Test Environments

Cavallo Support - 2026-02-16 - Setup

Overview

Below is an overview of how important it is for all Cavallo for GP customers to create a test environment. Please note, the instructions below are not a step-by-step tutorial but an overview of the steps needed.

See Also: System and Hardware Requirements

Purpose of a Test Environment

Each version of Cavallo for GP products (SalesPad Desktop, Inventory Manager, etc) contains between 20 and 50 changes. While these changes are made to improve performance, usability, and to address issues, each change may introduce a new potential issue.

Each new version goes through several steps of QA including hands on review from quality assurance analysts, developer code review, manual and automatic testing. However since we cannot emulate every customer environment, some issues will still appear even after a thorough review.

To facilitate a smooth upgrade, Cavallo recommends any upgrades be placed in a test company database first. Below is an overview for creating a test environment. If you have active configuration changes being made, please make sure you or your client consult Cavallo staff or IT professionals with questions regarding a new test database. This will allow mission critical functions to be tested and validated before entering the live environment.

Creating a Test Environment

For accurate testing, the test environment should be as close to a mirror image of the live environment as possible.

- Create a new GP company using GP Utilities
    - This will ensure the test company has a properly configured Comapny ID in GP
- If testing a different GP Dynamics configuration then the new company will need to be in a different SQL Server or Server Instance
- Restore a recent backup of the live company database over the test company
- Creating a fresh backup is recommended
- Create a new connection to the test database from the SalesPad login screen
- Run the database update from SalesPad
    - The connections are stored in the local registry by default. It is recommended to only create a connection to the test database for administrators or users who will need access. Be careful not to log into the live company with the test version of SalesPad or you could have an unplanned upgrade to the live company.