



# SmartFill

For Dynamics GP 9.0  
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# Rockton Software SmartFill

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# Introduction

Rockton Software is pleased to bring SmartFill to the Microsoft Dynamics GP community. SmartFill is the next generation successor to the popular Lookup Pro enhancement to assist user data entry within Dynamics GP and Small Business Financials. Because Small Business Financials is similar to Dynamics GP, it will not be referenced in this documentation. All installation and user instructions that apply to Dynamics GP also apply to Small Business Financials, unless specifically noted.

Many customers using Dynamics GP often use non-intuitive numbering schemes for their Vendor and Customer IDs. For instance, "V1234" may refer to a vendor by the name of "Bob's Fruit Stand." Data-entry personnel often know the vendor is "Bob's Fruit Stand" but have to go through several steps to find the Vendor ID.

SmartFill allows you to enter the first few characters of the Vendor or Customer Name into the ID field (or other key fields as described below), and then intelligently seeks out the best match. In our example, typing "BOB" in the Vendor ID field will find "Bob's Fruit Stand" by name, find the ID "V1234", and then replace "BOB" with "V1234." Data entry then continues normally.

SmartFill capabilities also include:

- Providing a short list of all name matches that meet the entered Name/ID. In the above example, if more than one Vendor in the company started with the letters "BOB" then all vendors with this match will be displayed in a shortened list by name and ID.
- Intelligent searching of existing IDs. For instance, if the user does know the Vendor ID, then it can be entered. SmartFill knows that it is a vendor ID and will not assume it is a name.
- If no matches for a Name or ID are found, SmartFill assumes the ID is new.
- Works with any field in the Dynamics GP core product. Customers, Vendors, Items, Accounts, Employees and many other fields are automatically SmartFill enabled when you install. Or you can easily set it up to work on different fields, even in Third Party products.
- Allows both **Begins With** and **Contains** lookups. For instance, if you searched for all Vendors that **Began With** the letters "co" you would get names like "Coopersville Market" and "Coal Town Industries". However, if you use the **Contains** feature, you would get these **Begins With** names as well as "ABC Company" and "Garden Incorporated" because these names **Contain** the sequential letters "co".
- Includes a Calendar which can be activated from the shortcut bar or pressing "F2" key, which can help resolve dates.
- You can now specify alternate fields in which to define your lookup. For instance, instead of Customer Name for customer lookups, you can now use Phone Number, Contact Name, part of an address, or any other string field in the Customer table.

# What's in This Manual

This manual contains the basic instructions needed for the installation and use of Rockton Software's SmartFill. You will find instructions for:

- Installation
- Navigation
- Setting up SmartFill

If you do not find the information you need in the following documentation, please contact Rockton Software (see page 6).

## *Symbols and Conventions*

To help you use this documentation more effectively, we have included the following symbols to highlight important information:



This symbol points out suggestions and important notes that assist you in installing and using SmartFill.



The warning symbol alerts you to situations in which you should proceed with caution. Notes highlighted with a warning symbol relate to information that affects your entire system—please read carefully!



The “OK” symbol points out helpful tips that can simplify the process and save time.

- Keyboard keys, specific buttons, file names and menu paths are shown in bold print, such as the **Move Right** button, the **OK** key or the **setup.exe** program.
- Window titles and captions are shown in quotes, such as the “Maintenance” window.

## Customer Technical Support

Please contact your authorized reseller for support on this product. Or, contact technical support from Rockton Software by phone at (877) 476-2586 or e-mail [support@rocktonsoftware.com](mailto:support@rocktonsoftware.com). You can also visit [www.rocktonsoftware.com](http://www.rocktonsoftware.com) for more information on Rockton products, including a Frequently Asked Questions section.

User input into improving this product or constructive feedback is greatly appreciated.

If you have registered your SmartFill product, support is available depending on the support plan agreement you purchased. Your first line of support should always be your Microsoft Business Solutions reseller.

As always, technical ideas and user input is highly encouraged. At Rockton, we want to hear your input. So drop us a line whenever you feel like it. Enjoy!

## Installation

1. Copy the **SmrtFill.cnk** file into your Dynamics GP directory (where Dynamics.exe is found). Additionally, you will need to copy each of the Object text files (named SmartFill \*\*\*\*\*.txt, where \*\*\*\*\* is the object name) and the Field Mappings file (SF\_FieldMappings.txt) to the same directory.
2. Include the new chunk file code by launching Dynamics GP.

The following message will appear: "New code must be included in the DYNAMICS.SET dictionary. Do you wish to include new code now?" Click **Yes** and a progress bar will display the status of the integrating process until the login window appears. Note that for Small Business Financials, or certain versions of Dynamics GP, this message may not appear.

This process will modify your DYNAMICS.SET file to include information relating to the SmartFill, and the **SmrtFill.cnk** file will create a **SmrtFill.dic** file.

3. Log into the system as the System Administrator using the **sa** or **DYNSA** User ID. This is important for building the tables that contain data for the product.
4. Log into any company. Since SmartFill maintains data at the system level, it is only necessary to install the software in one company. If you are evaluating the software and do not yet have a registration key, it is recommended that you log into the Dynamics GP test company. Without a valid registration key, SmartFill will not work in other companies.
5. Installation is now complete. Once you register the product, you can install SmartFill on all other network workstations by following steps 1 and 2 above. No further workstation-specific installation is required.

This completes the process for workstation installation. Installation is the same on other workstations.

Note that this product is not required on all workstations. Workstations can choose to use or not use this product without affecting other users or the system.



## Removing SmartFill

The following steps will completely remove SmartFill from both workstation and server:

1. Log on to Dynamics GP as 'sa' or 'DYNSA' and open the SmartFill Setup window.
2. Select Uninstall SmartFill from the drop-down and click the Process button.
3. Click OK on the message to close Dynamics GP.
4. Delete the following files from the Dynamics GP installation directory (you may not find all of these files):
  - SMRTFILL.DIC
  - FRMS4551.DIC
  - RPTS4551.DIC
  - Changes To SmartFill.txt
  - QuickInstallTip.txt
  - SmartFill Manual.pdf
  - SmrtFill.cnk
  - spSmartFill.sql
  - SF\_FieldMappings.txt
  - Any files that start with SmartFill and have an extension of .txt
5. Log on to Dynamics GP as a User that has access to the Security windows. Remove the ADMIN\_SMARTFILL\_01 Security Task and the SMARTFILL ADMIN Security Role.

### Manually uninstalling SmartFill

The following steps can also be used to manually remove SmartFill:

#### Manually uninstalling SmartFill from a Workstation

Perform this process on each workstation where you want to remove SmartFill.

1. Edit the Dynamics.set file (located in the Dynamics GP installation directory) to remove the SmartFill entries. There are three steps to this:
  - a. The first line in the file should be a number. Subtract 1 from this number.
  - b. Remove these two lines:
    - 4551
    - SmartFill
  - c. The bottom part of the file contains several path names. Remove the ones that reference the following dictionaries:
    - SMRTFILL.DIC
    - FRMS4551.DIC
    - RPTS4551.DIC
2. Perform step 4, above to remove files from the Dynamics GP installation directory.

#### Manually uninstalling SmartFill from the Server

Perform this process only if you want to completely remove SmartFill from the system.

1. Perform step 5, above, to remove Security Tasks and Roles.
2. Open SQL Enterprise Manager or SQL Server Management Studio.
3. Drop all tables in the DYNAMICS database that are named SFxx, where xx is the table number.
4. Drop all stored procedures in the DYNAMICS database whose names start with zDP\_SFxxYYY, where xx is the table number.
5. If you are using the optional stored procedure, spSmartFill.sql, then remove it.

## Using SmartFill

After logging into a company, SmartFill will automatically begin working.

Whenever you open a window, SmartFill will register special triggers automatically for the window to operate. No user intervention is required. The concept is the similar for all lookups, but here is an example of what to expect.

1. Open the Cash Receipts window in the test company (Transactions >> Sales >> Cash Receipts).
2. Place your cursor in the Customer ID field. Type the letter "B". Tab or move out of the field. (DO NOT press the lookup button).
3. A shortened list of customers will appear, all of which start with the letter B.
4. Press Cancel on the Select Record window.
5. With your cursor in the Customer ID field, modify your entry to be "BER". Tab or move out of the field again.
6. This time, the ID for Berry Medical Center, BERRYMED0001 fills in automatically. This is because there is one and only one match that starts with BER. Tell me that isn't cool!

Additionally, try pressing the F2 key (if you have the Calendar set up to use F2). A calendar will appear. If you are using SmartFill, try the following:

1. In the Cash Receipts window again, move your cursor to the Date field.
2. Press F2. A calendar will open. Navigate to any date you wish. Select a date by pressing on the day number.
3. The date you selected will appear in the Cash Receipts Date window field and the Calendar will close. Awesome!

## Enabling or Disabling Features

To get the most out of SmartFill, you may want to use different features of the product. You can set up your product by using the SmartFill Objects Window. This will be discussed in detail below.

## About SmartFill window



You can get to this window by first going to Help > About Microsoft Dynamics GP... From the Extras menu, choose Additional > About SmartFill.

### Description

The About SmartFill window shows the version of SmartFill that you have loaded, along with the phone number to use to contact Rockton Software, and a link to our website. In addition, it also provides a convenient means of navigating to the SmartFill Registration window.

# SmartFill Registration window

SmartFill	
Version 9.0.13	
Site Name	<input type="text"/>
User Count	1
Microsoft Dynamics GP Version	9.0
Registration Key	<input type="text"/>
Expiration Date	0/0/0000 <b>Key is Invalid</b>

OK

You can get to this window in one of two ways:

- Go to Help > About Microsoft Dynamics GP and choose Extras > Additional > About SmartFill. Then choose the Register button.  
- OR -
- Go to Tools > Setup > SmartFill > SmartFill Setup. From the drop-down, choose Registration and choose the Process button.

## Description

SmartFill is an inexpensive, fee-based product. You can test out SmartFill fully in the test company without a registration key. To use SmartFill in any other company, simply submit a registration request to Rockton Software along with payment. Visit [www.rocktonsoftware.com](http://www.rocktonsoftware.com) for more information.

You can enter your registration key into the SmartFill Registration window once you have registered your product. The registration key will need to be entered only once for a network. Any number of users can use SmartFill at a Site, and it does not matter if some users are using SmartFill and some are not.

After entering your key, just tab off the Registration Key field. If your key is valid, a "Thank You" message will be displayed. If not, you will see the words **Key is Invalid** to the right of the Expiration Date.

If you are told that your keys are invalid, first verify that you have not mistyped anything. If you received your keys in an email, it may be helpful to copy the keys from the email and paste them into the Registration Key field to avoid typing mistakes. If you still see this message, contact Rockton Support to verify that your Site Name, User Count and Dynamics GP version have not changed since you got your keys. If necessary we will generate new keys and resend them to you.

# SmartFill Setup window

The SmartFill Setup window allows you to perform miscellaneous setup and maintenance tasks.



To get to this window, go to Tools > Setup > SmartFill > SmartFill Setup.

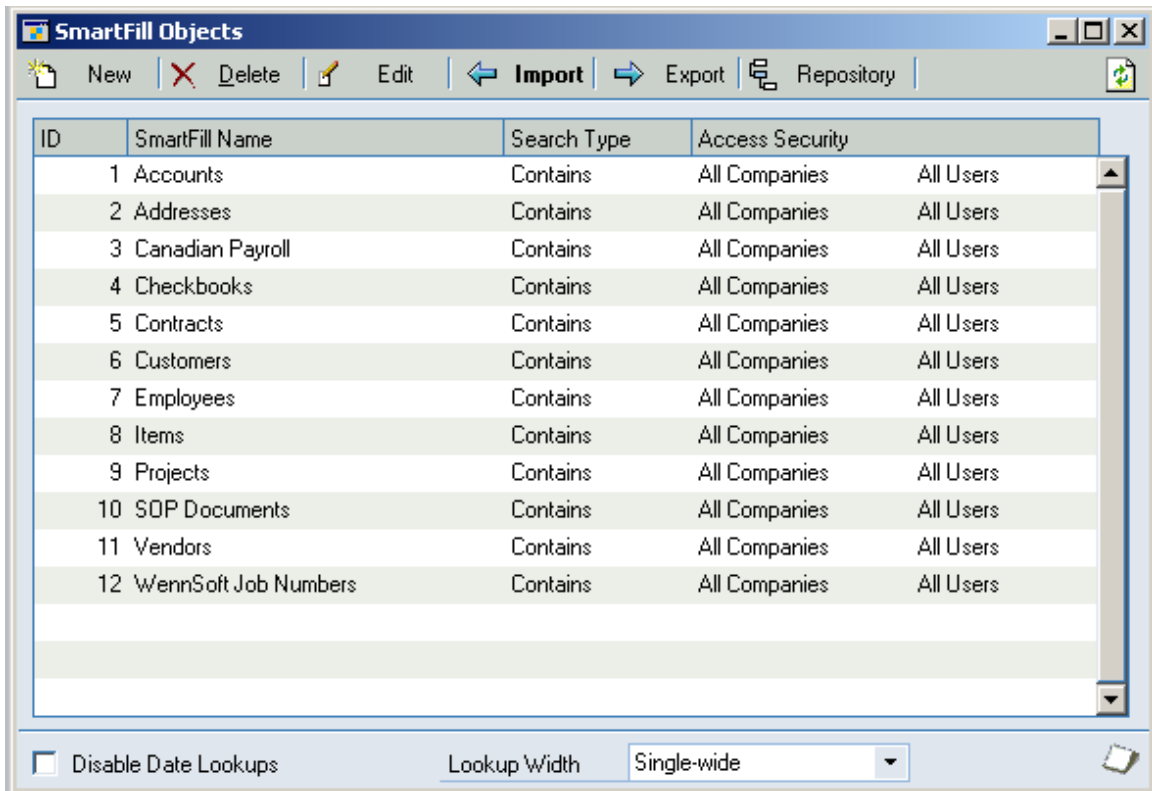
## Description

The task drop-down is used to select which task you want to perform. Once you have selected a task, choose the Process button. The tasks available are described in the table below:

Install/Upgrade SmartFill	Installs the software, or upgrades it from a previous version. This may take several minutes. It will also set table permissions to all users in the system database. You can perform this task multiple times without causing any problems.
Registration	Opens the window where you will enter a registration key.
Uninstall SmartFill	Tables will be removed from the database and SmartFill will be removed from the launch file.

# SmartFill Objects window

The SmartFill Objects is the main window from which you will configure SmartFill.



You can get to this window by going to Tools > Setup > SmartFill > Objects.

## Description

The SmartFill Objects window lists which Objects you have loaded. You can double-click an object in the window (or highlight the line and press Enter or the Edit button) to open the SmartFill Object Maintenance Details window for the Object.

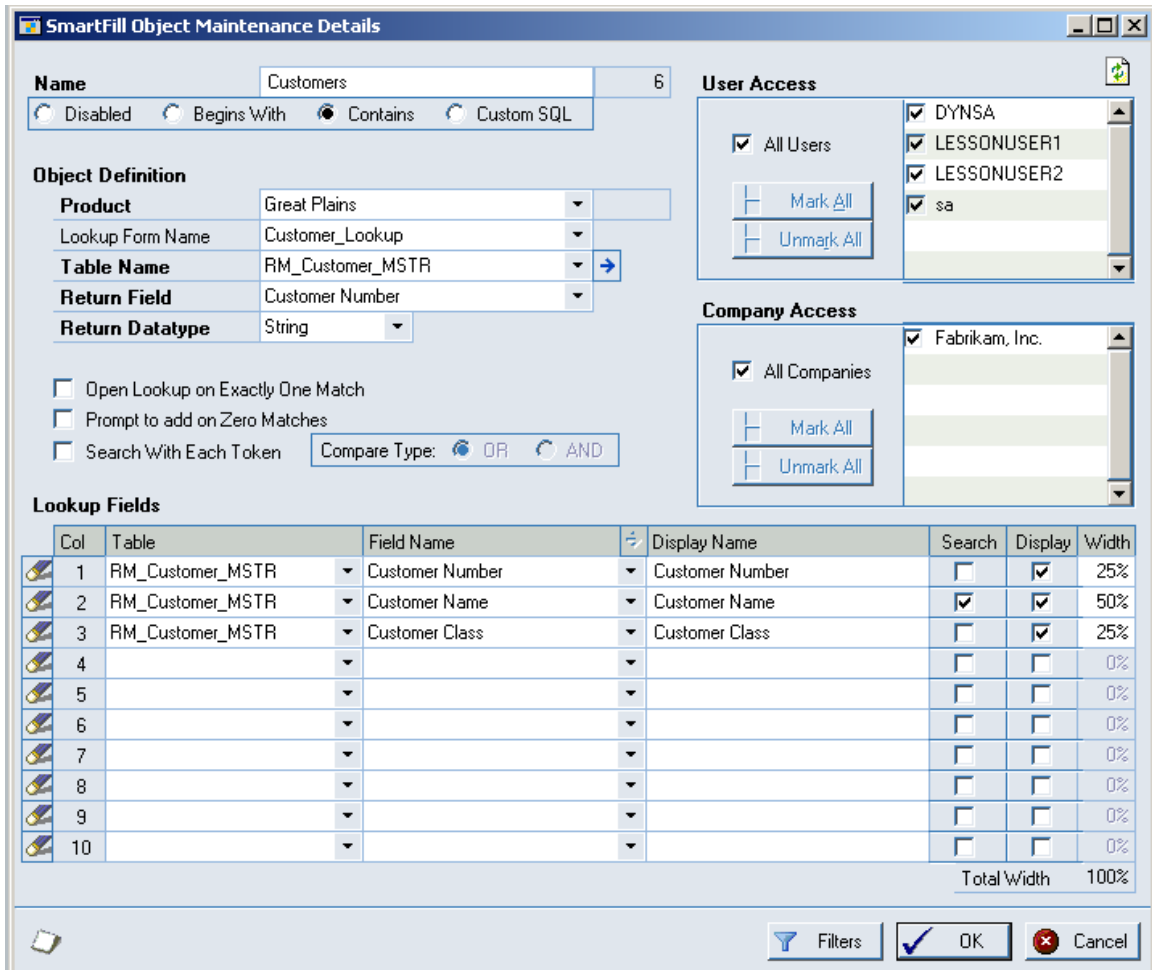
For each object available in SmartFill (Customers, Vendors, Employees, etc.), you may opt to disable SmartFill functionality, enable the **Begins With** functionality, or enable the **Contains** functionality. Additionally, you can change the search field for an object to any string field available for that object. To access these features, double-click an object in the window (or highlight the line and press the Edit button) to open the SmartFill Object Maintenance Details window for the Object.

The options on the window are described below:

New button	Create a new SmartFill Object definition. Keep in mind that you will also need to set up the Repository for this object. This is discussed in the <b>Creating Your Own SmartFill Objects</b> section, later in this manual.
Delete button	Deletes the Object and its associated Repository entries.
Edit button	Opens the SmartFill Object Maintenance Details window.
Import button	Allows you to add new Objects by importing a text file that contains the Object definition. Also allows the importing of Field Mapping definitions.
Export button	Allows you to create a text file that contains the selected Object's definition. This can then be imported at another site. Also allows the exporting of Field Mapping definitions.
Repository button	Opens the SmartFill Repository window.
Disable Dates Lookups	Increases processing speed on non-SQL systems. Because special processing happens whenever a window is opened while using Dynamics GP, this special processing can slow down the user experience. It is sometimes due to date lookups being enabled. Disabling the date lookups may increase performance speed.
Lookup Width	This drop-down is used to select the size of the window that opens when you do a SmartFill lookup. You have three options: Single-wide, One and a Half-wide, and Double-wide. If your users have their Windows display settings set to a higher resolution, you may wish to use one of the wider lookup windows so they will be able to see more data. However, remember that changing this setting will affect all objects, for all users, system-wide.

# SmartFill Object Maintenance Details window

From the Object list, when you edit an object this maintenance window will open.



You can get to this window by first going to Tools > Setup > SmartFill > Objects. Then double-click an object, or select the object and choose the Edit button.

## Description

The upper-left header shows the SmartFill Object ID and Name of the Object. The ID is generated automatically and cannot be changed. The Object Name can be changed to your liking. You may, for instance, wish to use the term Debtors instead of Customers.

The Search Type follows. You can choose to Disable this Object, or choose a Begins with or Contains Search. Additionally, you can choose a Custom SQL option and write your own SQL stored procedure to return data any way you can imagine.

User Access tells SmartFill which users should have this Object enabled. If you have some users that do not want SmartFill functional, you can specify which users are using the object here. By default everyone in the system will benefit from every SmartFill Object. Similarly, Company Access is where you assign the Companies that have this Object enabled.



The following table lists the other options available on this window. It is technical, and requires some understanding of how Dynamics GP and other products work in a technical manner. You need not fully understand these fields. If you have any questions, please contact support for assistance.

Product	Specify the product that contains the normal lookup feature that you are replacing or supplementing.
Lookup Form Name	It is important to specify the technical form that does a typical lookup on a related field. This is because SmartFill must be disabled when performing a traditional lookup. If you don't specify a lookup form, when performing a typical non-SmartFill lookup in Dynamics GP, SmartFill will try to override the selection and will cause users to experience frustration with selecting a desired record. By specifying this form, SmartFill will temporarily disable itself while the given traditional lookup window is open.
Table Name	This is the technical table name from which you are searching and displaying fields. It must exist in the Product specified above.
Secondary Tables button	This button opens the SmartFill Object Secondary Tables window, where you can link additional tables to this Object.
Return Field	This is the field you want returned once a selection is made from a lookup. Typically, this would also be the first column in the column list below. SmartFill also uses this field to examine if what you typed into an ID field is actually a valid value for the field.
Return Datatype	You must specify the Return Field's data type. SmartFill behaves differently for Accounts vs Strings. Most of this time, this will String.
Open Lookup on Exactly One Match	By default, when SmartFill attempts to do a lookup, if it only finds one match it will simply display the record associated with that match. Selecting this checkbox will cause the Select Record window to always open, even if only one match was found.
Prompt to add on Zero Matches	By default, when SmartFill attempts to do a lookup, if it does not find any matches it will treat the value that you typed as if you had intended to add a new record. Selecting this checkbox will give you the option of treating it as though it was a new record, or cancelling the lookup so that you can make changes to the value you originally entered.
Search With Each Token	This checkbox is designed to add power to your searches. A Token is basically an individual word separated by a space in the search value. If this box is not checked, and you typed in "blue widget" into an ID field, SmartFill would search for matches of "blue widget". If this box is checked, and you select AND for Compare Type, SmartFill will search for matches of "blue" in addition to matches of "widget". If you choose OR for Compare Type, SmartFill will search for matches of <i>either</i> "blue" or "widget".

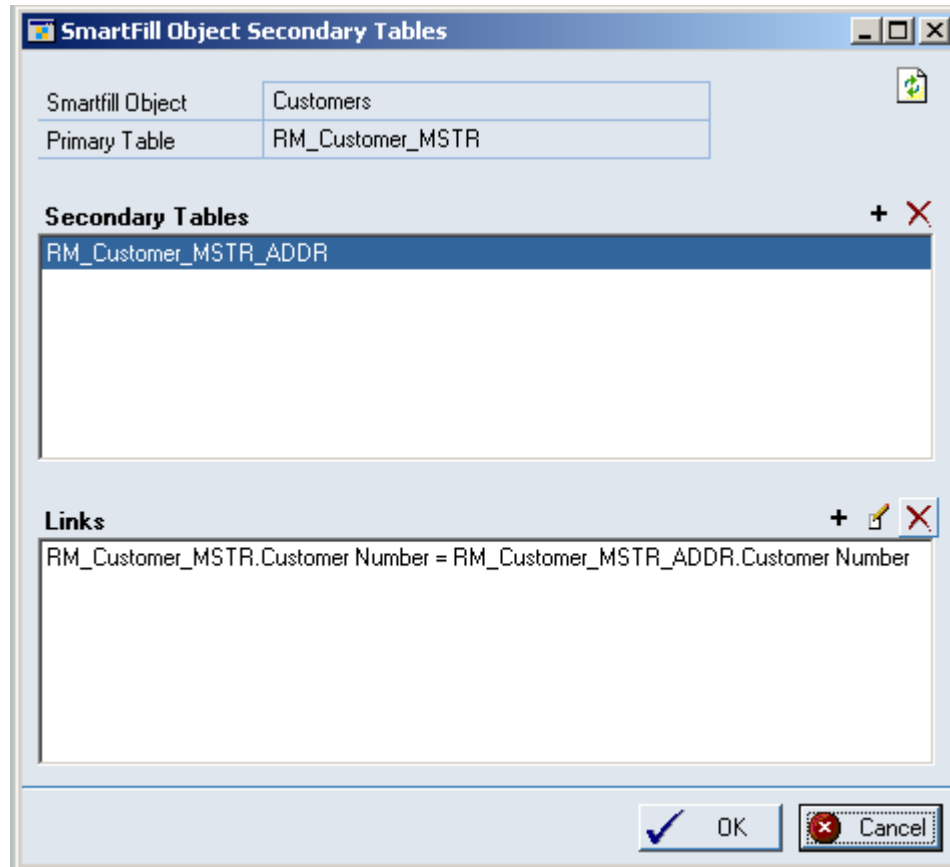
The column list is next. You can search and display up to 10 columns in a given SmartFill Object. If you need additional searching, you can use a Custom SQL Search Type. It is unlikely for a helpful lookup to exceed about 4 displayed columns.

Clear button	Clears all fields on that line.
Table Name	This is the name of the table that contains the field that you want to display or search on. The drop-down lists the Primary Table of the Object as well as all Secondary Tables that have been selected.  You can also choose <Calculated Field>, which will allow you to combine multiple fields into one.
Field Name	This is the field name in the table selected. The drop down will list the fields from the selected table.  If you have chosen <Calculated Field> for the Table Name, then the drop down will list all of the Calculated Fields that are currently defined for this Object. You can also select the <New Calculated Field> item to create a new one.  The Edit Calculated Field button at the top of this column can be used to review or make changes to an existing Calculated Field.
Display Name	This is the name that appears for this field if it is marked to display. You may have a field named "User Defined 1" and you may want to make it display "Hire Date" depending on how you use that field.
Search	Check this box for this field to be searched during a SmartFill lookup.
Display	Check this box if you want this field to be displayed in the lookup list should there be more than one valid match.
Width	For fields that are displayed, you must enter a width for the field. All field widths for displayed fields must add up to 100%. You may have to experiment with a few lookups to find reasonable values for your specific data set.

The Filters button at the bottom of the window opens the SmartFill Object Filters window, which is described in detail later in this document. This is where you can specify additional criteria to use when performing a SmartFill lookup. For instance, you can choose to show only active Customers in the Customers Object. This would be accomplished by setting a Filter to only show Customer records where the Inactive field is No.

Finally, the OK button will save any changes made to the Object and close the SmartFill Object Maintenance Details window.

# SmartFill Object Secondary Tables window



You can get to this window by first going to Tools > Setup > SmartFill > Objects. Next, double-click an object, or select the object and choose the Edit button. Then select the Secondary Tables button next to the Table Name.

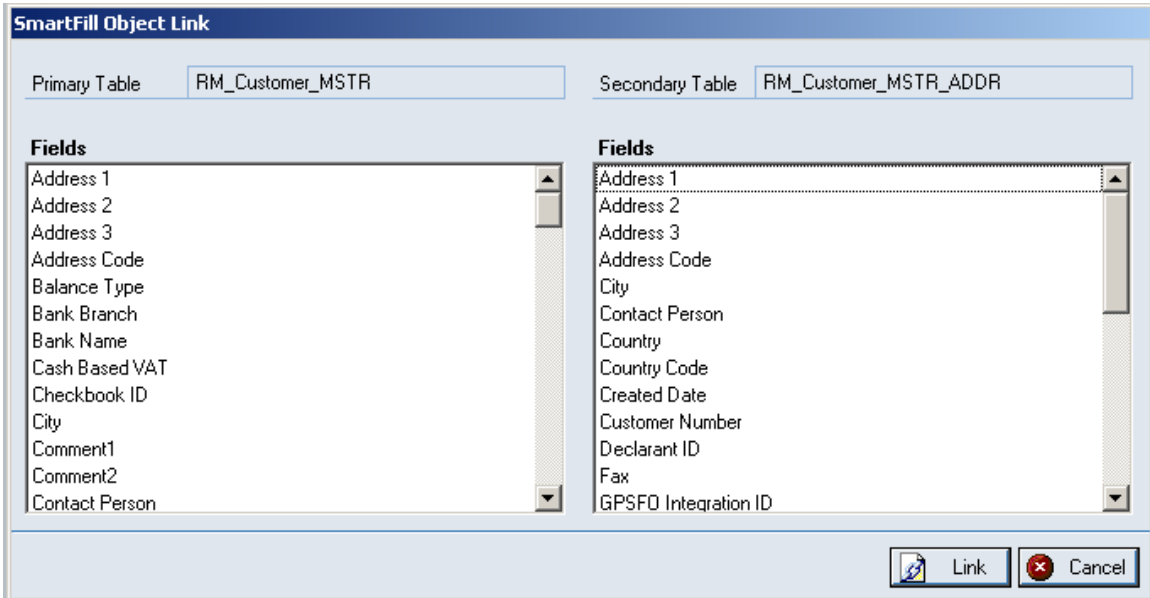
## Description

This is where you can specify additional tables for your SmartFill Object. Secondary tables must be linked to the Object's main table (or *Primary Table*) by at least one field. You define how to connect the records in one table to those in the other by creating one or more Links. A Link is a field in the Primary Table and another one in the Secondary Table whose values must be equal to connect records in the two tables.

When this window first opens, if there are already Secondary Tables assigned, they will be in the Secondary Tables list box at the top of the window. Highlighting one of these tables will display the Links associated with it in the Links list box at the bottom of the window. This gives you the opportunity to change or delete these links.

## Adding a new Secondary Table

When you select the Add Secondary Table button, a lookup will open where you can select another table from any product that is currently loaded. Once you select this table, the SmartFill Object Link window will automatically open.



The image shows a dialog box titled "SmartFill Object Link". At the top, there are two text boxes: "Primary Table" containing "RM\_Customer\_MSTR" and "Secondary Table" containing "RM\_Customer\_MSTR\_ADDR". Below these are two list boxes, both titled "Fields". The left list box contains the following fields: Address 1, Address 2, Address 3, Address Code, Balance Type, Bank Branch, Bank Name, Cash Based VAT, Checkbook ID, City, Comment1, Comment2, and Contact Person. The right list box contains: Address 1, Address 2, Address 3, Address Code, City, Contact Person, Country, Country Code, Created Date, Customer Number, Declarant ID, Fax, and GPSFO Integration ID. At the bottom right of the dialog box are two buttons: "Link" (with a blue arrow icon) and "Cancel" (with a red X icon).

You first select a field from the Primary Table in the left list box. You may notice that the list of Secondary Table fields in the right list box might then become smaller. This is because you can only link fields that have the same data type (e.g., string, integer, etc.). Therefore only the fields in the Secondary table that have a data type that matches the field you selected in the Primary Table will now be displayed.

Once you select both fields, simply click the Link button. The window will then close and the new link will show in the Links list box at the bottom of the Secondary Tables window. If you need to add another Link for this table, just click the Add Link button above the Links list box.

## SmartFill Object Calculated Fields window

**SmartFill Object** Customers

**Calculated Field Name** CityStateZip

Display Name City, State & Zip

**Datatype** String

Format as

Type	Table Name	Field Name
Table Field	RM_Customer_MSTR_ADDR	City

Operation Addition

Use Mapping Mapping

Type	String Value
String Constant	,

Operation Addition

Type	Table Name	Field Name
Table Field	RM_Customer_MSTR_ADDR	State

Operation Addition

Use Mapping Mapping

Type	String Value
String Constant	

Operation Addition

Type	Table Name	Field Name
Table Field	RM_Customer_MSTR_ADDR	Zip

Use Mapping Mapping

Delete OK Cancel

You can get to this window in one of two ways:

- From the SmartFill Object Maintenance Details window, select <Calculated Field> in the Table column. Next, select a field from the list of Calculated Fields in the Field Name column. Then choose the Edit Calculated Field button.
- From the SmartFill Object Maintenance Details window, select <Calculated Field> in the Table column. Next, select <New Calculated Field> in the Field Name column.

## Description

Calculated Fields are fields that you define. These fields can then be used to display values in the SmartFill Select Record window that are not stored in a table field on the database. They can be combinations of table fields or constant values. If each of the items you are combining is a numeric field, then you can perform basic arithmetic operations on them as well. It should be noted, however, that you cannot search against a Calculated Field.

When creating a Calculated Field, you first specify a Name and Datatype. The Datatype can be String or Number. For String fields, you can optionally choose to format the Calculated Field as a Phone Number or Social Security Number. For Number fields, you also have the option of formatting as Currency or as a Number with no decimals (this is useful for displaying Quantities).

A Calculated Field is composed of up to five sub-fields, plus the operation that specifies how to combine a given sub-field with the next one. The sub-fields can be either constant values or fields from one of the tables specified for the Object. You do not have to specify all five sub-fields, but you must at least specify one of them.

There are seven different types of constants that you can use: String, Account Number, Integer, Currency, Yes/No, Date and Time. Any of these can be used if the Calculated Field's Datatype is String. However, if the Datatype is Number, then only Integer and Currency constants can be used.

For Number Calculated Fields, you can choose Addition, Subtraction, Multiplication or Division for the Operation to be performed. Normal arithmetic order precedence will be in effect. For instance, if you specify:

sub-field1 + sub-field2 X sub-field3

it will be evaluated as:

sub-field1 + (sub-field2 X sub-field3).

In the case of String Calculated Fields, you will not be able to select the Operation field (it will always be "Addition", which is equivalent to concatenation for strings).

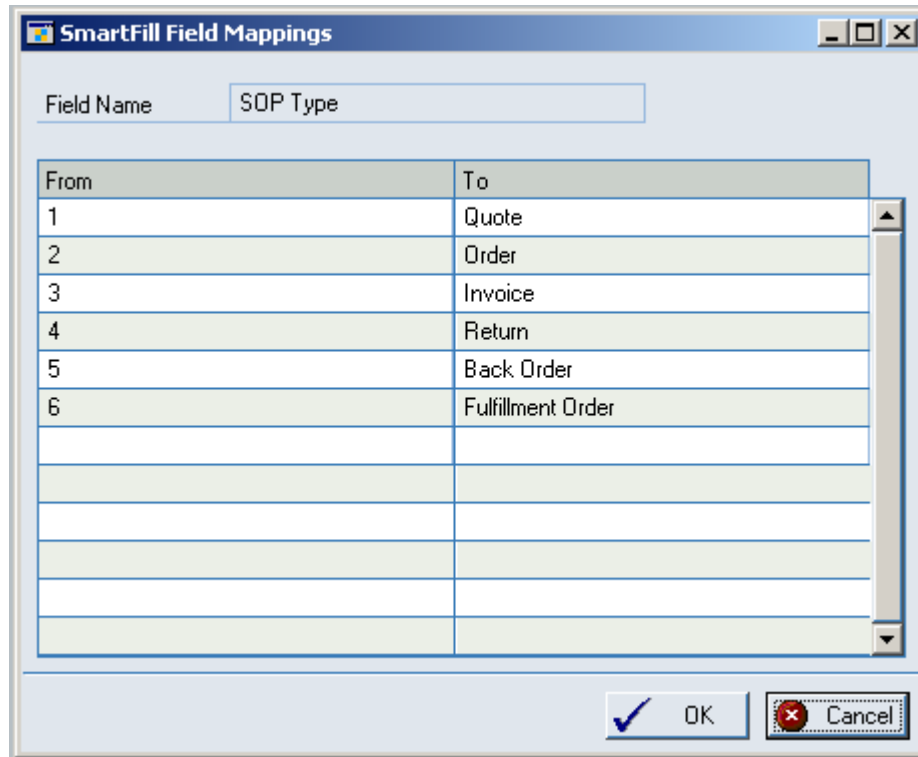
## Field Mapping

There may be times when you want to display a table field that has certain pre-defined values. For instance, for the field SOP Type, the value 1 corresponds to "Quote"; the value 2 corresponds to "Order", etc. It would make a lot more sense to the User if you could display "Quote" and "Order", instead of the values 1 and 2, right? This can be accomplished by using Field Mapping.

Field Mapping is available only for table fields (i.e., it is not available for constant values). The only types of fields that can be mapped are ones that have a string Datatype, or a numeric Datatype that is not a Currency type. For instance, Integers and Drop-down List fields can use Field Mapping; Date fields and Currency fields cannot.

To display the mapped values for a given field, instead of the values that are found on the database, choose the Use Field Mapping check box. You then may need to specify what these mappings are, if they are not specified already.

To define the values that will be mapped, click the Mapping button. This will open the SmartFill Field Mappings window.

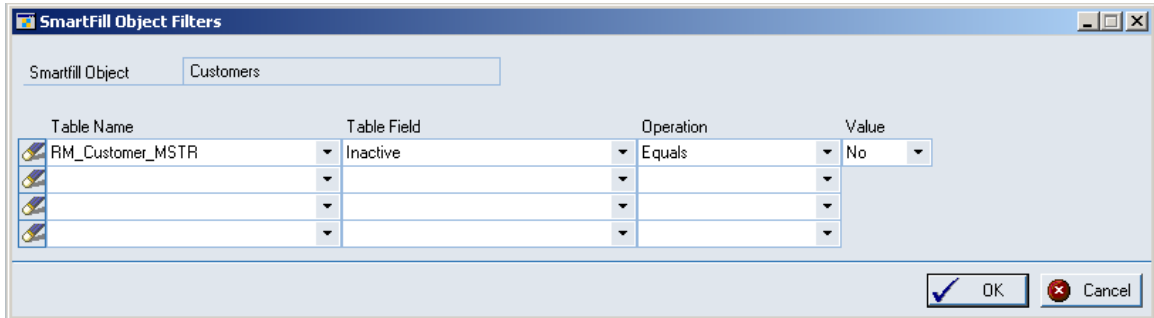


The Field Name will be prefilled from the Calculated Fields window. Alternatively, you can choose to select another field for which you can enter mapping values.

The From column should contain the values that will be found for this field on the database. In the To column, you should enter the values that you want to display on the Select Record window.

When you are done, click OK to close this window.

# SmartFill Object Filters window



You can get to this window by first going to the SmartFill Object Maintenance Details window. Then select the Filters button at the bottom of the window.

## Description

Filters are how you specify additional criteria to use when performing a SmartFill lookup. For instance, in the example above, there is a Filter defined on the Customers Object to only show Active Customers.

You can specify up to four additional criteria for each Object. Any criteria that are specified must all be met in order for SmartFill to search a given record.

The idea behind setting up a Filter is that you want the Object to only search for records that meet certain criteria. Think of each of these criteria as having the form:

<Table Field> <Operation> <Value>

In the above example:

< Table Field> is the 'Inactive' field on the RM\_Customer\_MSTR table

<Operation> is "Equals"

<Value> is "No".

To setup a Filter, first choose a table from the Table name column. You will be able to select any table (Primary or Secondary) that has been defined for this Object. Next, choose the Table Field for which you want to supply an additional condition. This drop-down will contain all of the fields for the table that you selected in the Table Name column.

Now, choose an Operation. This is how you will compare the Table Field to the Value. The available operations are: Equals, Is Greater Than, Is Less Than, Is Greater Than or Equal, Is Less Than or Equal, Does Not Equal, Begins With or Contains.

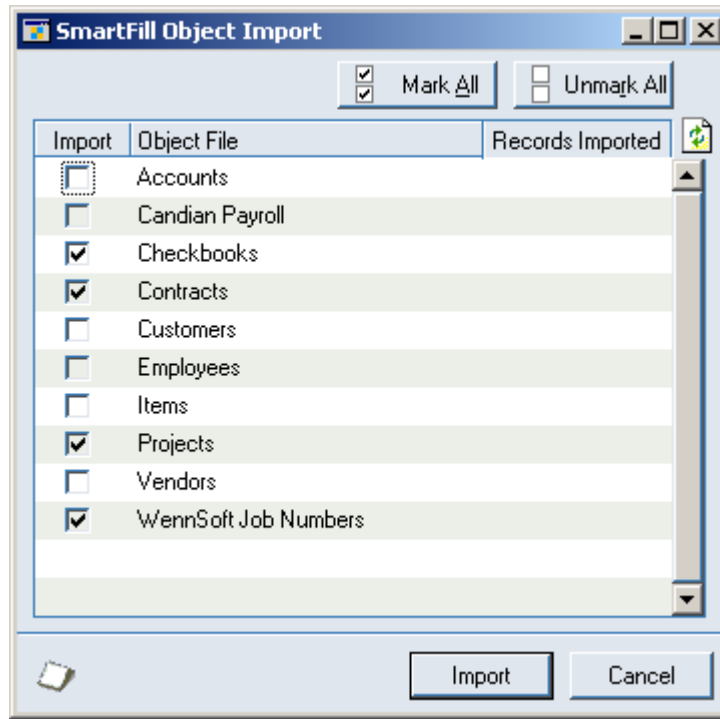
Finally, enter the Value to which you want to compare the Table Field.

When you are done, click OK and the Filter will be activated for this Object.



# Importing New SmartFill Objects

This window allows you to import new SmartFill Objects.



You can get to this window by first going to Tools > Setup > SmartFill > Objects. Then choose the Import button.

## Description

SmartFill is designed to be as easy to set up as possible. So when you first install it, all of the Object text files (named SmartFill\*\*\*.txt, where \*\*\* is the Object name) are automatically imported into the Repository when you first login to Dynamics GP as 'sa'. However, there may be times when you obtain new Object text files that you want to install. The SmartFill Object Import window is where you would do this.

When the SmartFill Object Import window opens, it will list all of the Object text files that it finds in the folder where Dynamics GP is installed. Any Objects that are not currently installed will have the Import checkbox pre-checked. Click the Import button and the new Objects will be installed and ready to use. No additional setup is necessary!

**Note:** You may also choose to Import any of the existing Objects. If you do this, SmartFill will make a **copy** of the selected Objects, not replace the existing ones. In most cases, you will never need to do this.

## Using the Calendar

The Calendar allows you to select dates, rather than typing them manually.



This window will open whenever you hit F2. It will also be added to your Shortcut Bar.

### Description

The Calendar is a very useful feature of SmartFill. By default, it is installed per user and is defined to use the F2 function key to operate. Simply press F2 to open the calendar at any time from any window in Dynamics GP.

If your calendar is not functioning, you may need to manually add the calendar to the Shortcut Bar. You can do this by following these steps:

- Open the Shortcut Bar
- From the Shortcut Bar, press the **Add** button.
- Select Other Window... from the drop-down.
- In the Add Window Shortcut, select SmartFill >> 3<sup>rd</sup> Party >> Calendar from the Available Windows list. Press the **Add** button.
- Press the **Done** button.

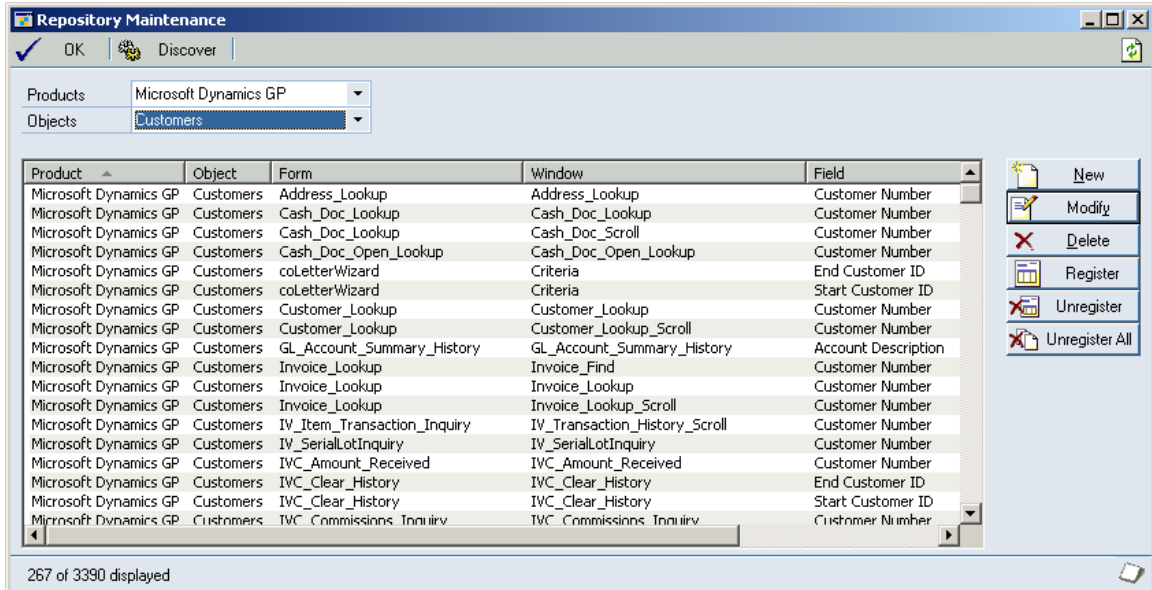
To modify which accelerator key you wish to use, right click on the Calendar item on the shortcut bar. Select Shortcut Properties. Modify the Keyboard Shortcut to your liking.

The date selected in the calendar will be returned to the current date field your cursor is in on any existing window. If your cursor is not in a date field, the selected date on the calendar is ignored.

If you are experiencing slowdowns on non-SQL systems, it may be due to the processing of date lookups in Dynamics GP. You can use the Objects window to disable the date lookup feature.

# Modifying the Repository (Advanced Feature)

Allows an Administrator to enhance or modify the way lookups work in SmartFill.



You can get to this window by going to Tools > Setup > SmartFill > Repository.

## Description

SmartFill has a modifiable and flexible repository of lookups used in the system.

Now for the technicalities of how SmartFill works.

Each time a form is opened, the repository is checked to see if any Lookups are defined for the form. If so, Dexterity triggers are registered to handle the processing of the specified fields, windows, and forms.

If a certain window, field, or form is not behaving as you expect it to, you can research its setup in the Repository. You can modify or delete any existing repository record, and add new ones.

Using the New button, you can add a lookup to any product installed at your Site. If you do add several repository records, please export the repository when you are finished and email it to [support@rocktonsoftware.com](mailto:support@rocktonsoftware.com). As more records are added, the collective database of registered lookups can be shared in the larger Dynamics GP community.

The Modify button will open the Modify Repository Record window, where you can change things about the way a particular lookup works, including specifying that a Filter should be used. In rare cases, a SmartFill lookup might result in an error message once the user tabs off of the field to which the lookup returned. In these cases, you might try marking the 'Skip running change script for this field' check box. This will usually resolve this situation.

Product	Microsoft Dynamics GP
Object	Customers
Form	RM_Customer_Maintenance
Window	RM_Customer_Maintenance
Field	Customer Number
Comment	

Skip running change script for this field

**Repository Filters**

Table Name	Table Field	Operation	Type	Value

OK Cancel

Repository Filters are how you specify additional criteria to use when performing a SmartFill lookup. They are similar to Object Filters, except that Repository Filters only apply to the way the lookup works *on this window*. Also, with Repository Filters, you have the option of specifying a window field for the <Value> part of the condition. This is useful in cases where you only want to search for records that correspond to some other value that you have selected on a given window (for instance only searching for Items that belong to the Vendor that was selected on a Purchase Order transaction).

For more information on how Filters work, review the section on the SmartFill Object Filters window.

The Register/Unregister features are for advanced troubleshooting and are beyond the scope of this documentation. They are provided for advanced Dexterity programmers for informational purposes. They are also used for debugging when contacting technical support.

Date Lookups are never exported or imported, as they are generated on-the-fly by the product.

## Creating Your Own SmartFill Objects (Advanced Feature)

You can create new SmartFill objects so you can do lookups on Dynamics GP fields that currently have no lookup available. You can also create lookups for Third Party applications that do not currently have any SmartFill objects defined for them.

This can be a complex procedure, so in this document we will offer only a general description of the steps that would need to be performed. You can always call us for Technical Support if you have any questions.

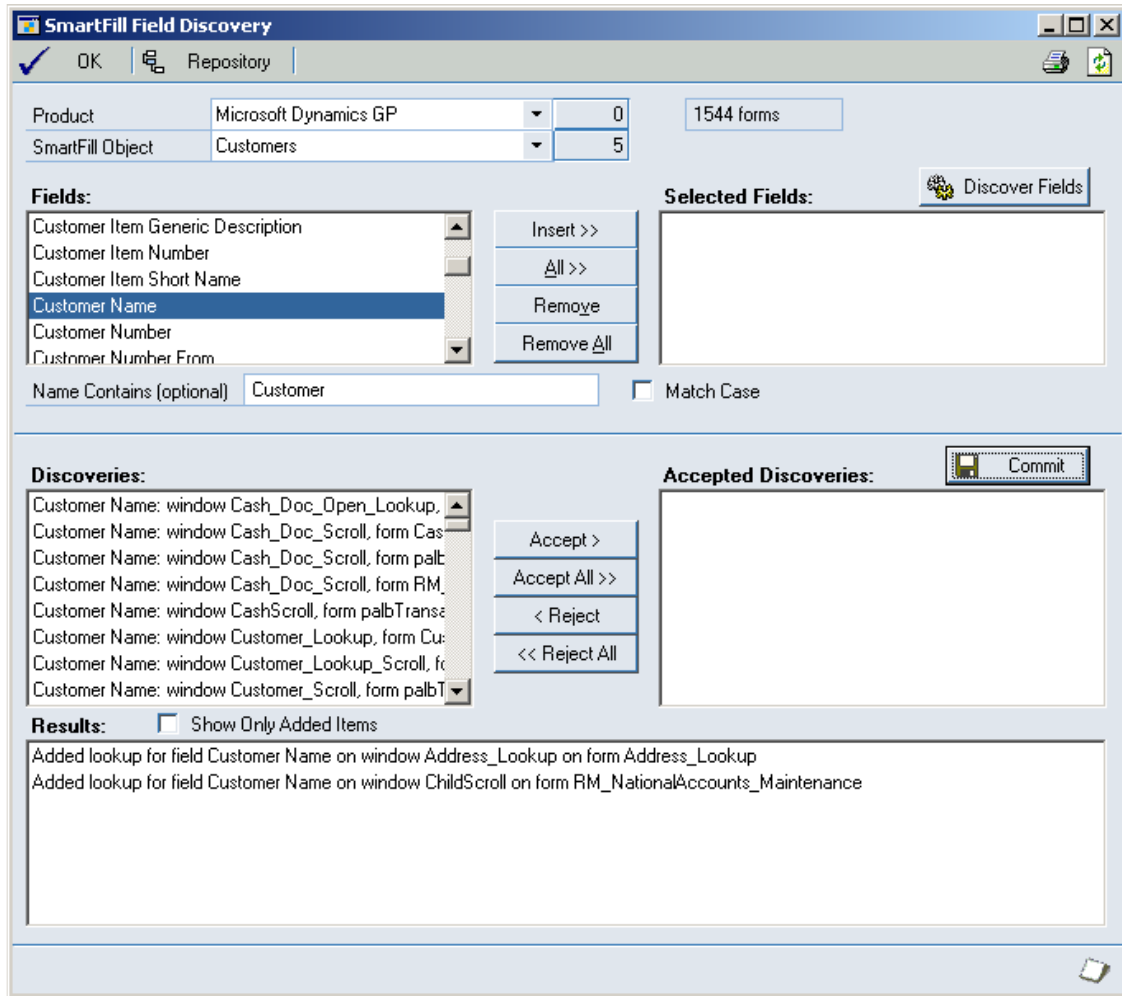
Creating a new SmartFill Object basically entails two major components: *Defining a New Object*, and *Setting Up the Repository*. Each of these components will be briefly described below:

### Defining a New Object

1. Open the SmartFill Objects window (Tools > Setup > SmartFill > Objects) and press the New button. See the section called **SmartFill Object Maintenance Details** for more about this window.
2. Give the Object a name that has not already been used.
3. Select the lookup type (Begins With, Contains or Custom SQL).
4. Select the Product that contains the field that you want to look up.
5. Select the Lookup Form Name. This is the form that is used when the standard lookup is invoked for this object. For Customers, the form to select here is Customer\_Lookup.
6. Select the Table Name of the master table that is used to define this field. Using Customer Number as an example, you would select RM\_Customer\_MSTR here.
7. Select any Secondary Tables that you want to attach to this Object. Do this by clicking the Expansion button next to the Table Name.
8. Select the Return Field and Return Datatype.
9. Select the fields that will show in the lookup.
10. Mark the Search column for at least one field. Also, make sure that the total of the Width column is exactly 100%.
11. Assign access to the appropriate Users and Companies.
12. Click OK.

Now that you have created the Object definition, you must tell SmartFill how you want lookups to behave and on each window where they will be active. This information is stored in the Repository. As you can imagine, finding every window where your lookup field exists can be quite an arduous task. However, SmartFill provides a powerful search tool to help you to determine every occurrence of a given search field, even ones that have non-standard names! We refer to this process as *Field Discovery*.

## Setting Up the Repository for a New Object



1. Open the SmartFill Field Discovery window (Tools > Setup > SmartFill > Repository; then hit the Discover button) to find all occurrences of the Return Field.  
**Note:** If this is the first time you have entered this window, you may be asked to build the Field / Datatype Database. This is required in order to perform this function. However, note that it could take several minutes.
2. Select the Product where you want to search for the Object's Return Field.
3. Select the new SmartFill Object you created above.
4. Select a field to Insert to the Selected Fields box. You can enter a string in the Name Contains field to narrow down the list of Fields. You can do this multiple times to select several fields (i.e. Customer Name, Customer Number, etc.). Or, you can Insert All.
5. Click the Discover Fields button.
6. In the Discoveries box, choose to Accept each valid occurrence of the Return Field that has been found. Click the Accept button to move them to Accepted Discoveries.
7. Click the Commit Button.

You can perform steps 4-7 as many times as needed to find all instances of the Return Field.

## Adding Lookups to an Existing Object (Advanced Feature)

You can extend the lookup capabilities of existing SmartFill Objects to other Third Party products. The procedure is similar to the previously described procedure of adding new Objects.

This can be a complex procedure, so in this document we will offer only a general description of the steps that would need to be performed. You can always call us for Technical Support if you have any questions.

Because your Object is already created, adding a lookup to an existing SmartFill Object only requires the *Setting Up the Repository* step. Since the procedure is slightly different than for creating a new Object, it is described below:

### Setting Up the Repository for an Existing Object

1. Open the SmartFill Field Discovery window (Tools > Setup > SmartFill > Repository; then hit the Discover button) to find all occurrences of the Return Field.  
**Note:** If this is the first time you have entered this window, you may be asked to build the Field / Datatype Database. This is required in order to perform this function. However, note that it could take several minutes.
2. Select the Product where you want to search for the Object's Return Field. For instance, if you want to add the Customer Lookup to the Extended Pricing windows, choose Extended Pricing here.
3. Select the SmartFill Object to which you want to add lookup functionality. For the example above, choose the Customers Object.
4. Select a field to Insert into the Selected Fields box. Optionally, you can enter a string in the Name Contains field to narrow down the list of Fields. You can do this multiple times to select several fields (i.e. Customer Name, Customer Number, etc.). Or, you can insert All.
5. Click the Discover Fields button.
6. In the Discoveries box, choose to Accept each valid occurrence of the Return Field that has been found. Click the Accept button to place them in the Accepted Discoveries box.
7. Click the Commit Button.

You can perform steps 4-7 as many times as you need to in order to find all occurrences of the Return Field.