

USERMANUAL

SmartPost



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Publication date: December 2017

What is SmartPost

SmartPost is the tool for everyone that is tired of hitting the post button. It is the set and forget tool that will look after your Microsoft Dynamics GP posting for you. You decide which batches you want automatically posted, define the rules for your team and SmartPost does the rest. Whether you are importing records after hours that you need posted, or you have 30 people entering batches and people forget to post them, SmartPost will automate that job.

How it Works

First you need to set up a posting user and leave them logged into Microsoft Dynamics GP all the time. This can be on a server or on a machine sitting in the corner dedicated to your posting robot. This is a bit of a pain, we know, but it is much better than posting yourself. The robot then watches your defined schedule and when required grabs all the batches you asked it to find and posts them. The robot follows all the posting rules of Microsoft Dynamics GP and will post To or Through as well as ensure approvals and check that the digits are correct. The robot will then generate posting reports (if you asked for them) and email them to you.

Batches it will Post

Financial

- General Entry
- Clearing Entry
- Budget Transactions

Sales

- Sales Transaction Entry
- Invoice Entry
- Cash Receipts Entry
- Transaction Entry

Purchasing

- Manual Payment
- Payables Transaction Entry
- Receivings Transaction Entry
- Purchasing Invoice Entry
- Returns Transactions Entry

Inventory

- Transaction Entry
- Transfer Entry

SmartPost Features

Feature	Description
Multi Company	SmartPost will post across all of your Microsoft Dynamics GP companies. Whether you have one company or one hundred – SmartPost will log into each one and do your posting for you.
After Hours	Post while your team is asleep and never slow them down again.
After Import	If you use SmartConnect or Integration Manager to import data – set SmartPost to post all those records when the import is complete.
Schedule	Schedule posting to be instant, every 30 minutes, hourly, daily or monthly.
Define	Define which batches from which series should be posted.

Installing SmartPost

Information about installing SmartPost is divided into the following sections:

- System Prerequisites
- Installation
- Registration

System Requirements

The system requirements for SmartPost are the same as those for Microsoft Dynamics GP. You can review the Microsoft Dynamics GP System Requirements documentation on CustomerSource or PartnerSource.

SmartPost is not compatible with the Microsoft Dynamics GP Web Client.

Prerequisites

Installing SmartPost on Microsoft Dynamics GP requires that the Microsoft Dynamics GP version 18.5.xxxx or higher. This is available in the Microsoft Dynamics GP October 2020 Release.

Release Notes

The SmartPost 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.

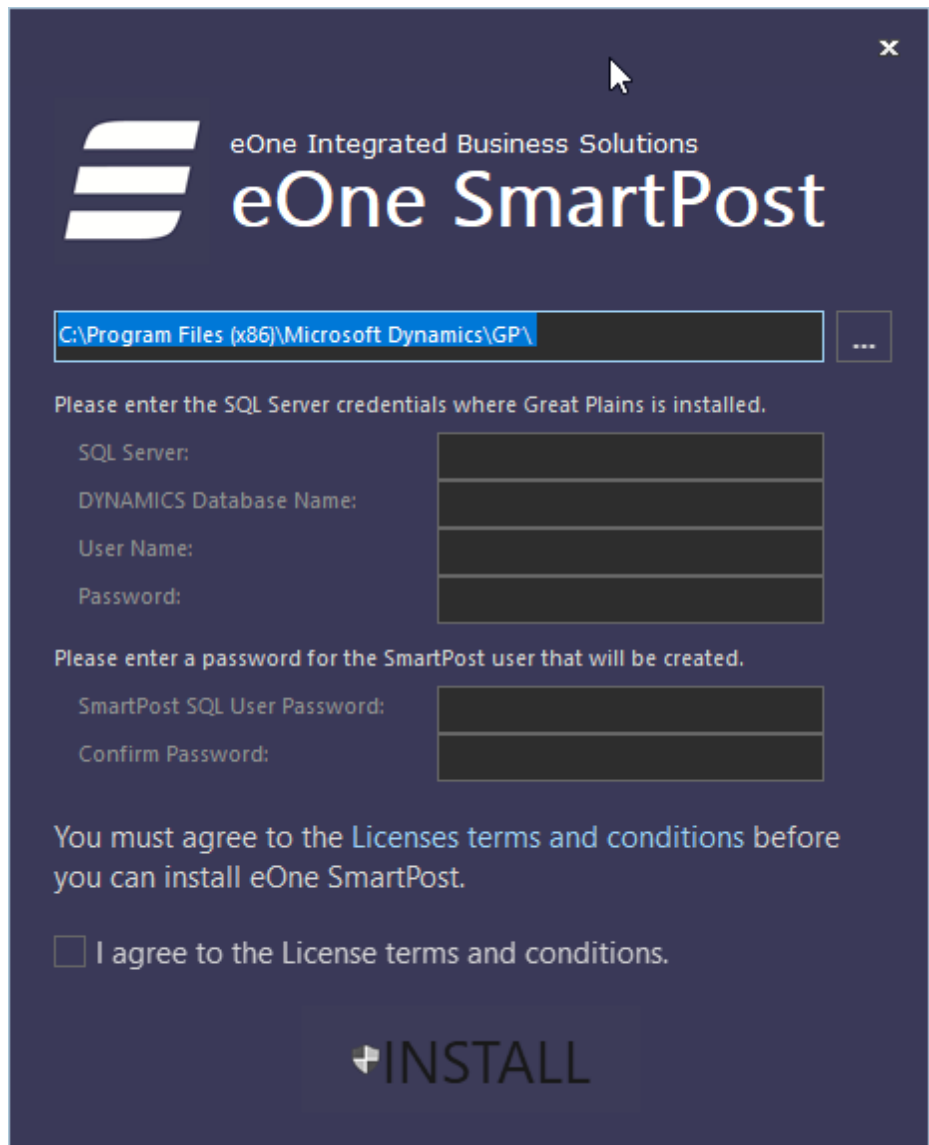
Installation

The SmartPost installation will need to be run on the server/workstation where GP is installed and the automated posting process is to run.

To install SmartPost:

1. Run the SmartPost installer by executing the SmartPost.exe file.
2. On the SmartPost installation screen enter the following:
 - a. Verify the path to the Microsoft Dynamics GP installation directory. If needed, correct the path.
 - b. Enter in the name of the SQL Server where the Microsoft Dynamics GP databases reside.
 - c. Enter in the name of the Dynamics system Database.
 - d. Enter in a SQL Login information for a login that has enough permissions to create SQL objects. We recommend 'sa'.
 - e. Enter in a password for the installation to set on the SmartPost SQL login it

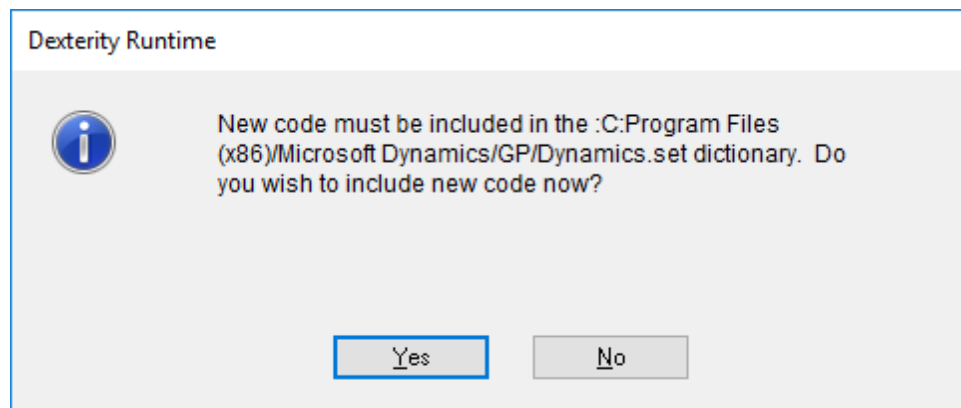
- will create.
- f. Mark the checkbox to agree to the License terms and conditions.
 - g. Click Install.

The image shows a dark-themed installation window for 'eOne SmartPost'. At the top, there is a logo consisting of three horizontal white bars of increasing length, followed by the text 'eOne Integrated Business Solutions' and 'eOne SmartPost' in a large, white, sans-serif font. Below the header, there is a text box containing the path 'C:\Program Files (x86)\Microsoft Dynamics\GP\' with a blue highlight and a small '...' button to its right. Underneath this, a message reads: 'Please enter the SQL Server credentials where Great Plains is installed.' This is followed by four input fields with labels: 'SQL Server:', 'DYNAMICS Database Name:', 'User Name:', and 'Password:'. Below these, another message says: 'Please enter a password for the SmartPost user that will be created.' This is followed by two input fields with labels: 'SmartPost SQL User Password:' and 'Confirm Password:'. Further down, a message states: 'You must agree to the [Licenses terms and conditions](#) before you can install eOne SmartPost.' Below this message is a checkbox followed by the text 'I agree to the License terms and conditions.' At the bottom center of the window is a large, dark button with a white right-pointing arrow and the word 'INSTALL' in white capital letters.

- 3. If prompted, click Yes to allow the SmartPost installation to make changes to the computer.
- 4. The installation will process for a few seconds.
- 5. When the installation is done, click Finish.



6. Launch Microsoft Dynamics GP and select Yes when prompted to include new code.



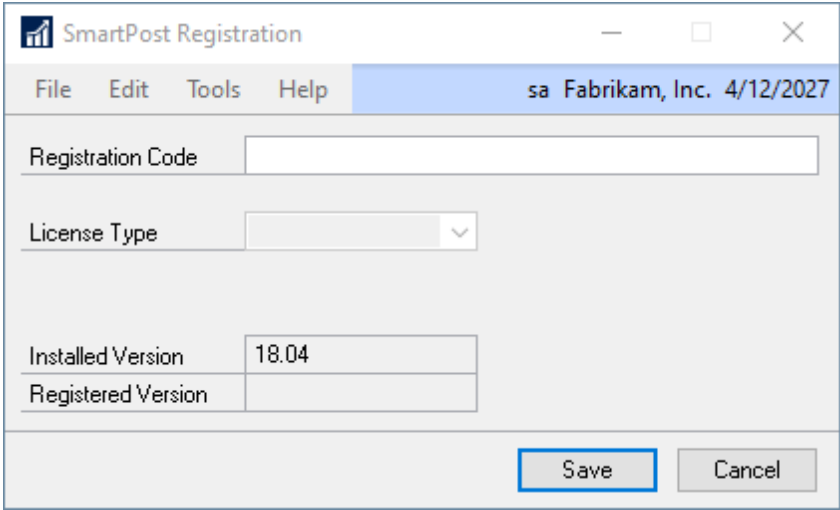
Upgrade

If you are upgrading to Microsoft Dynamics GP from Microsoft Dynamics GP 2018 or 2016, there is no separate update process that needs to be completed for SmartPost . For SmartPost, you will want to follow the steps in the Installation section on the machine where you want to run SmartPost. This will install the SmartPost application into your Microsoft Dynamics GP installation and the update will be completed automatically in that process.

Registration

To Register SmartPost:

1. Open the SmartPost Registration window by going to Microsoft Dynamics GP - Tools - SmartPost - Registration.
2. Enter in the Registration Code.

The image shows a screenshot of the 'SmartPost Registration' window. The window has a title bar with the text 'SmartPost Registration' and standard minimize, maximize, and close buttons. Below the title bar is a menu bar with 'File', 'Edit', 'Tools', and 'Help'. To the right of the menu bar, it says 'sa Fabrikam, Inc. 4/12/2027'. The main area of the window contains several input fields: a 'Registration Code' text box, a 'License Type' dropdown menu, and two rows of version information. The first row is labeled 'Installed Version' and contains the text '18.04'. The second row is labeled 'Registered Version' and is currently empty. At the bottom right of the window are two buttons: 'Save' and 'Cancel'. The 'Save' button is highlighted with a blue border.

3. Click Save to save the registration information.

Setup

The setup information is divided into the following topics:

- [SmartPost Options](#)
- [SmartPost Report Options](#)
- [Posting Routines](#)
- [Scheduling](#)
- [Analytical Accounting](#)

SmartPost Options

To setup the SmartPost Options:

1. Open the SmartPost setup window. Using the Microsoft Dynamics GP interface go to Microsoft Dynamics GP - Tools - SmartPost - Setup.

SmartPost Options

OK | Report Setup

SMTP Server

Port 25

Username

Password

Domain

Service Email Address

Admin Email Address

Report File Path

Analytical Accounting Max Report Time 0

☐ Do not delete batch reports

Version 20.18.0.1

2. To enable emails within SmartPost enter a SMTP server (This could be a SMTP Url or the exchange server).
3. Enter the Username, Password, and Domain for the user that will be used to e-mail the reports.
4. Service Email Address : The user that all emails in the system will be sent as.
5. Admin Email Address : This is the user that will receive emails if there are anything that went wrong while posting or trying to post a batch.
6. Report File Path : The path where all batch reports will be created.
7. Set the Analytical Accounting Max Report Time. This is used as a timeout for the

reports if they don't generate in the time given, it will quit trying.

8. Do not delete batch reports: Select this flag if you want to keep the batch reports after they have been emailed to the specified user.

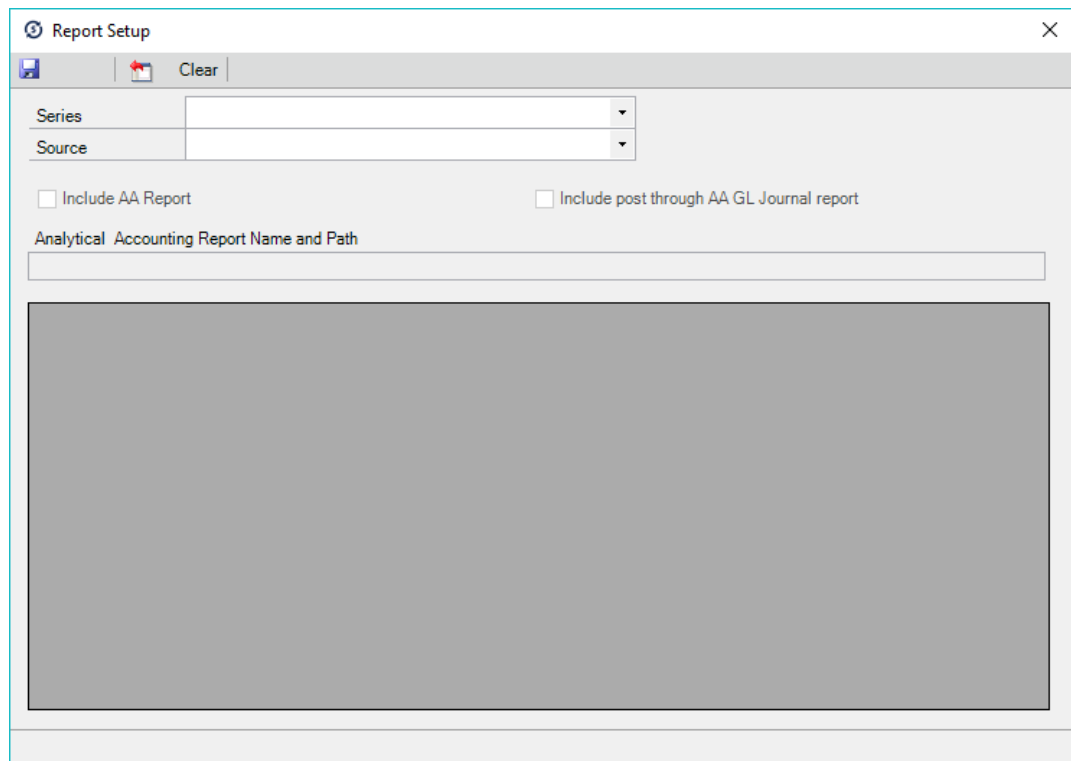


To allow SSL to be used for the SMTP server, you will need to open the eOne.SmartPost.dll.config file in the AddIns folder of your Microsoft Dynamics GP installation. In this file, you will need to change the line "<add key='UseSSL' value='false'/>" from false to true and save the file. Then relaunch Microsoft Dynamics GP and it should allow for an SSL site to be used.

SmartPost Report Setup

To setup the SmartPost Report Options:

1. Open the SmartPost setup window. Using the Microsoft Dynamics GP interface go to Microsoft Dynamics GP - Tools - SmartPost - Setup.
2. Click on the Report Setup button.



3. Select the Batch Series and Source.
4. Mark the Include AA Report and Include post through AA GL Journal report if appropriate. Please see the section on the [Analytical Accounting Setup](#) for more information.
5. Select the reports you would like to print and mail when the selected batch type

gets posted.

6. Click Save to save the selection.

Report Output

The ReportOutput defaults to HTML but it can be set to other options as well.

The options available for the report output are:

- pdf
- txt
- tab
- csv
- htm

If you have pdf but don't have full Adobe installed, it will revert back to html output.

To change the Report Output:

1. Close Microsoft Dynamics GP if it open on the machine.
2. Open the eone.SmartPost.dll.config file that can be found in the AddIns folder of the Microsoft Dynamics GP install directory. By default this is: C:\Program Files (x86)\Microsoft Dynamics\GP\AddIns
3. Locate the key listed as follows: `<add key="ReportOutput" value="htm"/>`
4. Change the htm value to one of the other available options.
5. Save the eone.SmartPost.dll.config file
6. Launch Microsoft Dynamics GP and SmartPost will now use the new report option.
7. This setting will need to be changed on each machine where SmartPost is being run.



The pdf option requires that the full Adobe Acrobat installed and not just Adobe Reader.

Posting Routines

To setup the Posting Routine:

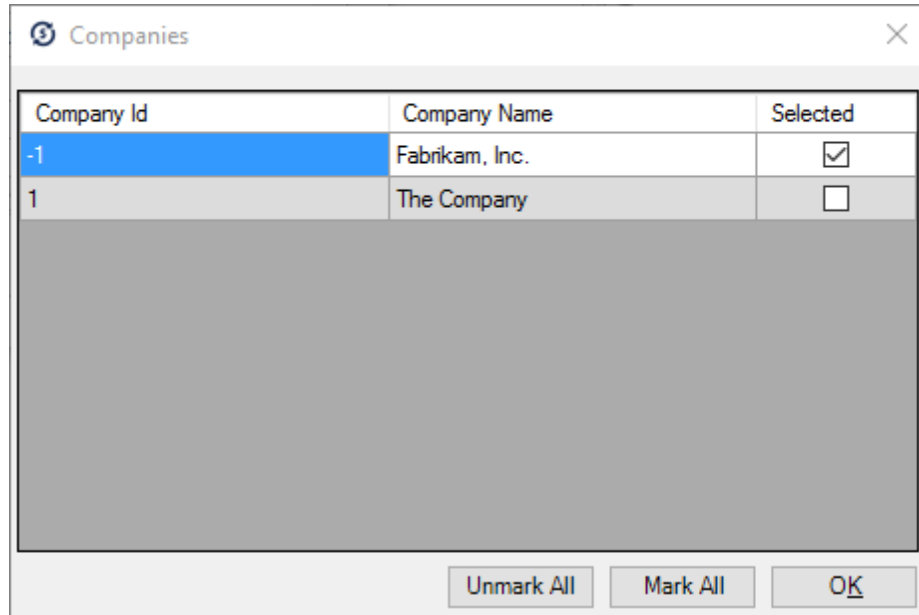
1. Open the Posting Routines window by going to Microsoft Dynamics GP - Tools - Setup - SmartPost - Posting Routine.

Routine Name			
Series			
Batch Source			
Where Batch Number			
Batch Number			
Email Address			
Maximum batch posting time	0	mins	
Schedule Task	Immediate		<input type="checkbox"/> Active

2. Enter a Routine name.
3. Select the Batch Series and Source for this routine.
4. Select a search type on the batch number.
5. Enter the what the search type should look for. (For example if i selected "Begins With" and enter "AA" in the Batch Number field, the routine will find all batches that begin with "AA")

- Equals
- Contains
- Begins With
- Ends With
- is Greater than
- is Greater than or Equal to
- is Smaller than
- is Smaller than or Equal to

6. Enter the email address of the person that will receive the reports when this posting routines posts a batch.
7. Set the Schedule. For more information, see the [Scheduling](#) section.
8. The active flag specifies whether the Routine is active or not.
9. Click the Companies button and select all the companies that the routine must find batches and post.



10. Click OK to close the Companies window.
11. Click the Save button to save the routine.

SmartPost Scheduling

SmartPost Routines may be scheduled to run immediately, daily, weekly, monthly, and once only.

The SmartPost scheduling information has been divided into the following topics:

- [Immediate](#)
- [Daily schedules](#)
- [Weekly schedules](#)
- [Monthly schedules](#)
- [Scheduling to run once](#)

Immediate

A Routine scheduled to run immediately will look for batches and as soon as they are found they will be posted.

To schedule a Routine once:

1. Open the SmartPost Routine setup window by going to Microsoft Dynamics GP - Tools - Setup - SmartPost - Posting Routine.
2. Select 'Immediate' as the schedule task option.

Schedule Task: Immediate [v] ☐ Active

3. Click save to save the Routine changes.

Daily Schedules

A daily schedule sets a Routine to run every x days, at the selected time.

To schedule a Routine to run daily:

1. Open the SmartPost Routine setup window by going to Microsoft Dynamics GP - Tools - Setup - SmartPost - Posting Routine.
2. Select 'Daily' as the schedule task option.

Schedule Task: Daily [v] ☐ Active

Start Time: 9:21:27 AM [v]

Daily

Every 1 [v] day(s)

Repeat

☐ Repeat every 1 [v] minutes, for the duration of 1 [v] minutes

3. Enter the start time for the routine.
4. Enter the number of days between each run of the Routine.
5. If the routine is to be repeated, setup the following:
 - a. Mark the Repeat every... checkbox.
 - b. Select the time in minutes between each run.
 - c. Select the minutes between the start time and the time before which the last daily run should start.
6. Click save to save the Routine amendments.

Weekly Schedules

A weekly schedule sets a Routine to run every x weeks, on selected days, at the selected time.

To schedule a Routine to run weekly:

1. Open the SmartPost Routine setup window by going to Microsoft Dynamics GP - Tools - Setup - SmartPost - Posting Routine.
2. Select 'Weekly' as the schedule task option.

The screenshot shows the 'SmartPost Routine Setup' window. At the top, 'Schedule Task' is set to 'Weekly' in a dropdown menu, and there is an unchecked 'Active' checkbox. Below this, 'Start Time' is set to '12:42:16 PM' in a time picker. A section titled 'Weekly' contains an 'Every' field set to '1' and a 'Week(s) on' section with checkboxes for Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, and Sunday. At the bottom, a 'Repeat' section has an unchecked checkbox for 'Repeat every' followed by a field set to '1' minutes, and a field for 'for the duration of' set to '1' minutes.

3. Enter the time that the Routine run should start.
4. Enter the number of weeks between each run of the Routine.
5. Select the day(s) of the week where the Routine is to be run.
6. If the Routine is required to be run multiple times each day it is run, mark the Repeat every... checkbox and enter the minutes between the start time and the time before which the last daily run should start.
7. Click save to save the Routine amendments.

Monthly Schedules

A monthly schedule sets a Routine to run on a certain day of the month for the selected months, at a specified time.

To schedule a Routine to run monthly:

1. Open the SmartPost Routine setup window by going to Microsoft Dynamics GP - Tools - Setup - SmartPost - Posting Routine.
2. Select 'Monthly' as the schedule task option.

Schedule Task Monthly ☐ Active

Start Time 12:42:16 PM

Monthly

☒ Day 1 of the month(s)

☐ The First Monday of the month(s)

☐ January ☐ April ☐ July ☐ October

☐ February ☐ May ☐ August ☐ November

☐ March ☐ June ☐ September ☐ December

Repeat

☐ Repeat every 1 minutes, for the duration of 1 minutes

3. Enter the time that the Routine run should start.
4. Enter the day of the month that you want to run the Routine.
5. Select the months where the Routine is to be run.
6. If the Routine is required to be run multiple times each day it is run, check the Repeat every... checkbox and enter the minutes between the start time and the time before which the last daily run should start.
7. Click save to save the Routine amendments.

Run Once

A Routine scheduled to run once will be run only once at the date and time specified by the schedule. This schedule will be automatically deactivated after the Routine has been run once.

To schedule a Routine once:

1. Open the SmartPost Routine setup window by going to Microsoft Dynamics GP - Tools - Setup - SmartPost - Posting Routine.
2. Select 'Once' as the schedule task option.

Schedule Task

Frequency: **Once**

Start Time: **1:41:14 PM**

Run on: **Monday, November 27, 2017**

☐ Active

3. Enter the time that the Routine should run.
4. Enter the date that that the Routine should run.
5. Click save to save the Routine amendments.

Analytical Accounting

SmartPost require a few manual setups to be completed for AA to work. If AA is installed these steps need to be followed for each batch series and batch source that SmartPost will post regardless of whether you want to print and email the AA reports or not.

On the SmartPost Options window we have added a default AA report timeout.

Analytical Accounting Max Report Time: **0**

When SmartPost is posting a batch with an AA report, it will wait for the report to print in the specified folder as setup below. SmartPost will wait for this report to be printed and continue when it has waited longer than the time specified. (If the time is set to 0, SmartPost will wait for a default time of 5 min)

Please Note: When you have Post through General Ledger setup in Great Plains you will need to follow the steps in the [Financial](#) section on General Entry.

If you want to print or email AA reports:

1. Open the Report Setup window by going to Microsoft Dynamics GP - Tools - SmartPost - Setup and click the Report Setup button.
2. Select the Batch Series and Source that you want to print or email the AA reports for.
3. Select the "Include AA Report" option on the Report Setup window in SmartPost

for the desired Batch Series and Source. If you are using the Post Through General Ledger Files option in the Microsoft Dynamics GP Posting Setup window and you want it to send the General Ledger report as well as the Sales, Inventory, or Purchasing report, mark the Include post through AA GL Journal report checkbox.

☒ Include AA Report ☐ Include post through AA GL Journal report

Analytical Accounting Report Name and Path
C:\Users\Nicole\Desktop\IVTransactionEntry.htm

4. Below this check box a report name will be displayed. This is the path and name of the report that we will need to setup in Great Plains Posting Setup.
5. Now we need to change the AA Report Printing Options in the report Setup for Great Plains. To do this go to Microsoft Dynamics GP - Tools - Setup - Posting - Posting.

Posting Setup - TWO (sa)

OK Save File Print Tools Help Add Note

Series: Financial Origin: General Entry

☒ Post to General Ledger
☐ Post Through General Ledger Files

☒ Allow Transaction Posting
☐ Include Multicurrency Info

☐ Verify Number of Trx
☐ Verify Batch Amounts

Create a Journal Entry Per:
☒ Transaction ☐ Batch ☐ Use Account Settings

Posting Date From: ☒ Batch ☐ Transaction
If Existing Batch: ☐ Append ☒ Create New

☐ Require Batch Approval
Approval Password:

Mark All Unmark All

Reports: Send To: File

Print	Report	Type	Append/Replace
<input checked="" type="checkbox"/>	AA General Posting Journal	Html file	Append
	C:\Program Files (x86)\Microsoft Dynamics\GP2018\GLJournalEntry.html		
<input type="checkbox"/>	General Posting Journal	Html file	Append

6. Select the series and origin as selected in step 2.
7. Select the file option for this AA report.
8. Change the Type drop down to Html file.
9. The file and path selected in the path field of this window MUST be the same name and path as in step 4.
10. Please follow steps in the following links to make sure you change the correct reports for each Series.
 - a. [Financial](#)
 - b. [Sales](#)
 - c. [Purchasing](#)
 - d. [Inventory](#)

If you do not want to print or email AA reports:

1. Open the Report Setup window by going to Microsoft Dynamics GP - Tools - SmartPost - Setup and click the Report Setup button.
2. Select the Batch Series and Source that you don't want to print or email the AA reports for.
3. De-select the "Include AA Report" option.

☐ Include AA Report

4. Now we need to turn off the AA Report Printing Options window in the report Setup for Great Plains. To do this go to Microsoft Dynamics GP - Tools - Setup - Posting - Posting.

Posting Setup - TWO (sa)

Series: Financial
 Origin: General Entry

☒ Post to General Ledger
☐ Post Through General Ledger Files

☒ Allow Transaction Posting
☐ Include Multicurrency Info
☐ Verify Number of Trx
☐ Verify Batch Amounts

☐ Create a Journal Entry Per:
☒ Transaction
☐ Batch
 ☐ Use Account Settings

Posting Date From: ☒ Batch ☐ Transaction
 If Existing Batch: ☐ Append ☒ Create New

☐ Require Batch Approval
 Approval Password:

Reports: Send To: File

Print	Report	Type	Append/Replace
<input type="checkbox"/>	AA General Posting Journal	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Html file	Append
<input checked="" type="checkbox"/>	General Posting Journal	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Html file	Append

Path: C:\Program Files (x86)\Microsoft Dynamics\GP2018\GLJournalEntry.html

5. Select the series and origin as selected in step 2.
6. De-select the AA report in the scrolling window.
7. Please follow the steps in the following links to make sure you turn off the correct reports for each Series.
 - a. [Financial](#)
 - b. [Sales](#)
 - c. [Purchasing](#)
 - d. [Inventory](#)

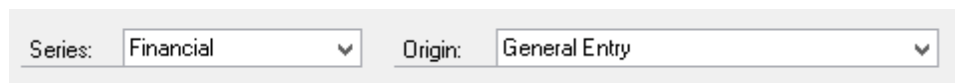
Financial

To setup the Analytical Accounting Posting Reports for the financial series:

1. Open the Great Plains Report Setup window by going to Microsoft Dynamics GP - Tools - Setup - Posting - Posting.
2. If you are turning off the AA reporting options then de-select the reports below instead of adding the file paths.
3. We will be changing the Series and Origin for the options below to change the required AA report.

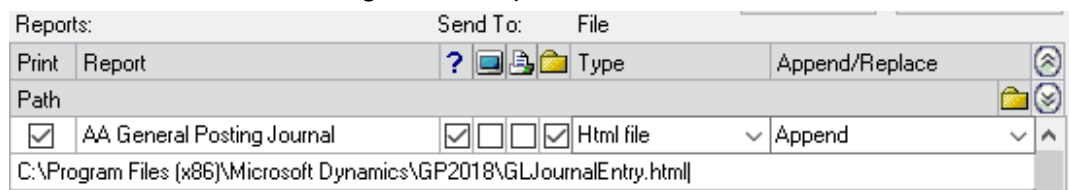
General Entry

1. Select the Series of Financial and the Origin of General Entry.



The screenshot shows two dropdown menus. The first is labeled 'Series:' and has 'Financial' selected. The second is labeled 'Origin:' and has 'General Entry' selected.

2. Mark the AA General Posting Journal report.



The screenshot shows the 'Reports' window. The 'Send To:' dropdown is set to 'File'. The 'Type' dropdown is set to 'Html file'. The 'Append/Replace' dropdown is set to 'Append'. The 'Path' field contains 'C:\Program Files (x86)\Microsoft Dynamics\GP2018\GLJournalEntry.html'. The 'AA General Posting Journal' report is checked.

3. Select the file type checkbox and change the type to Html.
4. The report path needs to be the same as the path in the Report Setup window of SmartPost and the report name should be GLJournalEntry.htm. (Please note that this report path and name needs to be exact for SmartPost to pickup the report and mail it.)

Sales

To setup the Analytical Accounting Posting Reports for the Sales series:

1. Open the Great Plains Report Setup window by going to Microsoft Dynamics GP - Tools - Setup - Posting - Posting.
2. If you are turning off the AA reporting options then de-select the reports below instead of adding the file paths.
3. We will be changing the Series and Origin for the options below to change the required AA report.

Sales Transaction Entry

1. Select the Series of Sales and the Origin of Receivables Sales Entry.

Series:	Sales	Origin:	Receivables Sales Entry
---------	-------	---------	-------------------------

2. Mark the AA Sales Entry Posting Journal report.

Reports:	Send To:	File
Print Report	? ? ? ?	Type Append/Replace
Path		
<input checked="" type="checkbox"/> AA Sales Entry Posting Journal	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> Html file	Append
C:\Program Files (x86)\Microsoft Dynamics\GP2018\SOPReceivables.htm		

3. Select the file type checkbox and change the type to Html
4. The report path needs to be the same as the path in the Report Setup window of SmartPost and the report name should be SOPReceivables.htm. (Please note that this report path and name needs to be exact for SmartPost to pickup the report and mail it.)

Cash Receipts Entry

1. Select the Series of Sales and the Origin of Receivables Cash Receipts.

Series:	Sales	Origin:	Receivables Cash Receipts
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2. Mark the AA Cash Posting Journal.

Reports:	Send To:	File
Print Report	? ? ? ?	Type Append/Replace
Path		
<input checked="" type="checkbox"/> AA Cash Posting Journal	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> Html file	Append
C:\Program Files (x86)\Microsoft Dynamics\GP2018\SOPCashReceipt\htm		

3. Select the file type checkbox and change the type to Html
4. The report path needs to be the same as the path in the Report Setup window of SmartPost and the report name should be SOPCashReceipt.htm. (Please note that this report path and name needs to be exact for SmartPost to pickup the report and mail it.)

Transaction Entry

1. Select the Series of Sales and the Origin of Receivables Sales Entry.

Series:	Sales	Origin:	Receivables Sales Entry
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2. Mark the AA Sales Entry Posting Journal report.

Reports:		Send To:		File
Print	Report	?		Type
				Append/Replace
Path				
<input checked="" type="checkbox"/>	AA Sales Entry Posting Journal	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Html file
				Append
C:\Program Files (x86)\Microsoft Dynamics\GP2018\SOPReceivables.htm				

3. Select the file type checkbox and change the type to Html
4. The report path needs to be the same as the path in the Report Setup window of SmartPost and the report name should be SOPReceivables.htm. (Please note that this report path and name needs to be exact for SmartPost to pickup the report and mail it.)

Purchasing

To setup the Analytical Accounting Posting Reports for the purchasing series:

1. Open the Great Plains Report Setup window by going to Microsoft Dynamics GP - Tools - Setup - Posting - Posting.
2. If you are turning off the AA reporting options then de-select the reports below instead of adding the file paths.
3. We will be changing the Series and Origin for the options below to change the required AA report.

Manual Payment

1. Select the Series of Purchasing and the Origin of Payment Entry.

Series:	Purchasing	Origin:	Payment Entry
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2. Mark the AA Payment Entry Posting Journal report.

Reports:		Send To:		File
Print	Report	?		Type
				Append/Replace
Path				
<input checked="" type="checkbox"/>	AA Payment Entry Posting Journal	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Html file
				Append
C:\Program Files (x86)\Microsoft Dynamics\GP2018\PO Manual Payment.htm				

3. Select the file type checkbox and change the type to Html.
4. The report path needs to be the same as the path in the Report Setup window of SmartPost and the report name should be PManualPaymanet.htm. (Please note that this report path and name needs to be exact for SmartPost to pickup the report and mail it.)

Payables Transaction Entry

1. Select the Series of Purchasing and the Origin of Payables Trx Entry.

Series:	Purchasing	Origin:	Payables Trx Entry
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2. Mark the AA Trx Entry Posting Journal report.

Reports:		Send To:		File	
Print	Report	?		Type	Append/Replace
Path					
<input checked="" type="checkbox"/>	AA Trx Entry Posting Journal	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Html file	Append
C:\Program Files (x86)\Microsoft Dynamics\GP2018\POPayablesTransaction.htm					

3. Select the file type checkbox and change the type to Html.
4. The report path needs to be the same as the path in the Report Setup window of SmartPost and the report name should be POPayablesTransaction.htm. (Please note that this report path and name needs to be exact for SmartPost to pickup the report and mail it.)

Receivings Transaction Entry

1. Select the Series of Purchasing and the Origin of Receivings Trx Entry.

Series:	Purchasing	Origin:	Receivings Trx Entry
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2. Mark the AA Receivings Posting Journal report.

Reports:		Send To:		File	
Print	Report	?		Type	Append/Replace
Path					
<input checked="" type="checkbox"/>	AA Receivings Posting Journal	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Html file	Append
C:\Program Files (x86)\Microsoft Dynamics\GP2018\POReceivingsTrx.htm					

3. Select the file type checkbox and change the type to Html
4. The report path needs to be the same as the path in the Report Setup window of SmartPost and the report name should be PORreceivingsTrx.htm. (Please note that this report path and name needs to be exact for SmartPost to pickup the report and mail it.)

Purchasing Invoice Entry

1. Select the Series of Purchasing and the Origin of Purchasing Invoice Entry.

Series:	Purchasing	Origin:	Purchasing Invoice Entry
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2. Mark the AA Invoice Posting Journal report.

Reports:		Send To: File	
Print	Report	? [Icons]	Type Append/Replace
Path			
<input checked="" type="checkbox"/>	AA Invoice Posting Journal	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/>	Html file Append
C:\Program Files (x86)\Microsoft Dynamics\GP2018\POPurchaseInvoice.htm			

3. Select the file type checkbox and change the type to Html
4. The report path needs to be the same as the path in the Report Setup window of SmartPost and the report name should be POPurchaseInvoice.htm. (Please note that this report path and name needs to be exact for SmartPost to pickup the report and mail it.)

Inventory

To setup the Analytical Accounting Posting Reports for the inventory series:

1. Open the Great Plains Report Setup window b going to Microsoft Dynamics GP - Tools - Setup - Posting - Posting.
2. If you are turning off the AA reporting options then de-select the reports below instead of adding the file paths.
3. We will be changing the Series and Origin for the options below to change the required AA report.

Transaction Entry

1. Select the Series of Inventory and the Transaction Entry.

Series:	Inventory	Origin:	Transaction Entry
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2. Mark the AA Inventory Transaction Journal report.

Reports:		Send To: File	
Print	Report	? [Icons]	Type Append/Replace
Path			
<input checked="" type="checkbox"/>	AA Inventory Transaction Journal	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/>	Html file Append
C:\Program Files (x86)\Microsoft Dynamics\GP2018\VTtransactionEntry.htm			

3. Select the file type checkbox and change the type to Html.
4. The report path needs to be the same as the path in the Report Setup window of SmartPost and the report name should be IVTransactionEntry.htm. (Please note that this report path and name needs to be exact for SmartPost to pickup the report and mail it.)

Transfer Entry

1. Select the Series of Inventory and the Origin of Transfer Entry.

Series: Inventory Origin: Transfer Entry

2. Mark the AA Inventory Transfer Journal report.

Reports:		Send To:		File	
Print	Report	?		Type	Append/Replace
Path					
<input checked="" type="checkbox"/>	AA Inventory Transfer Journal	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Html file	Append
C:\Program Files (x86)\Microsoft Dynamics\GP2018\IVTransferEntry.htm					

3. Select the file type checkbox and change the type to Html.
4. The report path needs to be the same as the path in the Report Setup window of SmartPost and the report name should be IVTransferEntry.htm. (Please note that this report path and name needs to be exact for SmartPost to pickup the report and mail it.)

Processing

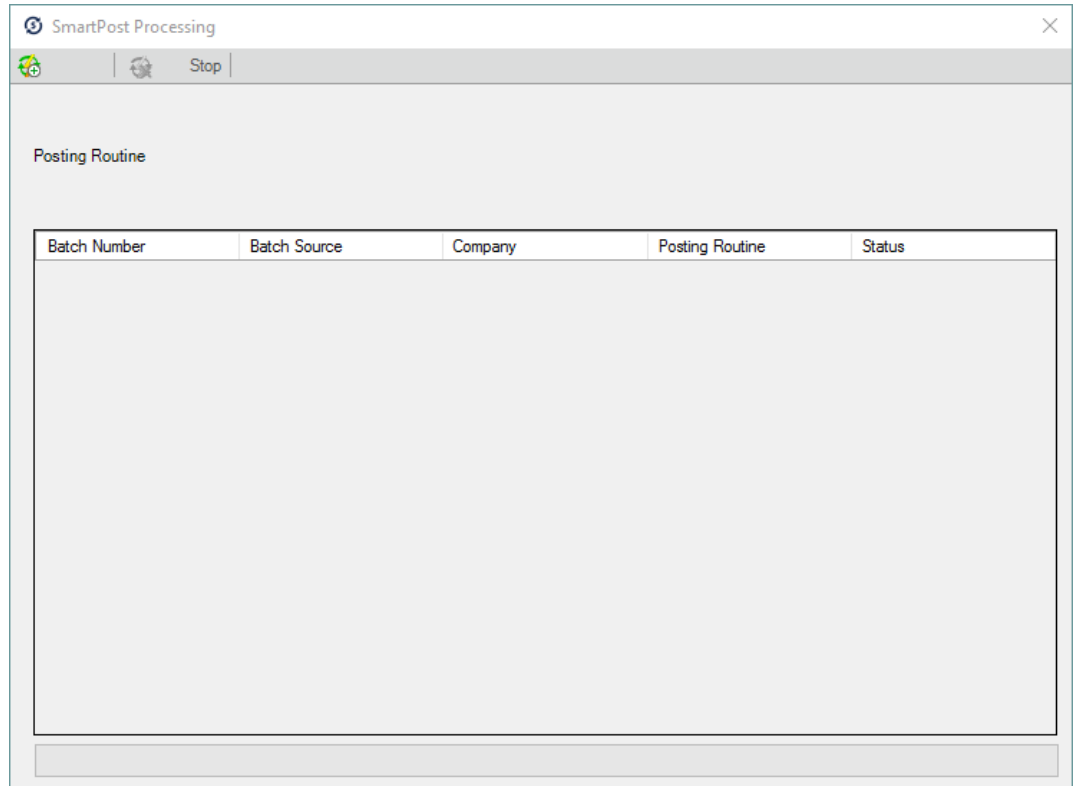
The SmartPost processing window is where the running of routines and posting of batches occur.

When logged into Microsoft Dynamics GP, the user that you are logged in as, will be the user that all batched will be posted as.

Please ensure that this user has access to post all batches Setup in your Posting Routines.

To Start the SmartPost Processing:

1. Open the SmartPost Processing window by going to Microsoft Dynamics GP - Tools - SmartPost - Processing.



2. Click on the Start Button.
3. SmartPost will start looking for batches on all companies for all routines setup.
4. Once a batch or batches are found SmartPost will display these batches in the processing window and start posting them one by one.
5. When you click on the Stop Button and SmartPost is in the process of posting a batch, it will finish the posting of that batch before the window can be closed or the Start button becomes available again.

Preview

The preview window can be used to show the batches that are available to post based on the posting routines that you have setup.

To view the available batches:

1. Open the Preview window by going to Microsoft Dynamics GP - Tools - SmartPost - Preview.

Preview

Redisplay

Routine
☒ All ☐ Routine

Company
☒ All ☐ Company

☒ All ☐ From 4/12/2027 12:00:00 AM To 4/12/2027 12:00:00 AM

Batch Number	Batch Source	No. of Trx	Routine	Next Run	Company
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2. Select the Routines, Companies, and dates you want to view the batches for.
3. Click Redisplay.

Enhancements

- Release [18.5.15.0](#)

18.5.15.0

This release is a compatibility release for SmartPost 18.5. It allows SmartPost to be compatible with Microsoft Dynamics GP 18.5.xxxx. It will contain the same features/fixes as the SmartPost 18.4 build 18.4.10.0 for Microsoft Dynamics GP 18.4.

Release Date: 10/7/2022

Compatible GP Versions: Microsoft Dynamics GP (18.5.xxxx)