



Resources

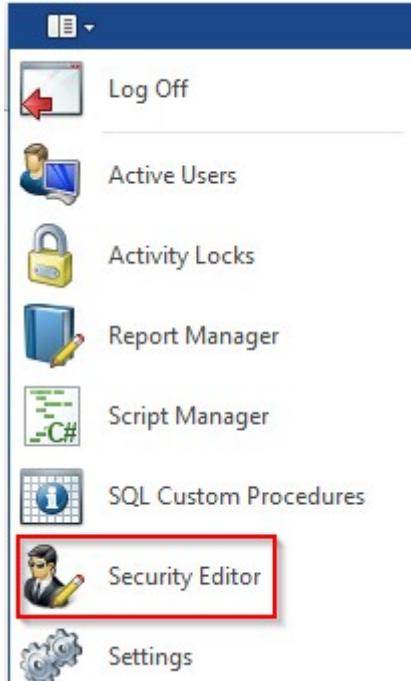
Cavallo Support - 2024-11-22 - [Utilities](#)

Overview

Resources are files attached to various business objects. Resources do not write to the Dynamics GP version of resources (attachments) by default. The setting *Save Resources as GP Attachments* must be enabled in order for SalesPad resources to be available from the corresponding GP source (ie. Customer Card, Sales Document Entry, etc.). Additionally, Allow Document Attachments must be enabled within Dynamics GP. Resources are visible in different workflow scenarios. For example, if a quote gets transferred to an order, the resource is visible on the order from referencing the Item Master Number. There is also the Resource Migrator which writes the resource to User Defined Fields.

Security

1. Click the **Actions** dropdown and select Security Editor.



2. Search for *Resource and enable the following Securities:

– Security

Select All | Select None

Acc...	Name
<input type="checkbox"/>	*Resource
<input checked="" type="checkbox"/>	Assembly Resources*

Security	
<input checked="" type="checkbox"/> Select All <input type="checkbox"/> Select None Copy From...	
<input checked="" type="checkbox"/>	Name
<input checked="" type="checkbox"/>	*Resource
<input checked="" type="checkbox"/>	Assembly Resources*
<input checked="" type="checkbox"/>	BOM Resources*
<input checked="" type="checkbox"/>	Contact Resources*
<input checked="" type="checkbox"/>	Customer Address Resources*
<input checked="" type="checkbox"/>	Customer Resources*
<input checked="" type="checkbox"/>	Equipment Resources*
<input checked="" type="checkbox"/>	Historical Resources*
<input checked="" type="checkbox"/>	Interaction Resources*
<input checked="" type="checkbox"/>	Item Resources*
<input checked="" type="checkbox"/>	New Resource*
<input checked="" type="checkbox"/>	Opportunity Resources*
<input checked="" type="checkbox"/>	Prospect Resources*
<input checked="" type="checkbox"/>	Purchase Order Resources*
<input checked="" type="checkbox"/>	Resource Card*
<input checked="" type="checkbox"/>	Resource Migrator
<input checked="" type="checkbox"/>	Resource Properties
<input checked="" type="checkbox"/>	Sales Document Resources*
<input checked="" type="checkbox"/>	Sales Line Resources*
<input checked="" type="checkbox"/>	Upload New Resource Version
<input checked="" type="checkbox"/>	Vendor Address Resources*
<input checked="" type="checkbox"/>	Vendor Resources*

- *Assembly Resources* - Resources will appear for assemblies.
 - *Can Add Resource* - Disables/Enables the ability to add resources. Defaults to True.
 - *Can Delete Resource* - Disables/Enables the ability to delete resources. Defaults to True.
 - *Can Edit Resource* - Disables/Enables the ability to edit resources. Defaults to True.
 - *Download on DoubleClick* - Instead of opening the resource card, double click the resource to prompt for download. Defaults to False.
- *BOM Resources* - Resources will appear on BOM.
 - *Can Add Resource* - Disables/Enables the ability to add resources. Defaults to True.
 - *Can Delete Resource* - Disables/Enables the ability to delete resources. Defaults to True.
 - *Can Edit Resource* - Disables/Enables the ability to edit resources. Defaults to True.
 - *Download on DoubleClick* - Instead of opening the resource card, on double click the resource will prompt for download. Defaults to False.
- *Contact Resources* - Resources will appear on the Contact level.
 - *Can Add Resource* - Disables/Enables the ability to add resources. Defaults to True.
 - *Can Delete Resource* - Disables/Enables the ability to delete resources. Defaults to True.
 - *Can Edit Resource* - Disables/Enables the ability to edit resources. Defaults to True.
 - *Download on DoubleClick* - Instead of opening the resource card, on double click the resource will prompt for download. Defaults to False.
- *Customer Address Resources* - Resources will appear on the Customer Address card.
 - *Can Add Resource* - Disables/Enables the ability to add resources. Defaults to True.
 - *Can Delete Resource* - Disables/Enables the ability to delete resources. Defaults to True.
 - *Can Edit Resource* - Disables/Enables the ability to edit resources. Defaults to True.
 - *Download on DoubleClick* - Instead of opening the resource card, on double click the resource will prompt for download. Defaults to False.
- *Customer Resources* - Resources will appear on the Customer card.
 - *Can Add Resource* - Disables/Enables the ability to add resources. Defaults to True.
 - *Can Delete Resource* - Disables/Enables the ability to delete resources. Defaults to True.
 - *Can Edit Resource* - Disables/Enables the ability to edit resources. Defaults to True.
 - *Download on DoubleClick* - Instead of opening the resource card, on double click the resource will prompt for download. Defaults to False.
- *Equipment resources* - Resources will appear on the Equipment card.

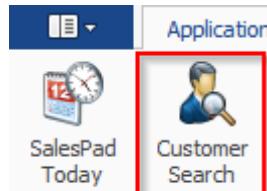
- *Can Add Resource* - Disables/Enables the ability to add resources. Defaults to True.
 - *Can Delete Resource* - Disables/Enables the ability to delete resources. Defaults to True.
 - *Can Edit Resource* - Disables/Enables the ability to edit resources. Defaults to True.
 - *Download on DoubleClick* - Instead of opening the resource card, on double click the resource will prompt for download. Defaults to False.
- *Historical Resources* - Resources will appear on historical sales documents.
 - *Can Delete Historical Resources* - Defaults to True.
- *Interaction Resources* - Resources will appear on interactions.
 - *Can Add Resource* - Disables/Enables the ability to add resources. Defaults to True.
 - *Can Delete Resource* - Disables/Enables the ability to delete resources. Defaults to True.
 - *Can Edit Resource* - Disables/Enables the ability to edit resources. Defaults to True.
 - *Download on DoubleClick* - Instead of opening the resource card, on double click the resource will prompt for download. Defaults to False.
- *Item Resources* - Resources will appear on the Item level.
 - *Can Add Resource* - Disables/Enables the ability to add resources. Defaults to True.
 - *Can Delete Resource* - Disables/Enables the ability to delete resources. Defaults to True.
 - *Can Edit Resource* - Disables/Enables the ability to edit resources. Defaults to True.
 - *Download on DoubleClick* - Instead of opening the resource card, on double click the resource will prompt for download. Defaults to False.
- *New Resource* - This will give the user the ability to create a new resource.
 - *Default Auto Print* - Set the default value for the Auto Print checkbox when adding a new resource. Defaults to False.
 - *Default Printable* - Set the default value for the Printable checkbox when adding a new resource. Defaults to False.
 - *Default Transfers* - Sets the default value for the Transfers checkbox when adding a new resource. Defaults to False.
- *Opportunity Resources* - Resources can be created for Opportunities.
 - *Can Add Resource* - Disables/Enables the ability to add resources. Defaults to True.
 - *Can Delete Resource* - Disables/Enables the ability to delete resources. Defaults to True.
 - *Can Edit Resource* - Disables/Enables the ability to edit resources. Defaults to True.
 - *Download on DoubleClick* - Instead of opening the resource card, on double click the resource will prompt for download. Defaults to False.
- *Prospect Resources* - Resources can be created for Prospects.
 - *Can Add Resource* - Disables/Enables the ability to add resources. Defaults to True.
 - *Can Delete Resource* - Disables/Enables the ability to delete resources. Defaults to True.
 - *Can Edit Resource* - Disables/Enables the ability to edit resources. Defaults to True.
 - *Download on DoubleClick* - Instead of opening the resource card, on double click the resource will prompt for download. Defaults to False.
- *Purchase Order Resources* - Resources will appear on Purchase Orders.
 - *Can Add Resource* - Disables/Enables the ability to add resources. Defaults to True.
 - *Can Delete Resource* - Disables/Enables the ability to delete resources. Defaults to True.
 - *Can Edit Resource* - Disables/Enables the ability to edit resources. Defaults to True.
 - *Download on DoubleClick* - Instead of opening the resource card, on double click the resource will prompt for download. Defaults to False.
- *Resource Card* - This will give the user access to the resource card.
 - *Can Delete Resource* - Disables/Enables the ability to delete resources. Defaults to True.
- *Resource Migrator* - This will give access to the Resource Migrator.
- *Resource Properties* - This will give access to Resource Properties.
- *Sales Document Resources* - This will put resources on sales documents.
 - *Can Add Resource* - Disables/Enables the ability to add resources. Defaults to True.
 - *Can Delete Resource* - Disables/Enables the ability to delete resources. Defaults to True.
 - *Can Edit Resource* - Disables/Enables the ability to edit resources. Defaults to True.
 - *Download on DoubleClick* - Instead of opening the resource card, on double click the resource will prompt for download. Defaults to False.
- *Sales Line Resources* - Resources will appear at the Sales Line level.
 - *Can Add Resource* - Disables/Enables the ability to add resources. Defaults to True.
 - *Can Delete Resource* - Disables/Enables the ability to delete resources. Defaults to True.
 - *Can Edit Resource* - Disables/Enables the ability to edit resources. Defaults to True.
 - *Upload a New Resource Version* - Allows the user to upload a new resource version.
- *Vendor Address Resources* - This will put resources on the Vendor Address level.
 - *Can Add Resource* - Disables/Enables the ability to add resources. Defaults to True.
 - *Can Delete Resource* - Disables/Enables the ability to delete resources. Defaults to True.
 - *Can Edit Resource* - Disables/Enables the ability to edit resources. Defaults to True.
 - *Download on DoubleClick* - Instead of opening the resource card, on double click the resource will prompt for download. Defaults to False.
- *Vendor Resources* - This will put resources on the Vendor card.
 - *Can Add Resource* - Disables/Enables the ability to add resources. Defaults to True.

- *Can Delete Resource* - Disables/Enables the ability to delete resources. Defaults to True.
- *Can Edit Resource* - Disables/Enables the ability to edit resources. Defaults to True.
- *Download on DoubleClick* - Instead of opening the resource card, on double click the resource will prompt for download. Defaults to False.

3. Save your changes.
4. Log off. You must log off your for changes to take effect.

Usage

1. Open up Customer Search or another card that has Resources enabled. For this example, Customer Search will be used.



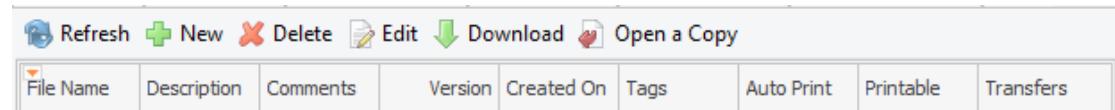
2. Select a customer.

Cust#	Cust Name	Email	Sales Person ID
AARONFITO	Aaron Fitz Electrical /...		IAN M.
			IAN M.

3. Click Resources on the post specific tab.



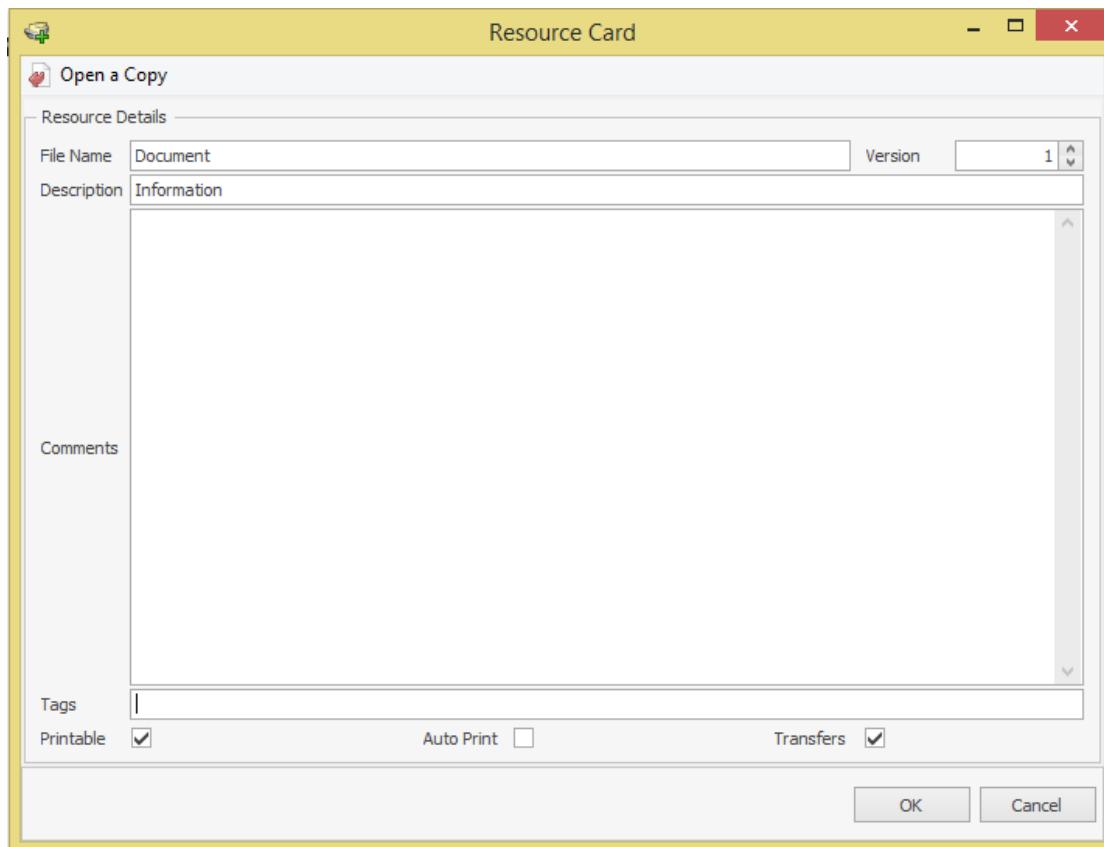
The Action Toolbar for resources is shown below.



Creating a New Resource

1. Click **New** on the Action Toolbar.
2. Upload the attachment from the windows explorer.

The "Resource Card" menu will open.



1. Name the file in the File Name field.

Descriptions for all of the menu options can be found below:

Description - Gives detail about the resource.

Version dropdown - Provides the revision number for the particular resource.

Comments - Provides additional detail or notices about the resource.

Tags - Attaches categories to the resource.

Printable checkbox - Gives the resource the ability to print.

Auto Print Checkbox - Puts the resource on auto print.

Transfers checkbox - Allows the resource to transfer on to other sales document.

2. Press **OK** to save the resource. The Resource will appear below.

Resource Card				
File Name	Description	Comments	Version	
Document	Information		1	
Basecamp Basics	Overview of all basic tips and tricks for ...		1	

You can double click the resource to open the Resource Card. Here you can make changes, view the historical resources, and perform various actions using the Action Toolbar.

The screenshot shows the SalesPad Resource Card interface. The top navigation bar includes tabs for Customer Search, Customer: [AARONFIT0001] Aaron Fitz Electrical, and Resource Card. Below the tabs are standard file operations: Close, Refresh, Save, Delete, Download, and Open a Copy. The main area is divided into two panels: 'Resource Properties' and 'Historical Resources'.

Resource Properties:

- File Name: Document
- Description: Information
- Comments: (empty)
- Tags: (empty)
- Printable:
- AutoPrint:
- Transfers:

Historical Resources:

- File Name
- Description
- Comments
- Version
- Tags

No data to display

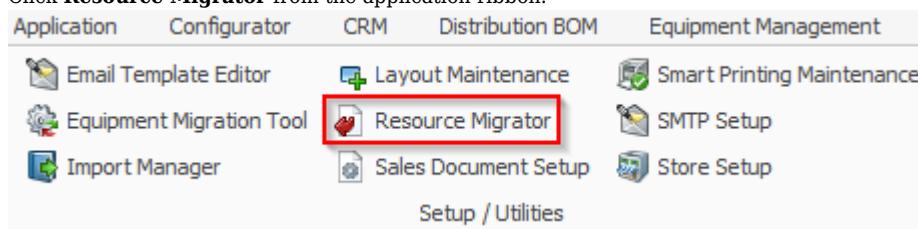
If the Transfers checkbox is disabled, this is because you're using the *Save Resources as GP Attachments* setting. It is disabled because SalesPad Desktop respects GP's *Document Attachment Flow* settings, and any adjustments to how the Transfers checkbox is set will need to be done from within GP.

Resource Migrator

The Resource Migrator allows users to grab attachments that are stored in User Defined Fields and take the data or file and move it into a resource for that specific item.

Usage

1. Click **Resource Migrator** from the application ribbon.



The "Resource Migrator" screen will appear.

The screenshot shows the 'Resource Migrator' screen. On the left, a list of 'File Attachment User Fields' is displayed in a table format. On the right, a 'Migrate Selected' panel shows a list of attachments with their corresponding business object keys and file attachments.

Table Name	Field Name
spxCustomer	xCust_Logo_File
spxCustomer	xCustomer_Profile
spxItemMaster	xData_Sheet
spxSalesDocument	xCust_Logo_File
spxSalesDocument	xProject_Detail1
spxSalesDocument	xProject_Detail2
spxSalesDocument	xProject_Detail3
spxSalesDocument	xQuote_Details
spxVendor	xVen_Contract
spxVendor	xVendor_Contract

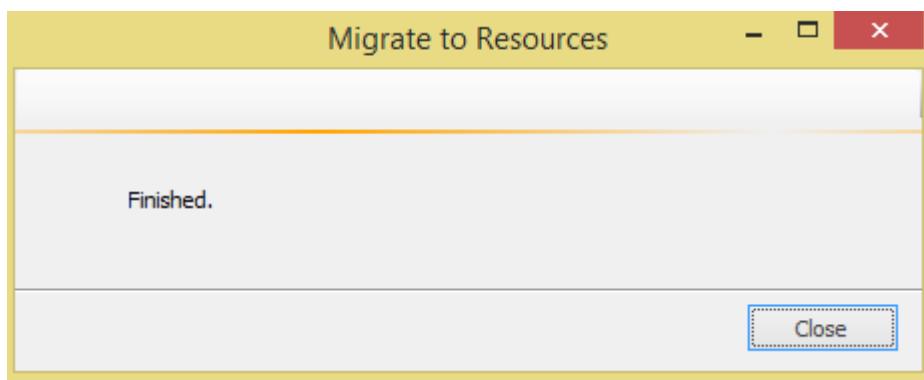
Migrate Selected:

Business Object Key	File Attachment
AARONFIT0001	C:\SalesPad\Documentation\Add Item Plugin.pdf
BLUEYOND0001	C:\Documents and Settings\TimH\My Documents\Demo Documents\Project Diagram...
FOURTHC00001	C:\Documents and Settings\TimH\My Documents\Demo Documents\Client Artwork...
HOLLINGC0001	C:\Users\TimH.SPLLC\Desktop\Documents\Demo Documents\Logo\SalesPad_Logo...
SUPERFO00001	C:\Users\TimH.SPLLC\Desktop\Documents\Demo Documents\Logo\SalesPad_Logo...

2. Select the File Attachment User Field from that panel.
3. Select resources to Migrate from the Migrate Selected panel.

Attachments	
Business Object Key	File Attachment
AARONFIT0001	C:\SalesPad\Documentation\Add Item Plugin.pdf
BLUEYOND0001	C:\Documents and Settings\TimH\My Documents\Demo Documents\Project Diagram.JPG
FOURTHCO0001	C:\Documents and Settings\TimH\My Documents\Demo Documents\Client Artwork.JPG
HOLLINGC0001	C:\Users\timh.SPLLC\Desktop\Documents\Demo Documents\Logo\SalesPad_Logo_800x...
SUPERFOO0001	C:\Users\timh.SPLLC\Desktop\Documents\Demo Documents\Logo\SalesPad_Logo_800x...

4. Press the **Migrate Selected** button () at the top.
5. The Migration will run. Press **Close**.



You will see the Migrated Resources at the bottom of the screen.

BusinessObjectKey	Table Name	Field Name	File Attachment	Migrated	Migrated On
AARONFIT0001	spxCustomer	xCust_Logo_File	C:\SalesPad\Documen...	<input type="checkbox"/>	9/10/2015
BLUEYOND0001	spxCustomer	xCust_Logo_File	C:\Documents and Set...	<input type="checkbox"/>	9/10/2015
FOURTHCO0001	spxCustomer	xCust_Logo_File	C:\Documents and Set...	<input type="checkbox"/>	9/10/2015
HOLLINGC0001	spxCustomer	xCust_Logo_File	C:\Users\timh.SPLLC\...	<input type="checkbox"/>	9/10/2015
SUPERFOO0001	spxCustomer	xCust_Logo_File	C:\Users\timh.SPLLC\...	<input type="checkbox"/>	9/10/2015