



# **SmartSort Installation Guide**

*For Microsoft Dynamics GP 2018*

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# Install SmartSort

## *Pre Installation*

1. If this is an update of an existing SmartSort installation:
  - a. If all Dynamics GP\* clients use a shared network location for SmartSort modified forms and/or reports , perform the following on one Dynamics GP client; otherwise perform the following on each Dynamics GP client:

Check for modified SmartSort forms and reports using the Dynamics GP Customization Maintenance window. If modified forms (DSB3575F.DIC) or reports (DSB3575R.DIC) exist\*\*:

    - Export the modified forms and/or reports using one export package for forms and another for reports.
    - Back up the DSB3575F.DIC and/or DSB3575R.DIC file(s).
    - Print modified reports.
    - Save screenshots of modified forms.
  - b. Back up the DSB3575.DIC file.
2. Download the latest SmartSort 2018 build from our website at [www.ethotech.com](http://www.ethotech.com). Save the downloaded SmartSort 2018 zip file (SmartSort2018\_bXX.zip) to a network location accessible by all Dynamics GP clients.
3. Review the EthoTech Software License included in the SmartSort 2018 zip file – installing the application confirms your acceptance to the terms described in the license.
4. Review the SmartSort Release Notes included in the SmartSort 2018 zip file.
5. Have all users exit Dynamics GP – **users should not be allowed to log in until after all Pre Installation, Installation, and Post Installation steps are complete.**
6. Back up the DYNAMICS database.

*\* Note that throughout this guide, Dynamics GP will be used to mean Microsoft Dynamics™ GP.*

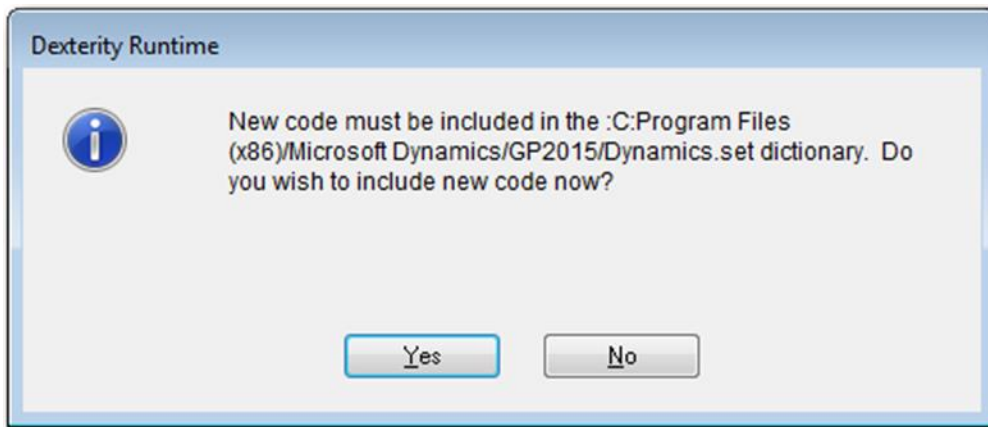
*\*\* You may be required to recreate SmartSort modified forms and/or reports if the existing versions do not update properly.*

## ***Installation***

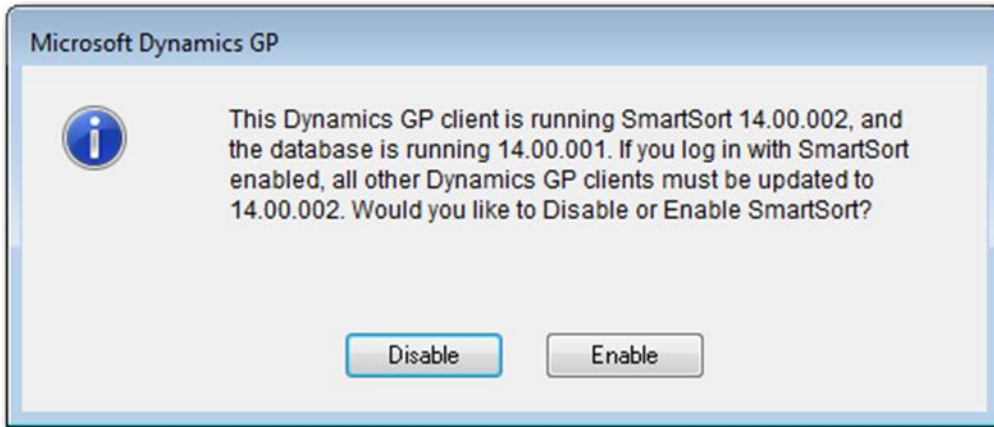
### **On Each Dynamics GP client:**

If a Dynamics GP client exists on the SQL Server, EthoTech recommends installing first to this client.

1. If this is an update of an existing SmartSort installation:
  - a. If modified SmartSort forms or reports exist, make sure the Dynamics.set path points to the appropriate DSB3575F.DIC and/or DSB3575R.DIC file(s).
2. Extract the contents of the SmartSort 2018 zip file to the Dynamics GP application folder (the folder where Dynamics GP is installed).
3. Launch Dynamics GP, choosing **Yes** when prompted to include new code.

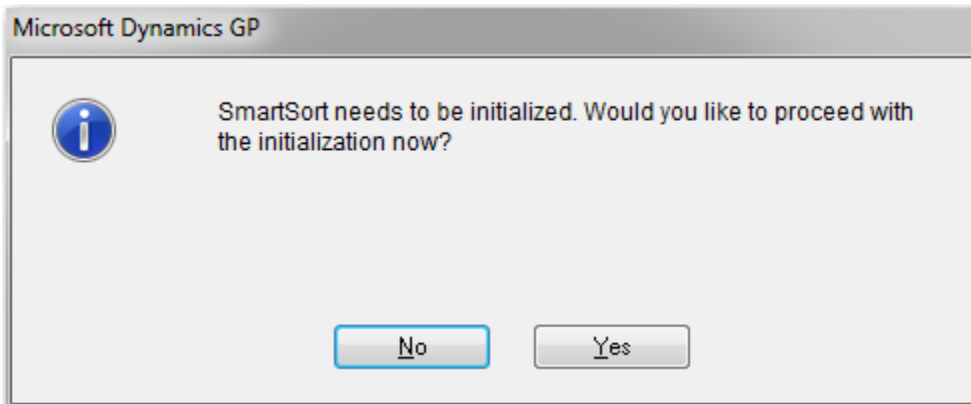


4. If this is an update of an existing SmartSort installation:
  - a. If modified SmartSort forms (DSB3575F.DIC) and/or reports (DSB3575R.DIC) exist, they will be updated at this point.
  - b. A file named DSB3575.DIC will be updated in your Dynamics GP application folder.
5. If this is a new SmartSort installation:
  - a. The Dynamics.set file will be modified to include the information required to run SmartSort.
  - b. A file named DSB3575.DIC will be created in your Dynamics GP application folder.
6. Log into a company as "sa". If an older build of SmartSort has been installed on your system, you'll receive the following warning:



Choose Enable to proceed with the update, or Disable to cancel the update. If you cancel, skip the remainder of the instructions in this guide and restore the backups of the DSB3575.DIC, DSB3575F.DIC, and/or DSB3575R.DIC file(s) that you made in the [Pre Installation](#) section of this guide.

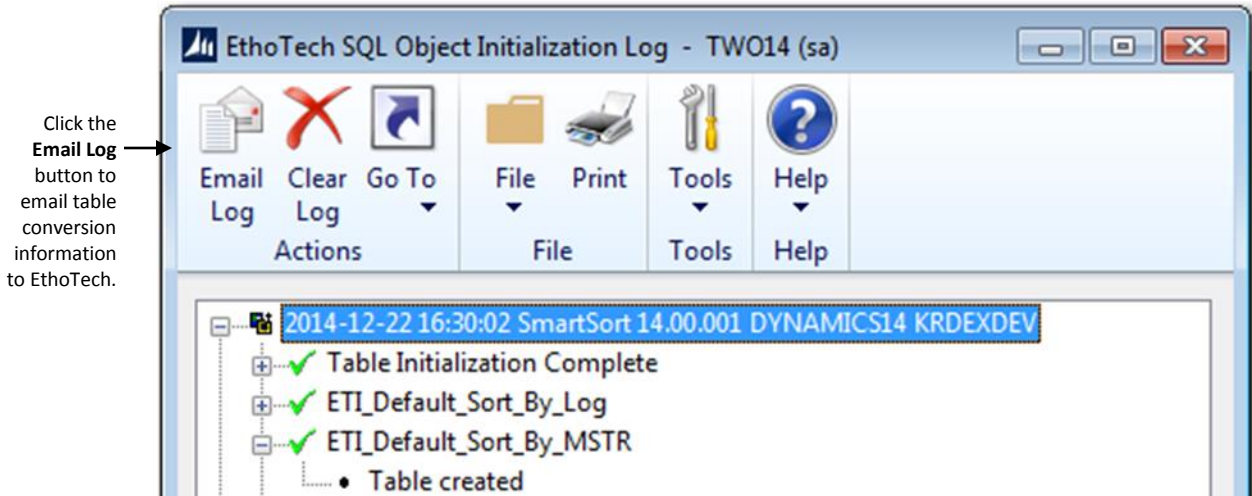
7. Choose **Yes** if prompted to initialize SmartSort.



This process does not destroy any data; it simply creates or updates objects in SQL Server and grants access to these objects for all users. The EthoTech SQL Object Initialization window will display the initialization progress.

*This process may take some time to complete and will report a completion status of successful or unsuccessful. If you receive an unsuccessful message, contact your Microsoft Partner or EthoTech.*

If you are prompted to initialize SmartSort and you choose Yes, a progress window will be displayed. Once the initialization completes, the EthoTech SQL Object Initialization Log window will be displayed.



*The EthoTech SQL Object Initialization Log contains valuable update information. This information is used to troubleshoot table conversation issues. To email this log to the EthoTech Product Support team, click on the **Email Log** button.*

8. If this is an update of an existing SmartSort installation:
  - Test modified forms and/or reports. If any issues exist, use the following steps to resolve the issues:
    - a. Import the modified forms and/or reports using the export files you created before installing the new SmartSort build. Test any modified forms and/or reports.
    - b. If step a does not resolve the issues, exit Dynamics GP and rename/delete the DSB3575F.DIC and/or DSB3575R.DIC file(s). Using Report Writer, import the modified forms and/or reports using the backup of the DSB3575F.DIC and/or DSB3575R.DIC file(s) you made in the [Pre Installation](#) section of this guide. Test modified forms and/or reports.
    - c. If step a or step b does not resolve the issues, exit Dynamics GP, rename/delete the DSB3575F.DIC and/or DSB3575R.DIC file(s), launch Dynamics GP, and re-modify the forms and/or reports.
    - d. Once you're satisfied with your modified forms and/or reports, make a backup of the DSB3575F.DIC and/or DSB3575R.DIC file(s).
  - If you're upgrading from a previous Dynamics GP version, remove the EthoTech Documentation folder and its contents from the Dynamics GP application folder. The new SmartSort documentation was created in the Dynamics GP application folder in step 2 above.
9. If this is a new SmartSort installation:
  - a. If appropriate, edit the Dynamics.set file to reflect the network path to the DSB3575F.DIC and/or DSB3575R.DIC file(s).

## Post Installation

1. Check each Dynamics GP client to ensure that the same SmartSort build is installed (*Help > About Microsoft Dynamics GP >> Additional >> SmartSort AA.BB.CCC*, where AA.BB.CCC is the build number). You can also use the EthoTech Workstation Build Log window (*Inquiry >> System >> EthoTech Workstation Build Log*) to view the SmartSort build installed on each workstation.
2. If a Dynamics GP client is running an earlier SmartSort build, follow the instructions in the [Installation](#) section to update the client to the current build.
3. Use the EthoTech Database Build Log window (*Inquiry >> System >> EthoTech Database Build Log*) to ensure that each company database has been updated to the same EthoSeries build.

## Register SmartSort

By registering your copy of SmartSort, you will enable us to keep you informed of all enhancements, improvements, and upgrades for the software. By communicating with you, we can gather information about additional Dynamics GP enhancements that will assist us in driving powerful, new features and enhancements into EthoTech products. Software registration can also eliminate unauthorized use of software without imposing restrictive copy protection.

EthoTech provides registration keys directly. For more information or to obtain your registration keys, please call (678) 384-7500 ext 1, email [sales@ethotech.com](mailto:sales@ethotech.com) or contact your Microsoft Partner.

To register SmartSort:

1. Start Dynamics GP and log into your company.
2. Click **Register** when you receive a warning that you are running an unregistered version of SmartSort. The EthoTech Registration window will display.
3. Enter your registration keys.  
*If you received the keys via email, simply copy and paste the keys into the appropriate field(s) on the form.*
4. Click **Register**.\*  
*If you mistyped the keys, you will receive a warning message. Try again. If you still receive a warning, contact EthoTech for assistance. Registration keys will be invalid if the Dynamics GP version or site name is incorrect, or if the Dynamics GP System Manager user count is greater than the EthoTech user count.*
5. If the module(s) you are registering now appears with a checkbox in the **Registered** column, close the EthoTech Registration window.

\* *If you are testing SmartSort within the Dynamics GP sample company and do not wish to receive registration messages when logging into production companies, clear the registration keys, mark the Suppress Registration Warning checkbox, and click Register.*

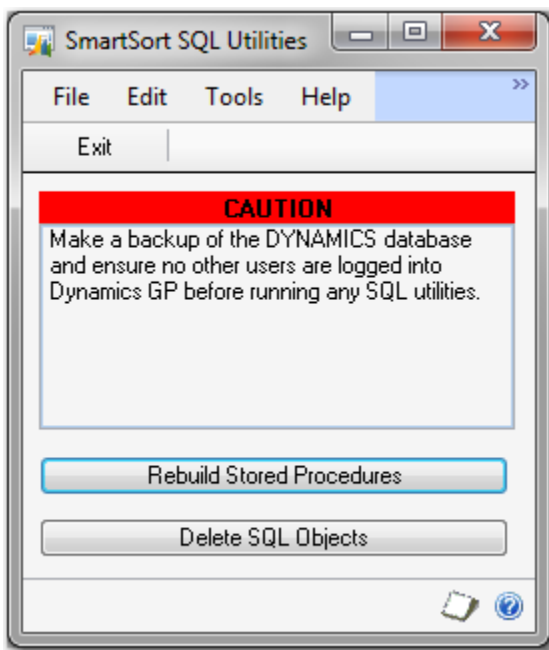


## Uninstall SmartSort

### ***Remove the EthoSeries Database Objects***

If SmartSort will be removed from all Dynamics GP clients, use the following steps to remove the SmartSort database objects:

1. Make sure all users have exited Dynamics GP.
2. Back up the DYNAMICS database.
3. Launch Dynamics GP and log into a company as "sa".
4. Open the SmartSort SQL Utilities window (*Tools >> Utilities >> System >> SmartSort SQL Utilities*).



5. Click the Delete SQL Objects button. When the utility completes, a report will be displayed if EthoSeries objects could not be removed from the DYNAMICS database.
6. Exit Dynamics GP.

## ***Remove SmartSort from each Dynamics GP Client***

1. Remove the DSB3575.DIC file from the location specified in the Dynamics.set file. If the location is a shared network drive, other Dynamics GP clients may be using this file, in which case it should not be removed unless this is the last remaining SmartSort installation on your system.
2. If SmartSort modified forms exist, remove the DSB3575F.DIC file from the location specified in the Dynamics.set file. If the location is a shared network drive, other Dynamics GP clients may be using this file, in which case it should not be removed unless this is the last remaining SmartSort installation on your system.
3. If SmartSort modified reports exist, remove the DSB3575R.DIC file from the location specified in the Dynamics.set file. If the location is a shared network drive, other Dynamics GP clients may be using this file, in which case it should not be removed unless this is the last remaining SmartSort installation on your system.
4. Remove the following files from the Dynamics GP application folder:
  - SmartSort Installation Guide.pdf
  - SmartSort User Guide.pdf
  - SmartSort Release Notes.pdf
5. If no other EthoTech products exist on the Dynamics GP client, remove the following file from the Dynamics GP application folder:
  - EthoTech Software License.pdf
6. Remove the SmartSort entries from the Dynamics.set file:
  - Reduce the first entry (the number of installed applications) by 1.
  - Remove the "3575" and SmartSort" lines.
  - Remove the 3 lines ending in "DSB3575.DIC", "DSB3575F.DIC", and "DSB3575R.DIC".

## ***Remove SmartSort Security Roles and Tasks***

If SmartSort has been removed from all Dynamics GP clients, use the following steps to remove SmartSort security roles and tasks:

1. Use the Dynamics GP User Security Setup window to remove the ETI SS USER and ETI SS MANAGER role from each user in each company.
2. Use the Dynamics GP Security Role Setup window to remove the ETI SS USER and ETI SS MANAGER roles.
3. Use the Dynamics GP Security Task Setup window to remove the ETI\_SS\_USER\_001 and ETI\_SS\_ADMIN\_001 tasks.