



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' section in the left sidebar. The menu options include: Close, Refresh, Hide 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' and 'PAUL W.' with dates ranging from 08/03/2018 to 09/17/2018. The status of the orders varies, including 'ZL FPD', 'FP', 'BO PBO PP', and 'EM'.

Doc #	Doc Date	Customer	Req Ship Date	Total	Rep	Status
Batch: NEW ORDER						
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
ORDST2269	08/07/2018	Aaron Fitz Electrical	08/07/2018	0.00	PAUL W.	FP FPD
ORDST2270	08/15/2018	Aaron Fitz Electrical	08/15/2018	20.00	PAUL W.	BO PBO PP
ORDST2271	08/15/2018	Aaron Fitz Electrical	08/15/2018	20.00	PAUL W.	FP
ORDST2272	08/29/2018	Aaron Fitz Electrical	08/29/2018	0.00	PAUL W.	ZL FPD
ORDST2273	08/29/2018	Aaron Fitz Electrical	08/29/2018	0.00	PAUL W.	ZL FPD
ORDST2274	08/30/2018	Aaron Fitz Electrical	08/30/2018	0.00	PAUL W.	FP FPD
ORDST2275	08/31/2018	Aaron Fitz Electrical	08/31/2018	20.00	PAUL W.	FP
ORDST2276	08/31/2018	Aaron Fitz Electrical	08/31/2018	20.00	PAUL W.	FP
ORDST2277	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
20				853.519		

Clicking on this hyperlink takes you directly to the main documentation page on [cavallo.com](http://www.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

[System User Card](#)
[Security Validate Customer PO](#)
[Security Script Manager](#)
[See all 26 articles »](#)

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

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[Remote Library](#)
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[Dispatch](#)

Equipment Management

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Manufacturing

[Manufacturing Routing](#)
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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 Document Mass Update Sales Line Mass Update Sales Batch Processing Inventory Lookup Inventory Analysis Inventory Transfers Purchasing Reporting

Customer Search Sales

Close Refresh Hide All

ALL ORDERS (SPECORD) ORDERS (S

ID Doc# Doc Date Customer Req Ship Date Total Rep Status

Batch: NEW ORDER

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

ORDST2270 08/15/2018 Aaron Fitz Electrical 08/15/2018 20.00 PAUL W. BO PBO PP

ORDST2271 08/15/2018 Aaron Fitz Electrical 08/15/2018 20.00 PAUL W. FP

ORDST2272 08/29/2018 Aaron Fitz Electrical 08/29/2018 0.00 PAUL W. ZL FPD

ORDST2273 08/29/2018 Aaron Fitz Electrical 08/29/2018 0.00 PAUL W. ZL FPD

ORDST2274 08/30/2018 Aaron Fitz Electrical 08/30/2018 0.00 PAUL W. FP FPD

ORDST2275 08/31/2018 Aaron Fitz Electrical 08/31/2018 20.00 PAUL W. FP

ORDST2276 08/31/2018 Aaron Fitz Electrical 08/31/2018 20.00 PAUL W. FP

ORDST2277 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

ORDST2282.2 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

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