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Inventory Manager Configuration

Megan De Freitas - 2025-07-10 - Setup

Overview

SalesPad DataCollection increases accuracy and control in your warehouse inventory operations. DataCollection Mobile is designed to work with DataCollection Extended Warehouse Module to advance the level of control you have over your warehouse inventory.

Hardware & Software Requirements & Supported Devices

Please refer to System and Hardware Requirements.

DataCollection Installation

To install the DataCollection Console follow the steps below:

- 1. Find the DataCollection Console installer file and double-click it.
- 2. The installation wizard appears. Click Next.
- 3. Read the End User License Agreement (EULA) and click the **I Agree** button to continue.
- 4. Install the program to the default (or desired) folder.

DataCollection 99.9.1.524 Setup	
Choose Install Location Choose the folder in which to install DataCollection 99.9.1.524.	12245
Setup will install DataCollection 99.9.1.524 in the following folder. To inst folder, dick Browse and select another folder. Click Next to continue.	all in a different
Destination Folder C:\Program Files (x86)\DataCollection	Browse
Space required: 85.2MB Space available: 436.5GB	
Copyright (c) SalesPad Solutions, LLC. (v99.9.1.524) –	Cancel

- 5. Follow the instructions until the application has been installed.
- 6. Click **Finish** when the Setup Wizard has completed.

Create a Database Connection

To create a connection to your GP database follow the steps below:

 On the DataCollection Console Login screen, click the ellipsis (...) button in the Connect To field. The Connection Editor window appears.

	Connection Editor	
	Connection Name:	SALESPAD
	Server: Connect Using: User ID: Password Database	Windows Authentication SQL Authentication
(please	Export Import	. OK Cancel

- 2. Specify a Connection Name.
- 3. Enter the Server Name or IP address. This is the server hosting the GP database and the Database used for this connection.
- Choose an Authentication Method and enter the credentials.
 User ID: User ID used to access the SQL server
 Password: Password used to access the SQL server
- 5. Click **OK** to save the connection and return to the Login screen.

Note: Regardless of the method of authentication, the user must be a part of the DYNGRP group on your database. If you will be using the Windows Authentication method on the main login screen, the connection will be forced to Windows authentication and any User ID and Password specified here will be ignored.

Required min SQL user security

- DYNAMICS db: DYNGRP, public
- MASTER db: public
- tempdb: db_datareader, db_datawriter, public
- COMPANY db: db_datareader, db_datawriter, DYNGRP, public
 - Note: If you are still getting error messages, enable db_datareader on DYNAMICS

Required min Windows user security

SalesPad needs the following permissions to run:

- SalesPad Install Folder Read
- ProgramData and AppData Folders Read/Write
- Registry HKEY_CURRENT_USER\Software\SalesPad Read/Write

Log in to DataCollection

You may click on the + button to the right of the Connect To combo box to create additional connections. The - button deletes connections. The ellipsis (...) button allows you to edit an existing connection.

All connections appear as options under the Connect To combo box.

- 1. Select a connection from the list.
- 2. Enter User ID and Password and click the Login button.

Database Update

You may be asked to install a Database Update. To do so, please follow the steps below:

- 1. Enter the SQL Server administrator user and password.
- After ensuring a database backup is in place, click the I have made a database backup option.
- 3. Click the Login button.

.ogin		E
G DataCollect	ion	v99.9.1.524
Please provi User: Password	de a SQL user name and password with 'sysadmin' acc sa Use my Trusted Credentials	iess:
√ I ha	ve made a database backup	View Update SQL
Server LOC	ALHOST, Database: TWO	
Copyright 20	13 - SalesPad LLC.	Login Cancel

- 4. The Database Update will begin analyzing database differences. This analysis may take a few minutes.
- 5. When the Database Analysis is complete, click the **Login** button.

Setting up Security in DataCollection

DataCollection Console provides a security editor to set up and manage security groups. Security groups determine which modules and features are available to users when they log in to DataCollection. If you have used the Security Editor in SalesPad, you will be familiar with the Security Editor in DataCollection Console.

To access the Security Editor in DC Console, follow the steps below:

- 1. Log in to DC Console with administrator privileges. The 'sa' user is automatically set up by default on new installations. You may use the 'sa' user to start setting up users and groups and change the groups to fit your needs.
- 2. Open the **Administrative** dropdown, then click the **Security Editor** icon.

System Users		System Groups			
🕄 New 🔞 Delete		🕒 New 🔞 Delete	Security	: 📄 Copy Security 🛛 🕡 Export Security 🖓 Import Security 🖉 Enable All Settings 📋 Disable All Settings	
User Name	Security Group	Security Group	Enabled	Plugin Name	-
console	Accounting	Accounting		Active Users	
sa	Admin	Admin		Activity Lodis*	
salespad	Admin	Receiving		Allocation Monitor	
sinisam	Admin			Settings	
				Bin Lookup	
				Customer Inventory	
				Customer Warehouse Configuration	
			V	Database Update *	
			V	DataCollection Server	
			V	Email Template Editor	
			V	Fields"	
			V	Grid*	
			V	GridReports*	
lser Name	console			Inventory Lookup	
assword	••		V	Mobile Bin Transfer	
lisplay Name				Mobile Inventory & disistment	
ocked	Locked				
eset Password Next Log	in 🔲 Reset Password Next Login				
ecurity Group	Accounting	-			

- Create a Security Group. A Security Group must be entered to display the Security Settings on the right pane. To add a Security Group, click New under Group Security. Enter the name of the Security Group in the pop-up window and click OK.
- To give users access to execute future database updates under Database Update > Can Update Database and set it to True.
- 5. To add users to a Security Group, click **New** under System Users.

New User	
User Name	User 1
Security Group	Admin 👻
	OK Cancel

6. Enter information about the new user in the pop-up window and click **OK**. To assign

the user to a Security Group, you must enter the name of the group in the Security Group field.

7. You must log out and log back in for security changes to take effect.

Configuring the DataCollection Service

The DataCollection Service is responsible for hosting the handheld device so users can manage inventory and execute transactions via the scanners. Follow the instructions below to configure the DC Service:

1. Click on the **Settings** button in the toolbar.

P Settings ×	
Close 🚽 Save	
host	
2 L	
4 Host Service	
Chosen_Certificate	
Close_Timeout	2
DNS_Name	localhost
Enable_SSL	False
Host_Port_Number	5501

- 2. Type host in the filter and press enter in the keyboard.
- 3. Change the *DNS Name* to the server name or IP address of the computer where you installed the DC Console.
- 4. Change the Host Port Number to the port of your choice. You may also use the default port 5501.
- 5. Click on the **DataCollection Server** icon on the toolbar.



- 6. Click the **Start** button to start the DC Service.
 - 1. If you update the server address, please restart the service.
 - 2. If Windows Firewall is enabled you may have to disable it or enter an

exception to the port you are using to host the service.

Close	Start	Stop	Install As Service	Uninstall Service
erver S	ettinas			



Uninstalling DataCollection

To remove the DataCollection Console from a workstation, follow the steps below:

- 1. On your PC, click the Windows **Start** button. The Start Menu appears.
- 2. Click the Control Panel option.
- 3. Find the Add or Remove Programs icon and double-click on it.
- 4. The Add or Remove Programs screen appears.
- 5. Select SalesPad DataCollection from the list and click the **Change/Remove** button.
- 6. Click **OK** when the Finished screen appears.