ShipCenter Installation and Configuration

Cavallo Support - 2024-11-22 - Miscellaneous

Overview

This guide details the installation and connection setup for ShipCenter.

Please note that the minimum required SQL user securities are as follows:

- Dynamics Tables - DYNGRP and Public
- Tempdb Tables - db_datareader, db_datawriter, and public
- Company database - db_datareader, db_datawriter, and public
- Master database - public

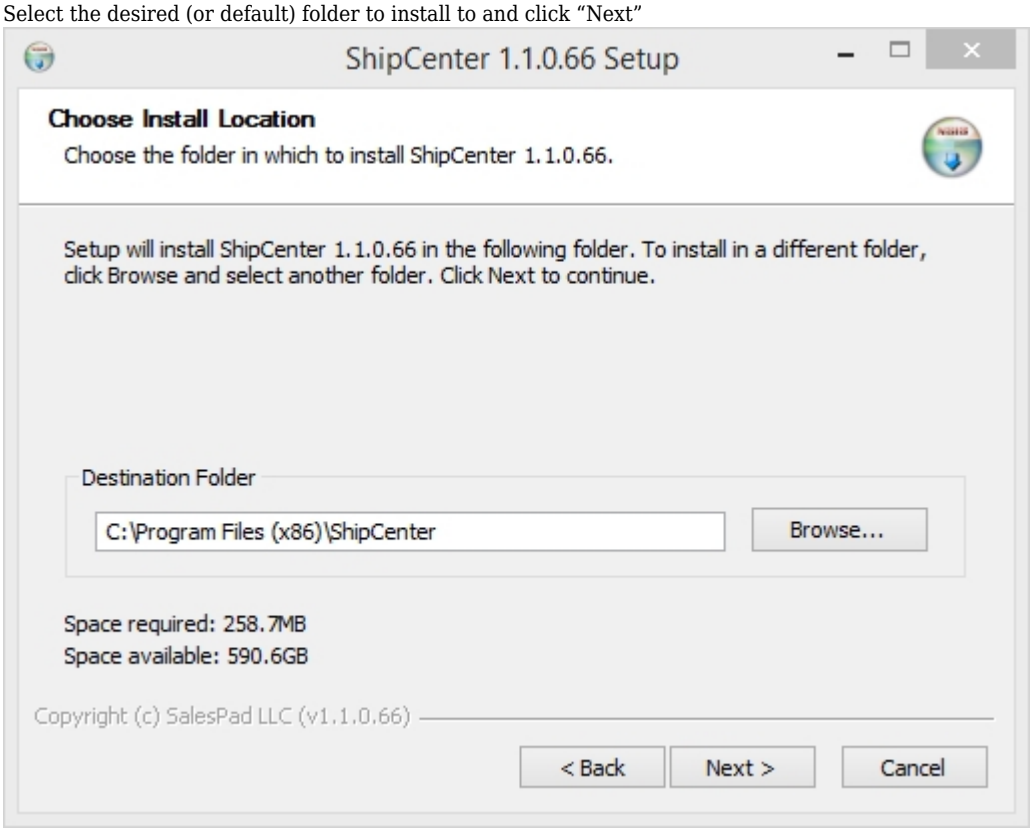
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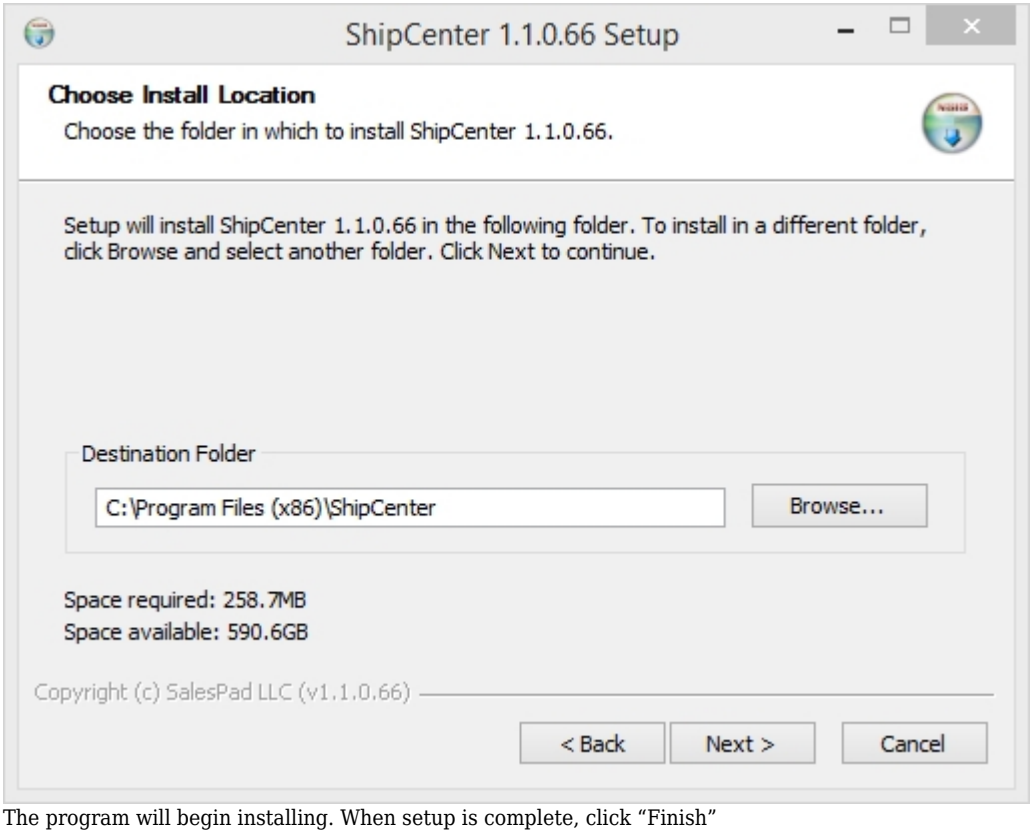
Install Client Program

To begin ShipCenter installation:

1. Open the installation file. The Setup Wizard will appear
2. Read and accept the EULA (End User License Agreement) by clicking “I Agree”
3. Select the desired (or default) folder to install to and click “Next”



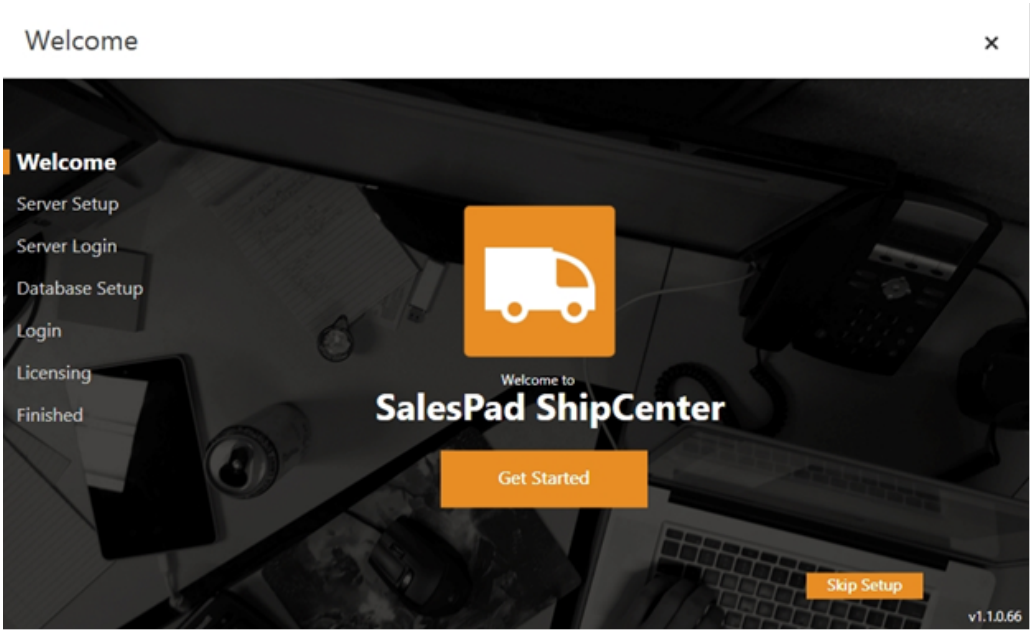
4. Select the features of ShipCenter to install and click “Install”



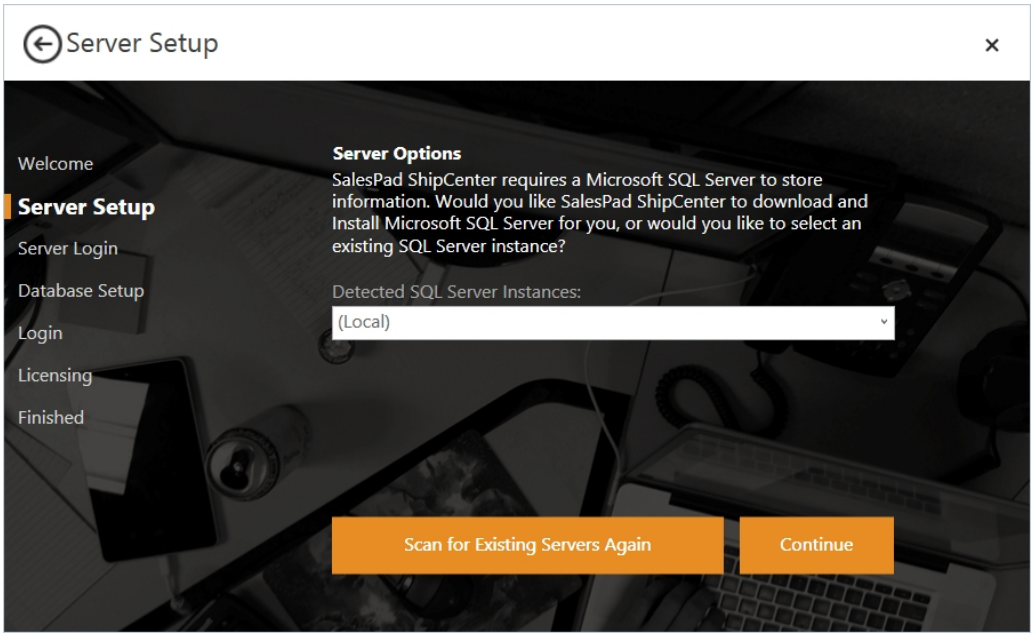
5. The program will begin installing. When setup is complete, click “Finish”

Connecting for the First Time

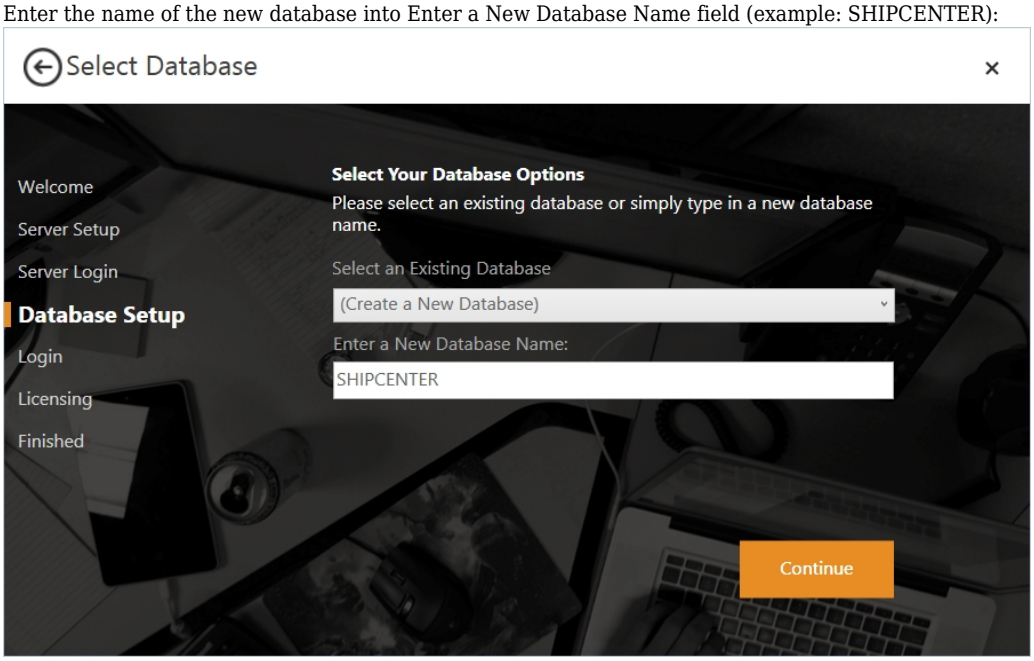
1. Click “Get Started” on the Welcome Screen



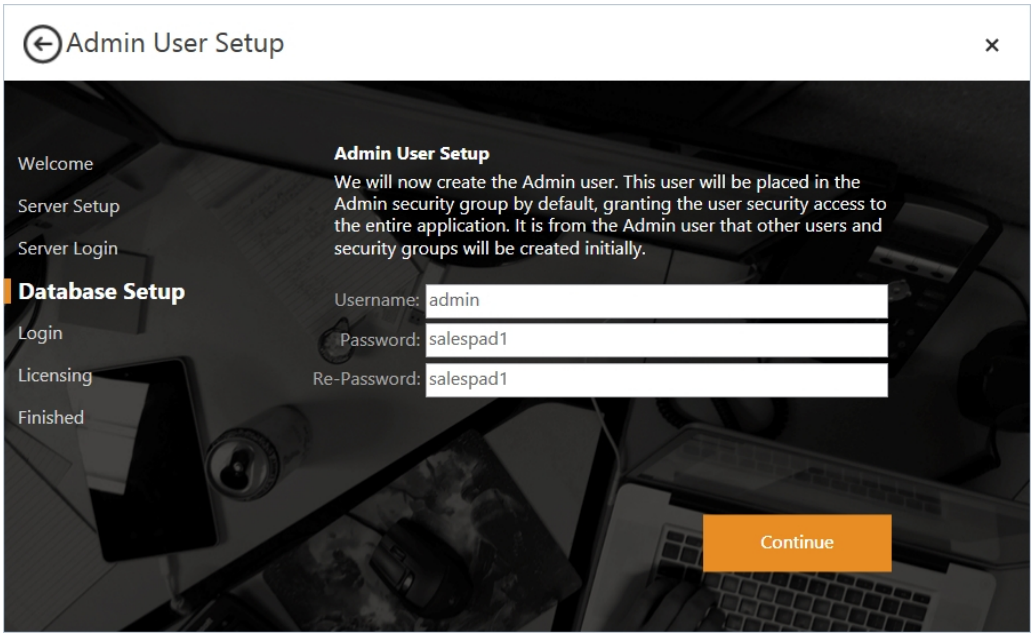
2. Use the drop down menu to locate and select your established SQL Server instance and click “Continue”. You can also enter the server name into the text bar:



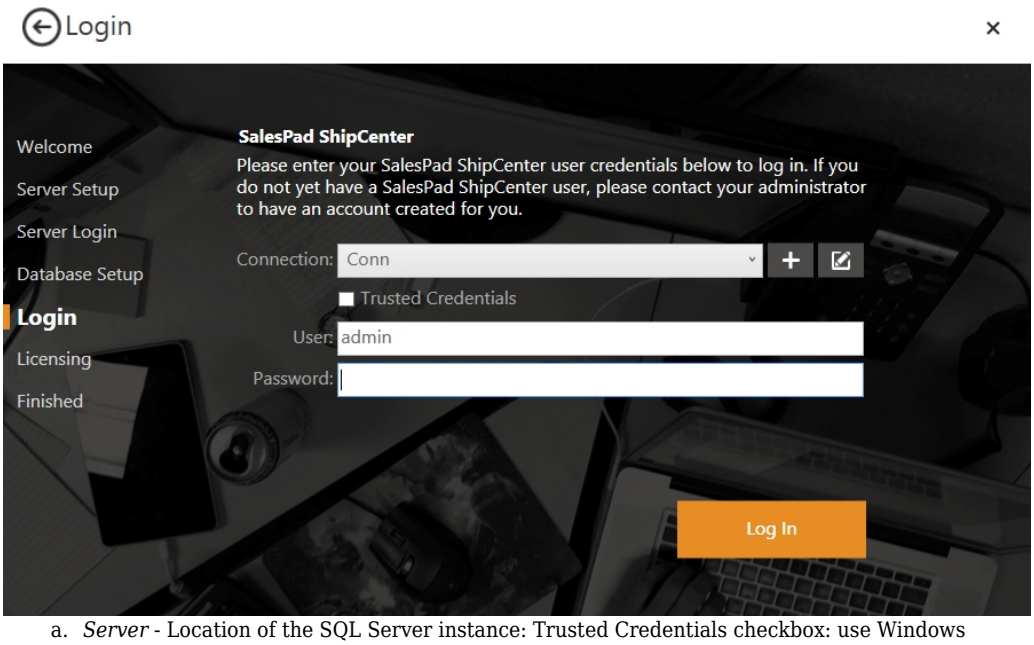
3. Now we will create a new database for ShipCenter to store all related users, security, settings, and other setup independent of the GP company database
4. To create the new database select “Create a New Database” from the Select an Existing Database dropdown
5. Enter the name of the new database into Enter a New Database Name field (example: SHIPCENTER):



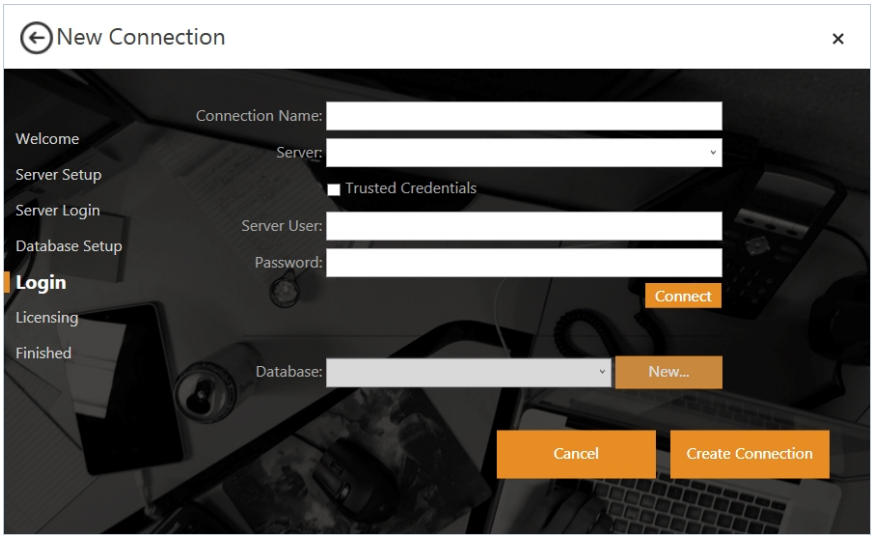
6. Click “Continue”
7. The wizard will create the new database and necessary database objects
8. Enter the desired admin username and password:



9. A default connection has now been made to the database. Click the New ("+" sign) or Edit button's to setup a new or modify the existing connection.

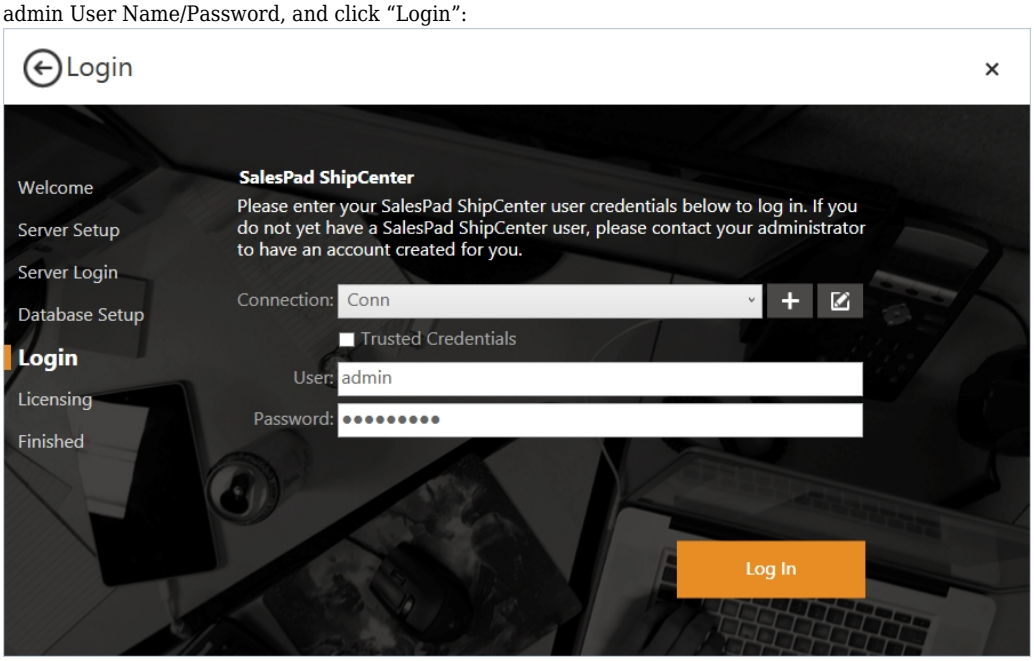


   a. *Server* - Location of the SQL Server instance: Trusted Credentials checkbox: use Windows Authentication to log in, if enabled during initial setup of the SQL Server instance.
   b. *Server User/Password* - Enter the SQL Server credentials for the system administrator user (sa). Once they are entered, click the "Connect" button.
      i. Database - This dropdown menu contains a list of the active SQL Server databases. Select or type the database name of the existing ShipCenter database and click "Save".

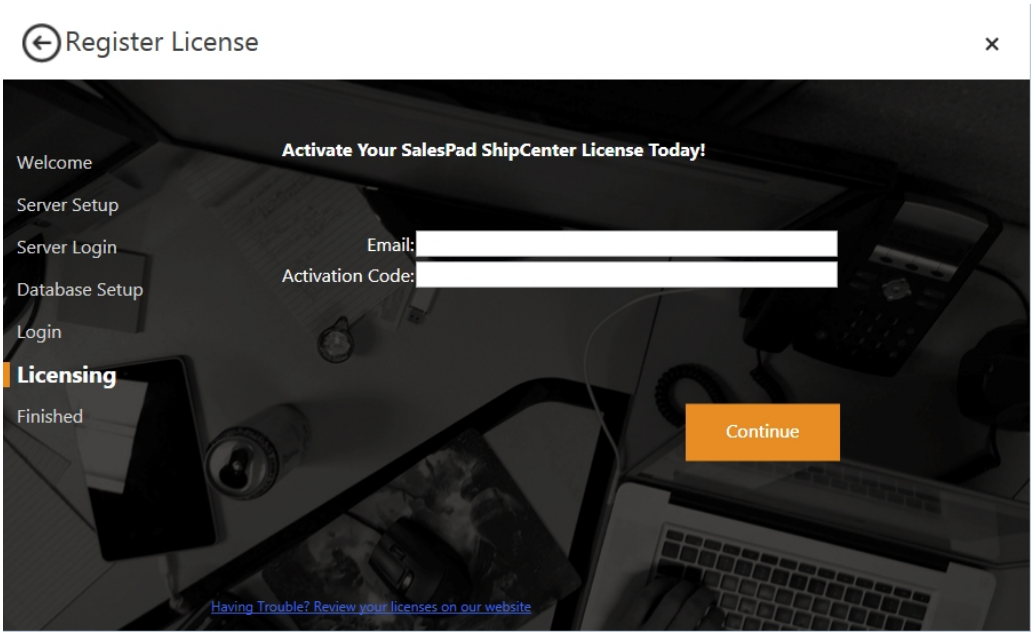


First Time Logging In

1. Select the desired connection from the drop-down menu, log in with the Trusted Credentials or enter the admin User Name/Password, and click “Login”:



2. Upon first Installation, enter the registered email address and activation code into the respective fields and click “Continue” to log into ShipCenter:


Register License
Welcome
Server Setup
Server Login
Database Setup
Login
Licensing
Finished
Activate Your SalesPad ShipCenter License Today!
Email:
Activation Code:
Continue
Having Trouble? Review your licenses on our website