Search in GP

Megan De Freitas - 2024-12-02 - Miscellaneous

Overview

In Additions, users can use the Search module to quickly search for different objects. When the user clicks on the entry that they are looking for, the correlating value will open up within Microsoft Dynamics GP. The goal of Additions Search is to improve efficiency in Dynamics GP by adding a powerful search tool in a selection of companion forms. This tool has the ability to search a number of fields, making the user more efficient and allowing them to find the desired data more quickly. The search module can match a search term with a customizable selection of fields such as sales document, customer, and vendor searches. All of these values can be searched at the same time from any keyword or number. The results grid of the search screen is fully customizable, allowing the user to control what fields they see and search. Also, it is possible to order by, write a custom filter for, or modify the layout and size of any available column. Once installed, additions will instantly pop up by selecting any of the following in GP:

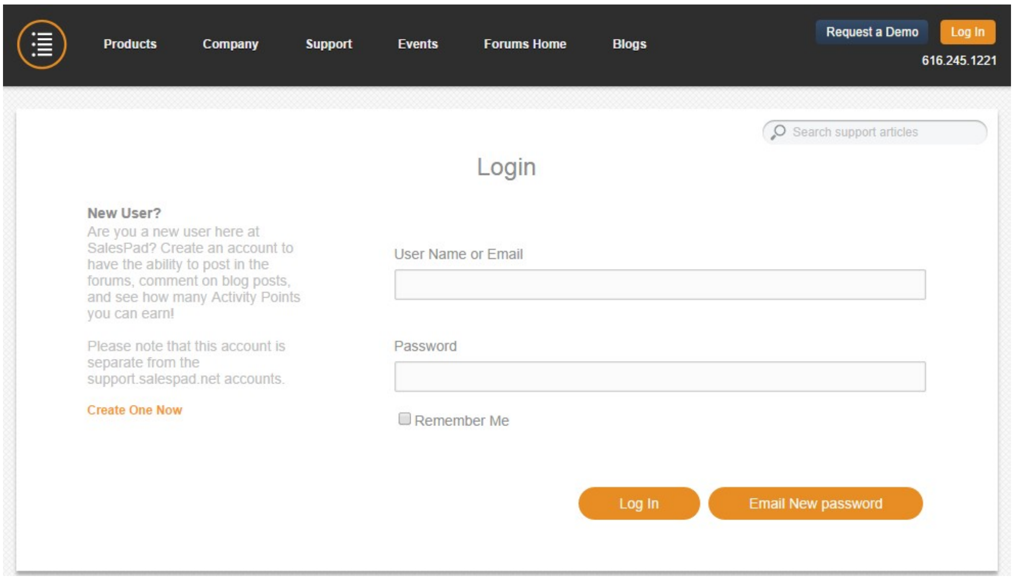
- Sales Transaction Entry
- Customer Card
- Item Card
- Purchase Order Entry
- Vendor Card

System Requirements

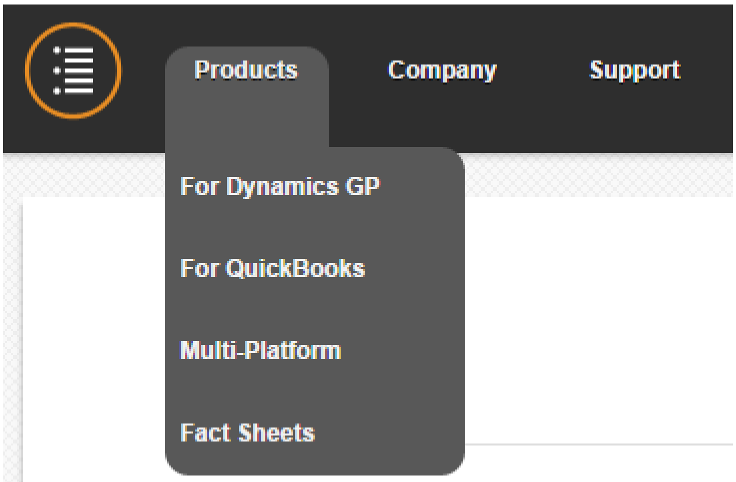
- Dynamics GP (10/2010/2013/2013 R2) *2013 R2 Requires Latest Version
- SalesPad GP (Refer to SalesPad GP System Requirements)
- Refer to SalesPad GP: SalesPad Installation & Connection Guide for SalesPad installation
- Refer to CardControl GP: CardControl Installation Guide for CardControl Installation

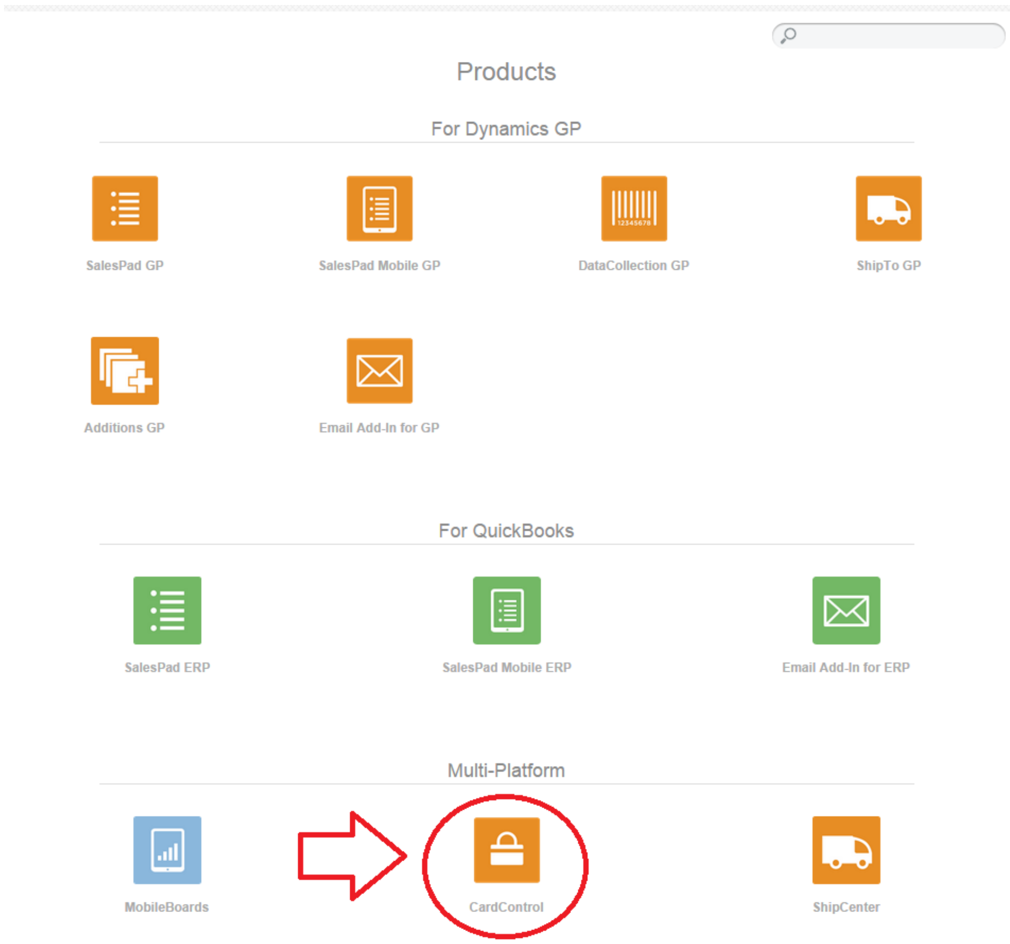
Setup

1. Create an account at on SalesPad’s website

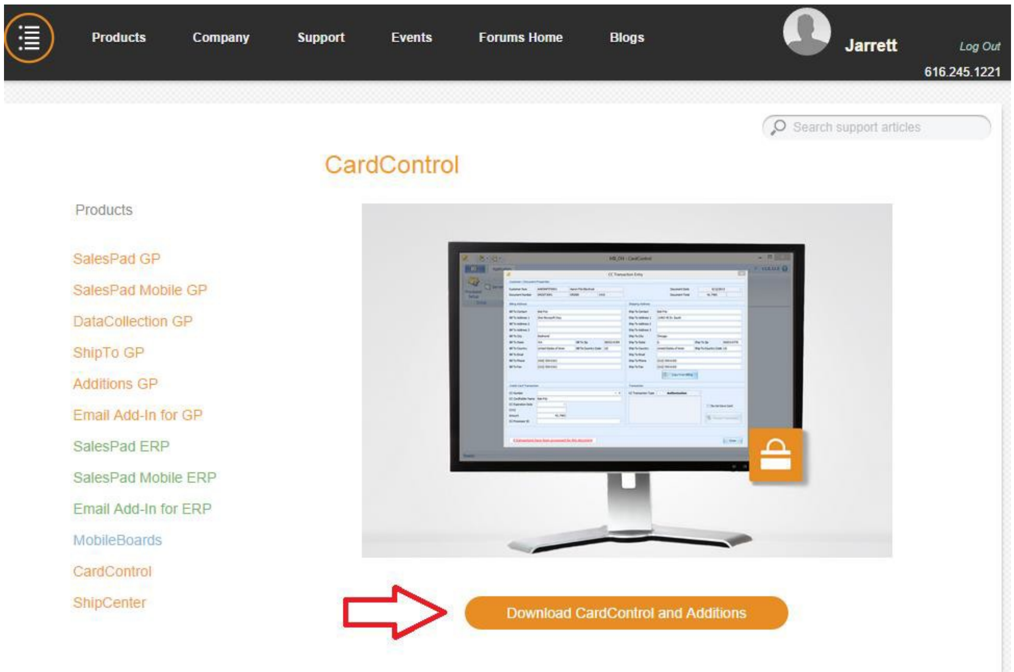


2. Click on SalesPad's product page and click on CardControl once an ID is created

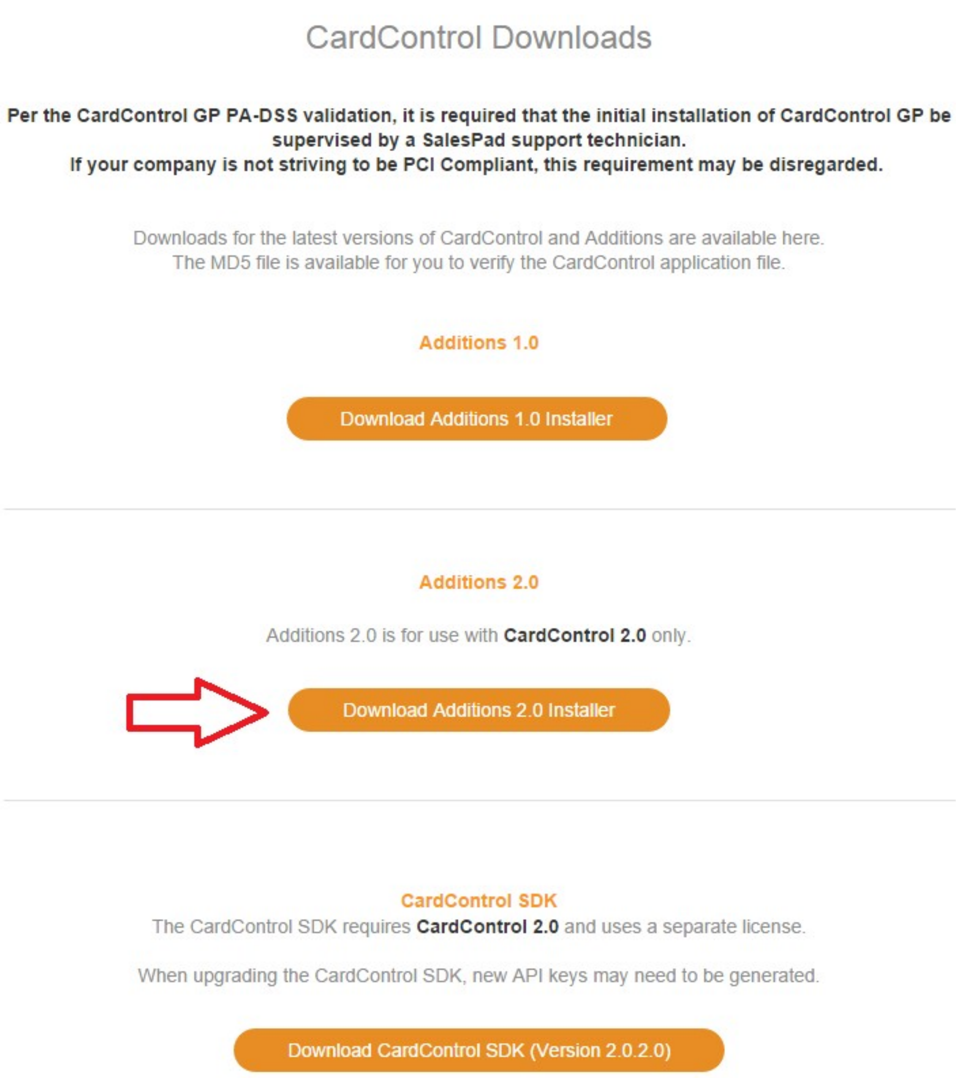




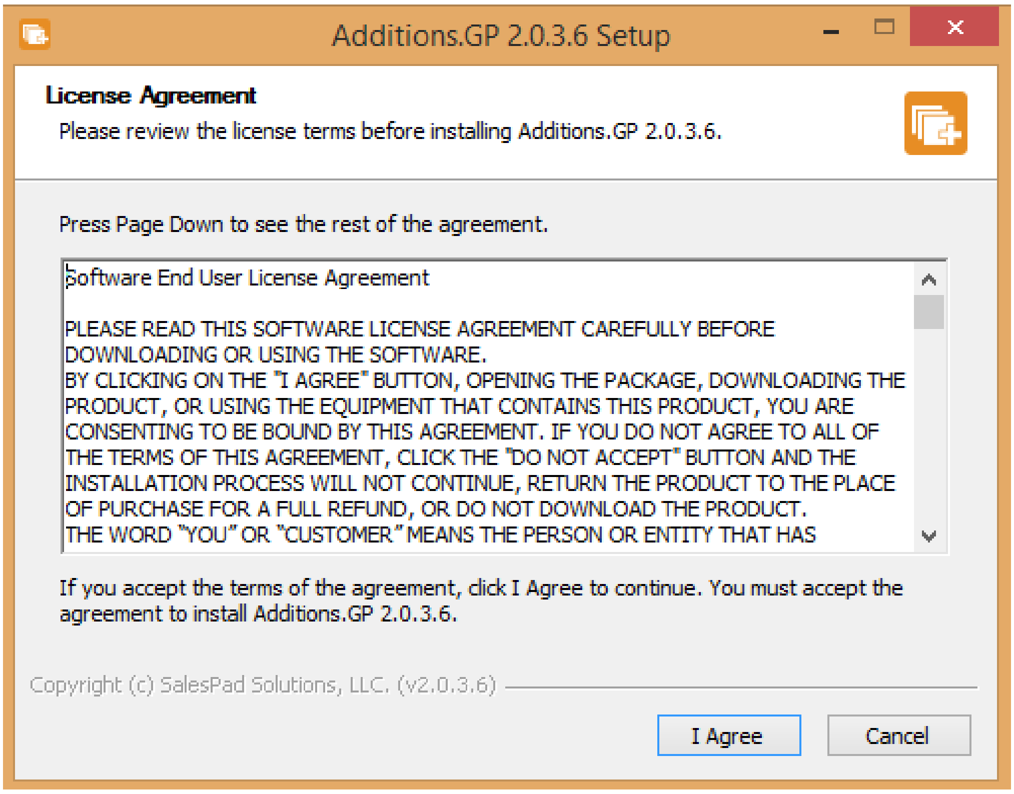
3. Click **Download CardControl and Additions**



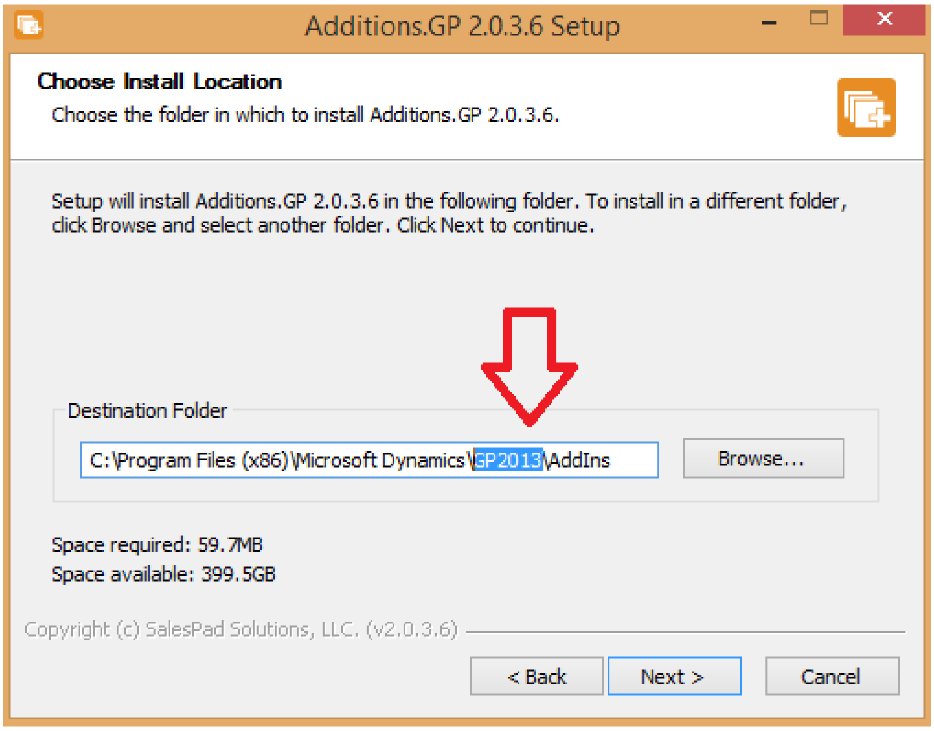
4. Download Additions 2.0 Installer once the page redirects



5. Click **I Agree** when the install pops up

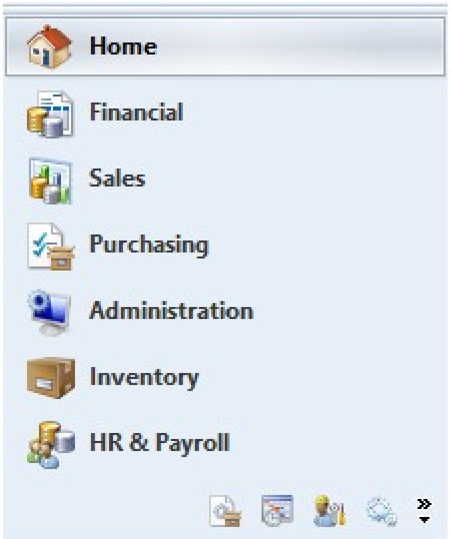


6. Click **Next** on the setup wizard
    1. Change the Destination Folder from C:\Program Files (x86)\Microsoft Dynamics\GP 2010\AddIns to C:\Program Files (x86)\Microsoft Dynamics\GP 2013\AddIns



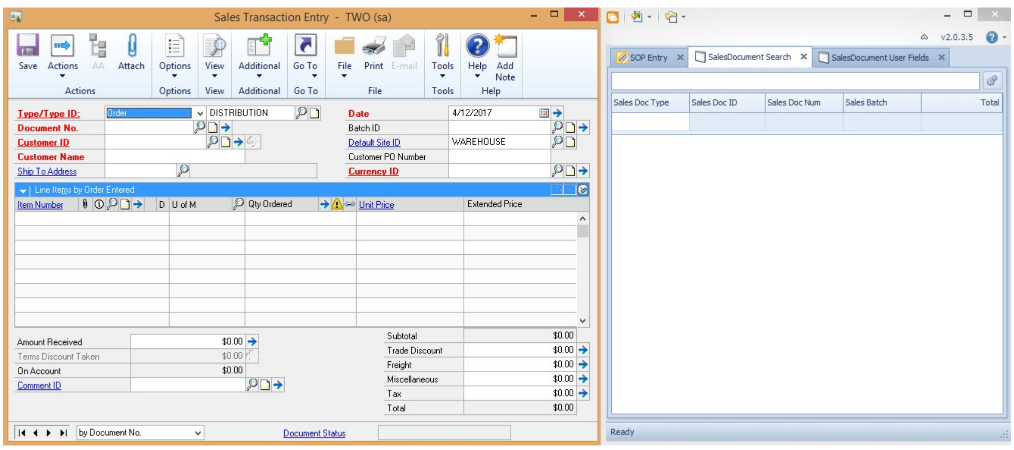
    2. Click **Install** on the setup wizard
    3. Click **Finish** on the setup wizard (show release notes is optional)
    4. Open Microsoft Dynamics GP

7. Enter login credentials
8. Click **Sales** in the bottom left corner of GP



9. Click on one of the form links to open Additions

   Example: Sales Transaction Entry
10. Additions will appear right of the business object
11. Click on **Sales Transaction Entry**

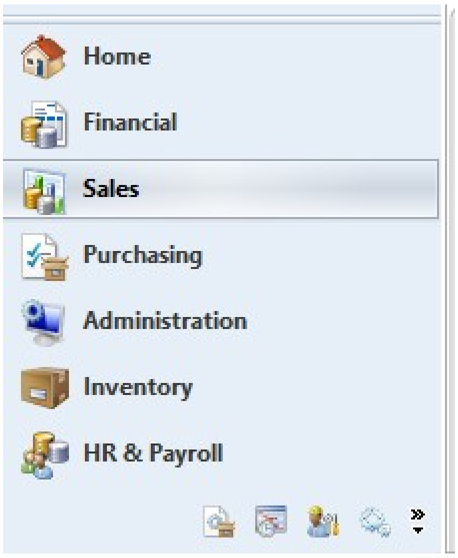


Searching

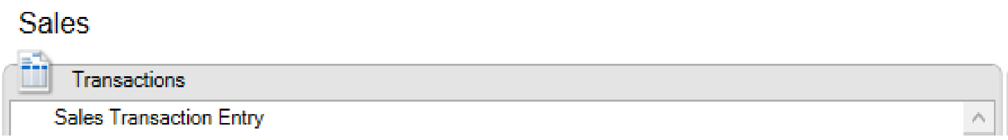
The Additions window will appear in Sales Transaction Entry, Customer Card, Item Card, Purchase Order Entry, and the Vendor Card windows. The search feature works the same across the board but the fields searched differ depending on the business object.

Sales Transaction Entry

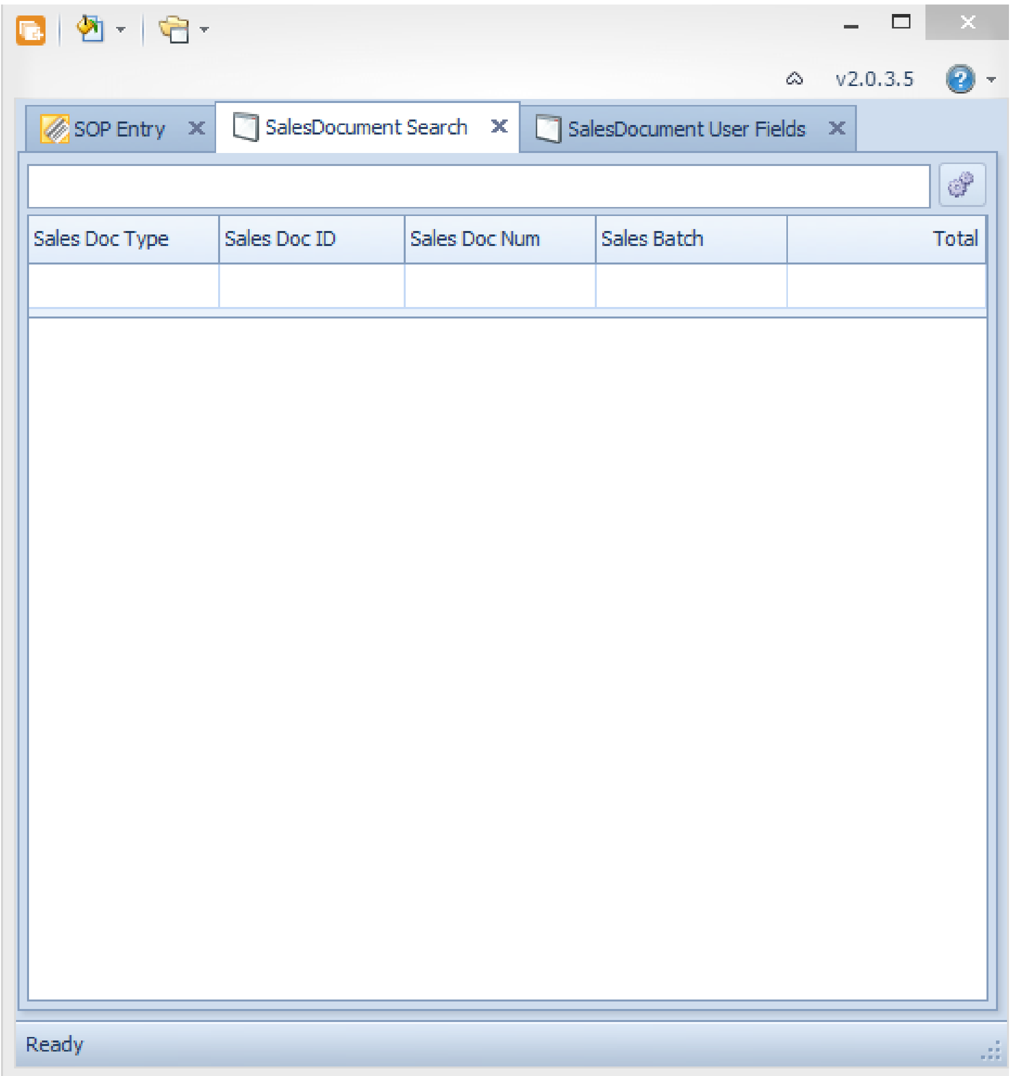
1. Click on **Sales** in the box on the bottom right hand corner of GP



2. Click on **Sales Transaction Entry** in the Transactions box

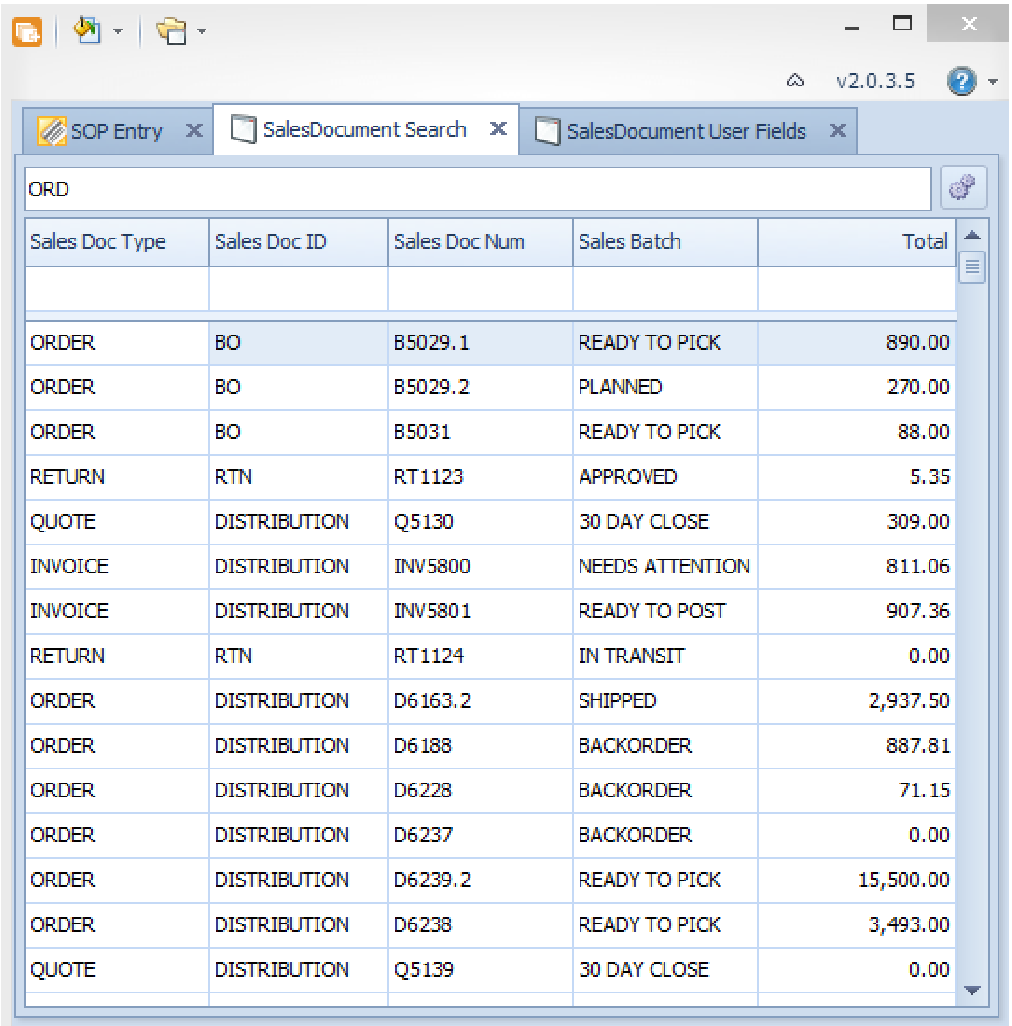


3. The Additions window will open to the right



4. Enter a Sales Document Type, Sales Document ID, Sales Document Number, Sales Batch, or Total to garner results

   Example: Enter “ORD” on search

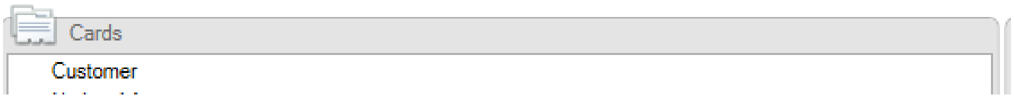


Sales Doc Type	Sales Doc ID	Sales Doc Num	Sales Batch	Total
ORDER	BO	B5029.1	READY TO PICK	890.00
ORDER	BO	B5029.2	PLANNED	270.00
ORDER	BO	B5031	READY TO PICK	88.00
RETURN	RTN	RT1123	APPROVED	5.35
QUOTE	DISTRIBUTION	Q5130	30 DAY CLOSE	309.00
INVOICE	DISTRIBUTION	INV5800	NEEDS ATTENTION	811.06
INVOICE	DISTRIBUTION	INV5801	READY TO POST	907.36
RETURN	RTN	RT1124	IN TRANSIT	0.00
ORDER	DISTRIBUTION	D6163.2	SHIPPED	2,937.50
ORDER	DISTRIBUTION	D6188	BACKORDER	887.81
ORDER	DISTRIBUTION	D6228	BACKORDER	71.15
ORDER	DISTRIBUTION	D6237	BACKORDER	0.00
ORDER	DISTRIBUTION	D6239.2	READY TO PICK	15,500.00
ORDER	DISTRIBUTION	D6238	READY TO PICK	3,493.00
QUOTE	DISTRIBUTION	Q5139	30 DAY CLOSE	0.00

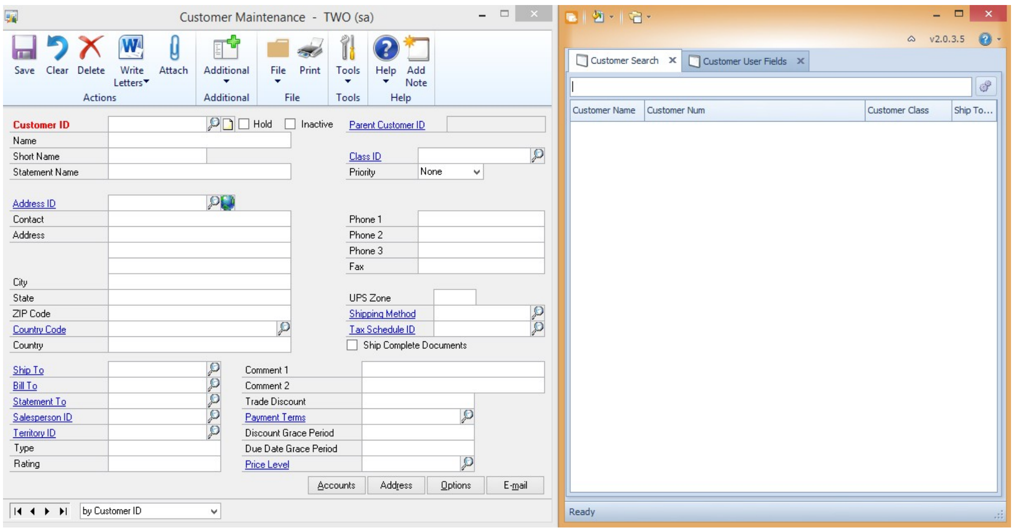
Customer Card

While still in sales, the Customer Card can be accessed as well.

1. Go one box over to Cards and click **Customer**



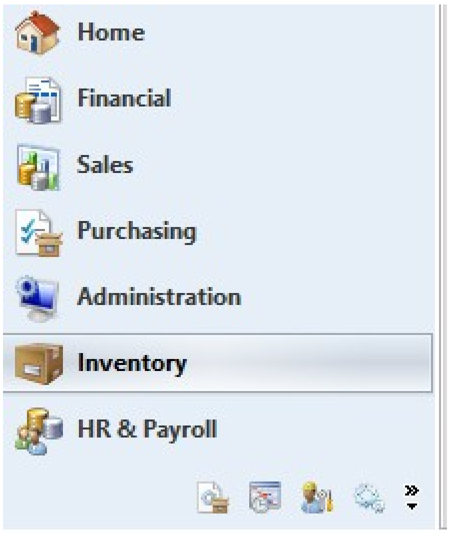
Once Customer is clicked the following screen will appear:



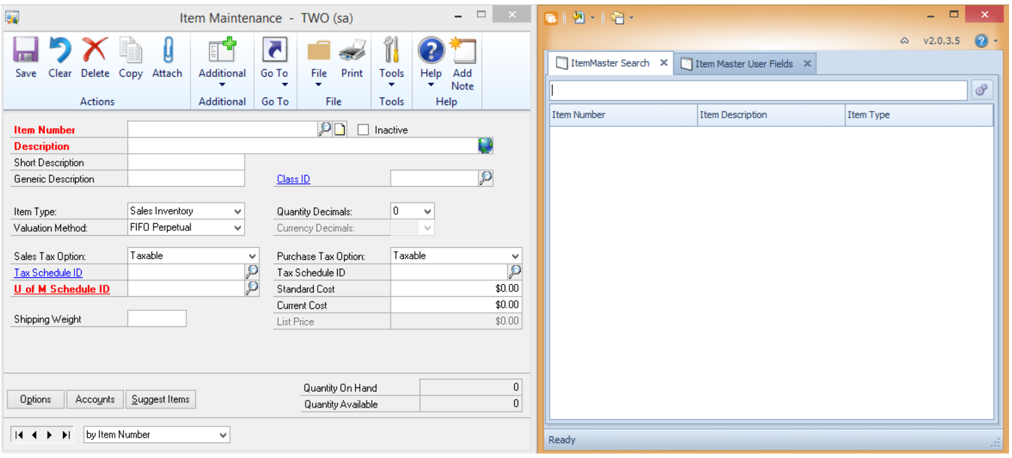
2. Enter a value in the search bar to garner results

Item Card

1. Click **Inventory** in the bottom left hand corner



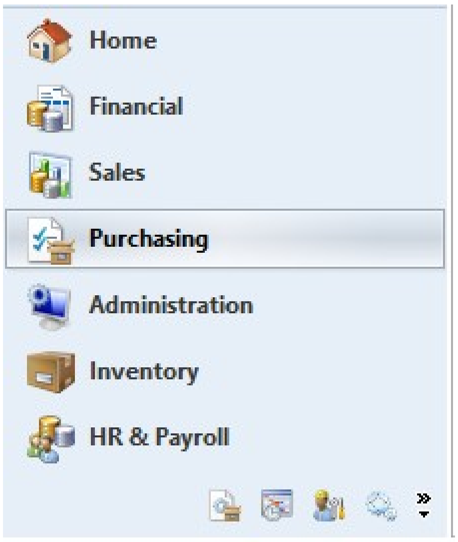
2. Go to Cards and click **Item**. The following screen will appear.



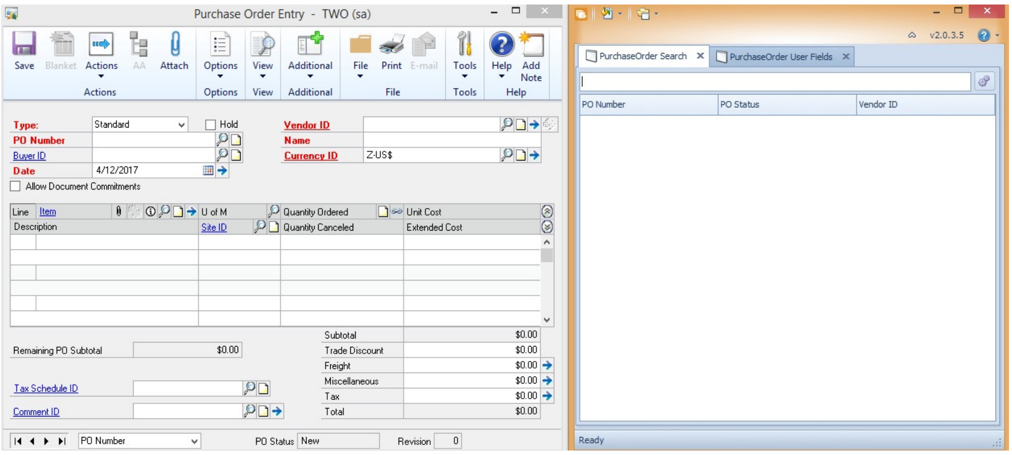
3. Enter an Item Number, Item Description, or Item type to garner results.

Purchase Order Entry

1. Click **Purchasing** in the bottom left corner.



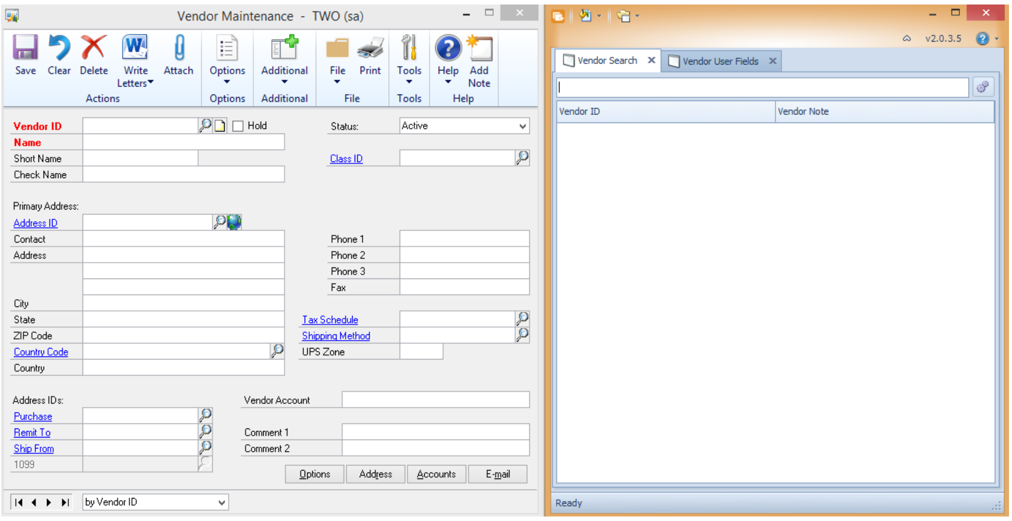
2. Click on **Purchase Order Entry** under Transactions. The following screen will appear.



3. Enter a PO Number, PO Status, or Vendor ID to garner results.

Vendor Card

1. Click **Cards** in Purchasing to open the following window:



2. Enter a Vendor ID or Vendor Note in the search bar to garner results.