



GP User to GP Superhero 2018

SmartList Designer + Mail Merge Macro to Create Stock Count Sorted by Bin

Using SmartList Designer to View Item Bin Information

1. Open SmartList Designer by clicking New in SmartList
2. Enter List Name: Item Bin Info
3. Product: Microsoft Dynamics GP
4. Series: Inventory
5. Open: Microsoft Dynamics GP > Tables > Inventory
6. Find Table: Item Quantity Master

The screenshot shows the SmartList Designer interface for a list named 'Item Bin Info'. The 'Database View' on the left shows a tree structure with 'Item Quantity Master' selected and its fields 'Item Number', 'Location Code', and 'Bin Number' checked. The 'Selected Fields' pane on the right lists these three fields. Below that, the 'Relationship' and 'Filter' panes are empty. At the bottom, the 'Results Preview' tab shows a table with three rows of data.

Item Number	Location Code	Bin Number
100XLG		
100XLG	NORTH	
100XLG	SOUTH	

7. Check the boxes by the fields you need.
8. Click Execute Query to Preview

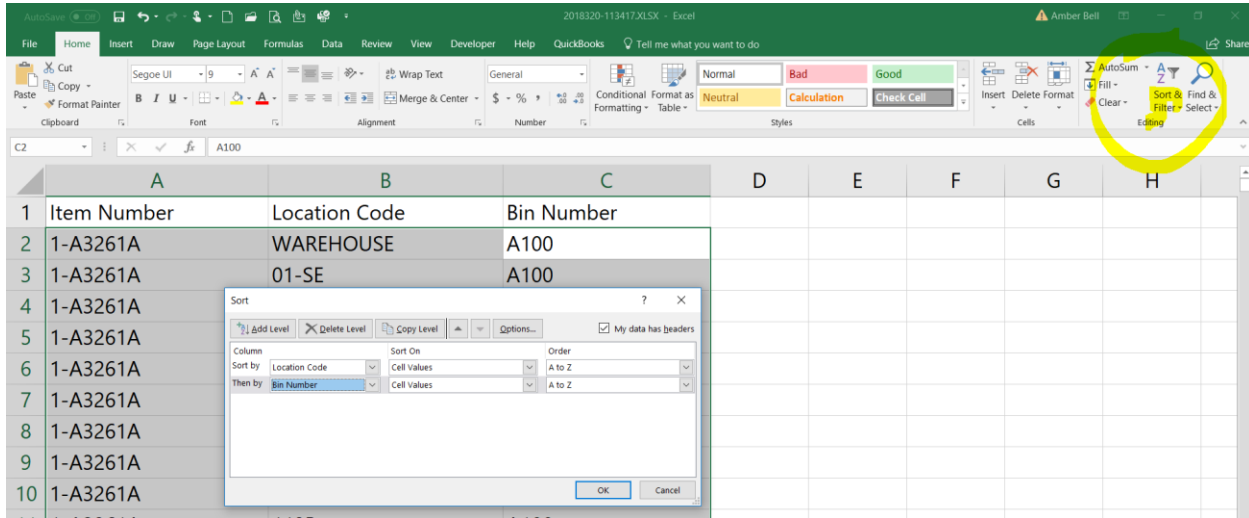
9. Click OK.

[Use this document to update security.](#)

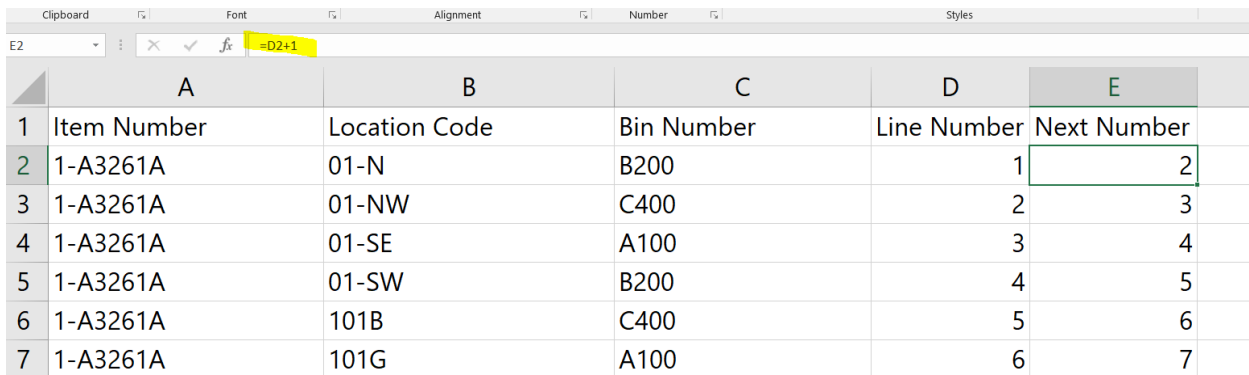
[Use this document to learn how to create a mail merge macro.](#)

Export to Excel and Sort

1. Export the SmartList Data to Excel
2. Sort by Warehouse then Bin



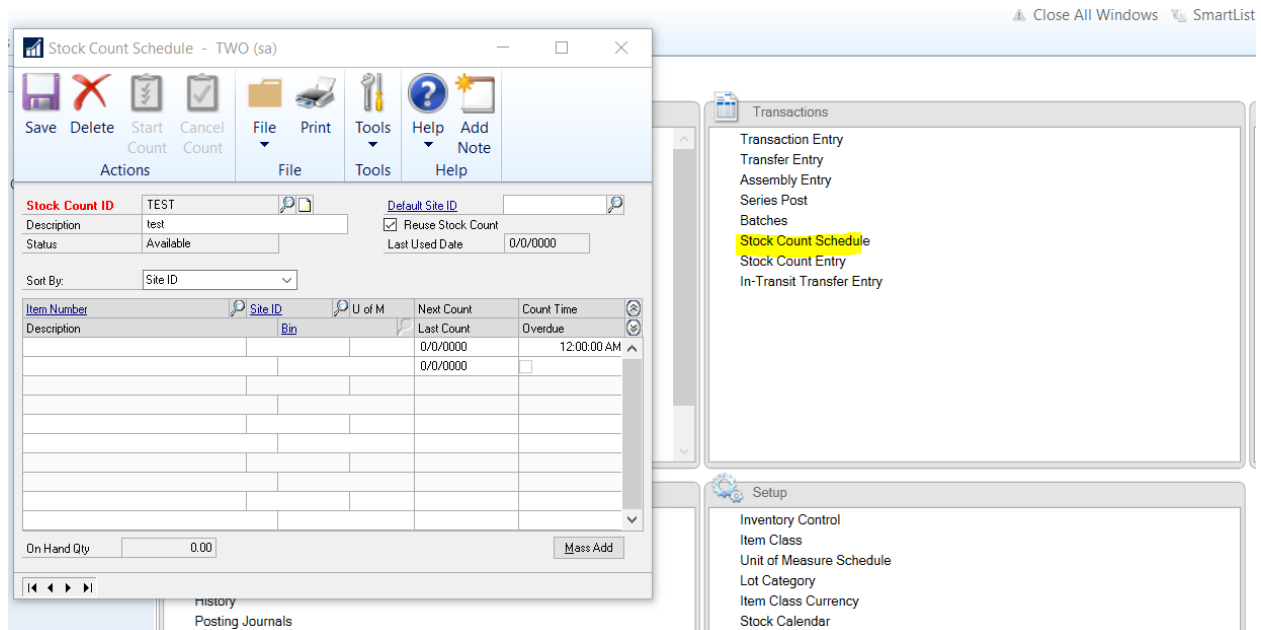
3. Manually add a Line Number column (autofill 1,2,3 on each line)
4. Manually Add a Next Number column (formula is "=___+1")



5. Save.

Create Macro

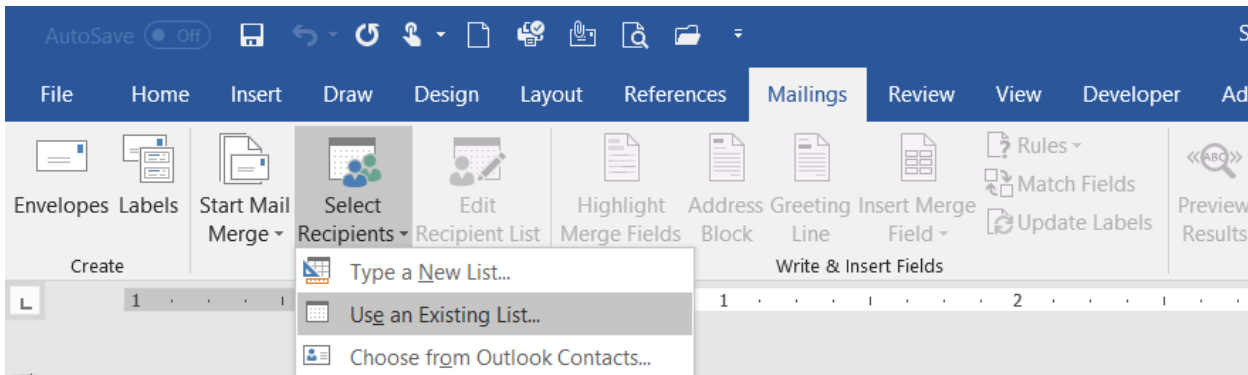
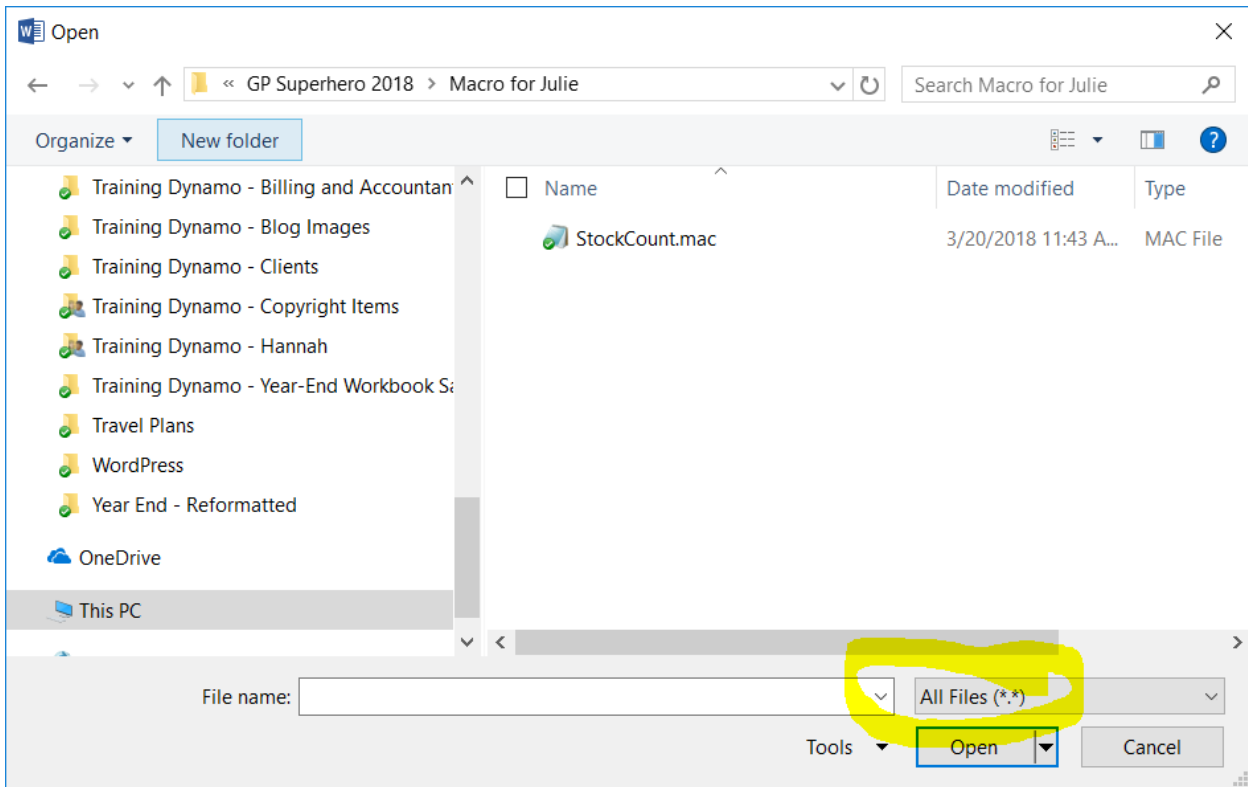
1. Close all extra GP Windows.
2. Inventory > Transactions > Stock Count Schedule



3. Enter Stock Count ID
4. Enter Description
5. Keep the Reuse Stock Count box checked.
6. Skip the Default Site ID field.
7. Click in the first row.
8. Tools > Macro > Record
9. Pick a location and make the name easy to read (i.e. StockCount.mac)
10. Enter the 1st item number.
11. Tab
12. Enter the Site ID
13. Tab
14. Click: Tools > Macro > Stop Record

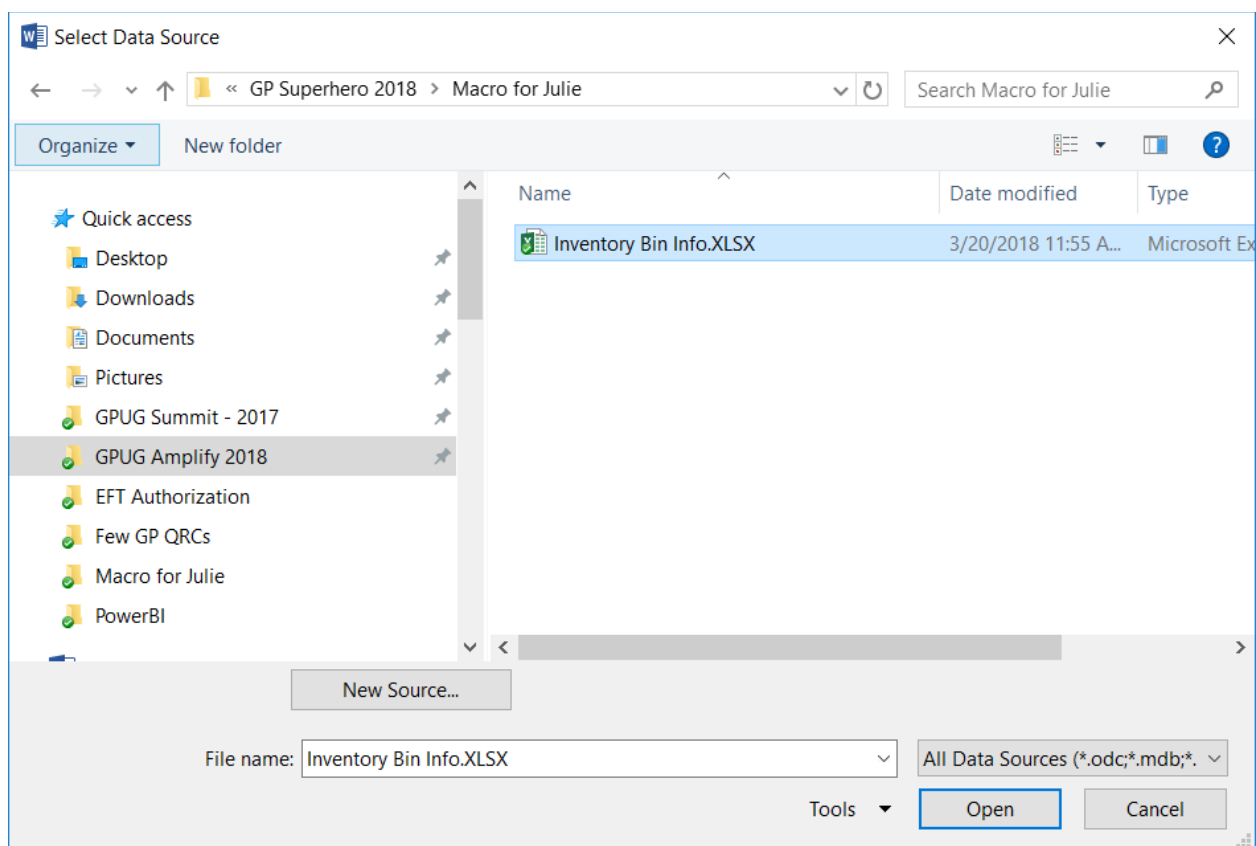
Creating Mail Merged Macro

1. Open MS Word
2. Open Macro File. Remember to change to see "All Files"

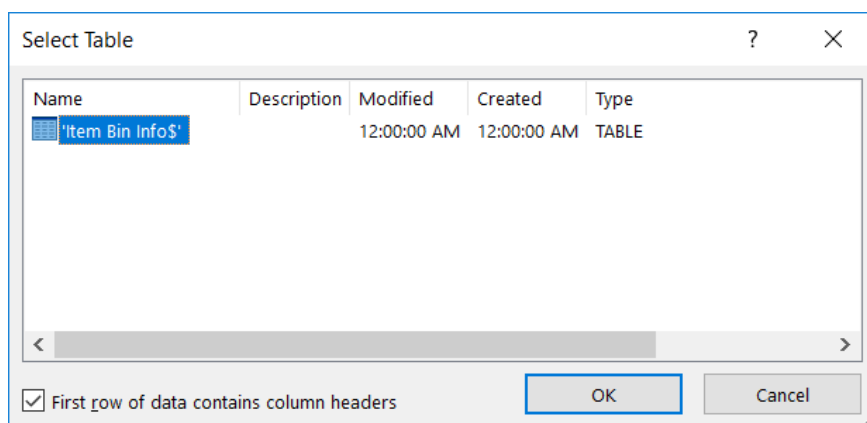


```
# DEXVERSION=18.00.0010.000 2 2  
CheckActiveWin dictionary 'defau
```

3. Click on Mailings Tab
4. Select Recipients
5. Use Existing List
6. Find the List you saved earlier.



7. Click Open
8. Click OK on second screen (pick the worksheet if needed)

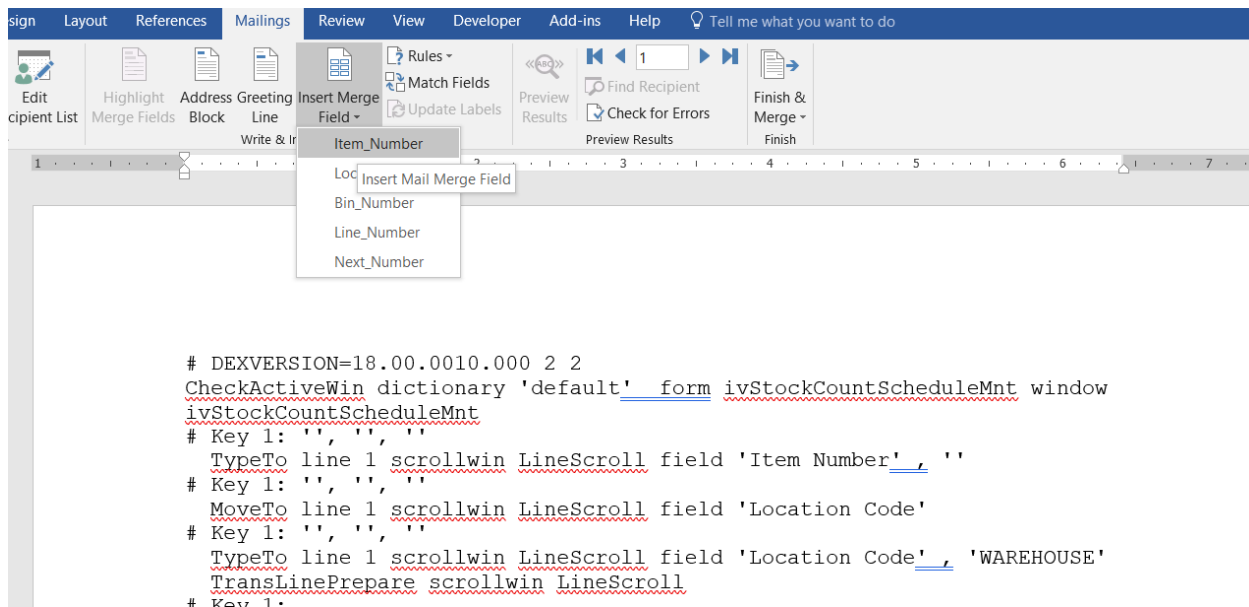


9. Find the fields in the macro that are going to be replaced.

```
# DEXVERSION=18.00.0010.000 2 2
CheckActiveWin dictionary 'default' form ivStockCountScheduleMnt window
ivStockCountScheduleMnt
# Key 1: ', ', ' ', ' '
TypeTo line 1 scrollwin LineScroll field 'Item Number', '1-A3261A'
# Key 1: ', ', ' ', ' '
MoveTo line 1 scrollwin LineScroll field 'Location Code'
# Key 1: ', ', ' ', ' '
TypeTo line 1 scrollwin LineScroll field 'Location Code', 'WAREHOUSE'
TransLinePrepare scrollwin LineScroll
# Key 1:
MoveTo line 2 scrollwin LineScroll field 'Item Number'
```

10. Delete the old data...but leave the ½ quote symbol.

11. Replace with the relevant column from your Excel sheet.

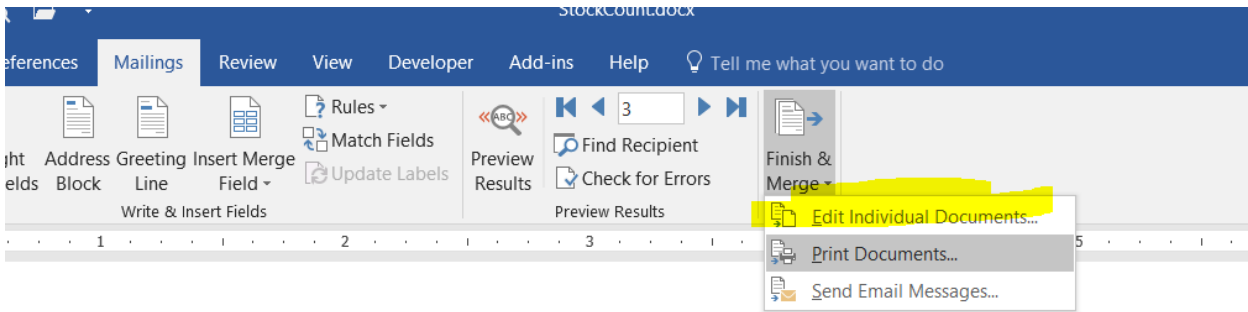


```
# DEXVERSION=18.00.0010.000 2 2
CheckActiveWin dictionary 'default' form ivStockCountScheduleMnt window
ivStockCountScheduleMnt
# Key 1: ', ', ' ', ' '
TypeTo line 1 scrollwin LineScroll field 'Item Number', '
# Key 1: ', ', ' ', ' '
MoveTo line 1 scrollwin LineScroll field 'Location Code'
# Key 1: ', ', ' ', ' '
TypeTo line 1 scrollwin LineScroll field 'Location Code', 'WAREHOUSE'
TransLinePrepare scrollwin LineScroll
# Key 1:
```

```

# DEXVERSION=18.00.0010.000 2 2
CheckActiveWin dictionary 'default' form ivStockCountScheduleMnt window
ivStockCountScheduleMnt
# Key 1: '', '', ''
TypeTo line «Line_Number» scrollwin LineScroll field 'Item Number',
'«Item_Number»'
# Key 1: '', '', ''
MoveTo line «Line_Number» scrollwin LineScroll field 'Location Code'
# Key 1: '', '', ''
TypeTo line «Line_Number» scrollwin LineScroll field 'Location Code',
'«Location_Code»'
TransLinePrepare scrollwin LineScroll
# Key 1:
MoveTo line «Next_Number» scrollwin LineScroll field 'Item Number'

```

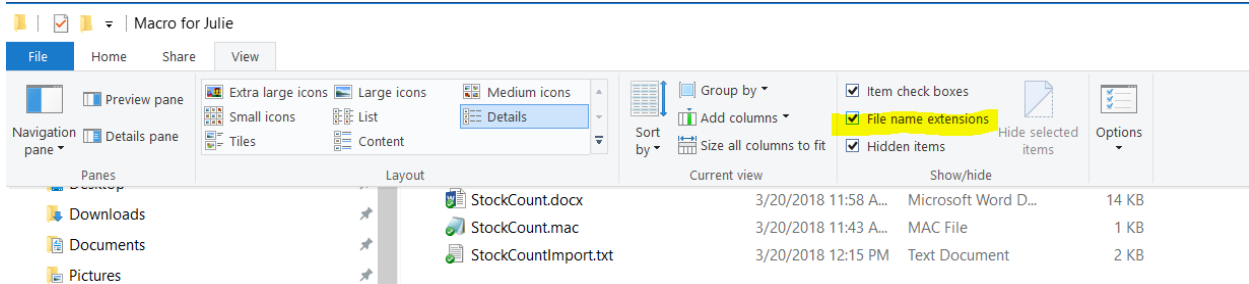
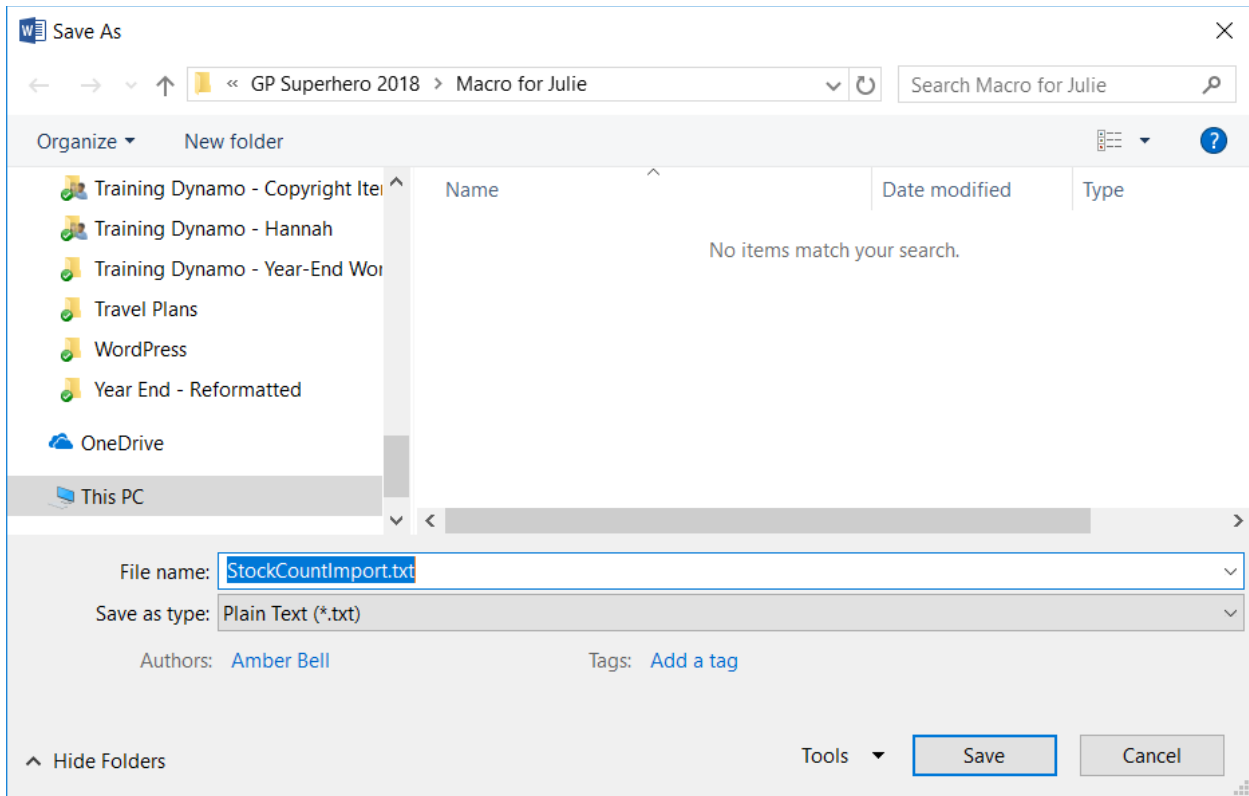


```

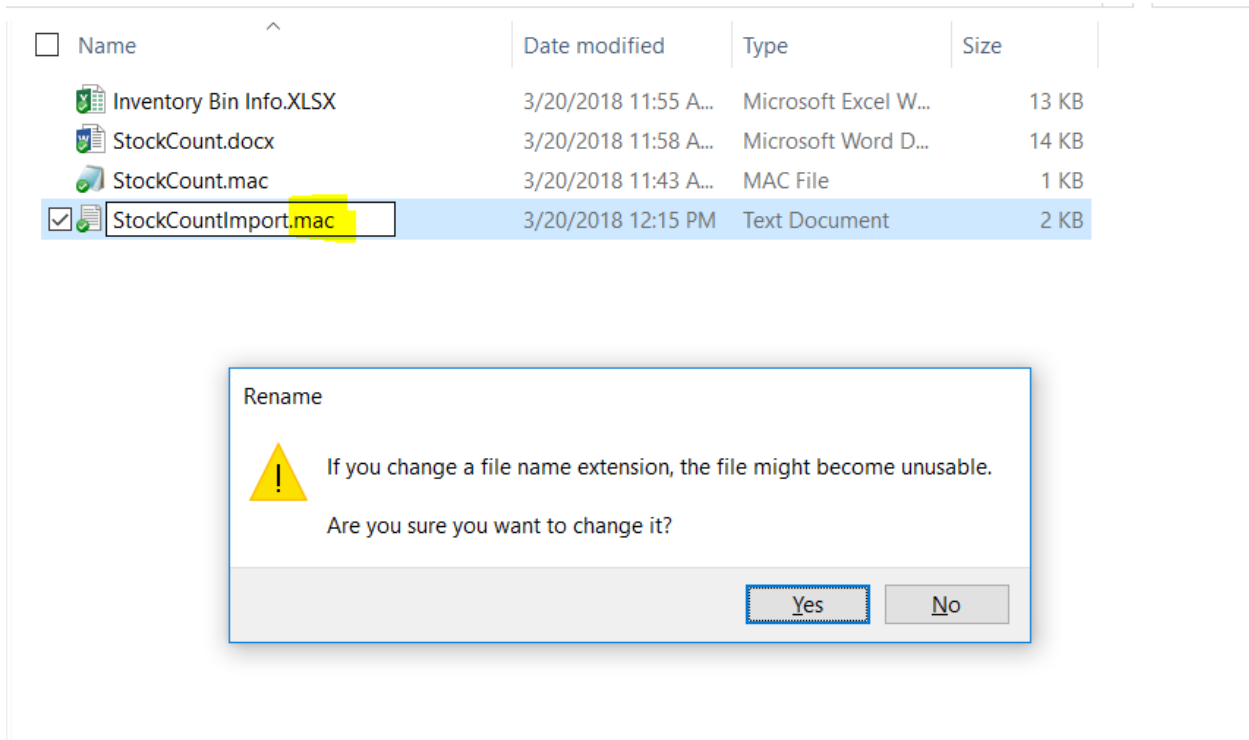
RSION=18.00.0010.000 2 2
tiveWin dictionary 'default' form ivStockCountScheduleMnt
CountScheduleMnt
: '', '', ''
o line «Line_Number» scrollwin LineScroll field 'Item Numb
Number»'
: '', '', ''
- line «Line_Number» scrollwin LineScroll field 'Item Numb

```

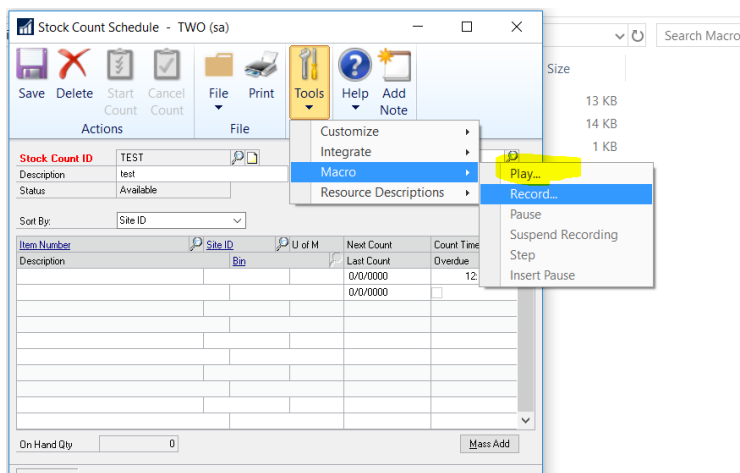
12. Save as a Text File
13. Click OK on the next screen.
14. Close the document
15. Find the file in the folder



16. Make sure you can see the File Name Extensions.
17. Rename the new file from .txt to .mac



18. Go to Transaction Screen in GP.
19. File in "Header info"
20. Make sure cursor is in row 1
21. Tools > Macro > Play
22. Find your Macro.



Stock Count Schedule - TWO (sa)

Save
 Delete
 Start Count
 Cancel Count
 File
 Print
 Tools
 Help
 Add Note

Actions **File** **Tools** **Help**

Stock Count ID TEST **Default Site ID**

Description test Reuse Stock Count

Status Available Last Used Date 0/0/0000

Sort By: Site ID

Item Number	Site ID	U of M	Next Count	Count Time
Description	Bin		Last Count	Overdue
1-A3261A	01-N	Each	0/0/0000	12:00:00 AM
Multi-Core Processor			0/0/0000	<input type="checkbox"/>
1-A3261A	01-NW	Each	0/0/0000	12:00:00 AM
Multi-Core Processor			0/0/0000	<input type="checkbox"/>
1-A3261A	01-SE	Each	0/0/0000	12:00:00 AM
Multi-Core Processor			0/0/0000	<input type="checkbox"/>
1-A3261A	01-SW	Each	0/0/0000	12:00:00 AM
Multi-Core Processor			0/0/0000	<input type="checkbox"/>
I			0/0/0000	12:00:00 AM
			0/0/0000	<input type="checkbox"/>

On Hand Qty Mass Add