GP Professional Services Tools Library and SalesPad

Cavallo Support - 2024-11-22 - Troubleshooting

Overview

The Professional Services Tools Library (PSTL) is designed for use in Microsoft Dynamics GP. All of the free tools contained in the library are compatible with the core modules in GP. The tools feature capabilities not found in the standard GP product. For example, users of the Tools Library can take advantage of a set of modifier and combiner tools to change and combine master records in GP.

SalesPad, however, does not support these tools. This document lists Professional Services Tools by topic, and describes how each tool impacts (or does not impact) SalesPad.

Note: If an item is not listed below, it is not supported in SalesPad.

System Tools

Database Disabler: While this will prevent GP users from logging into a specific company, it will have no impact on SalesPad or other SalesPad products. SalesPad users will still be able to access that company and log in.

Financial Tools

No impact on SalesPad.

Sales Tools

Customer Combiner: This will merge customers together, which will result in lost visibility of the original customer’s SalesPad- specific data (CRM events, CRM Notes, Customer Special pricing, Customer Discounts, Group pricing, Customer and Address UDFs, Customer Recurring Sales Definitions). While this data will still exist in the database, it will have the original customer’ s number still attached.

Customer Modifier: Same as above. To be able to view this data, each table would need to be updated to reflect the new customer number.

Receivables Management Master Record Triggers: This will only replicate GP data, not SalesPad data.

SOP PO Number Check: Not supported as a PSTL tool. This functionality is available as a presave script within SalesPad.

Inventory Tools

Item Number Combiner: This will merge items together, which will result in lost visibility of the original items' SalesPad- specific data (Item UDFs, Item Options, Item Configurator, Item Aggregate Pricing, Item Matrix, Customer Default Items, Customer Recurring Sales Definitions, Customer Special Pricing, Group Pricing, Equipment Manager, Vendor Special Costing). While this data will still exist in the database, it will have the original item number attached.

Item Number Modifier: Same as above.

Purchasing Tools

Payables Management Master Record Triggers: This will only replicate GP data, not SalesPad data.

Vendor Combiner: This will merge vendors together, which will result in lost visibility of the original vendor’s SalesPad- specific data (CRM Notes, Vendor Special costing, Vendor and Address UDFs). While this data will still exist in the database, it will have the original vendor’ s number still attached.

Vendor Modifier: Same as above.

POP Cost Defaulter: Not supported within SalesPad as part of the PSTL, but already exists as a separate setting.

Payroll Tools

No impact on SalesPad.

Miscellaneous Tools

Minimum PO/Receipt Number: Not supported within SalesPad by default, but could be supported through customization.

Default Add Item POP/SOP: Not supported within SalesPad.

Doc Date Verify: Not supported within SalesPad.

Company Copy: Will only copy GP data, not SalesPad.