Workflow for GP Sales Monitor Documentation

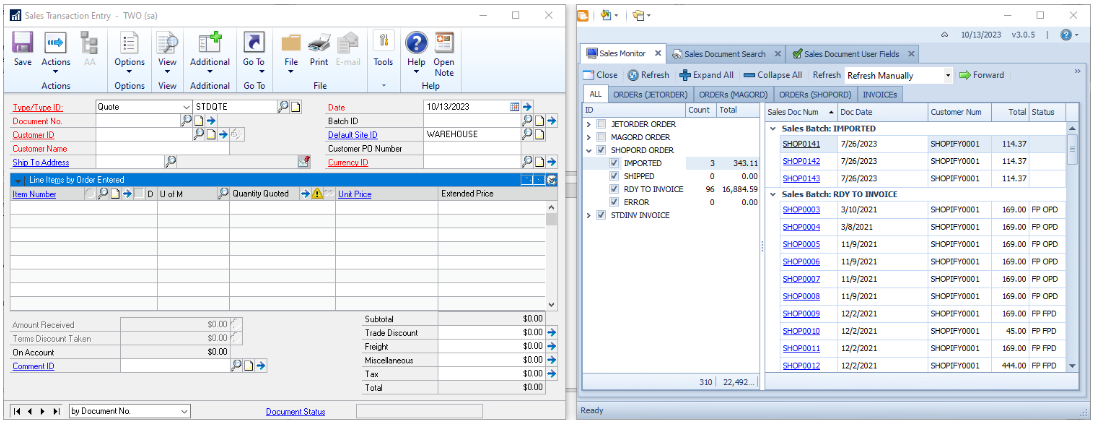
Megan De Freitas - 2024-12-03 - Workflow for GP

Overview

The Sales Monitor 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.

Usage

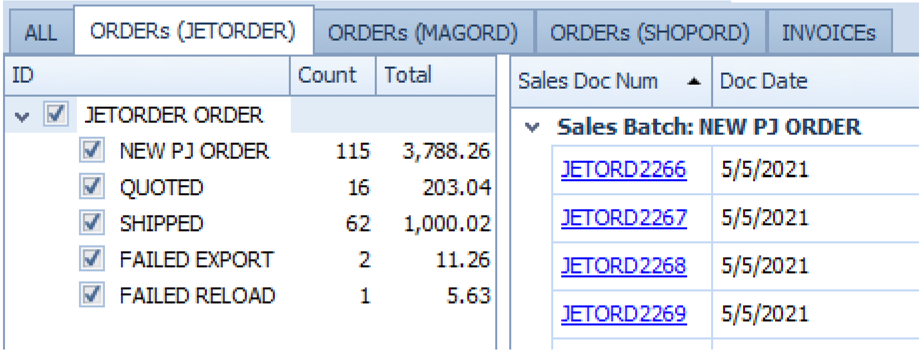
Navigate to the Sales Monitor by opening Sales Transaction Entry within Microsoft Dynamics GP. If the Sales Monitor is enabled in the Security Editor, it will appear in a window to the right of Sales Transaction Entry.



Display

The Sales Monitor organizes sales documents by document ID and workflow batch. Displayed documents can be sorted by any of the grid columns by clicking on the column header.

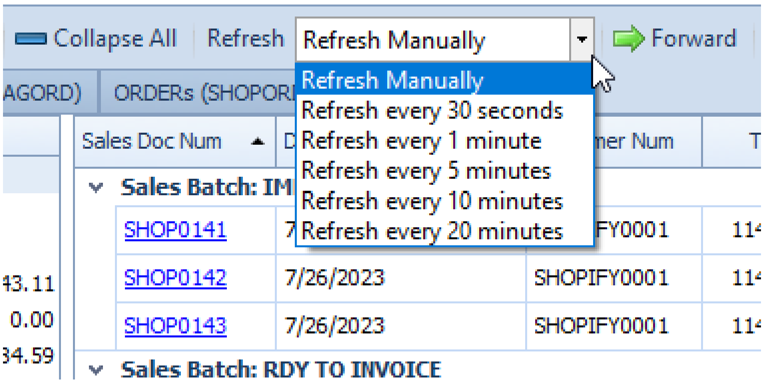
Each sales document ID that has a workflow appears as a tab on the top of the Sales Monitor. Clicking on a tab will narrow the grids to the selected document ID.



If the 'All' tab is selected, all document IDs appear in the left-side grid. Each document ID can be expanded or collapsed with the arrow to the left of each ID's checkbox. Each document ID and workflow batch can be included or excluded from the right-side grid by using the checkboxes in the left-side grid.

Clicking on a document number will open the sales document in the Sales Transaction Entry window. Double-clicking elsewhere in the sales document's row will also open the sales document.

The Sales Monitor's header has a Refresh button which updates the Sales Monitor grids to show the latest data. The header also has options to automatically refresh the grids at predefined time intervals such as every 5 minutes.



Status Column

The sales document grid has a Status column that uses status codes to concisely deliver information about each document. A document can have multiple codes. The following codes may appear:

- BO (Back Ordered): One or more lines has back-ordered quantities
- FBO (Fully Back Ordered): Quantity back-ordered is equal to the document quantity
- PBO (Partially Back Ordered): Quantity back-ordered is less than the document quantity
- PP (Partially Picked): One or more lines have quantities that are partially fulfilled
- FP (Fully Picked): One or more lines have been fully fulfilled
- PL (Purchased Lines): One or more purchase orders are attached to this sales order
- DS (Drop Ship): One or more lines are marked as dropship line items
- TRK (Tracking Numbers): One or more tracking numbers exist on the document

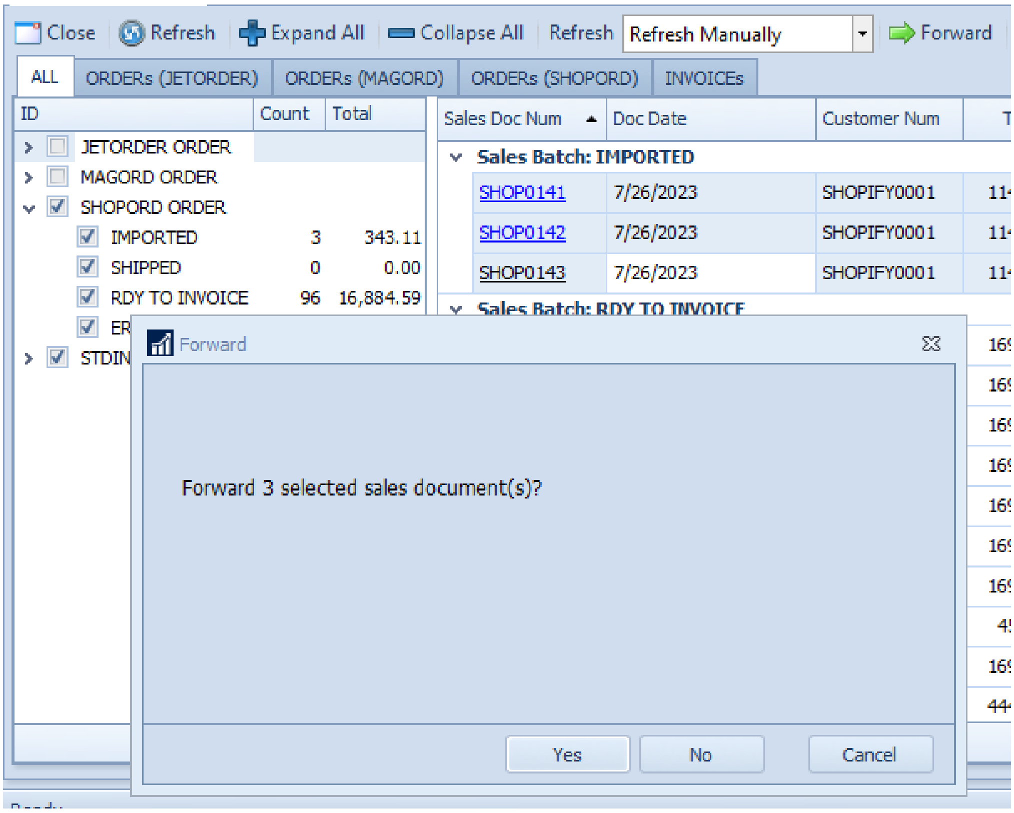
- ZL (Zero Lines): There are no line items on the order
- EM (Email): Document has been emailed
- FPD (Fully Paid): Sales document originating account amount is 0
- OPD (Overpaid): Sales document originating account amount is less than 0

Forwarding

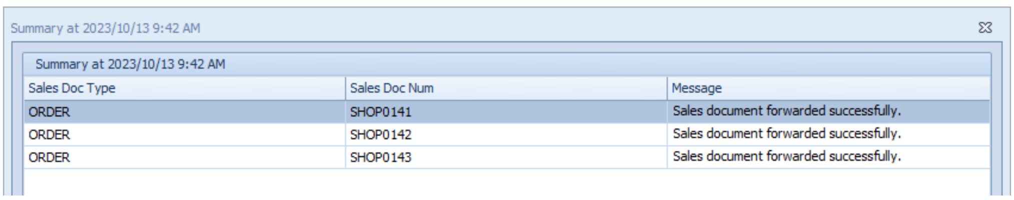
If the ‘Can Forward Using Workflow’ security setting is enabled, users can forward sales documents through the workflow. This requires that SalesPad Remote Library is running at the URL specified by the ‘SalesPad Remote Library URL’ setting.

Forwarding documents can be done with the following steps:

1. Select one or more sales documents. Multiple rows can be selected by holding down the Shift or Ctrl keys while selecting documents.
2. Click the ‘Forward’ button in the header and click ‘Yes’ when asked if you want to forward.



3. Once finished, the Sales Monitor will report whether or not each sales document is forwarded successfully.

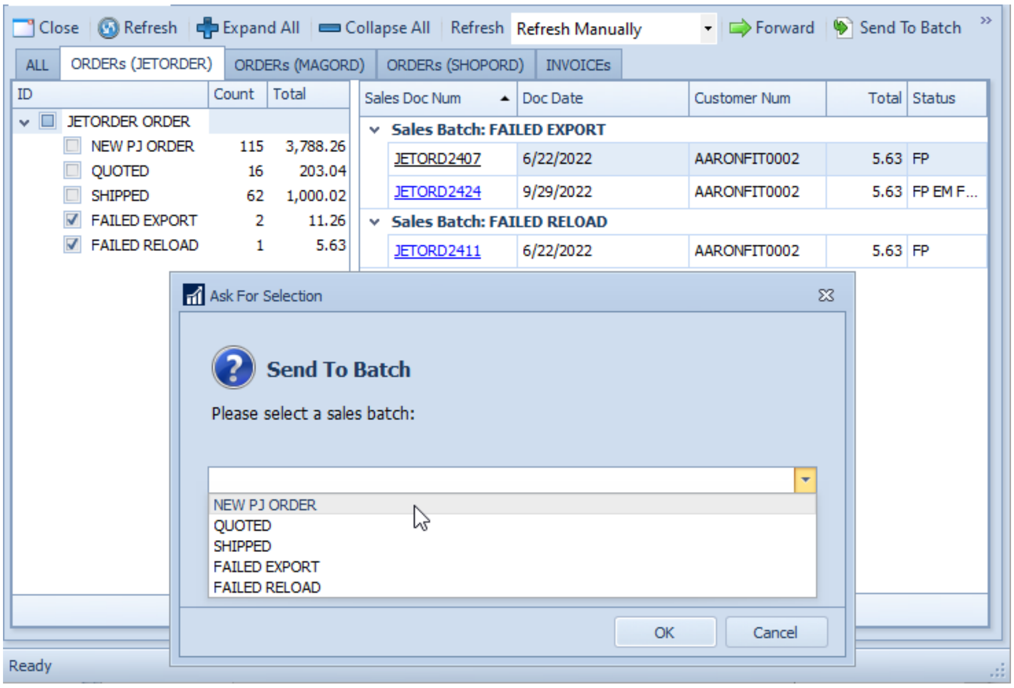


Send to Batch

If the ‘Can Send To Batch’ security setting is enabled, users can move documents to a different batch from within the Sales Monitor. Note that moving documents in this way will bypass normal workflow rules, plugins, and logic, so this functionality should generally be reserved for situations where a sales document has to be rescued from an unexpected workflow status.

Sending documents to a batch can be done with the following steps:

1. Choose a Document ID tab.
2. Select one or more sales documents. Multiple rows can be selected by holding down the Shift or Ctrl keys while selecting documents.
3. Click the ‘Send to Batch’ button in the header.
4. Select a destination batch and click ‘OK’.

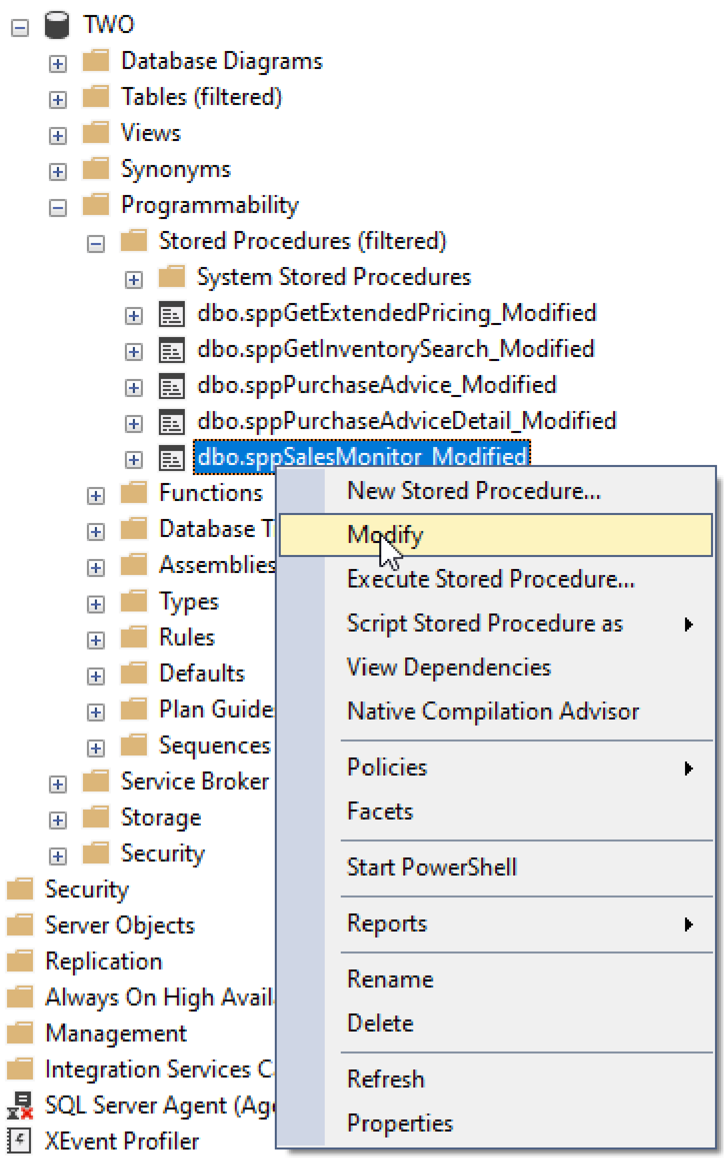


5. SalesPad+ will then move the documents to the selected batch.

Using a Sales Monitor Custom Procedure for Increased Functionality

Due to performance concerns, the Sales Monitor does not load data for every potential column in the sales document grid by default. Some of the columns which do not load by default are Dynamics GP Sales User-Defined Fields, SalesPad Sales Document User Fields, and time in queue columns such as Batch Days. Enabling these columns involves creating a custom stored procedure called spcpSalesMonitor.

To create a spcpSalesMonitor procedure, open SQL Server Management Studio (SSMS). Find sppSalesMonitor_Modified under Company Database > Programmability > Stored Procedures, then right-click on sppSalesMonitor_Modified and select Modify (or Script Stored Procedure as).



Near the top of the resulting SQL is a line that starts with “ALTER procedure [dbo].[sppSalesMontor_Modified]”. Update that snippet to be “CREATE procedure [dbo].[spcpSalesMonitor]”. The standard procedure sppSalesMonitor is designed to check for spcpSalesMonitor and run it in place of its own logic if that custom procedure exists.

For an in-depth guide on creating custom procedures, refer to the documentation for [Creating a SalesPad Custom Procedure].

Disclaimer: Cavallo is not responsible for the code in the customs procedure (SPCP) or any issues that are a result of modified logic used in the SPCP. Testing any changes to stored procedures in a non-production database is highly recommended. If a support issue is found to be related to a customer or partner written SPCP, any time spent by Cavallo may be billable.

Adding Dynamics GP Sales User-Defined Fields to the Sales Monitor

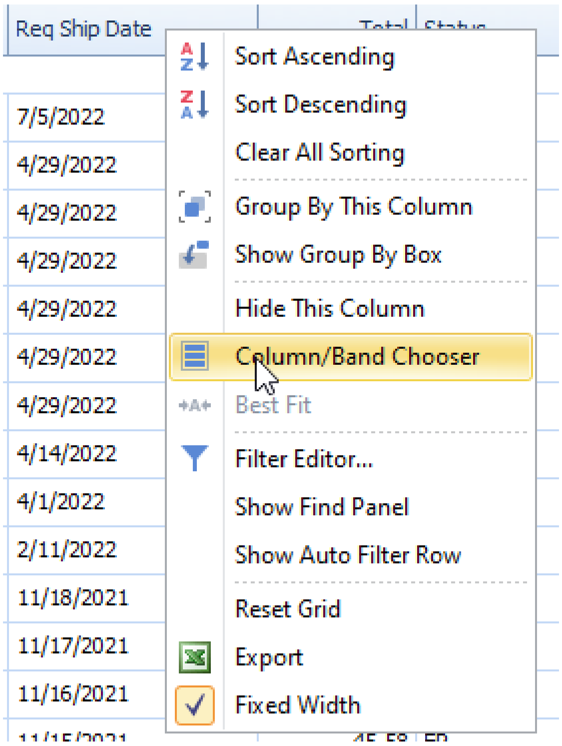
Dynamics GP sales user-defined fields can be added to the sales document grid by modifying the spcpSalesMonitor procedure within SSMS.

If SalesPad version 5.2.31 or above is installed, modify the procedure by un-commenting (remove the two hyphens from) the red-bordered lines shown below and execute the changes for user field values to appear in Sales Monitor. If you have an older SalesPad version installed instead, you will have to manually add those lines instead.

```
--gpudfs-->
--,[User_Def_Date_1] = gpudfs.USRDAT01
--,[User_Def_Date_2] = gpudfs.USRDAT02
--,[User_Def_List_1] = gpudfs.USRTAB01
--,[User_Def_List_2] = gpudfs.USRTAB09
--,[User_Def_List_3] = gpudfs.USRTAB03
--,[User_Def_1] = gpudfs.USERDEF1
--,[User_Def_2] = gpudfs.USERDEF2
--,[User_Def_3] = gpudfs.USRDEF03
--,[User_Def_4] = gpudfs.USRDEF04
--,[User_Def_5] = gpudfs.USRDEF05
FROM SOP10100 AS sh WITH (NOLOCK)
JOIN #Batches AS b ON sh.BCHSOURC = 'Sales Entry'
    AND sh.BACHNUMB = b.Sales_Batch
    AND sh.VOIDSTTS = 0
```

```
--gpudfs-->
--LEFT JOIN SOP10106 AS gpudfs WITH (NOLOCK) ON gpudfs.SOPTYPE = sh.SOPTYPE AND gpudfs.SOPNUMBE = sh.SOPNUMBE
--spsd--
--LEFT JOIN spSalesDocument AS spsd WITH (NOLOCK) ON sh.SOPTYPE = sdt.SOPTYPE
--AND sh.SOPNUMBE = spsd.Sales_Doc_Num
--Needed for Alert to Work
--LEFT JOIN spWorkflow AS wf WITH (NOLOCK) ON wf.Sales_Doc_Type = sdt.Sales_Doc_Type
--AND wf.Sales_Doc_ID = sh.DOCID
--AND wf.QUEUE = sh.BACHNUMB
--NEW------->
--LEFT JOIN (
--SELECT [totalBackordered] = SUM( QTYTBAOR * ORUNTPRC)
--,[Sales_Doc_Number] = SOPNUMBE
--,[Cost_Less_BOs] = SUM(((CASE SOPTYPE WHEN 4 THEN QUANTITY ELSE QTYREMAI END) -QTYTBAOR) * ORUNTCST)
--,Sales_Doc_Type = SOPTYPE
--FROM SOP10200 WITH (NOLOCK)
--GROUP BY SOPTYPE ,SOPNUMBE
--) AS New ON New.Sales_Doc_Number = sh.SOPNUMBE
--AND New.Sales_Doc_Type = sh.SOPTYPE
WHERE (
        (
            @doctypeEnum <> 10
            AND sh.SOPTYPE = @doctypeEnum
            )
        OR (@doctypeEnum = 11)
        )
    AND voidstts = 0
```

Once those lines are added or un-commented, sales user-defined fields will show their values in the Sales Monitor. To add the fields to the sales document grid, right-click one of the currently displayed columns and select ‘Column/Band Chooser’. The user-defined fields appear in the list of columns with the same user-configured captions which they have in other areas of Dynamics GP, rather than the generic names which appear in the procedure.



Adding other fields to the Sales Monitor

SalesPad and Workflow for GP both use the same spcpSalesMonitor procedure, so SalesPad's Sales Monitor documentation contains additional information on how to enable SalesPad Sales Document User Fields and other fields.

Security

Sales Monitor can be enabled for each security group within the Security Editor. It also has the following sub-securities:

Can Forward Using Workflow – If set to 'True', users can forward sales documents using SalesPad workflow. Defaults to 'False'.

Can Send To Batch – If set to 'True', users can send sales documents to a specific batch. Defaults to 'False'.

Sales Batches Visible – The sales batches which will be visible. If this setting is left without a value, every sales batch will be visible. Defaults to nothing.

Sales Document IDs Visible – The sales document IDs which will be visible. If this setting is left without a value, every sales document ID will be visible. Defaults to nothing.

Show Batch Totals – If set to 'True', users can view the sales document total for each batch. Defaults to 'False'.

Show Cost – If set to 'True', users can view the cost of each sales document. Defaults to 'False'.

Show Gross Margin – If set to 'True', users can view the gross margin of each sales document. Defaults to 'False'.

Sales Documents

Select Sales Document – Unsaved Changes Action – When selecting a sales document from a SalesPad+ 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 - Auto save the current sales document. Ask - Show a prompt that has an option to save the current sales document. Disallow - Show a prompt stating the user must manually resolve the issue. Defaults to 'Save'.

SalesPad Remote Library

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. Values below 3 seconds will be ignored. Defaults to '20'.

SalesPad Remote Library URL – The URL for SalesPad Remote Library's Remote Web Service. The service must be running and accessible to SalesPad+. Defaults to 'http://localhost:5501/SalesPadRemoteLibrary'.