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Documentation Hyperlinks

Megan De Freitas - 2024-11-22 - [Sales](#)

Overview

In an effort to make help functions and documentation more readily available in Sales Pad, documentation hyperlinks have been added to the right-click menu for the main forms that launch the user documentation portal on the Sales Pad website (www.cavallo.com). Using this functionality, you can easily be linked to documentation from within any Sales Pad module.

Example: Sales Monitor

To see an example of how documentation hyperlinks work in SalesPad, open the Sales Monitor module in Sales Pad. Click on Sales Monitor, then right-click to display the dropdown menu. In this menu, hovering over the Links item displays the Sales Documentation hyperlink.

The screenshot shows the Sales Monitor module interface. A right-click context menu is open over the 'ENDING' folder in the left-hand tree view. The menu options include: Auto Start, Un-Tab Window, Favorite, Close, Close Other Tabs, Close All Tabs, Links (highlighted), and Security. The 'Links' option has a sub-menu arrow. The main window displays a table of orders with columns: Doc #, Doc Date, Customer, Req Ship Date, Total, Rep, and Status. The table lists various orders for 'Aaron Fitz Electrical' with dates ranging from 08/03/2018 to 09/17/2018. The status for most orders is 'ZL FPD' or 'FP FPD'. The total amount for the selected orders is 853.519.

Doc #	Doc Date	Customer	Req Ship Date	Total	Rep	Status
ORDST2265	08/03/2018	Aaron Fitz Electrical	08/03/2018	0.00	PAUL W.	ZL FPD
ORDST2266	08/03/2018	Aaron Fitz Electrical	08/03/2018	0.00	PAUL W.	ZL FPD
ORDST2267	08/03/2018	Aaron Fitz Electrical	08/03/2018	21.40	PAUL W.	FP
ORDST2268	08/07/2018	Aaron Fitz Electrical	08/07/2018	21.40	PAUL W.	FP
ORDST2270	08/07/2018	Aaron Fitz Electrical	08/07/2018	0.00	PAUL W.	FP FPD
ORDST2271	08/15/2018	Aaron Fitz Electrical	08/15/2018	20.00	PAUL W.	BO PBO PP
ORDST2272	08/15/2018	Aaron Fitz Electrical	08/15/2018	20.00	PAUL W.	FP
ORDST2273	08/29/2018	Aaron Fitz Electrical	08/29/2018	0.00	PAUL W.	ZL FPD
ORDST2274	08/29/2018	Aaron Fitz Electrical	08/29/2018	0.00	PAUL W.	ZL FPD
ORDST2275	08/30/2018	Aaron Fitz Electrical	08/30/2018	0.00	PAUL W.	FP FPD
ORDST2276	08/31/2018	Aaron Fitz Electrical	08/31/2018	20.00	PAUL W.	FP
ORDST2277	08/31/2018	Aaron Fitz Electrical	08/31/2018	20.00	PAUL W.	FP
ORDST2278	09/04/2018	Aaron Fitz Electrical	09/04/2018	20.00	PAUL W.	BO PBO PP
ORDST2279	09/04/2018	Aaron Fitz Electrical	09/04/2018	518.95	PAUL W.	FP FPD
ORDST2280	09/05/2018	Aaron Fitz Electrical	09/05/2018	114.169	PAUL W.	FP
ORDST2281	09/06/2018	Aaron Fitz Electrical	09/06/2018	0.00	PAUL W.	ZL FPD
ORDST2282	09/07/2018	Aaron Fitz Electrical	09/07/2018	38.80	PAUL W.	EM
ORDST2283	09/13/2018	Aaron Fitz Electrical	09/13/2018	19.40	PAUL W.	BO FBO
ORDST2284	10/01/2018	Aaron Fitz Electrical	10/01/2018	19.40	PAUL W.	BO FBO
ORDST2285	09/17/2018	Aaron Fitz Electrical	09/17/2018	0.00	PAUL W.	ZL FPD

Clicking on this hyperlink takes you directly to the main documentation page on cavallo.com. You can use the search field at the upper right of this page to find the documentation you're looking for.

SalesPad Support

SalesPad Desktop

A full front-end order entry, purchasing, sales, and inventory management solution that fully integrates with Microsoft Dynamics GP, SalesPad Desktop is the complete package for distribution and manufacturing companies. Process orders more accurately and efficiently, while having full visibility into each step of your fulfillment. Simplify the lives of your customer service and sales reps by putting information at their fingertips with powerful Excel-style searching. Operating outside of Dynamics GP cuts down on your costs per seat and adds additional levels of security by removing warehouse employees from your accounting environment, and vice versa.

System

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[Security Validate Customer PO](#)
[Security Script Manager](#)
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Setup

[Note Shortcut Maintenance](#)
[Packaging Template Setup](#)
[Business Object Workflow](#)
[See all 53 articles »](#)

Sales

[Special Pricing Maintenance](#)
[Price Maintenance](#)
[Creating and Opening Sales Documents](#)
[See all 104 articles »](#)

CRM

[TeleSales](#)
[Sales Person Search](#)
[Sales Person Card](#)
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Reporting**Utilities**

[Credit Card Utilities](#)
[Remote Library](#)
[Locating Old SalesPad Desktop License Files](#)
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Dispatch

[Dispatch Geo-coordinates](#)
[Dispatch](#)

Equipment Management

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Manufacturing

[Manufacturing Routing](#)
[Manufacturing Orders](#)
[Manufacturing BOMs](#)

Configurator

[Configurator](#)
[Configurator with Manufacturing](#)
[Configurator Advanced Part One](#)
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PayFabric

Using the same right-click menu, you can also launch the Help Guide for the Sales Pad module you are in. In the example below, the hyperlink would take you to the Sales Monitor Help Guide.

Sales Monitor - TWO - SalesPad

Application Automations CRM Distribution BOM Equipment Management Inventory Purchasing Reporting Returns Manage

SalesPad Today Customer Search Sales Monitor Sales Documents Counter Sales Sales Line Mass Update Sales Batch Processing Inventory Analysis Inventory Transfers Inventory Lookups Sales Transfers Purchasing Reporting

Customer Search Sales

Close Refresh Hide All

ALL ORDERS (SPECORD) ORDERS (S

ID

ENDING

SP_ORDER

DOCS

EMAIL

NEW WHATEVER

ORDERS4/12

READY TO PICK

WMSORDER ORDER

ORDER

BKORD BACKORDER

SALES BACKORDER

CAINV INVOICE

FULORD INVOICE

POSINV INVOICE

RMAINV INVOICE

SERVINV INVOICE

CONTRACTS

SPECINV INVOICE

INVOICE

SLS SEP FULFILL

STDINV INVOICE

SP_ORDER

DOCS

ENDING

INVOICE

NEW ORDER

SVCZERO INVOICE

CARTN RETURN

RMARTN RETURN

Auto Start

Un-Tab Window

Favorite

Close

Close Other Tabs

Close All Tabs

Links

Security

Batch: NEW ORDER

Doc#	Doc Date	Customer	Req Ship Date	Total	Rep	Status
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ORDST2274	08/30/2018	Aaron Fitz Electrical	08/30/2018	0.00	PAUL W.	FP FPD
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ORDST2284	10/01/2018	Aaron Fitz Electrical	10/01/2018	19.40	PAUL W.	BO FBO
ORDST2285	09/17/2018	Aaron Fitz Electrical	09/17/2018	0.00	PAUL W.	ZL FPD
20				853.519		

Ready

9/18/2018 sa TWO (1 of 231 seats in-use) v4.6.3.4