



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

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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
 7. 
 8. Click **Install** on the setup wizard
 9. Click **Finish** on the setup wizard (show release notes is optional)
 10. Open Microsoft Dynamics GP
 11. 
 12. Enter login credentials
 13. Click **Sales** in the bottom left corner of GP
 14. 
 15. Click on one of the form links to open Additions
Example: Sales Transaction Entry
 16. Additions will appear right of the business object
 17. Click on **Sales Transaction Entry**
 18. 

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. 
3. Click on **Sales Transaction Entry** in the Transactions box
4. 
5. The Additions window will open to the right
6. 
7. Enter a Sales Document Type, Sales Document ID, Sales Document Number, Sales Batch, or Total to garner results
Example: Enter "ORD" on search
8. 

Customer Card



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

1. Go one box over to Cards and click **Customer**
2. 
3. Once Customer is clicked the following screen will appear:
4. 
5. 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.