Workflow for GP Overview

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Overview

Workflow for GP, also known as SalesPad+, is an add-in application for Microsoft Dynamics GP that provides some of SalesPad's most-loved functionality directly in GP. This includes powerful workflow capabilities for the Sales Transaction Entry screen, as well as user fields and improved search capabilities for Sales Transaction Entry, Customer Maintenance, Item Maintenance, and more.

This guide provides a general overview of Workflow for GP's features. For information on installation and setup, please refer to [this documentation].

SalesPad+ Panel

Most of Workflow for GP's functionality is found in the SalesPad+ panel which automatically displays to the right of supported Dynamics GP screens.

Supported Dynamics GP screens include:

- Sales Transaction Entry
- Sales Item Detail Entry
- Customer Maintenance
- Item Maintenance
- Purchase Order Entry
- Vendor Maintenance

If the SalesPad+ panel is closed, it can be reopened by reopening its corresponding Dynamics GP screen, or by selecting 'Open SalesPad+ Panel' from the Additional menu.

Individual tabs can be reopened by opening the modules menu near the top of the panel and selecting a tab to reopen. The SalesPad submenu contains administrative screens such as Settings, Security Editor, and System Log Search.

Sales Monitor

The Sales Monitor is available for the Sales Transaction Entry screen. It provides a complete view of all open sales documents which are relevant to each user. Users can also use this screen to batch forward sales documents through workflow, which provides process control as well as powerful automated functionality such as splitting and emailing. For more details, please view the Workflow for GP Sales Monitor documentation.

Searching

All supported screens except Sales Item Detail Entry have a tab for searching for the screen's transaction or card. For example, the Item Maintenance screen has a tab called Item Master Search which allows users to search for items. To perform a search, type into the text bar at the top of the tab and then press the enter key. Double clicking a row in the search results will open that item in the Item Maintenance screen.

Right-clicking one of the column headers will show a menu which has various options for customizing the search tab, such as sorting the results, grouping by a column, or further filtering the results. Most notably, the Column/Band Chooser option allows users to select which columns are visible. Available columns include various GP fields as well as any user fields for the business object.

Clicking the gear icon next to the search bar will open a screen for selecting which columns to search on. For example, to search for customers which have a specific user field set to 'Yes', configure the search to only search on that user field column.

The settings screen has a few settings which are relevant to searching:

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'.

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'.

User Fields

All supported screens have a tab for viewing and editing SalesPad user fields. For example, the Vendor Maintenance screen has a tab called Vendor User Fields. These user fields must be created in SalesPad Desktop. Supported user field types include text fields, images, dropdown options, True/False checkboxes, hyperlinks, decimals, integers, and more.

By default, user field tabs show one or more standard fields to identify the currently selected business object. These fields are read-only because they are informational only.

Users which have the Allow Screen Layout Customization security enabled can add user fields to user field tabs. To enable this security setting, go to the Security Editor, select the Fields plugin, and set Allow Screen Layout Customization to True.

To add user fields, right-click an empty area in the tab and select Customize Layout. This will open a screen which displays a list of fields which can be dragged and dropped into the tab.

After adding user fields, users with access to the tab may view and edit them.