Smartlist Integration

Last updated: August 25, 2022

Installation

Advanced Credit Control now integrates with the Microsoft Dynamics GP SmartList module from Accountable Software. To install the extensions, follow these steps:

1. Open the ‘Shortcut Bar’ and select **Add**. Then select **Other Window.**

2. Enter **Install SmartList Extensions** into the **Name** field and then expand the **Advanced Credit Control** folder in the Available Windows list.

3. Expand the **Company** folder. Then find and select the **Install SmartList Extensions** window in the list and push the **Add** button.

4. Click on the **Done** button to close the Add Shortcut window.

5. Select **Install SmartList Extensions** from the Shortcut Bar.

6. Click the **Add** button to install the SmartList extensions. The main SmartList window will open when doing this. Please note: The main SmartList window will sometimes open over the top of the SmartList extensions window.

7. Close the Install Explorer Extensions window and the main SmartList window.

8. Reopen the SmartList window to see the new extensions.

Removing the Advanced Credit Control SmartList extensions is simply a matter of opening the install window again and pushing the Remove button.

Features

The following views have been created or added to by Advanced Credit Control:

Credit Control Customer Records View

This is a new view which displays the information from the Customer Records Maintenance window.

Credit Control Customer Turnovers View

This new view shows the information from the Customer Turnover Enquiry window. The periods shown are calendar periods and the current year is taken from the User Date. The period totals are then show for the current and the prior year, along with grand totals for both years.

Credit Control Diary Entries View

This is a new view which contains the diary entries from the Diary Enquiry window. Entries are show for all users and customers.

Customer View

New Go To items have been added for ‘Credit Control Enquiry’, ‘Turnover Enquiry’, ‘Transaction by Customer’, ‘Diary Enquiry’ and ‘Customer Records’. These all open Credit Control windows for the selected customer.

Receivables Transaction View

A new column has been added to this view called ‘Credit Control Status’. This contains the status of each transaction as set in the Credit Control Transaction Enquiry window.