Not Supported or Handled by SalesPad

Cavallo Support - 2024-11-22 - Troubleshooting

Not Supported Or Handled by SalesPad

- Windows XP is no longer supported as of SalesPad 4.2.
    - This is due to .Net Framework 4.5 not being supported by Microsoft for Windows XP
- Posting
    - All document posting activities must be completed within GP or via a 3rd party posting solution
- GP Extender fields
- GP Quantity types when doing Returns, Transfers, etc
    - GP allows you to set quantity types like “Returned”, “In Service”, “Damaged”, “On Hand”, etc, but SalesPad does not use these
- Allocation method of “None” or “Document/Batch”
    - Found in “Allocate by” field on Doc ID creation in GP SOP Setup
    - We do have customers who successfully use Document/Batch allocation, but this allocation method is not functional in all situations and may require advanced setup
- Backorder and Fulfillment SOP Types in GP
- Separate fulfillment of GP kits
    - Inventory Manager allows fulfillment of GP kit components
    - The recommended alternative is to use SalesPad's functionality to explode GP kits into packages, which creates individual sales lines for each of the kit components, which can then be fulfilled in SalesPad
- Quantity shortage handling not supported: Cancel All, Cancel Balance, Backorder All, Sell Balance, or Distribute
    - This setting is found on the SOP setup screen in GP. SalesPad works great with “Override Shortage” or “Back order Balance”
    - Override Shortage does not work on items that are serialized, lot tracked, or multi-bin
- Payment term discounts

    - These must be done in GP

- Partial invoicing within GP causes the remaining order to not be editable within SalesPad
    - You can instead invoice from SalesPad, which will allow editing both the remaining order and the invoice within SalesPad
- Transferring backordered items to the invoice when invoicing within SalesPad
    - SalesPad only allows fulfilled lines to transfer to an invoice
- Landed Cost
    - SalesPad does not allow viewing or editing landed cost
- Prospects within GP
    - SalesPad's CRM functionality uses its own prospect tables
- Microsoft GP's Purchase Order Workflow
    - SalesPad has its own workflow structure for POs
- Pre-payments on Purchase Orders
- Creating, editing, or receiving Blanket Purchase Orders
    - They can only be viewed in SalesPad
- Purchasing distributions for GP Manufacturing Standard Costing in Receiving
- Unsupported Tax Integrations
    - Vertex sales tax calculations are known to interfere with SalesPad processing
- Credit Card processing from the Credit Card tab in the Payment Window
- PSTL (Professional Services Tools Library)
- Changing font sizes, zoom, or scaling in Windows
- CardControl is no longer supported
    - CardControl was a SalesPad-supported credit card processing solution, which has been deprecated in favor of integrating with 3rd party payment processors who are able to stay up to date with PCI compliance
    - We recommend using one of our integrated payment processors, contact your account executive for more information
- Business Rules are no longer supported

    - Business Rules were a way to insert custom logic that would trigger any time a particular entity, like a sales document, saves anywhere within SalesPad. This was deprecated due to the high level of complexity involved which caused repeated issues with other modules

    - We recommend using custom scripting on particular screens or in workflow to accomplish these needs instead

    - Note that Business Rules are completely separate from Workflow Rules, which are still alive and well in SalesPad workflow!

- Databases using Binary Sort Order

    - Sorts and compares data in SQL server tables based on the bit patterns defined for each character. Binary Sort Order is case-sensitive and accent sensitive

    - **Binary collation databases are now supported as of SalesPad 5.4.10**

- Splitting Documents with Payments & Tax

    - Splitting with a cash/check payment or manual credit card payment and tax. While it will split the document, the payment will be split based off the document total and tax prior to the split. For example, you will end up with the .1 document having an over payment and the .2 document having an under payment, with the over payment being equal to the tax amount on the .2 document

    - **Payment splitting is now supported as of SalesPad 5.3.11**