

Knowledgebase > SalesPad > Setup > SalesPad Installation and Connection Guide

SalesPad Installation and Connection Guide

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Overview

SalesPad GP is a standalone application that integrates with and enhances Microsoft Dynamics GP. Its primary function is to provide a better, faster Sales and Customer Service interface for Dynamics GP. Moreover, a SalesPad user does not require an additional license of Dynamics GP. SalesPad can keep your Dynamics license count down and keep your nonfinancial users more than a password away from your confidential data.

SalesPad is a .NET form-based application. It provides a feature-rich experience by using best-in-class technology components and techniques to help users find and maintain customers, contacts, inventory, sales documents, and more. All the information is pulled from and saved to the Dynamics GP company database; there is no synchronization, duplicated data, or time-delayed access to data.

This Installation Guide is intended to provide a detailed set of instructions to install SalesPad. SalesPad must be installed on all client workstations using the application. A set of eConnect to SalesPad objects must be installed onto the database/GP Server. Please contact SalesPad LLC for the SalesPad client install program. After you have downloaded the client install program, you must run it on all the workstations that you want to install SalesPad. Before you can successfully use SalesPad, you must complete the installation on one workstation, including the database setup process.

SalesPad System Requirements

Required Hardware Components and Features

- **Processor:** Intel® Core[™] i3-3xxx (*or equivalent*), AMD Athlon X2, AMD FX 6100Intel®
- Disk drive: Minimum 250mb free disk space to store program executables and data
- Memory: Minimum 2 GB of RAM
- **Display:** 1024x768 is the minimum resolution that SalesPad supports; we also suggest the use of a widescreen monitor
- Network Adapter: SalesPad requires a network connection to connect to the server running Microsoft Dynamics® GP

Terminal Server (Optional)

- Supports Windows Server, version 1709 (*and up*), Windows 2016, Windows 2012, Windows 2008 R2 SP1
- If you are running both Microsoft Dynamics GP and SalesPad together, we

recommend a minimum of 2 GB of RAM per user

- Recommendation of no more than 15 users per terminal server depending on server hardware. Exceeding this number could impact application performance.
- For best results, consult your GP Partner's technology expert or an IT professional experienced with setting up terminal servers

Required Software Components

- **Operating System**: Windows 7 SP1, 8, 10, or 11
- Other Software: Microsoft Dynamics® GP (*GP2013, 2013 R2, GP2015, GP2016, GP2016 R2, GP2018, GP2018 R2, Dynamics GP October 2019 Release*), Microsoft .NET Framework 4.5 or greater (*SalesPad versions below 4.1 require 2.0 or greater*)

Note: If .NET 4.7.2 is not already installed at the time of SalesPad 4.1+ installation, it will automatically be installed as part of the SalesPad installation process

For information on the minimum version of SalesPad required for a given GP build, please visit <u>Upgrading Microsoft Dynamics GP with SalesPad</u>.

SQL Server Compatibility

- Microsoft SQL Server[™] 2012
- Microsoft SQL Server[™] 2014
- Microsoft SQL Server[™] 2016
- Microsoft SQL Server[™] 2017
- Microsoft SQL Server[™] 2019
- Microsoft SQL Server[™] 2022

Virtualized Environments:

Running SalesPad either as a published application or as part of your Virtual Desktop Infrastructure (VDI) is supported. Both SalesPad and Dynamics GP will place additional load onto your VDI servers, so please ensure that your infrastructure can support this.

Requirements to Complete Installation

- The current build of SalesPad to install (fill out the <u>Upgrade Request Form</u> to request it)
- Administrative privileges on the computer where you will be installing SalesPad
- The name of the SQL Server database to which you will create a SalesPad connection
- The System Administrator (sa) password for the SQL Server database to which you will create a SalesPad connection
- A completed install of Dynamics GP with the appropriate client registration keys entered

Install Instructions

Install Client Program

To begin SalesPad installation, open the installation file. The Setup Wizard will appear. Click **Next.**

Read and accept the EULA (End User License Agreement) by clicking I Agree.



Select the desired (or default) folder to install to and click **Next**, then select the features of SalesPad to install and click **Install**.

SalesPad.Desktop 4.6.3.1 Setu	ib	– 🗆 X
Choose Components Choose which features of Sales	Pad.Desktop 4.6.3.1 you want to	o install.
Check the components you wan install. Click Install to start the ir	t to install and uncheck the comp nstallation.	onents you don't want to
Select components to install:	 Installer Setup SalesPad Desktop Shortcuts 	Description Position your mouse over a component to see its description.
Space required: 248.9MB		
Copyright (c) SalesPad, LLC. (v4.6	3.1)	Install Cancel

The program will begin installing. When setup is complete, click Finish.

Connecting for the First Time

Before you can begin using SalesPad with your Dynamics GP company, you must set up a connection to the company (on each workstation). Follow the instructions below.

Run SalesPad via the Start Menu icon or the desktop icon. Click the + in the Connect To: box to set up a new connection.

	SALESPAD" DESKTOP
Connect To:	✓ + - ···
User ID: Password:	sarah.schaefer
Not Connec	ted OK Cancel

Create a Connection

Fill out the necessary information in the SQL Server Connection window.

	SQL S	erver Connection
Properties		
	Connection:	
	Server: Connect Using:	<u> </u>
	 Windows Authe SQL Server Auth User ID: Password: 	
	Company Database:	~
	Connection stored for:	Current User 🗸
Import	Export	OK Cancel

Name the connection, specify a server, the type of Authentication (and User ID and password if needed), and the name of the company database. Click **OK** to save the connection and return to the Login screen.

Note: Regardless of the method of authentication, the user must be a part of the DYNGRP group on your database. If you will be using the Windows Authentication method on the main login screen, the connection will be forced to Windows authentication and any User ID and Password specified here will be ignored.

Required min SQL user security

- DYNAMICS db: DYNGRP, public
- MASTER db: public
- tempdb: db_datareader, db_datawriter, public
- COMPANY db: db_datareader, db_datawriter, DYNGRP, public
 - Note: If you are still getting error messages, enable db_datareader on DYNAMICS

Required min Windows user security

SalesPad needs the following permissions to run:

- SalesPad Install Folder Read
- ProgramData and AppData Folders Read/Write
- Registry HKEY_CURRENT_USER\Software\SalesPad Read/Write

Database Update

The very first time SalesPad is installed, a Database Update will also need to be installed. Click **Next** to start the installation.

Database Update	×
	A Database Update is Available
	There is a database update. It is highly recommended that you apply this update (with all users logged out of SalesPad Desktop) before continuing to use SalesPad Desktop.
	To continue, dick Next
(LOCAL), TWO	< <u>B</u> ack <u>Next</u> > Cancel

Confirm that you have made a backup of your data, then log in as the "sa" user using these credentials:

- User ID: sa
- Password: sa

The sa user is created by default and has access to the administrative functions in SalesPad.

Database Update	×
A Database Up Please con	date needs to be Installed rm your backup and login information before proceeding
Please make sure Please provide a	you have a current backup of your database before proceeding.
(LOCAL), TWO	< <u>B</u> ack <u>N</u> ext > Cancel

Click **Next**. The database update will run. Click **Next** again once it's finished.

Database Update			x
Installing Database Update Please do not close the application until the update is	s complete		
Database update progress:		View	
The Database Update was Successful!			^
User Fields Updated!			
PeerDifferent: Table - spAssemblyResourceLink PeerDifferent: Table - spAuditLog PeerDifferent: Table - spContact PeerDifferent: Table - spCustomerContract PeerDifferent: Table - spCustomerContractDetail			*
(LOCAL), TWO	< <u>B</u> ack	Next > Close	

You will need to log back in to SalesPad Desktop once the database update has completed.

Security Setup

The first time SalesPad is installed after the Database Update, you will be prompted to select preconfigured role-based security groups to load.

Security Groups:	Demo Users:
Admin	CSR (group:CSR, password: help)
CSR Managor	Sales (group:Sales, password: sell)
	Purchasing (group:Purchasing, password: huv)
Sales	

Be sure to take note of the passwords for any Demo Users selected.

Select the desired Security Groups and Demo Users to add and click **Next**. Once logged in, you will be able to make changes to the security configuration at any time.

 Installing SalesPad Desktop

 Database Update Complete
 The Database Update was Successful!

 The Database Update was Successful!
 To dose this wizard, dick Close

 (LOCAL), MULTI
 < Back</td>
 Finish
 Close

The screen will indicate that the Database Update is complete.

Click **Finish** to return to the login window. Enter the sa password and click **OK**.

You can view the preset Security and make any changes to groups and their security settings in the Security Editor, accessible via Modules Menu > System > Security Editor or from the Navigation dropdown.

	· 🛛 😤 •		Security Editor - DESKTOP - Sal	esPa	ad					-	. 🗆	×
Appli	ication CRM Distribution BOM	Equipm	ent Management Inventory Purchasing Repo	rting	sa Sa	ales	Setup / Utilitie	s	^	P -		0
SalesPad Today	tomer arch Monitor	Mass Upda	Ch Sales Line Mass Update Sales Batch Processing Look	tory	201 201 201 201 201 201 201 201 201 201	Inventor Inventor Sales Tra	y Analysis y Transfers Insfers	Vendor Search	Purchase Order Search	Receiving	Rep	iorting
	Sa	es	ا د ا		Inve	ntory	12		Purchasing	la la		
🗸 Customer Sei	earch 🔟 🧞 Security Editor 🗵											
📑 Close 🛛 🛃	Save 🛛 🖳 🕃 Export Security 🛛 🗐 🛛	mport Se	curity 🛛 🐞 Reset Database Version									
Users			Groups		- Securi	ty —						
💩 New User 💧	🔬 Delete User		👪 New Group 🛛 🏭 Delete Group		🗸 Sel	ect All	Select N	one	🖳 Copy From			
User	Group		Group		Ăcc	Name						
		^	ADMIN									
markt	ADMIN		ADMIN1		~	Sales D	ocument Prom	otions* (B	Beta)			
mattw	ADMIN		CSR1			Sales Li	ine Promotions	Dock* (B	eta)			
Nathy	SALES		CUSTOMER SERVICE									
NJ Sales	NJ SALES		EXEC									
paul	SALES DEMO		FEATURES									
robr	ADMIN		MANAGER 1									
sa	ADMIN		NEW ADMIN									
sales	SALES DEMO		NJ SALES								-	
sarah.schaefer	ADMIN		SALES		×	[Name]	= Sales Docu	ment Pror	notions' Or [Name] = 'Sales Lir	e Promotions .	Edit	t Filter
stacy	ADMIN		SALES DEMO	:					~			
stevep	ADMIN		SALES NJ	:	⊿ Mi	sc						
tim	SALES NJ		SALES 1		Ca	n Add Pr	omo Item		True			
timb	ADMIN	~	TECH ADMIN		Can Add Promo Offer True		True					
Liner Properties			TEST		Ca	n Create	Item Promos	5	True			
- User Properties	and an another in	^			Ca	n Delete	Item Promos		True			
Reset passwo	ord on next login				Ca	n Delete	Promo Item		True			
User ID:	sa		- Group Properties		Ca	n Delete	Promo Offer		True			
Name:	System Administrator		Lavout Path:		De	fault Dur	ation		3			
Password:	**											
User Email:	stacy.dose@salespad.net											
Sales Rep:	v	×										
		×			Can A	dd Pron	no Item					
Default Whee								which we want the	and the solution items assess them			
Default Whse: Security Group:		×			Allows	users to ts to 'Tru	add new prom e'.	ouonaine	ems to existing item promotion	s.		

By default, the sa user will be part of the Admin group.

If you create a user with a Windows login name and do not enter a password, the user will be able to log in using Windows authentication by selecting Use Windows Credentials before logging in.

Refer to the SalesPad Security Settings guide for more information on adding or editing users and groups, and on the effects of enabling individual security settings.

Future Database Updates:

Note: The Database Update screen will automatically start whenever SalesPad detects that the database needs to be updated. It is crucial that you are logged in as a user that has the appropriate privileges on your database server; we recommend that you connect as the sa user when installing a database update.

The Database Update may take some time. You will have multiple opportunities to cancel the update process, but if you do not successfully update your database, you may experience problems while using SalesPad. When a database update is available, the following window will popup. Make a backup of your data and enter your sa username and password before proceeding.

Database Update	×
A Database Upo Please confi	date needs to be Installed rm your backup and login information before proceeding
Please make sure Please provide a S	you have a current backup of your database before proceeding. I have made a backup and would like to continue Update User Field Views QL user name and password with 'sysadmin' access:
	User: sa Password: •• Use my Trusted Credentials
(LOCAL), TWO	< <u>B</u> ack <u>N</u> ext > Cancel

Click **Next** to continue. The Database Update will begin analyzing database differences. The size of your database and the speed of your connection to the database will affect the length of the analysis process. Again, the size of your database and the speed of your connection to the database will affect the length of this process

Note: If the database process fails, review the error messages with your database administrator. If your database administrator cannot determine the problem, please contact our support team for further assistance.