



Workflow for GP Installation Guide

Megan De Freitas - 2024-12-03 - Workflow for GP

Overview

Workflow for GP, also known as SalesPad+, is an add-in application for Microsoft Dynamics GP. It adds a powerful workflow system to the Sales Transaction Entry screen. It also adds user fields and improved searching capabilities to the Sales Transaction Entry, Customer Maintenance, Item Maintenance, and other screens.

This installation guide provides a detailed set of instructions for installing Workflow for GP on each client workstation as well as how to configure Workflow for GP after a fresh install or upgrade.

System Requirements

GP version: 2013 (minimum), 2016 or higher (recommended)


SQL permissions for company database: db_datareader, db_datawriter, and public (minimum)

Installation

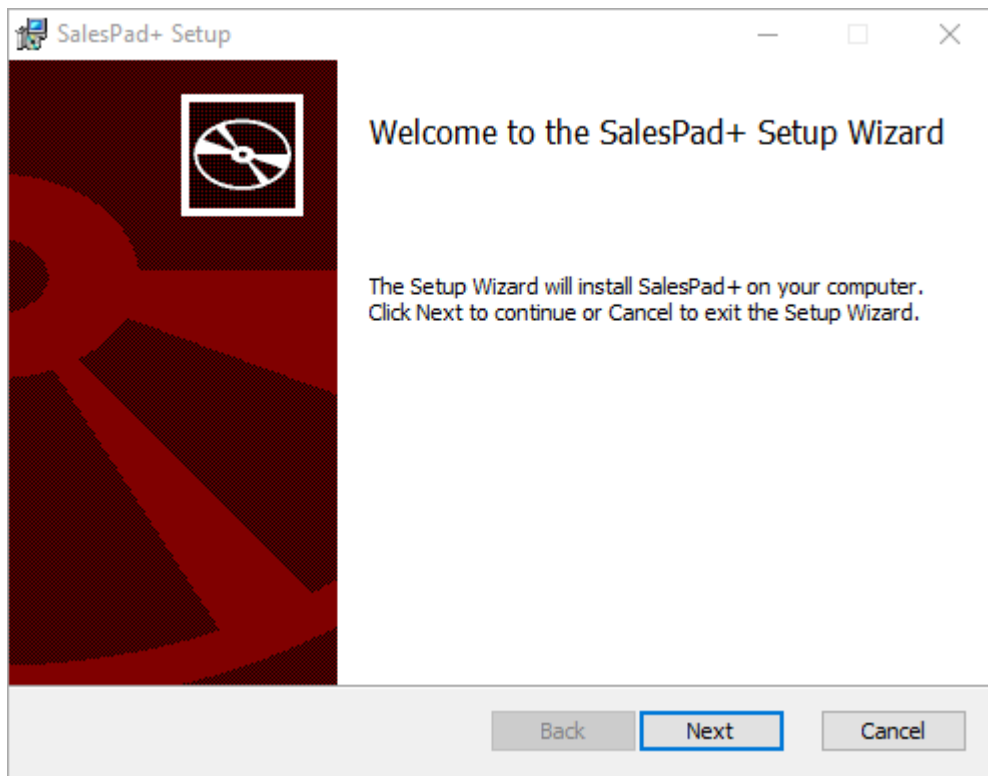
Workflow for GP has an installer. To obtain this installer, contact Cavallo and then distribute it within your company as appropriate.

An administrator can install Workflow for GP with the following steps and complete the initial setup. Once Workflow for GP is properly configured for additional users, repeat the following steps for each client workstation:

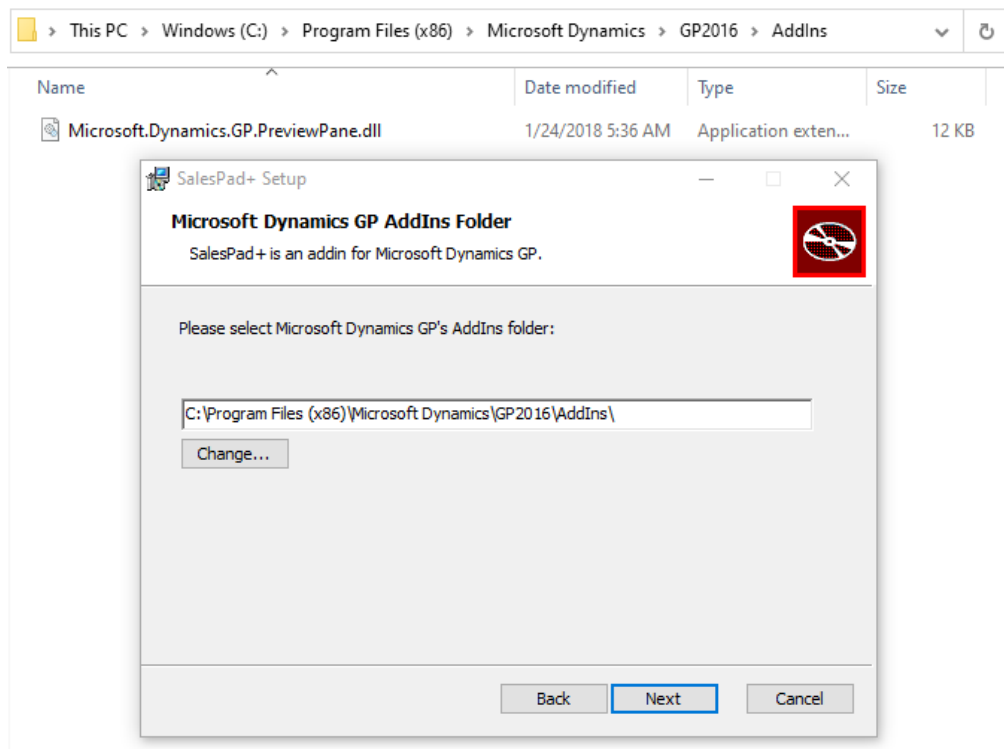
1. Run the SalesPad+ installer.

Name	Date modified	Type	Size
 SalesPadPlus.Setup.3.0.5.msi	9/11/2023 2:15 PM	Windows Installer ...	77,712 KB
<div><div>Install</div><div>Repair</div></div>			

2. On the first page, click 'Next'.



3. On the next page, review the End-User License Agreement, check 'I accept the terms in the License Agreement', and click 'Next'.
4. On the next page, select the AddIns folder in which to install Workflow for GP. Workflow for GP must be installed in the AddIns folder of the Microsoft Dynamics GP installation that you want to use.



5. On the next page, click the 'Install' button.
6. If you get a "Do you want to allow this app to make changes to your device?" system

prompt, agree to it.

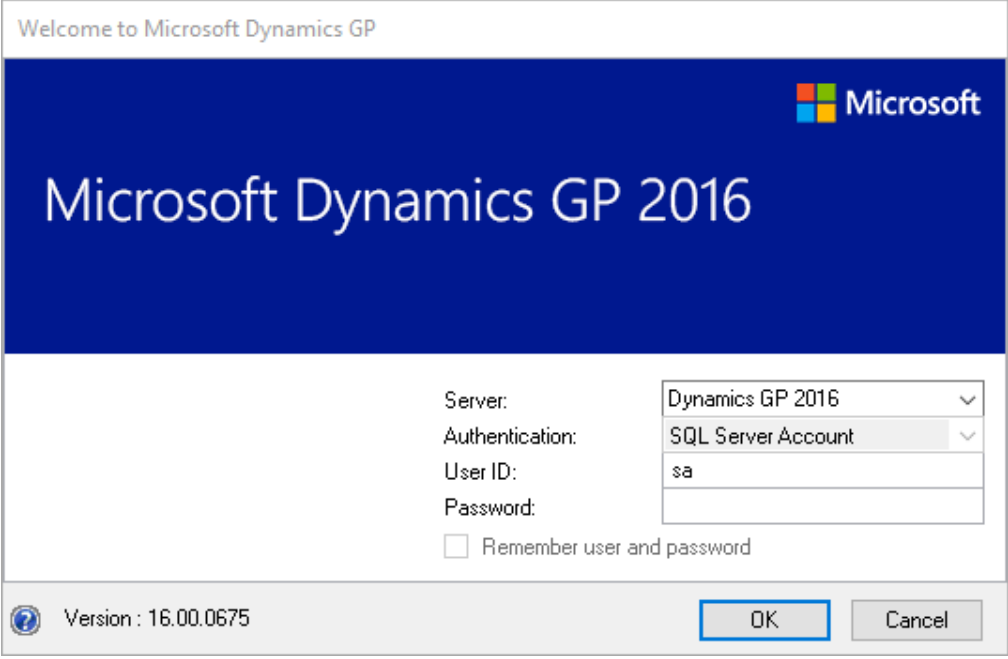
7. If the final page states 'Completed the SalesPad+ Setup Wizard', the installation succeeded and you can close the installer. Otherwise, address the error and run the installer again.

First-Time Sign In

After installing Workflow for GP for the first time, an administrator must sign in to Dynamics GP to run the database update and configure the application. Cavallo recommends making a database backup first to protect against the unlikely scenario that the database update malfunctions.

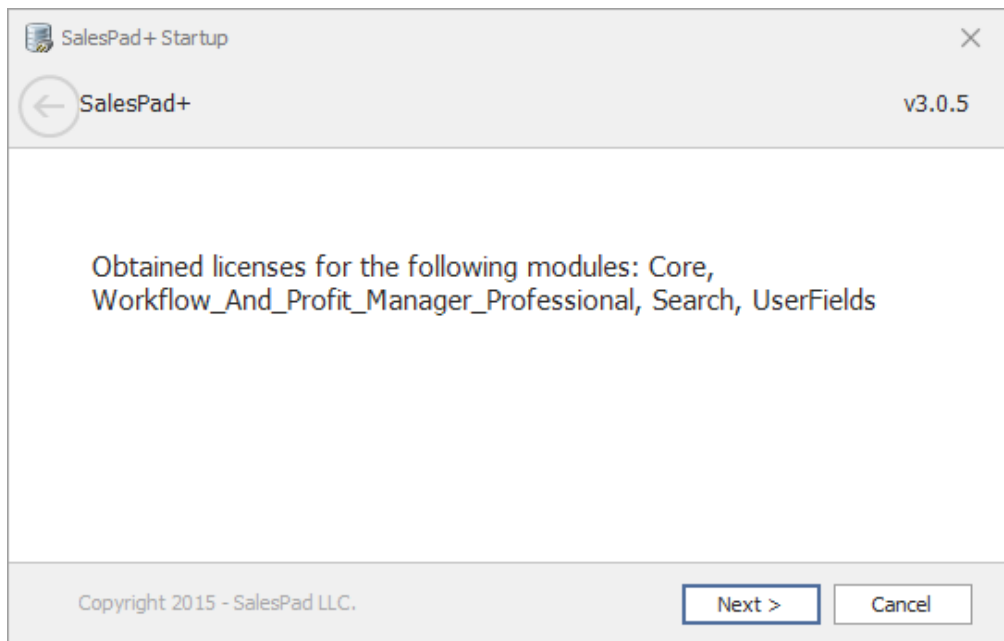
When upgrading Workflow for GP, you may have to repeat some of these steps if there have been database structure changes since your previous version.

1. Run Dynamics GP.
2. Sign in as the 'sa' user. The 'sa' user must be used for the first-time sign in because it is typically the only account with the correct database privileges to perform the initial database update.

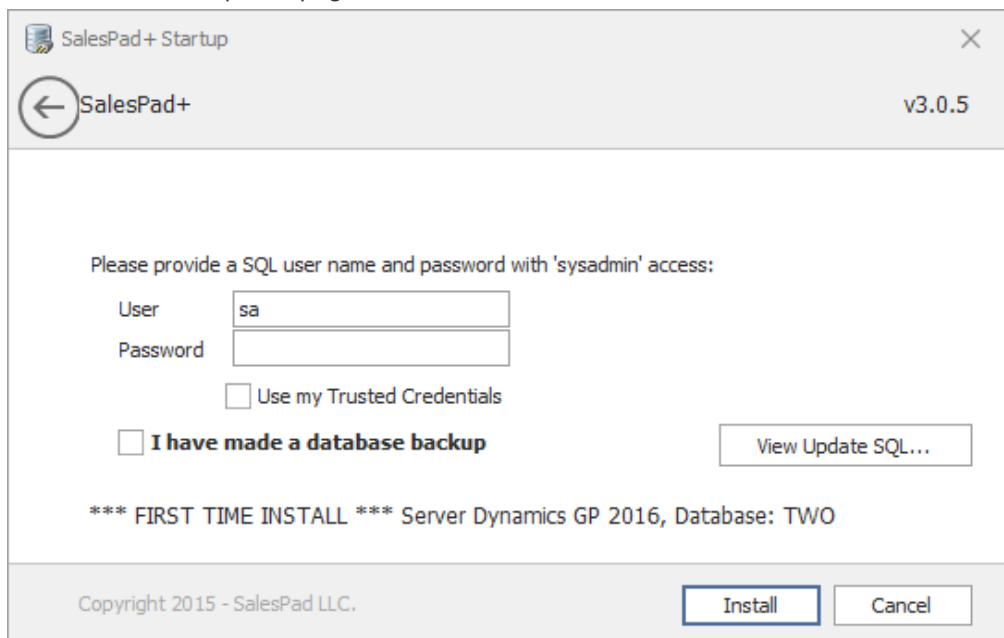


The screenshot shows the 'Welcome to Microsoft Dynamics GP' dialog box. The title bar reads 'Welcome to Microsoft Dynamics GP'. The main area has a dark blue background with the Microsoft logo in the top right corner and the text 'Microsoft Dynamics GP 2016' in the center. Below this, there are fields for 'Server:', 'Authentication:', 'User ID:', and 'Password:'. The 'Server:' dropdown is set to 'Dynamics GP 2016'. The 'Authentication:' dropdown is set to 'SQL Server Account'. The 'User ID:' field contains 'sa'. The 'Password:' field is empty. There is a checkbox labeled 'Remember user and password' which is unchecked. At the bottom left, there is a version number 'Version : 16.00.0675'. At the bottom right, there are 'OK' and 'Cancel' buttons.

3. After signing in, if Workflow for GP is properly installed it will look for licenses and report the results. If you have licenses, you can click 'Next' to continue setup. Otherwise, you will have to contact Cavallo.



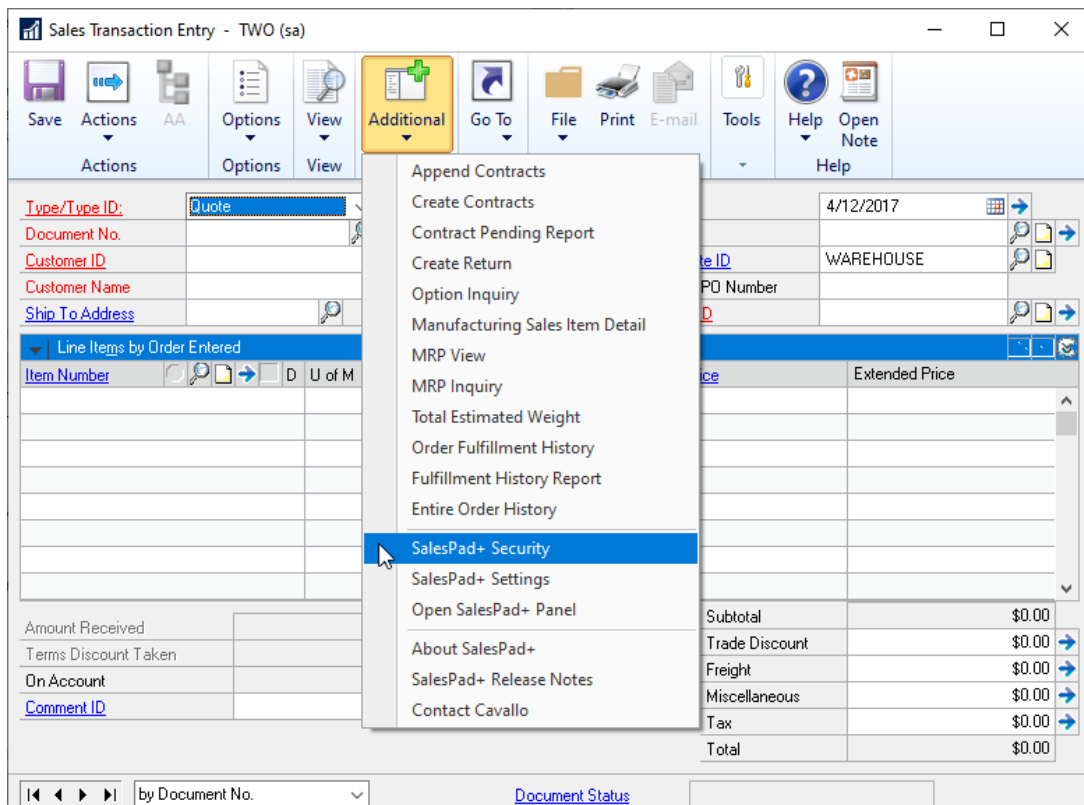
4. On the database update page, enter the credentials for the 'sa' user.



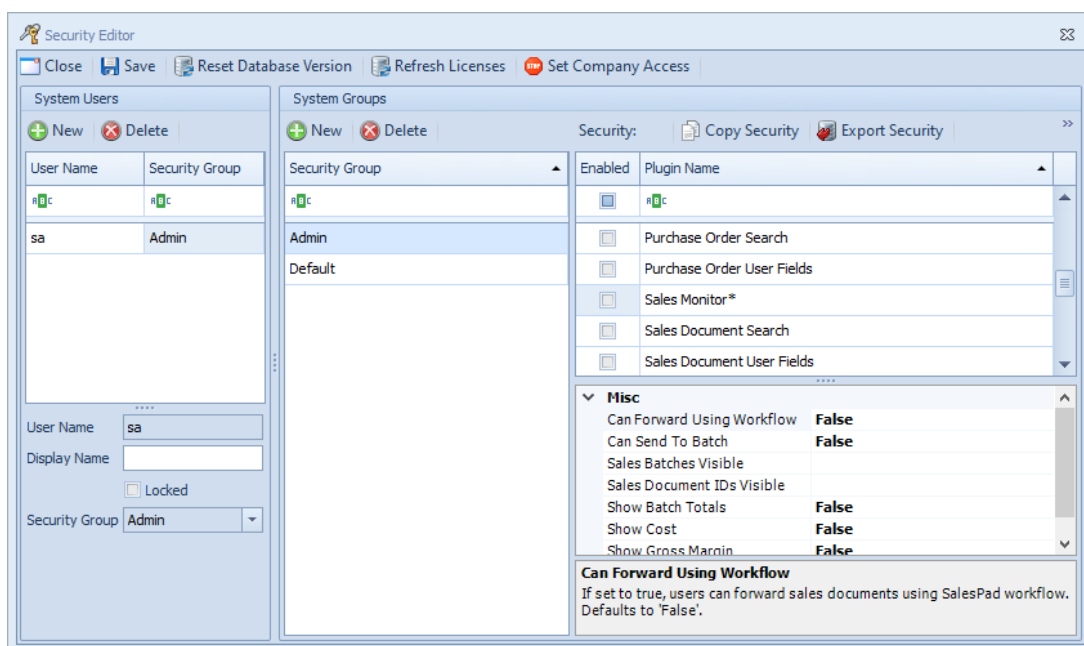
5. Check 'I have made a database backup' and click 'Install' to run the database update. If the database update is successful, the startup wizard will automatically close.

Security Editor

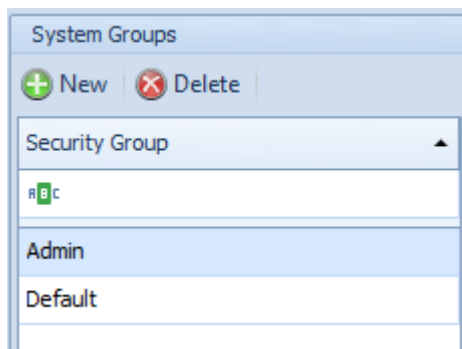
Workflow for GP has a Security Editor screen which gives administrators control over which users have access to which screens. By default, even the user who ran the first-time install does not have access to most screens, so you will need to visit the Security Editor as part of the initial setup process. To access the Security Editor, open the standard Sales Transaction Entry, open its Additional menu, and select 'SalesPad+ Security'.



Selecting 'SalesPad+ Security' opens the following screen, which has three main sections.



The Security Editor's middle section is for creating and selecting security groups. Security groups provide a way to assign multiple GP users to the same set of security permissions. For example, you can create a security group called 'Sales Reps' and assign all of your sales representatives to that group to ensure that every sales rep has access to the same screens and has the same permissions on each screen. Meanwhile, your administrative users can have access to a different set of screens.



The left section is for assigning GP users to security groups. The 'sa' user is already in the System Users grid and is assigned to the Admin security group. As other GP users log on, SalesPad+ will automatically add them to the Default security group. You can also use the 'New' button to preemptively add GP users and assign them to security groups.

User Name	Security Group
RBC	RBC
sa	Admin

User Name:

Display Name:

☐ Locked

Security Group:

The right section is for configuring screen access and permissions for the currently selected security group. The 'Enabled' checkbox in the grid controls if the user has access to the screen. Selecting a row will display its sub-securities in the bottom section, such as 'Can Forward Using Workflow'.

Notable screens include:

Administrative Screens

- Settings
- Database Update

- Security Editor

Workflow Screens

- Sales Monitor – Allows users to view sales documents by batch and perform bulk operations such as bulk forwarding.
- GP Sales Transaction Entry – If the sub-security ‘Can Forward Using Workflow’ is set to ‘True’, users can forward a sales document via the ‘Forward’ button in Sales Transaction Entry’s Additional menu.

Other Screens

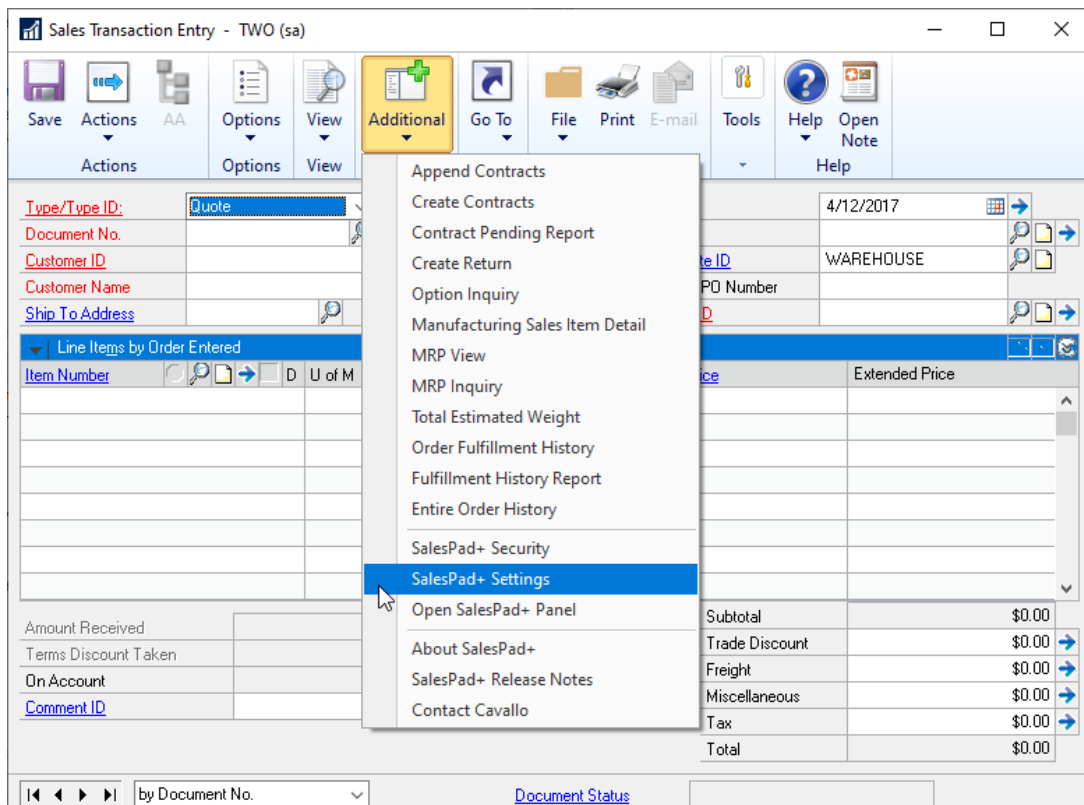
- (Entity) Search – Allows users to search for Sales Documents, Customers, and more.
- (Entity) UserFields – Allows users to view and edit SalesPad user fields.

Security:	
<input type="button" value="Copy Security"/> <input type="button" value="Export Security"/> <input type="button" value="Import Security"/> <input checked="" type="button" value="Enable All Settings"/> <input type="button" value="Disable All Settings"/> <input checked="" type="button" value="Enable All Sub Settings"/> <input type="button" value="Disable All Sub Settings"/>	
Enabled	Plugin Name
<input checked="" type="checkbox"/>	Purchase Order Search
<input checked="" type="checkbox"/>	Purchase Order User Fields
<input checked="" type="checkbox"/>	Sales Monitor*
<input checked="" type="checkbox"/>	Sales Document Search
<input checked="" type="checkbox"/>	Sales Document User Fields
Misc	
Can Forward Using Workflow	True
Can Send To Batch	True
Sales Batches Visible	
Sales Document IDs Visible	
Show Batch Totals	True
Show Cost	False
Show Gross Margin	False
Can Forward Using Workflow If set to true, users can forward sales documents using SalesPad workflow. Defaults to 'False'.	

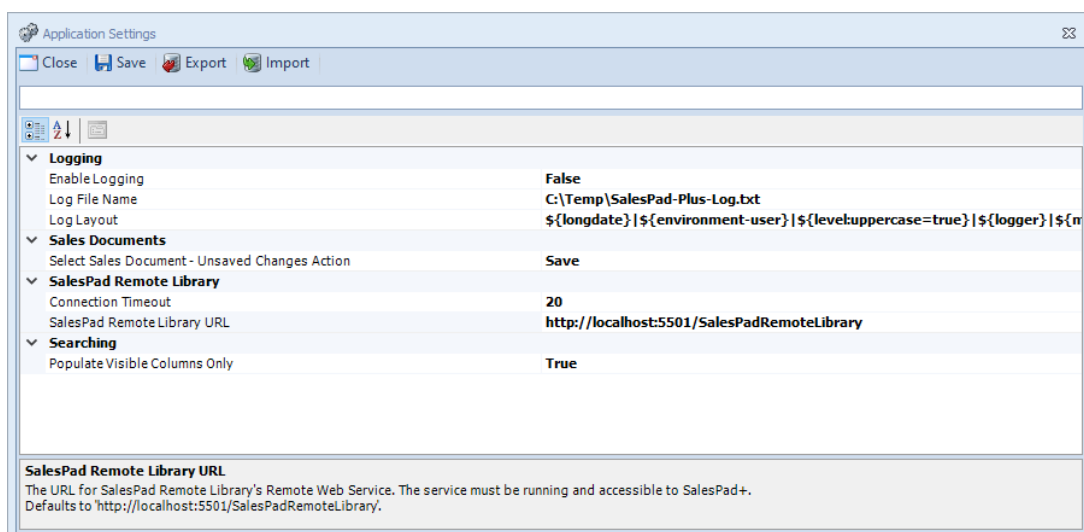
Once you have finished making security changes, be sure to click the ‘Save’ button in the top left of the screen.

Settings

Workflow for GP also has a settings screen. Settings apply to all users regardless of security group. To access Settings, open the standard Sales Transaction Entry screen, open its Additional menu, and select ‘SalesPad+ Settings’.



Selecting 'SalesPad+ Settings' opens the following screen, which displays a list of settings.



The 'SalesPad Remote Library URL' setting must be filled out for forwarding sales documents to work. View [this documentation](#) for more information on how to set up a Remote Library.

Other notable settings include:

Select Sales Document - Unsaved Changes Action - When selecting a sales document from a Workflow for GP screen such as Sales Monitor and there's a sales document in the GP Sales Transaction Entry window with unsaved changes, this setting determines how to resolve the unsaved changes. Save - Automatically save the current sales document. Ask - Show a prompt which has an option to save the current sales document. Disallow - Show a

prompt stating the user must manually resolve the issue. Defaults to 'Save'.

Connection Timeout – The amount of time in seconds to wait for SalesPad Remote Library to respond to a request, such as forwarding a sales document. Defaults to 20 seconds.

Populate Visible Columns Only – If set to 'True', searches on screens such as Sales Document Search will only load the columns which are currently visible. Enabling this setting makes searching faster, but may lead to inconveniences if users often change which columns are visible. Defaults to 'True'.

Verify Setup

Once Workflow for GP is fully set up, open the Sales Transaction Entry screen again. If you have access to the Sales Monitor or any other sales document screens, an additional panel will open to the right of Sales Transaction Entry.

The screenshot displays two windows from the SalesPad application. The primary window, titled 'Sales Transaction Entry - TWO (sa)', features a menu bar with options like Save, Actions, AA, Options, View, Additional, Go To, File, Print, E-mail, Tools, Help, Open Note, and Help. Below the menu is a form for document entry with fields for Type/Use ID, Document No., Customer ID, Customer Name, Ship To Address, Date, Batch ID, Default Site ID, Customer PO Number, and Currency ID. A table for 'Line Items by Order Entered' is visible, with columns for Item Number, Quantity Quoted, Unit Price, and Extended Price. At the bottom, a summary section shows financial details: Amount Received (\$0.00), Terms Discount Taken (\$0.00), On Account (\$0.00), Subtotal (\$0.00), Trade Discount (\$0.00), Freight (\$0.00), Miscellaneous (\$0.00), Tax (\$0.00), and Total (\$0.00). The secondary window, titled 'Sales Monitor', shows a table of sales documents with columns for Sales Doc Type, Sales Doc ID, Sales Doc Num, Sales Batch, and Total. The table lists various documents including orders and invoices with their respective IDs, numbers, batches, and totals.

Sales Doc Type	Sales Doc ID	Sales Doc Num	Sales Batch	Total
ORDER	SHOPORD	SHOP0145.2	RDY TO INVOICE	40.00
ORDER	SHOPORD	SHOP0146	RDY TO INVOICE	5.25
ORDER	SHOPORD	SHOP0147.1	RDY TO INVOICE	5.25
ORDER	SHOPORD	SHOP0062	RDY TO INVOICE	169.00
ORDER	DCORDER	SPDCORD0090	READY TO PACK	5.63
ORDER	MAGORD	MAGORD0013	RDY TO INVOICE	5.63
ORDER	SCORD	SCORD0001	ORDER	5.63
ORDER	SCORD	SCORD0002	ORDER	10.22
ORDER	SCORD	SCORD0003	ORDER	10.22
ORDER	MAGORD	MAGORD0016	RDY TO INVOICE	40.00
INVOICE	STDINV	ORDST4528	PART 1	140.83
ORDER	MAGORD	MAGORD0018	RDY TO INVOICE	40.00
ORDER	MAGORD	MAGORD0021	RDY TO INVOICE	5.63
ORDER	MAGORD	MAGORD0019	RDY TO INVOICE	5.63
ORDER	MAGORD	MAGORD0020	RDY TO INVOICE	5.63
INVOICE	MAGINV	MAGORD0025	NEW INVOICE	5.63
INVOICE	MAGINV	MAGORD0025	RDY TO INVOICE	5.63

For additional information on how to use these screens, please view other Workflow for GP documentation.