



Tips and Tricks Featuring SmartFill

Looking for a little something extra to give to your customers this holiday season? How about spending 5 minutes customizing their SmartFill Items object and saving them a ton of time?

Here is an example of you can customize the SmartFill Item object to include additional information from a secondary table. In this example we have added a QTY Available and QTY On Hand fields to the SmartFill Item object. This is not only handy information but will save your customer time by having this information right in the SmartFill search results window instead of having to navigate to additional windows to get this information.

Item Number	Item Description	Item Short Name	QTY Available	QTY On Hand
100XLG	Green Phone	Phone Green	17.00	27.00000
CORDG	Green Cord	Cord	4.00	10.00000
COV100G	Green Cover	Phone Cover	8.00	10.00000
HA100G	Green Hand Assembly	Hand Assembly	8.00	10.00000

Steps to update current Item Object:

1. Open the Item Object
2. Click the Secondary Table link arrow (Blue arrow to the right of the Table Name field)
3. Click the add button in the Secondary Table section of the window (+)
4. Select the IV_Item_MSTR_QTYS table
5. Link the two tables using the Item Number
6. On the SmartFill Object Maintenance Details window select <Calculated Field> in the next available Lookup Fields (Table Column)
7. Select <New Calculated Field> option in the Field Name column
8. In the SmartFill Object Calculated Fields window give your field a name (e.g. QTY Available)
9. Select Number as the Datatype
10. Select Currency as the Format As
11. Select Table Field as the Type
12. Select IV_Item_MSTR_QTYS as the Table Name
13. Select QTY On Hand as the Field Name

14. Select Subtraction as the Operation
15. On the next field select Table Field as the Type
16. Select IV_Item_MSTR_QTYS as the Table Name
17. Select QTY Allocated as the Field Name
18. Click OK to save your changes
19. On the SmartFill Object Maintenance Detail window mark the Display checkbox and enter a width amount for the newly created calculated field.
20. You can also display the QTY on Hand by selecting the IV_Item_MSTR_QTYS table and QTY On Hand field on another row in the object setup window.
21. Click Filters
22. Select the IV_Item_MSTR_QTYS as the Table Name
23. Select Record Type as the Table Field
24. Select Equals as the Operation
25. Enter 1 as the Value
26. Click Ok twice to save your changes

Adding SmartFill functionality to an existing object

Would you, or maybe you know someone, who would like to add SmartFill functionality to field in GP. Use the Lookup Creation Wizard in SmartFill to quickly and easily add SmartFill functionality to an existing object.

1. Open the SmartFill Repository (Microsoft Dynamics GP | Tools | Setup | SmartFill | Repository)
2. Click on the New button in the upper-right- hand corner of the Repository Maintenance window (see below)



3. Click the Next button in the Lookup Creation Wizard window
4. Select the SmartFill Object you would like to add a field to (e.g. Customer)
5. When the Add New Lookup For X Object window opens (X representing the object you selected, Customer in our case)
6. Open the window where you want your lookup to be attached
NOTE: The window you will be working with will need to be closed prior to starting this process.
7. Click on the field that you want to attach it to
8. Click the Add Lookup button on the Add New Lookup For X Object window (e.g. Add New Lookup for Customer Object)
NOTE: Repeat steps 6-8 until you have added this lookup to all the windows and fields where you would like it to work.
9. Click the Finish button