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)

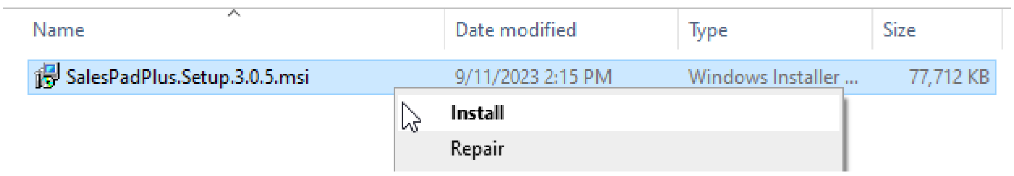
SQL permissions for company database: db_datareader, db_datawriter, and public (minimum)

Installation

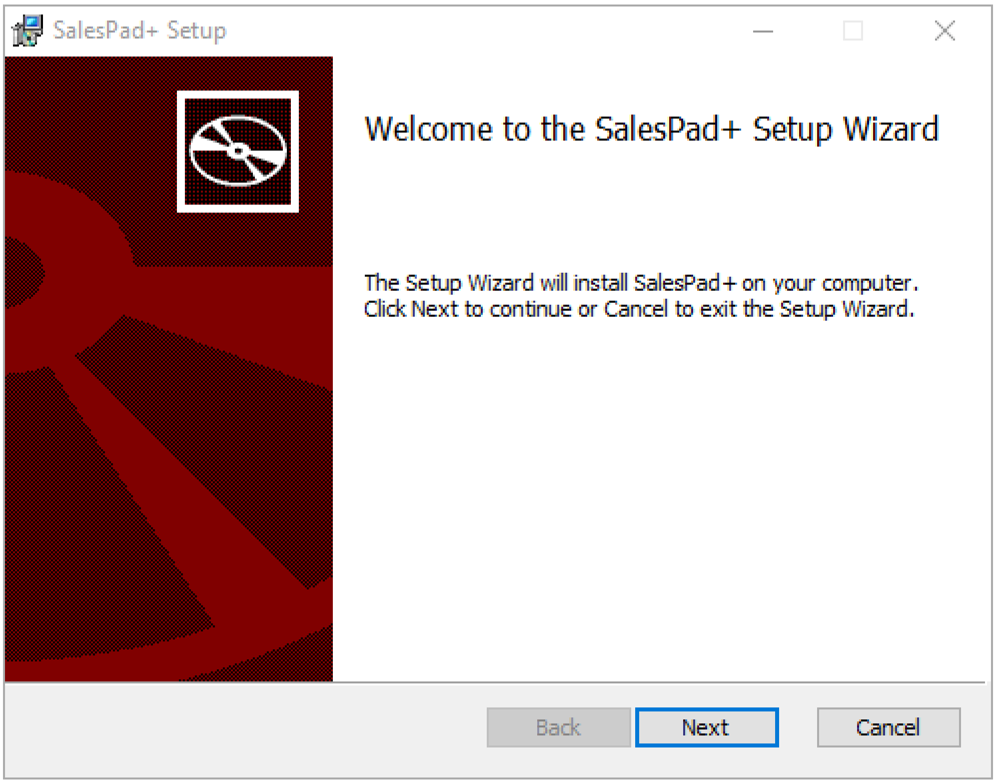
Workflow for GP has an installer. To obtain this installer, contact Cavallo and then distribute it within your company as appropriate.

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.

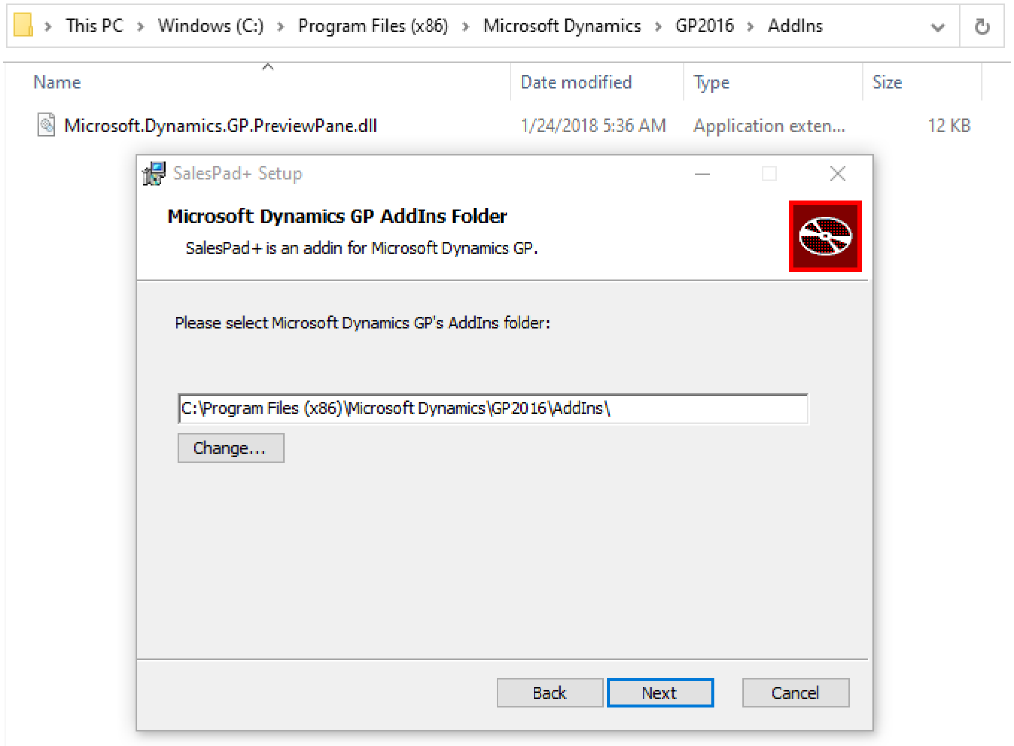


2. On the first page, click ‘Next’.



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.

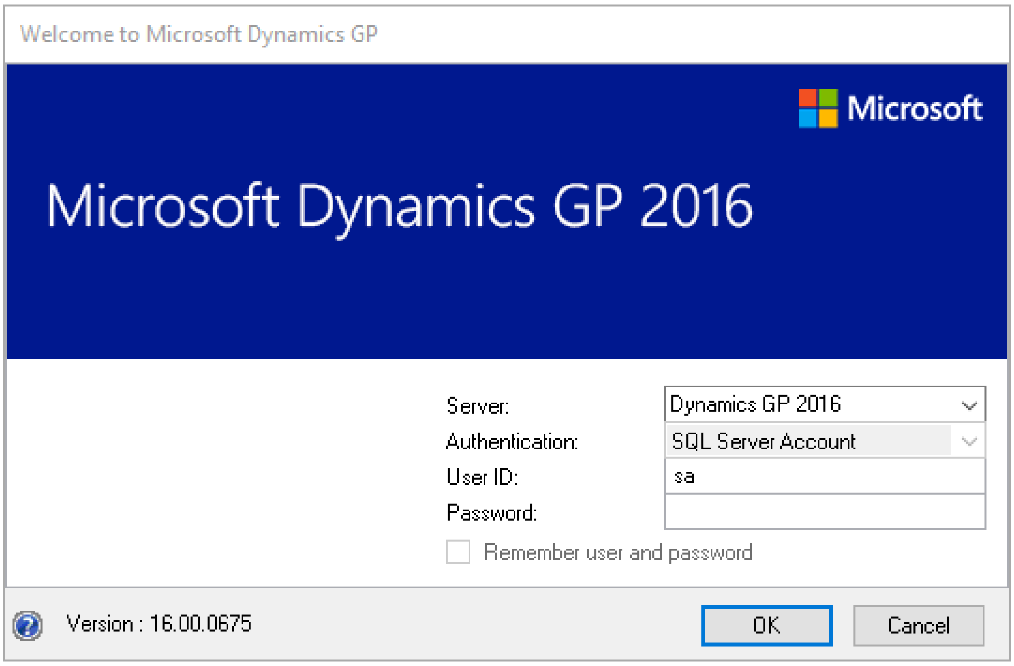
First-Time Sign In

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.

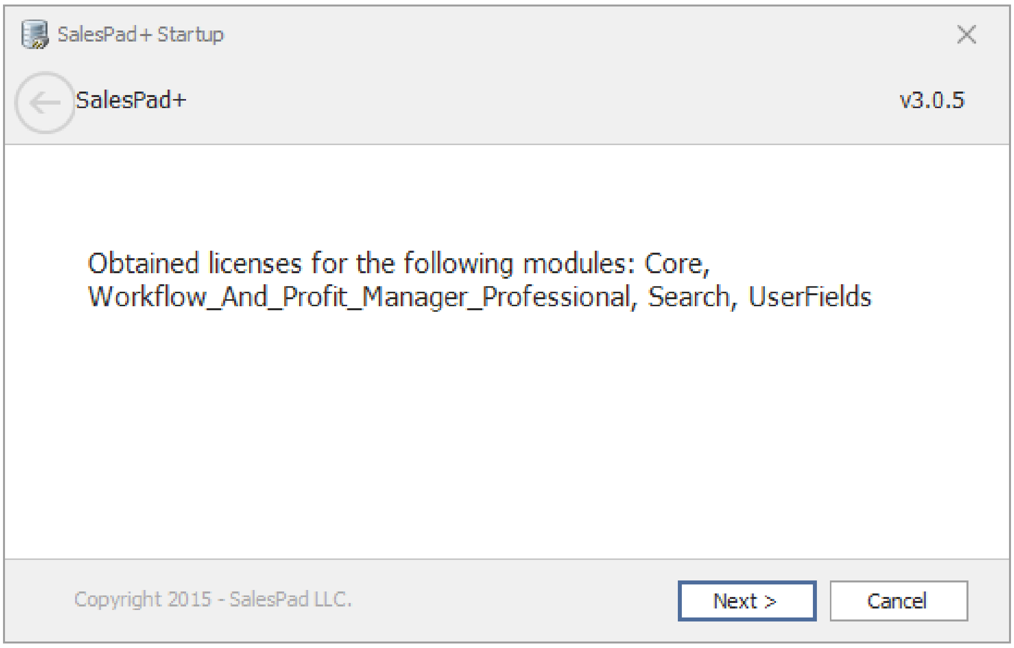
When upgrading Workflow for GP, you may have to repeat some of these steps if there have been database structure changes since your previous version.

1. Run Dynamics GP.

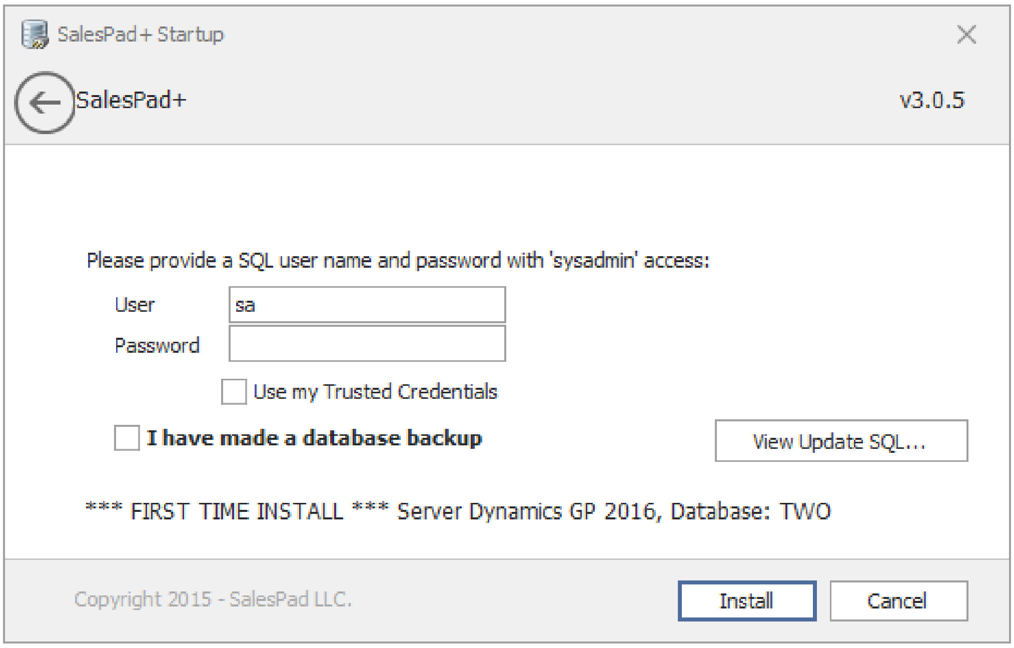
2. Sign in as the ‘sa’ user. The ‘sa’ user must be used for the first-time sign in because it is typically the only account with the correct database privileges to perform the initial database update.



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.



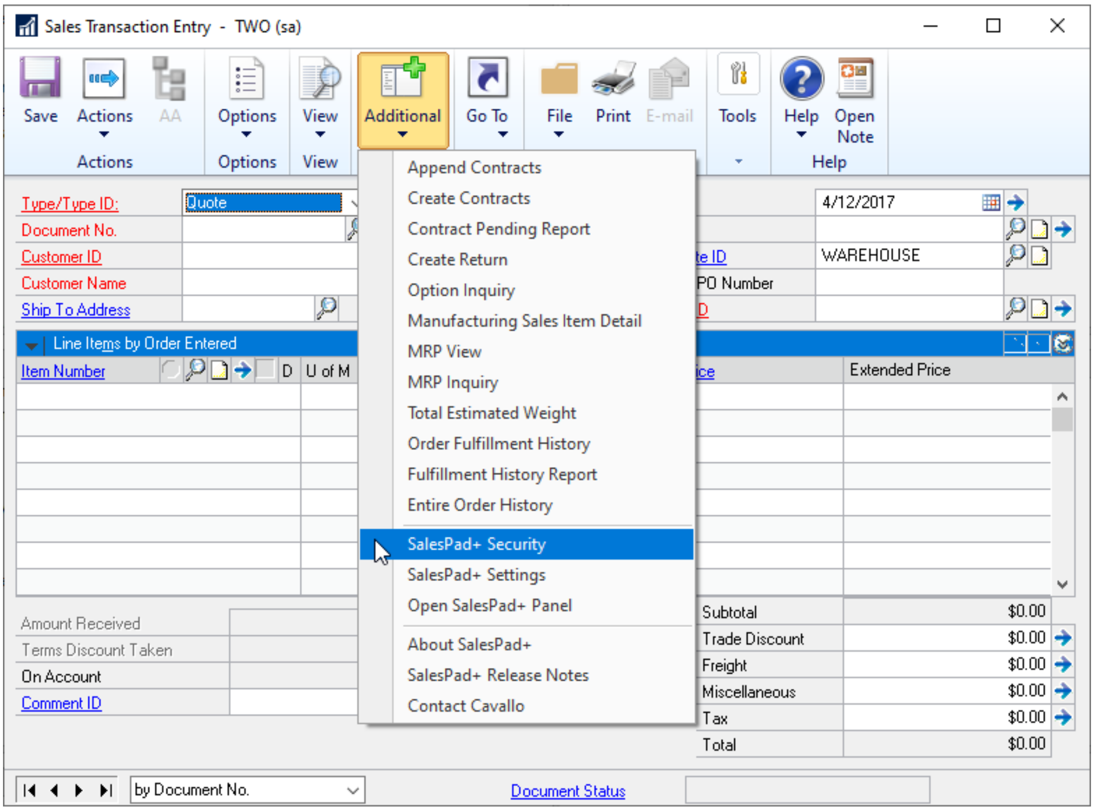
4. On the database update page, enter the credentials for the ‘sa’ user.



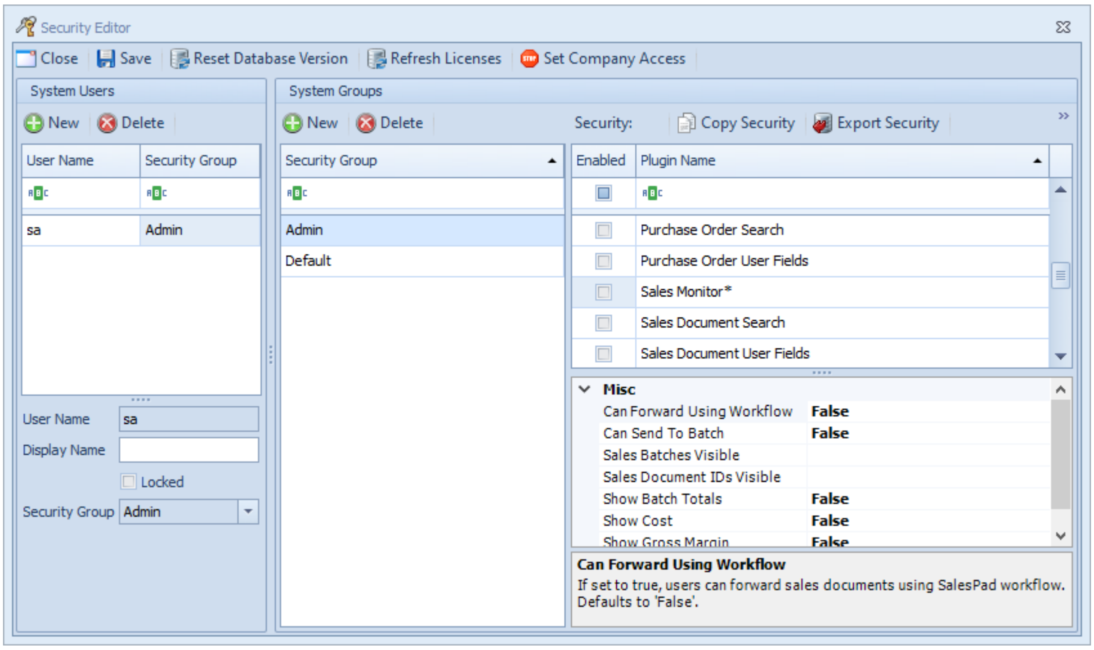
5. Check ‘I have made a database backup’ and click ‘Install’ to run the database update. If the database update is successful, the startup wizard will automatically close.

Security Editor

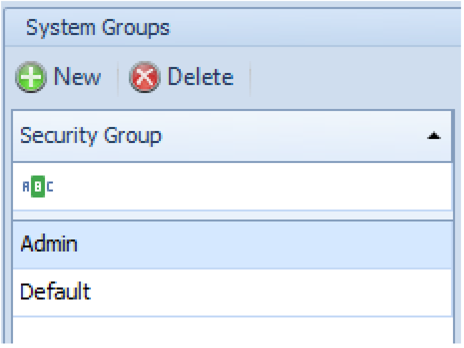
Workflow for GP has a Security Editor screen which gives administrators control over which users have access to which screens. By default, even the user who ran the first-time install does not have access to most screens, so you will need to visit the Security Editor as part of the initial setup process.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



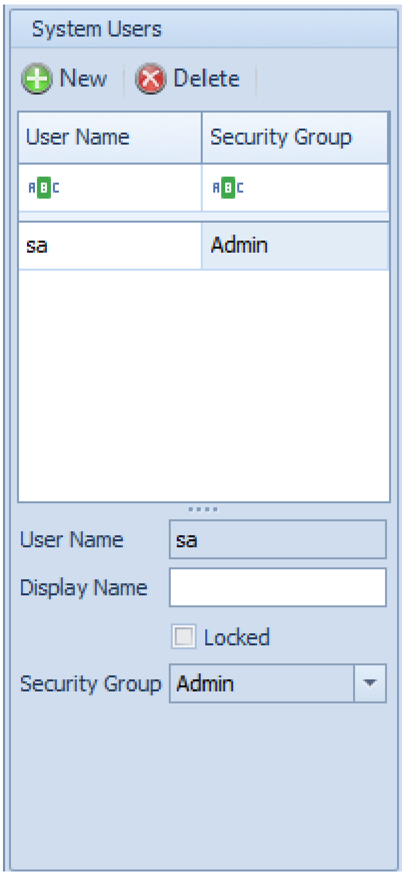
Selecting ‘SalesPad+ Security’ opens the following screen, which has three main sections.



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.



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

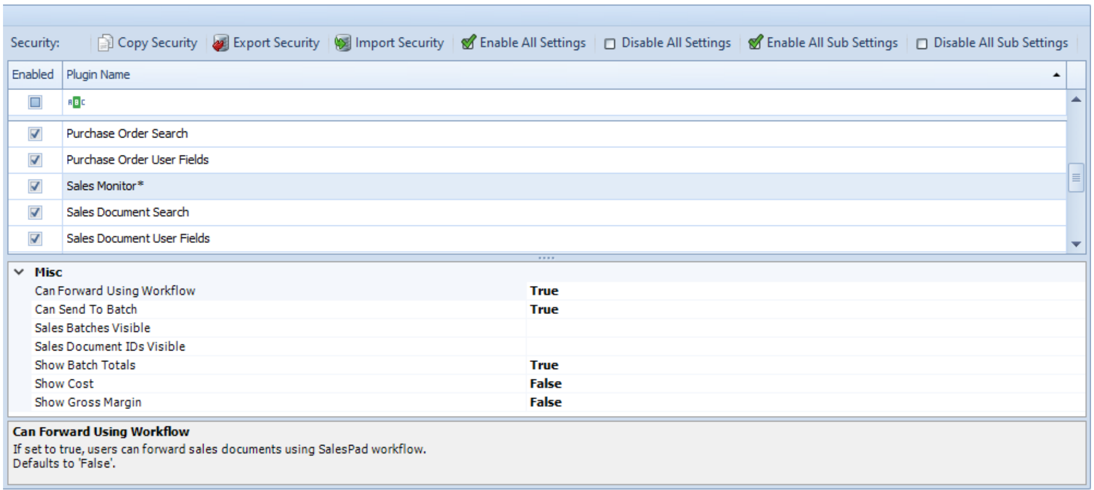
- Security Editor

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

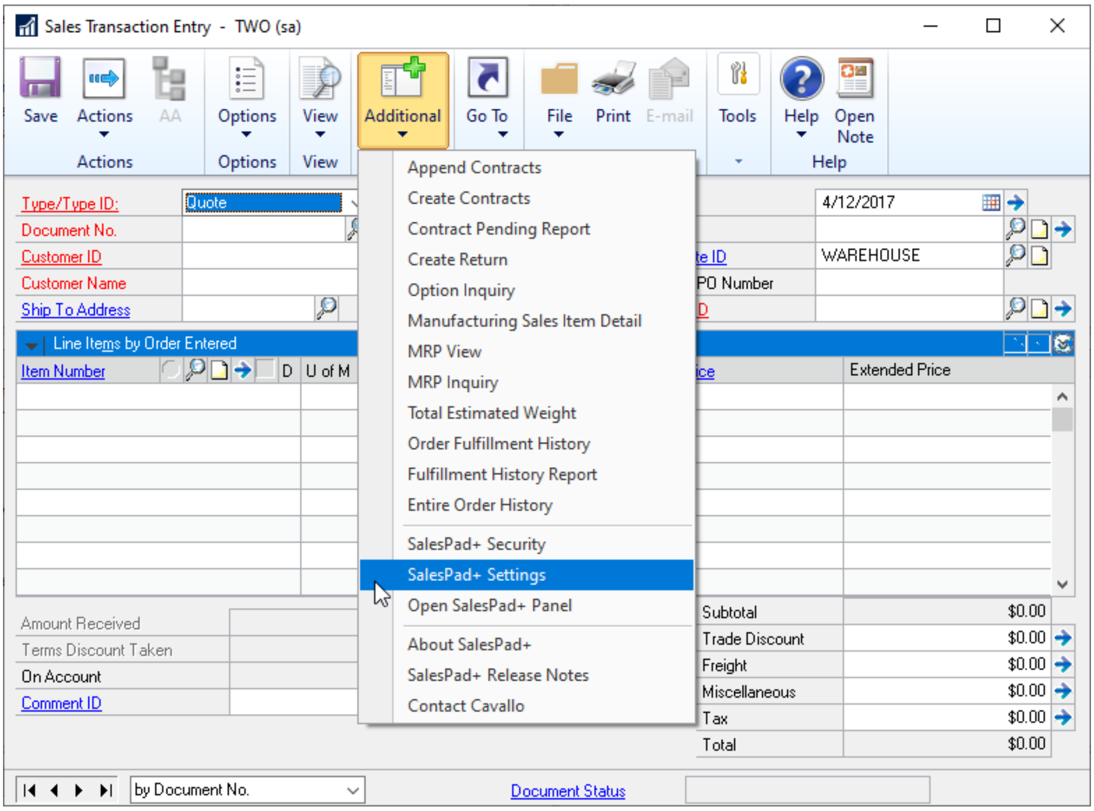
- (Entity) Search – Allows users to search for Sales Documents, Customers, and more.
- (Entity) UserFields – Allows users to view and edit SalesPad user fields.



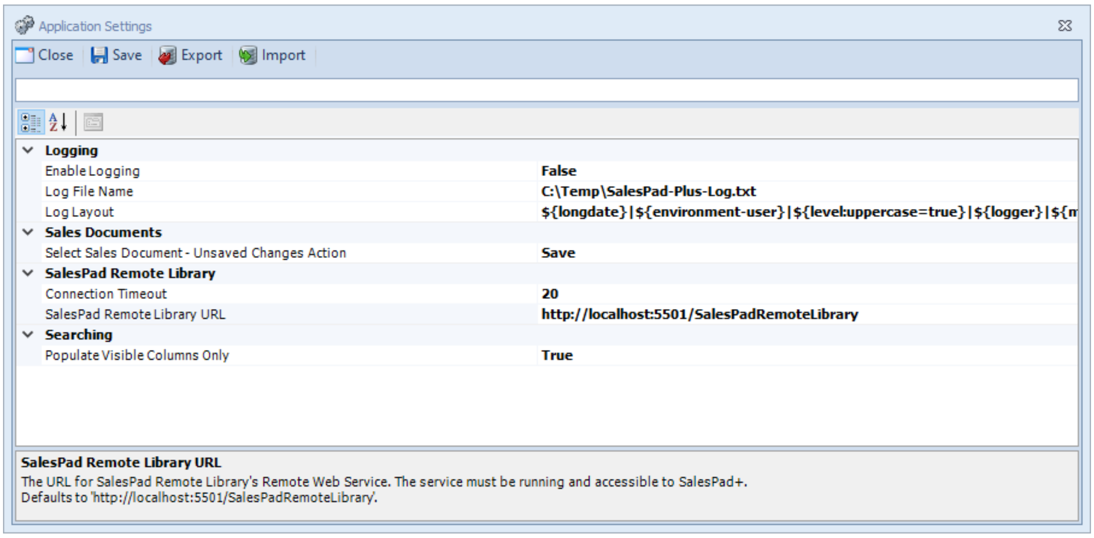
Once you have finished making security changes, be sure to click the 'Save' button in the top left of the screen.

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:

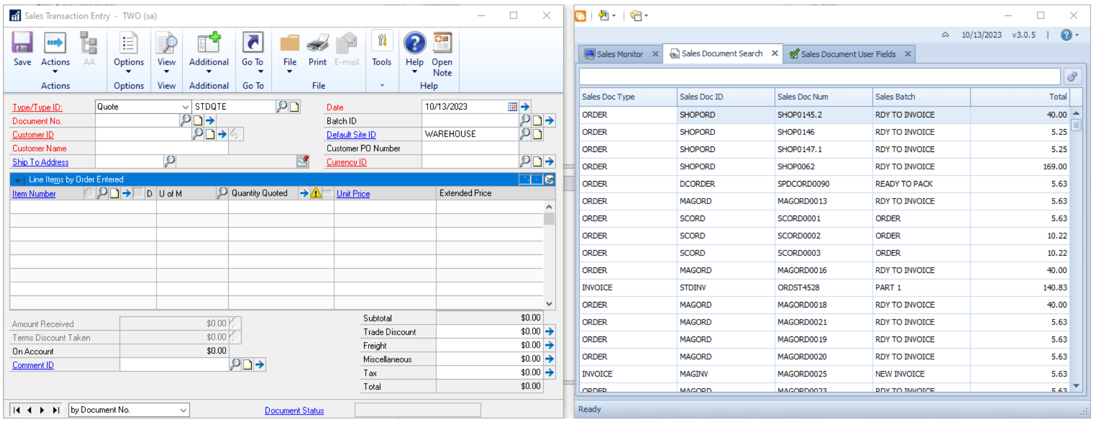
Select Sales Document – Unsaved Changes Action – When selecting a sales document from a Workflow for GP screen such as Sales Monitor and there’s a sales document in the GP Sales Transaction Entry window with unsaved changes, this setting determines how to resolve the unsaved changes. Save – Automatically 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.



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