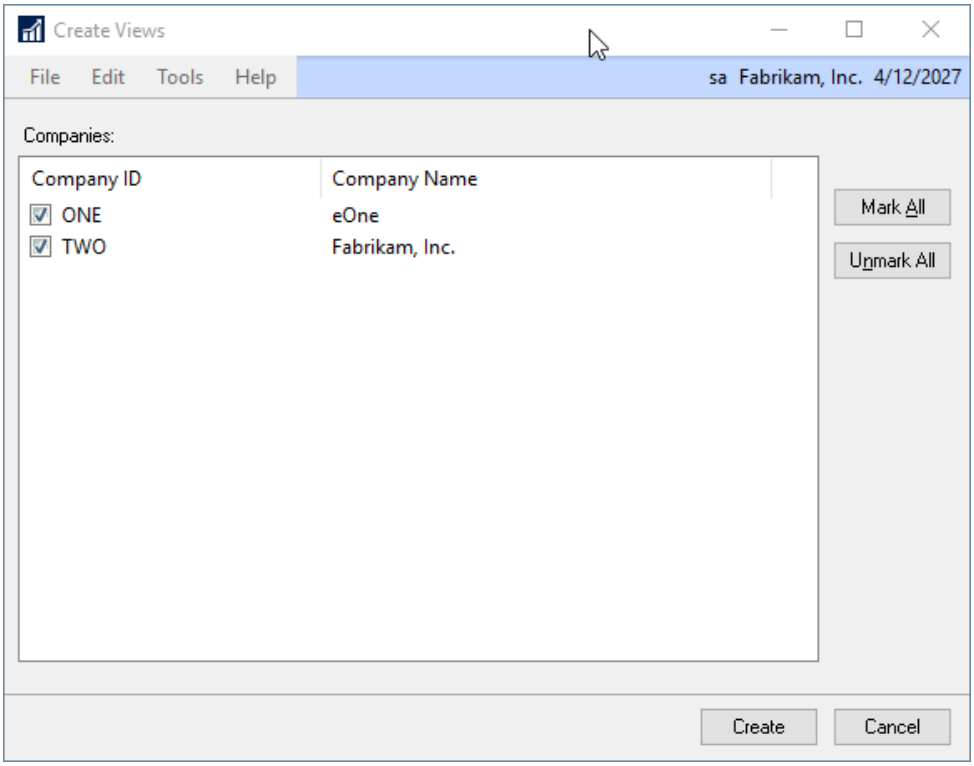
This module will walk you through the SmartView Maintenance procedures.

Create/Update Views

SmartView will automatically create views to retrieve the data in the lists from SQL when the 'sa' logs into each company. However, if the views need to be re-created, it can be done from the SmartView user interface. You need to have local administrator rights to complete this task correctly. If you log in as 'sa' you will see this option on the menu, non 'sa' users will not. If you are upgrading SmartView and have multiple GP companies, you can create views by selecting those companies from the new window 'Create Views':

To create or update the views:

1. Open the Create Views window using one of the following two methods
    a. Microsoft Dynamics GP - Tools - SmartView - Create Views
    b. Microsoft Dynamics GP - SmartView and in SmartView go to File - Maintenance - Create/update views



2. Mark the company or companies that you want to create the views for.
3. Click Create.

Update Field Cache

Update Field cache stores the field settings in SmartView tables. Use it if a field is missing in the Columns section in your SmartView. This procedure will update the fields and their settings (eg. number of decimal places, number of account segments, etc.) in SmartView tables and update the Columns accordingly making the fields available for display in your report.

To update field cache:

1. Run the Update Field cache process by navigating to (File - Maintenance - Update field cache)
2. There isn't a window that open for this, but you will see that it processes for a minute or two and once it is done, you can navigate around SmartView again.

Update Missing Physical Names

If you have SmartList Builder lists created prior to GP10 SP3, you need to run this procedure to update physical names in a SmartList Builder table which SmartView requires to work correctly. Only existing users who are upgrading a SmartView from an earlier version have to perform this task before viewing their SmartList Builder lists in SmartView. New installs include this procedure which is run automatically during the install process itself.

To update missing physical names:

1. Run the Update missing physical names process by navigating to (File - Maintenance - Update missing physical names)
2. There isn't a window that open for this, but you will see that it processes for a minute or two and once it is done, you can navigate around SmartView again.

Field Maintenance

This module describes how to use field maintenance within SmartView. This function is important to help speed up the performance of SmartView lists. By selecting fewer fields to display and default the faster the list will return data within SmartView.

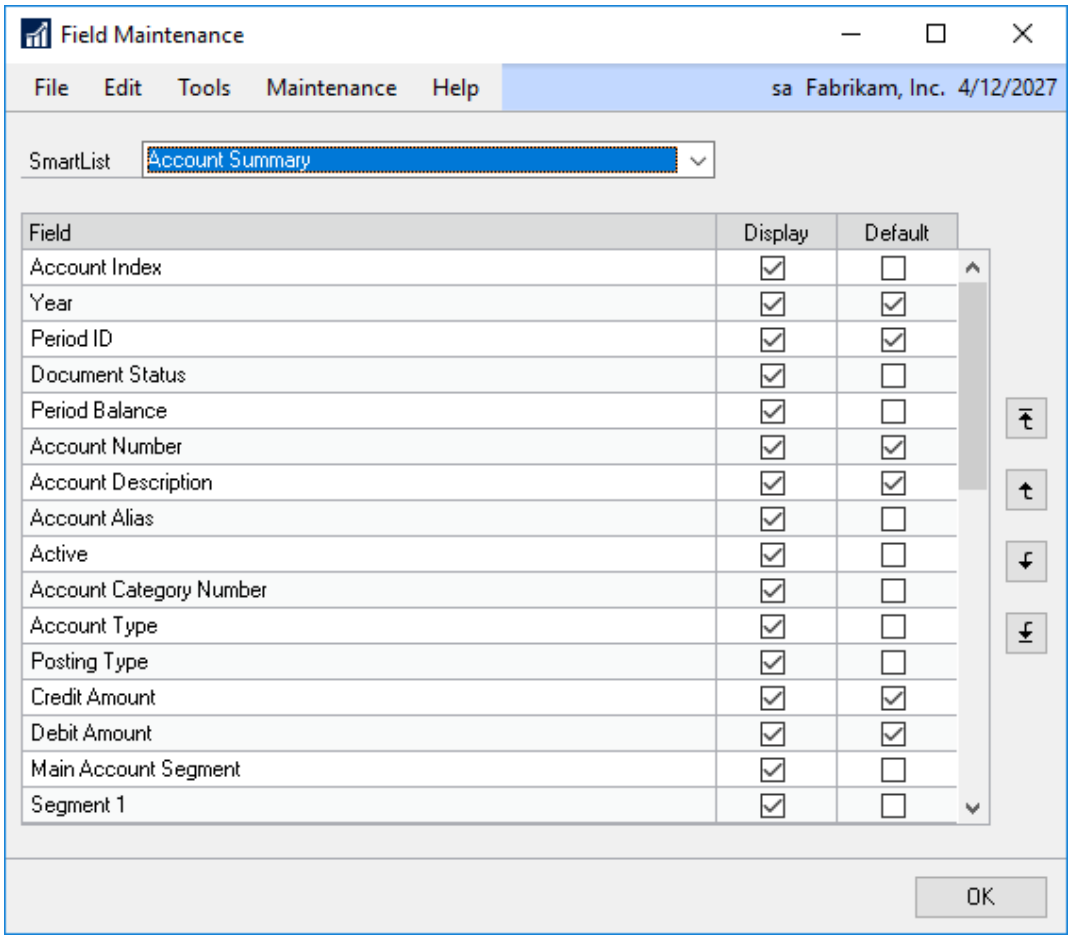
Field Maintenance

The Field Maintenance window will display all fields that are available for display within an existing SmartList. It will also show the fields that are displayed by Default. For custom built SmartLists that were built in SmartList Builder, the display and default fields are managed in SmartList Builder.

The Field Maintenance window will also allow you to rename the fields and change the order of the columns in the list as they are displayed by default.

There are two settings available for each column that is contained within the SmartList selected.

- Display: Select this option if you would like this field to be available within this list inside SmartView. The less display fields you select the faster the list will run and return records within SmartView. All fields from your SmartList will be marked to display be default.
- Default: Select the default option if you would like this field to be one of the default columns displayed within this lit in SmartView.



To update the display and default fields:

1. Open the Field Maintenance window (Microsoft Dynamics GP - Tools - SmartView - Field Maintenance)
2. Select the SmartList that the columns are to be changed in.
3. Mark or unmark the Display and Default columns as desired.
4. Click OK.



If a field has been added to the list, use Refresh Field Cache to update the table of available fields.

To rename a field:

1. Open the Field Maintenance window (Microsoft Dynamics GP - Tools - SmartView - Field Maintenance)
2. Select the SmartList that the columns are to be changed in.
3. Select the field name to be changed and type the new name.
4. Click OK.

To change the order of the fields:

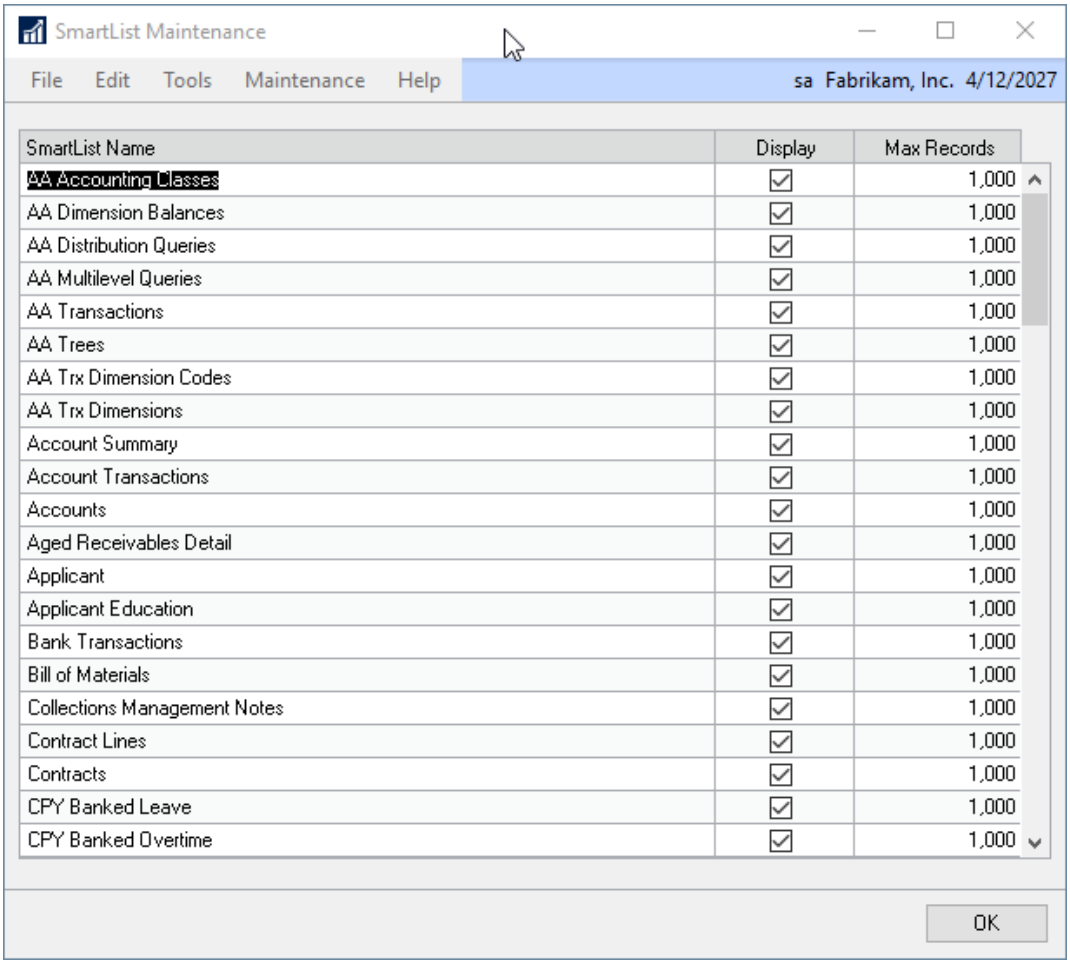
1. Open the Field Maintenance window (Microsoft Dynamics GP - Tools - SmartView - Field Maintenance)
2. Select the SmartList that the columns are to be changed in.
3. Highlight the field to move and use the arrow buttons on the right side of the window to move them up and down one or to the top or bottom.
4. Click OK.

SmartList Maintenance

This module describes how to use the SmartList Maintenance window to set the maximum number of records per list.

Maximum Records

Use the SmartList Maintenance window to enter the maximum number of records you would like to display for each SmartView list. The maximum record fields is defaulted to 1,000 for all lists. You are able to change this value to suit your specific use of this list.



To change the maximum records:

1. Open the SmartList Maintenance window (Microsoft Dynamics GP - Tools - SmartView - SmartList Maintenance)
2. Locate the SmartList that the maximum is to be changed for.
3. Change the maximum number of records to display.
4. Click OK.

Display

Mark this display box if you would like this SmartList to appear within SmartView. If you unmark the display field for a list it will not appear in SmartView – regardless of security settings for users.

To change the SmartLists displayed:

1. Open the SmartList Maintenance window (Microsoft Dynamics GP - Tools - SmartView - SmartList Maintenance)
2. Locate the SmartList to change the display on.

3. Mark or unmark the Display checkbox.
4. Click OK.

Refresh SmartLists

If a SmartList Builder list does not show here, run the Refresh SmartLists to update the SmartList Maintenance.

To run the refresh SmartLists:

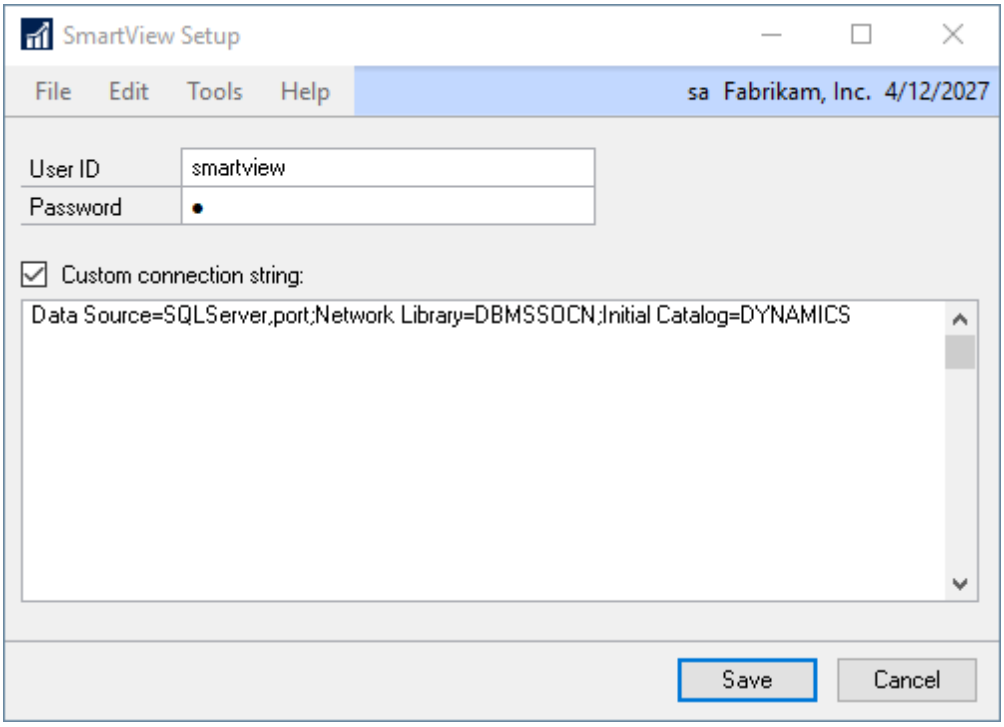
1. Open the SmartList Maintenance window (Microsoft Dynamics GP - Tools - SmartView - SmartList Maintenance)
2. Go to Maintenance - Refresh SmartLists

SmartView Setup

This module describes how to use the SmartList Setup window to reset the SmartView SQL login's password and set a custom connection string.

SmartView Setup

The SmartView users password is set by default in the installation, but if you need to change it for any reason that can be done in the SmartView Setup window. You can also enter in a custom connection string if need to do something like set a specific port for your SQL Server. SmartView by default will use SQL's default port.



To reset the SmartView SQL logins password:

Please note that not all GP users can change the password for another user. The user you are logged into Microsoft Dynamics GP as needs to be a sysadmin in SQL or have the 'Alter any Login' permission. By default, only the 'sa' user has permissions to change the 'smartview' users password.

1. Open the SmartView Setup window (Microsoft Dynamics GP - Tools - SmartView - SmartView Setup)
2. Change the password for the SmartView user ID.
3. Click Save.

To enter a custom connection string:

1. Open the SmartView Setup window (Microsoft Dynamics GP - Tools - SmartView - SmartView Setup)
2. Mark the Custom connection string checkbox.
3. Enter in the connection string. It may look something like the following.
   Data Source=SQLServer,port;Network Library=DBMSSOCN;Initial Catalog=DYNAMICS;

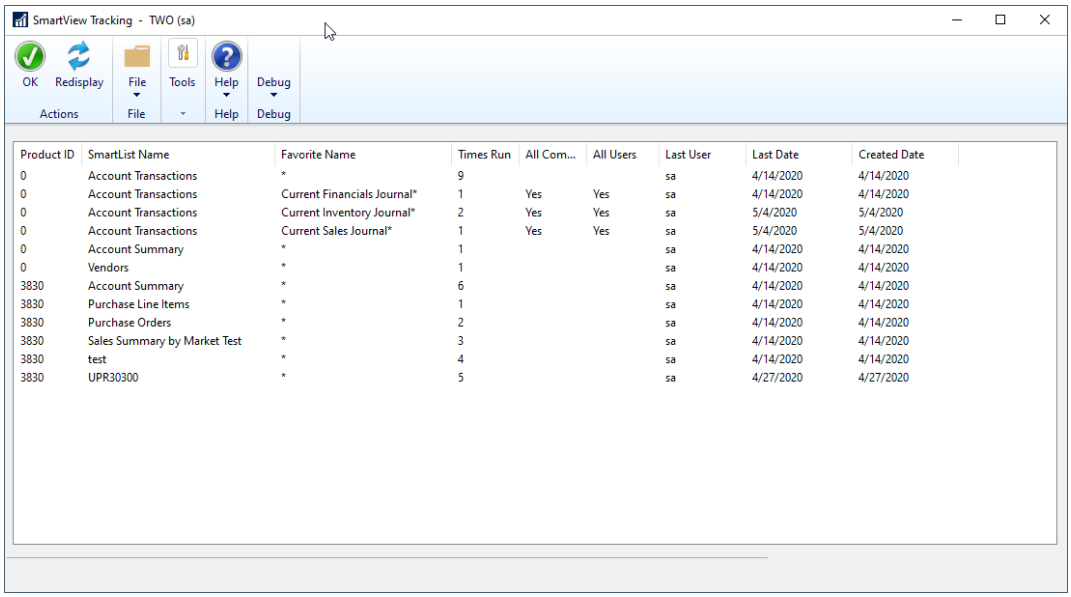
4. Click Save.

SmartView Tracking

SmartView allows users to create Favorites which can quickly grow in a system. The Favorites can become obsolete after time. Knowing which ones are still used is the hard part. The SmartView Tracking feature will track all runs of each Favorite in SmartView Internal. It will track which Favorite is run as well as the last run date and the user who ran it. It will also track how many times since the feature was included in Smartview Internal the favorite has been run. It will not track each individual run of the favorite separately.

To view the SmartList Tracking:

1. Open the SmartList Tracking window (Microsoft Dynamics GP - Tools - SmartView - SmartView Tracking).



Product ID	SmartList Name	Favorite Name	Times Run	All Com...	All Users	Last User	Last Date	Created Date
0	Account Transactions	*	9			sa	4/14/2020	4/14/2020
0	Account Transactions	Current Financials Journal*	1	Yes	Yes	sa	4/14/2020	4/14/2020
0	Account Transactions	Current Inventory Journal*	2	Yes	Yes	sa	5/4/2020	5/4/2020
0	Account Transactions	Current Sales Journal*	1	Yes	Yes	sa	5/4/2020	5/4/2020
0	Account Summary	*	1			sa	4/14/2020	4/14/2020
0	Vendors	*	1			sa	4/14/2020	4/14/2020
3830	Account Summary	*	6			sa	4/14/2020	4/14/2020
3830	Purchase Line Items	*	1			sa	4/14/2020	4/14/2020
3830	Purchase Orders	*	2			sa	4/14/2020	4/14/2020
3830	Sales Summary by Market Test	*	3			sa	4/14/2020	4/14/2020
3830	test	*	4			sa	4/14/2020	4/14/2020
3830	UPR30300	*	5			sa	4/27/2020	4/27/2020