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# 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 [Workflow for GP Installation Guide](#).

## 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.

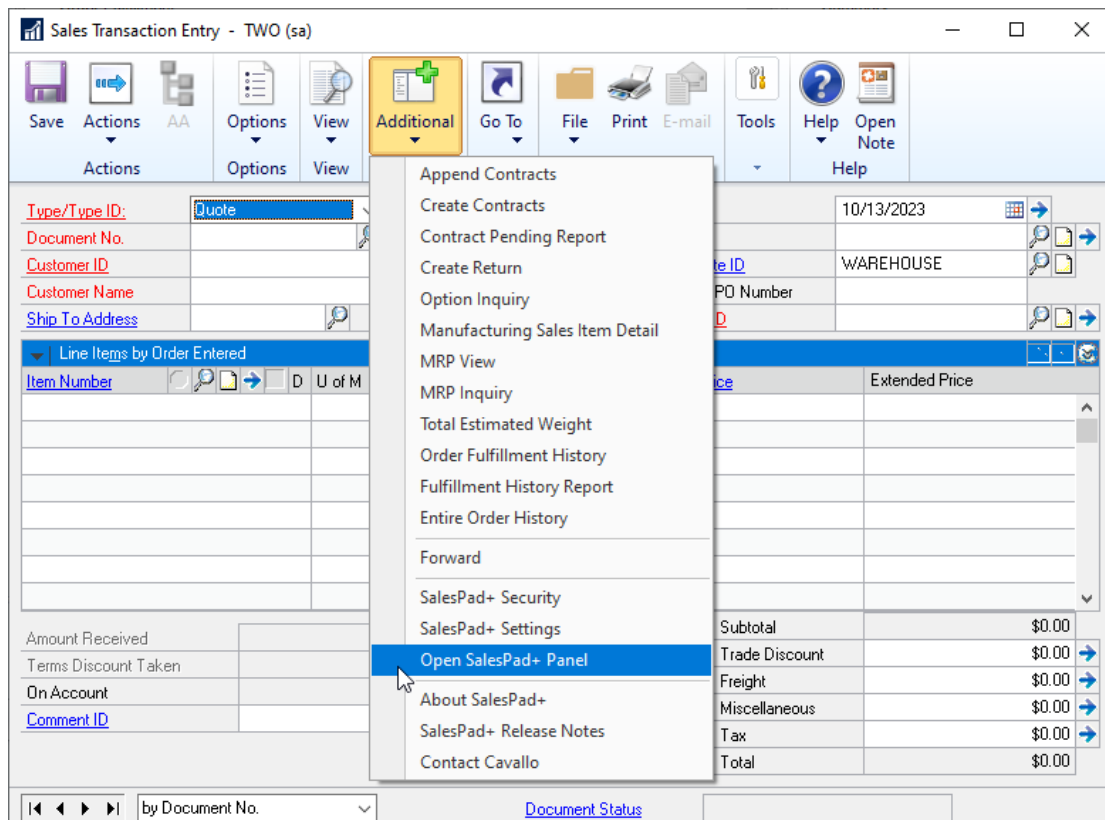
The screenshot displays the 'Sales Transaction Entry - TWO (sa)' window. The main area shows a 'Quote' document type with a date of 10/13/2023 and a warehouse of 'WAREHOUSE'. Below this is a table for 'Line Items by Order Entered' with columns for Item Number, U of M, Quantity Quoted, Unit Price, and Extended Price. The bottom section shows financial details: Amount Received (\$0.00), Terms Discount Taken (\$0.00), On Account (\$0.00), and a total of \$0.00. The SalesPad+ panel on the right, titled 'Sales Monitor', displays a table of sales documents with columns for Sales Doc Type, Sales Doc Num, Sales Doc ID, Doc Date, Sales Batch, Customer Num, and Total. The table lists various orders (ORDST2202 through ORD1010) and their corresponding totals.

Sales Doc Type	Sales Doc Num	Sales Doc ID	Doc Date	Sales Batch	Customer Num	Total
ORDER	ORDST2202	STDORD	8/16/2015	PART 2	AARONFTT0001	0.00
ORDER	ORDST2233	STDORD	11/17/2015	ORDER	AARONFTT0001	5.63
ORDER	ORDST2234	STDORD	11/17/2015	ORDER	AARONFTT0001	0.00
ORDER	ORDST2235	STDORD	11/17/2015	ORDER	AARONFTT0001	0.00
ORDER	ORDST2236	STDORD	11/17/2015	ORDER	AARONFTT0001	0.00
ORDER	ORDST2237	STDORD	11/17/2015	ORDER	AARONFTT0001	0.00
ORDER	ORDST2239	STDORD	11/19/2015	ORDER	AARONFTT0001	0.00
ORDER	ORDST2240	STDORD	11/19/2015	ORDER	ADAMPARK0001	618.70
ORDER	ORDST2241	STDORD	11/19/2015	ORDER	ADAMPARK0001	0.00
ORDER	ORDST2242	STDORD	11/19/2015	ORDER	ADAMPARK0001	0.00
ORDER	ORDST2243	STDORD	11/19/2015	ORDER	ADAMPARK0001	0.00
ORDER	ORDST2245	STDORD	11/19/2015	ORDER	AARONFTT0001	0.00
ORDER	ORDST2244	STDORD	11/19/2015	ORDER	AARONFTT0001	0.00
ORDER	ORDST2246	STDORD	11/19/2015	ORDER	AARONFTT0001	119.40
ORDER	ORDST2247	STDORD	11/19/2015	ORDER	AARONFTT0001	0.00
ORDER	ORD1010	BLKORD	11/19/2015	ORDER	AARONFTT0001	0.00
ORDER	ORDST2248	STDORD	11/19/2015	ORDER	AARONFTT0001	119.30

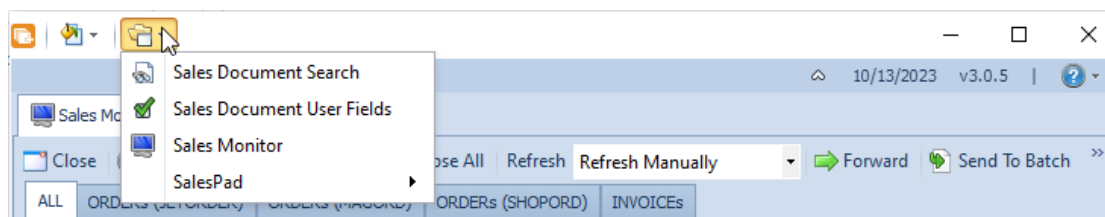
Supported Dynamics GP screens include:

- 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 [Workflow for GP Sales Monitor Documentation](#)

The Sales Monitor window displays a summary of sales orders on the left and a detailed list of sales batches on the right. The summary table shows counts and totals for different order types and statuses.

ID	Count	Total
JETORDER ORDER		
MAGORD ORDER		
SHOPORD ORDER		
IMPORTED	0	0.00
SHIPPED	3	343.11
RDY TO INVOICE	96	16,884.59
ERROR	0	0.00
STDINV INVOICE		
<b>Total</b>	<b>310</b>	<b>22,492...</b>

The detailed view shows sales batches categorized by status: SHIPPED and RDY TO INVOICE.

Sales Doc Num	Doc Date	Customer Num	Total	Status
<b>Sales Batch: SHIPPED</b>				
SHOP0141	7/26/2023	SHOIFY0001	114.37	
SHOP0142	7/26/2023	SHOIFY0001	114.37	
SHOP0143	7/26/2023	SHOIFY0001	114.37	
<b>Sales Batch: RDY TO INVOICE</b>				
SHOP0003	3/10/2021	SHOIFY0001	169.00	FP OPD
SHOP0004	3/8/2021	SHOIFY0001	169.00	FP OPD
SHOP0005	11/9/2021	SHOIFY0001	169.00	FP OPD
SHOP0006	11/9/2021	SHOIFY0001	169.00	FP OPD
SHOP0007	11/9/2021	SHOIFY0001	169.00	FP OPD
SHOP0008	11/9/2021	SHOIFY0001	169.00	FP OPD
SHOP0009	12/2/2021	SHOIFY0001	169.00	FP FPD
SHOP0010	12/2/2021	SHOIFY0001	45.00	FP FPD
SHOP0011	12/2/2021	SHOIFY0001	169.00	FP FPD
SHOP0012	12/2/2021	SHOIFY0001	444.00	FP FPD

## 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.

The Item Maintenance window shows details for a specific item (128 SDRAM). The Item Master Search window shows a list of search results for SDRAM items.

**Item Maintenance - TWO (sa)**

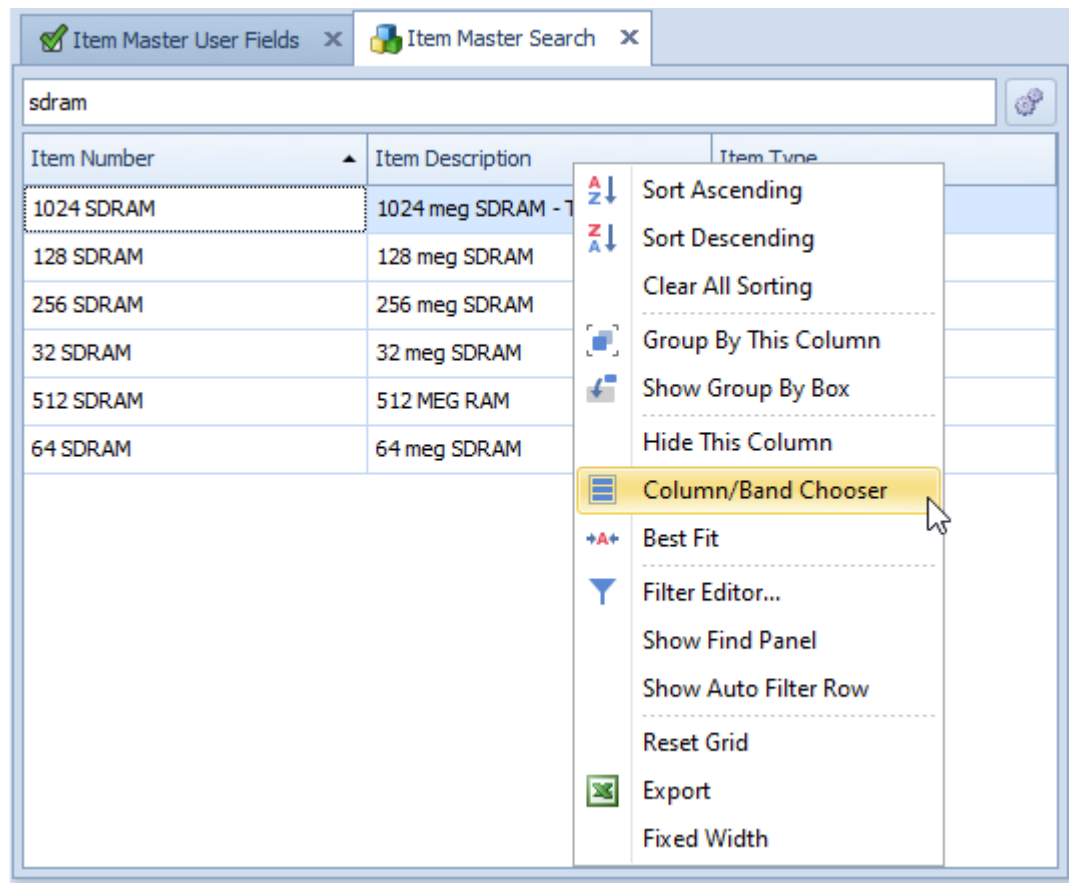
Item Number: 128 SDRAM  
 Description: 128 meg SDRAM  
 Short Description: RAM  
 Generic Description: RAM  
 Item Type: Sales Inventory  
 Valuation Method: FIFO Perpetual  
 Sales Tax Option: Taxable  
 Tax Schedule ID: PHONE 1-10  
 Shipping Weight: 2.00  
 Quantity Decimals: 0  
 Currency Decimals: 0  
 Purchase Tax Option: Nontaxable  
 Tax Schedule ID: \$120.00  
 Standard Cost: \$90.00  
 Current Price: \$90.00  
 List Price: \$90.00  
 Quantity On Hand: 62,795  
 Quantity Available: 60,494

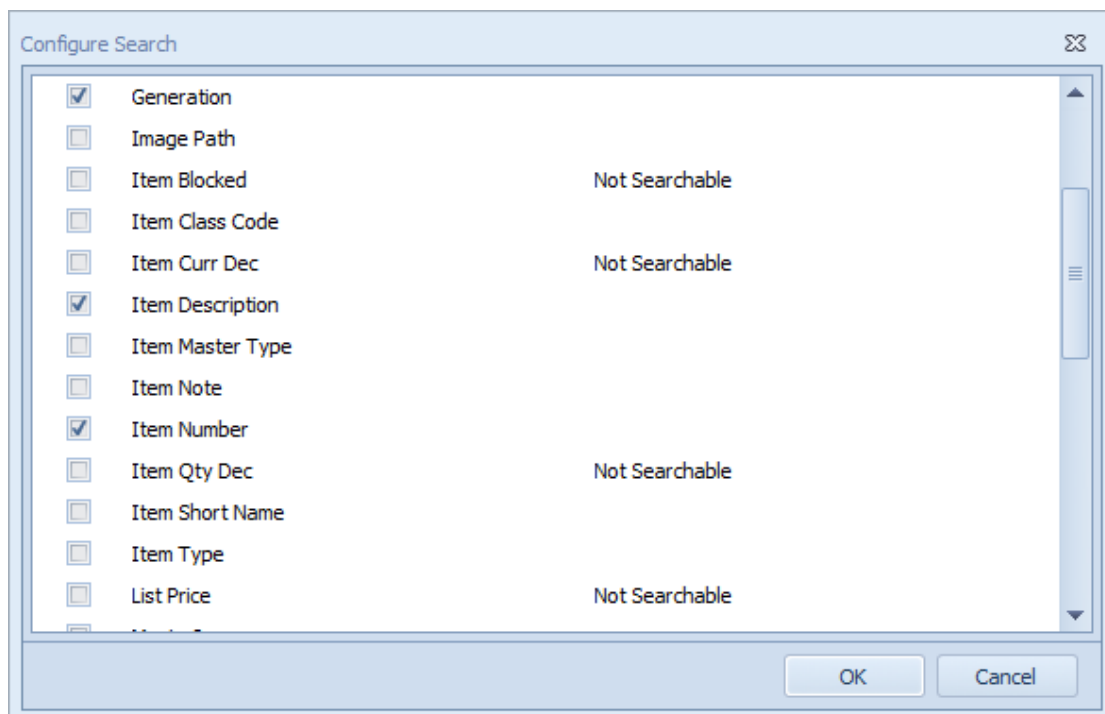
**Item Master Search**

Item Number	Item Description	Item Type
1024 SDRAM	1024 meg SDRAM - The latest a...	Sales Inv
128 SDRAM	128 meg SDRAM	Sales Inv
256 SDRAM	256 meg SDRAM	Sales Inv
32 SDRAM	32 meg SDRAM	Sales Inv
512 SDRAM	512 MEG RAM	Sales Inv
64 SDRAM	64 meg SDRAM	Sales Inv

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.

Vendor Maintenance - TWO (sa)

Save Clear Delete Write Letters Options Additional All-in-One View File Print Tools Help Add Note

Actions Options Additional File Help

Vendor ID: SUPERIOR0001

Name: Superior Telephone Systems

Short Name: Superior Teleph

Check Name: Superior Telephone Systems

Primary Address: Address ID: PRIMARY Contact: Kelly Houseman Address: 987 Main St. City: Vancouver State: BC ZIP Code: V4E 5E2 Country Code: Country: Canada

Address IDs: Purchase: PRIMARY Remit To: REMIT TO Ship From: PRIMARY

Status: Active

Class ID: CAN-ALL-C

Phone 1: (604) 555-0192 Ext. 0000 Phone 2: (604) 555-0192 Ext. 0000 Phone 3: Fax: (604) 555-0192 Ext. 0000

Tax Schedule: CANALLGST+7 Shipping Method: MAIL UPS Zone:

Vendor Account: Comment 1: Comment 2:

Options Address Accounts Email

Vendor Search Vendor User Fields

10/23/2023 v3.0.5

Vendor ID: SUPERIOR0001 Vendor Name: Superior Telephone Systems

Ready

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.

Enabled	Plugin Name
<input type="checkbox"/>	RIC
<input checked="" type="checkbox"/>	Customer User Fields
<input checked="" type="checkbox"/>	Database Update*
<input checked="" type="checkbox"/>	Fields*
<input checked="" type="checkbox"/>	GP Sales Transaction Entry*
<input checked="" type="checkbox"/>	Grid*

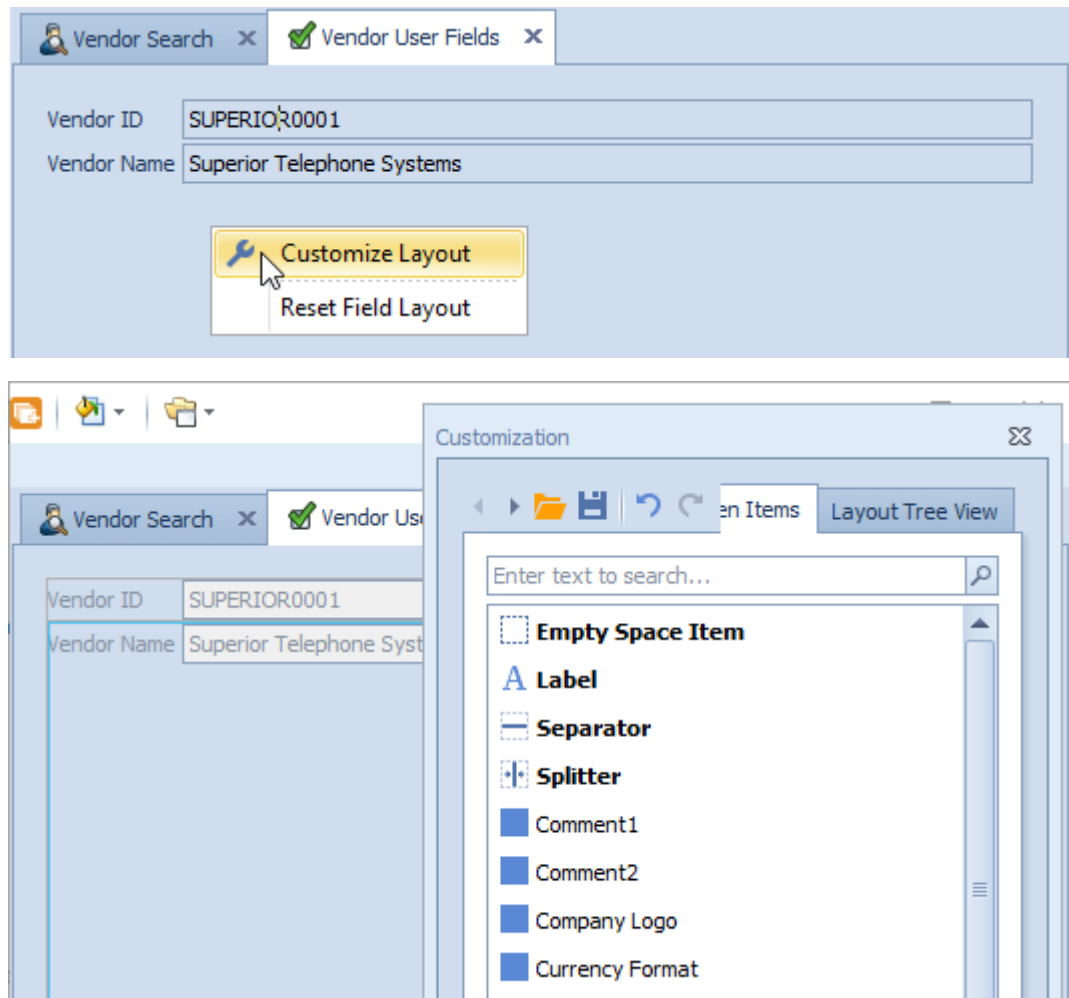
Misc

Allow Screen Layout Customization True

Allow Screen Layout Customization

Turns on the ability to customize fields screen layouts. Defaults to 'False'.

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.

10/23/2023 v3.0.5


Vendor Search

Vendor User Fields

Vendor ID

SUPERIOR0001

Company Logo



Order Tips

- This vendor gives a 30% discount when buying 5 or more phones at once.
- This vendor does not sell smartphones.

Vendor Source

Employee Referral

☒ Is Test Vendor

Ready