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Copying SalesPad Configuration from Test to Live

Megan De Freitas - 2024-11-22 - Setup

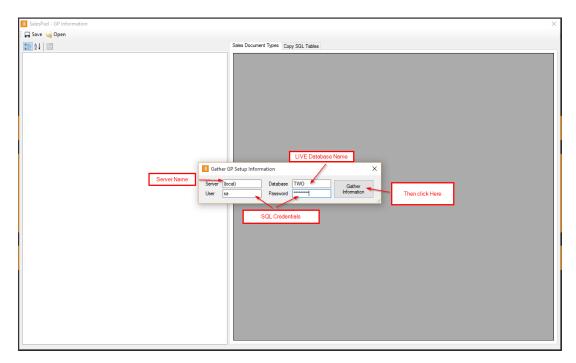
Overview

The development team at SalesPad has created a tool to help you transfer a SalesPad test configuration to a SalesPad live configuration by transferring the Microsoft SQL database. This same tool also exports a .gpinfo file of information on your SalesPad Desktop configuration that you can send to your SalesPad Partner Representative. To download the tool, click <u>here</u>.

Once you've downloaded the GP Setup tool, run the tool and click **Yes** in the Information Source window that will pop up.

II SalesPad - GP Information	Х
🔚 Save 🐋 Open	
24 🔤	Sales Document Types Copy SQL Tables
	tion Source X Would you like to gather information from a database?

Follow the directions as indicated in the screenshot below.



Select the Copy SQL Tables tab so that you can select what you need to copy.

	Save 🛶 Open										
	2↓ 🖻		Sale	es Document Types	Copy SQL Tables	Select "Copy	SQL Tables"				
	CardControl	^		Sales_Doc_Typ	e Sales_Duc_IU	Next_Doc_Id1	Next Doc Id2	Use_Manual_Fulfill	Allocate By	Comment Id	-
	CardControl API Enabled	True		QUOTE	BLKQTE	BLKORD			None		-
	CardControl Enabled	True	1								_
	Company			QUOTE	REPQTE	STDORD			None		
	Company Id	-1		QUOTE	STDQTE	STDORD	STDINV		None		
	Company Name	Fabrikam, Inc.		ORDER	BLKORD	BKORD	BLKINVOICE		Lipeltem		
	Default Warehouse	WAREHOUSE									_
	Currency			ORDER	PHNORD	BKORD	POSINV		DocumentBatch		
	Functional Currency	Z-US\$		ORDER	DEMO	BKORD	STDINV		Lineltem		
	Functional Currency Decimal Places	2		ORDER	SPECORD		SPECINV		DocumentBatch		-
	Functional Currency Format Multi-Currency Enabled	#,##0.00 True									_
	Multi-Currency Enabled	Irue		ORDER	STDORD	BKORD	STDINV		Lineltem		
	Company Database Name	TWO		INVOICE	POSINV	BKORD			Lineltem		
	Dynamics Database Name	DYNAMICS		INVOICE	SERVINV	BKORD			DocumentBatch		-
	Econnect Version	12 0 1 0									
	Great Plains Service Pack	1295		INVOICE	SPECINV	BKORD			DocumentBatch		
	Great Plains Version	GP2013		INVOICE	STDINV	BKORD			LineItem		
	Ste Name	Sales Pad LLC		RETURN	BTN	STDINV			None		
	SQL Server	11.0.5343.0. SP2. Developer Edition (64-bit)									_
	SQL Server Collation Name	SQL Latin1 General CP1 CI AS		BACKORDER	BKORD	STDORD	STDINV		None		
	SQL Server Compatibility Level	SQL2012		ORDER	WMSORDER		STDINV	\checkmark	LineItem		
	SQL Server Instance	LARABRINKMEYER\MSSQLSERVER		INVOICE	FULORD	BKORD			LineItem		
~	Fullfillment										_
	Auto Assign Lot Number	True		ORDER	ORDMAN	BKORD	STDINV		Document Batch		
	Auto Assign Serial Number	True		INVOICE	RMAINV				Lineltem		
	Multi-Bin Enabled	False		INVOICE	SVCZERO				LineItem		
	Quantity Shortage Option	BackOrderBalance		INVOICE	CAINV				Lipeltem		
	GP Modules										_
	Binary Stream Enabled	False		RETURN	RMARTN				None		
	Manufacturing Enabled	True		RETURN	SVCRTN				None		
	Inventory			RETURN	CARTN				None		-
	Intrastat Tracking Enabled	False									_
	Manufacturing	Not Set		ORDER	ROBE		STDINV		Lineltem		
	Outsourcing Cost Bucket Pricing	NOTSET		INVOICE	RTN	BKORD			LineItem		
	Extended Pricing Enabled	False		INVOICE	BLKINVOICE	BKORD			LineItem		-
	Price Required In Price List	False									_
	SalesPad WebAPI	LODG		ORDER	RRVP	BKORD	STDINV		Lineltem		
	SalesPad WebAPI Enabled	True		ORDER	ORDER	BKORD	STDINV		Lineltem		
	SOP Setup	1105		ORDER	VETMED	BKORD	STDINV		Lipeltem		-
	Advanced Distribution Enabled	True									_
	Master Number Tracking Enabled	True		ORDER	PANELS	BKORD	STDINV		LineItem		

Make sure that the Delete boxes are unchecked. You do not need to delete any information.

The schema will depend on what you are copying. If you want to run this tool for DataCollection you will use spgpm, for SalesPad, use dbo.

🔲 Save 🐋	Open	2										
81 <u>2</u> 1 📧	1	v	Sales	s Document Types Copy SQL Tables	_							
✓ CardCor	ntrol	^		Table Name	^		Table Name	Insert	Delete			
CardCont	trol API Enabled	True	•	sp Activity		Þ	sp Email Template					
CardCont	trol Enabled	True	Ľ			,						
Company	ıy			spAlternateItems			spLayout					
Company		-1		spAssembly			sp Script					
Company		Fabrikam, Inc.		spAssemblyID			sp Script Registration					
	Varehouse	WAREHOUSE		spAssemblyLine			sp Smart Printing					
Currence			-									
	al Currency	Z-US\$		spAssemblyResourceLink			sp System Report					
	al Currency Decimal Places al Currency Format	2 #.##0.00	spA	spAttributeClass		8	spSystemGroup					
	ar Currency Format rency Enabled	#,##0.00 True		sp AttributeClassField			sp System Security	M	M			
 Environ 		100					spSystemUser					
	r Database Name	TWO		spAuditLog								
	s Database Name	DYNAMICS		spAuditLogHistory			sp System User Membership		\checkmark			
Econnect		12.0.1.0		spAvalara TaxLine			spUserSetting					
Great Pla	ins Service Pack	1295		sp Avalara Tax Line Detail			spUserField					
Great Pla	ins Version	GP2013										
Site Nam	e	Sales Pad LLC		spBatchShipment			spWorkflow		\checkmark			
SQL Serv		11.0.5343.0, SP2, Developer Edition (64-bit)	spBir	spBinTransferHistory			spWorkflowRule					
	ver Collation Name	SQL_Latin1_General_CP1_CI_AS		spBM010115			spWorkflowConfiguredCondition					
	ver Compatibility Level	SQL2012		spBM010415			ap trontabilited inglicated later					
	ver Instance	LARABRINKMEYER\MSSQLSERVER										
	Fulfillment			spBM10400			You can change the	e tables to i	nclude in			
	Auto Assign Lot Number True			spBOM		the migration by double-clicking on the						
Auto Assi Multi-Bin	ign Serial Number	True		spBOMResourceLink		items from the list on the left. You can						
	Enabled Shortage Option	BackOrderBalance										
Guarity :		backorderbalance		spBusinessObjectSetting		a	also remove items b	by double-c	licking on			
	ream Enabled	False		spBusinessRule		items from the list on the right. You will						
	turing Enabled	True		spBusinessRuleAuditLog			lefinitely want to ins					
Inventor		1140				u						
	Tracking Enabled	False		spBusinessRuleCondition			you want to remove	/e what is e	xisitng.			
 Manufa 				spBusinessRuleEffect			•					
Outsourci	ing Cost Bucket	NotSet		spBusinessRuleEffectParam		_						
 Pricing 						L	.eave schema 🔰 🛛	TEST Dat	abasa			
	Pricing Enabled	False		spCashReceiptCreditCardPayment		1	as dbo					
	quired In Price List	False		spCCH_Root		L	43 400	Nam	e 📃			
 SalesPa 				spCCHChild		_	/					
	d WebAPI Enabled	True		spCCHTrax								
SOP Se			<u> </u>	ISDUUTI ITAX		_						
Advance	d Distribution Enabled	True			Schema	a :	dbo 🖉 🗸 Test D	atabase Name: TE	ŜT			
	umber Tracking Enabled	True										

If you double-click on the columns to the *left*, you will be adding more to your list to copy. If you double click on a line to the *right*, you will be removing that from your list of tables to copy. You can copy anything you like, but some information will not be necessary.

Copy the script and insert it into the database. You do not have to select a company database when you run the query, as it already has what it needs. Initially, this will run as a rollback so that you can see any error messages before you run the script. If you have already run SalesPad and have set up in the LIVE environment, you will want to delete from those tables before running this script so that it copies appropriately.

Copy Script – – ×	×							×
BEGIN TRAN PRINT 'BEGIN TRANSACTION'	^	Document Types Copy SQL Tables						
Move all of the spEmailTemplate IF (object_ID(spEmailTemplate_pre_update) IS NOT NULL)		Table Name	^		Table Name	Insert	Delete	
Drop Table TWO.dbo.spEmailTemplate pre update		spActivity			spEmailTemplate			
GO Select * into TWO.dbo.spEmailTemplate pre update from TWO.dbo.spEmailTemplate		spAlternateItems			spLayout			
GO PRINT 'INSERT INTO sp EmailTemplate'		spAssembly			spScript			
Inset into TWO.dbo.spEmailTemplate ([Created_By],[Template_Body],[Template_Name],[Template_Type]) SELECT [Created_By],[Template_Body],[Template_Name],[Template_Type] FROM TEST.dbo.spEmailTemplate		spAssemblyID			spScriptRegistration			
[Created_by],[Template_Body],[Template_Name],[Template_Type]FROM_TEST.dbo.spt:mailTemplate GO		spAssembly Line			spSmartPrinting			N
Move all of the soLavout		spAssemblyResourceLink			spSystemReport			ß
IF (object_ID(spLayout_pre_update) IS NOT NULL) Drop Table TWO.dbo.spLayout_pre_update		spAttributeClass			spSystemGroup			
GO		spAttributeClassField			spSystemSecurity			
Select * into TWO.dbo.spLayout_pre_update from TWO.dbo.spLayout GO		spAudtLog			sp System User			
PRINT 'INSERT INTO spLayout' insert into TWO dbo spLayout ([Language],[Last_Updated],[Layout],[Layout_ID],[Layout_Owner],[Layout_Type],		spAudtLogHistory			spSystemUserMembership			
[Read_Only][System_Group][Uer_Mane]) SELECT [Language][Lest_Update[Lest_Update][Layout_ID].[Layout_D].[Layout_Owner]. [Layout_Type].[Read_Only][System_Group].[Uer_Name] FROM TEST.dbo.spLayout		spAvalara TaxLine			spUserSetting			
[Layout_type],[Read_Uniy],[system_Group],[User_Name] FROM TEST.dbo.spLayout GO		spAvalara TaxLineDetail			spUserField			
-Move all of the spScript		spBatch Shipment			spWorkflow			
IF (object_ID(spScript_pre_update) IS NOT NULL) Drop Table TWO.dbo.spScript_pre_update		spBinTransferHistory			spWorkflowRule			
GO		spBM010115		•	spWorkflowConfiguredCondition			
Select * into TWO.dbo.spScript_pre_update from TWO.dbo.spScript GO		spBM010415						
PRINT 'INSERT INTO spScript' Insert into TWO.dbo.spScript (Script). Script Name). (Script Type)) SELECT (Script). (Script Name). (Script Type) FROM	\sim	spBM10400						
TEST.dbo.spScript	1	spBOM						
GO	Г	When you click Create you	will	aet :	a			
-Move all of the spScriptRegistration IF (object ID('spScriptRegistration pre update') IS NOT NULL)		script that you can copy in						
Drop Table TWO.dbo.spScriptRegistration_pre_update		query in SQL. Thuis transa						
GO Select * into TWO.dbo.spScriptRegistration_pre_update from TWO.dbo.spScriptRegistration		not complete untill you re			· .			
GO PRINT 'INSERT INTO sp ScriptRegistration'	l e	ROLLBACK to COMMIT at t			m			
insert into TWO.dbo.sp.ScriptRegistration ([Profile_Name],[Profile_Skin],[Script_Name],[Script_Parameters], [Script_Type],[Seg]) SELECT [Profile_Name],[Profile_Skin],[Script_Name],[Script_Parameters],[Script_Type],[Seg]	1.1	of the query. This is so that						
FROM TEST.dbo.spScriptRegistration		run the query to see if there						
60		sues with the script before						
Move all of the spSmartPrinting IF (object_ID(spSmartPrinting_pre_update) IS NOT NULL)		sues with the script before	you	Tun	<u>n.</u>			
Drop Table TWO.dbo.spSmartPrinting_pre_update		spCCHChild						
GO Select * into TWO.dbo.spSmartPrinting_pre_update from TWO.dbo.spSmartPrinting		spCCHTrax	~					
GO PRINT 'INSERT INTO so SmartPrinting'			Scherr	a:	dbo ∨ Test Da	stabase Name: T	EST	Create
insert into TWO dbo.spSmartPrinting ([Copies],[Email],[Email_Current_User],[Email_From],[Email_Sales_Rep],	~							

Change the rollback to Commit and execute the query. You should now see everything you set up in TEST in the LIVE company database.