Workflow in SalesPad Mobile

Cavallo IT - 2024-11-22 - Sales Documents

Overview

Starting with version 1.3.32.1 of SalesPad Mobile, forwarding a document will now auto-forward through “+” queues and run the Smart Printing, Run Script, and Split Sales Document workflow plugins. These plugins have certain restrictions when using them in SalesPad Mobile. These restrictions will be reviewed later in this documentation.

Note: If a workflow queue has multiple queues it can be forwarded to, there will no longer be a prompt asking which one to go to. Instead, the server will automatically choose a queue to forward to.

Workflow Setup in SalesPad Desktop

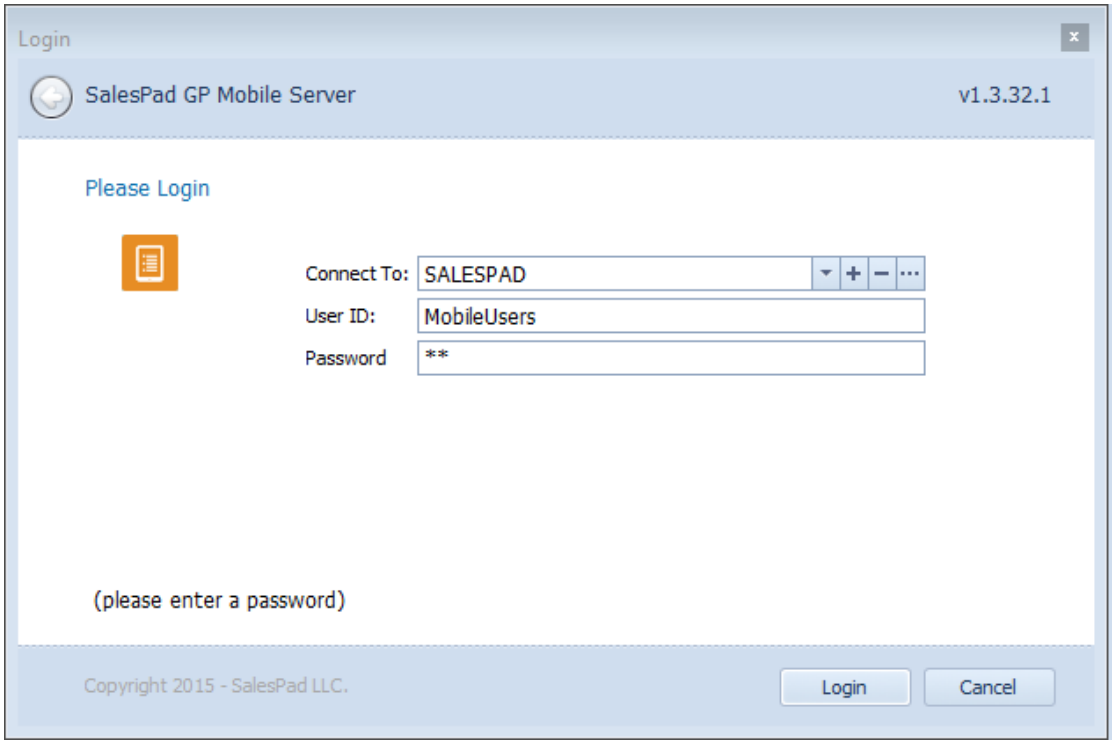
Understanding how workflow functions in SalesPad Mobile requires an understanding of workflow within SalesPad Desktop. For a review on workflow in SalesPad Desktop, please refer to this documentation.

SalesPad Desktop Security Settings in SalesPad Mobile

The Smart Printing, Run Script, and Split Sales Document plugins all use security settings from SalesPad Desktop. Which security settings the Mobile Server loads depends on how the mobile service is run.

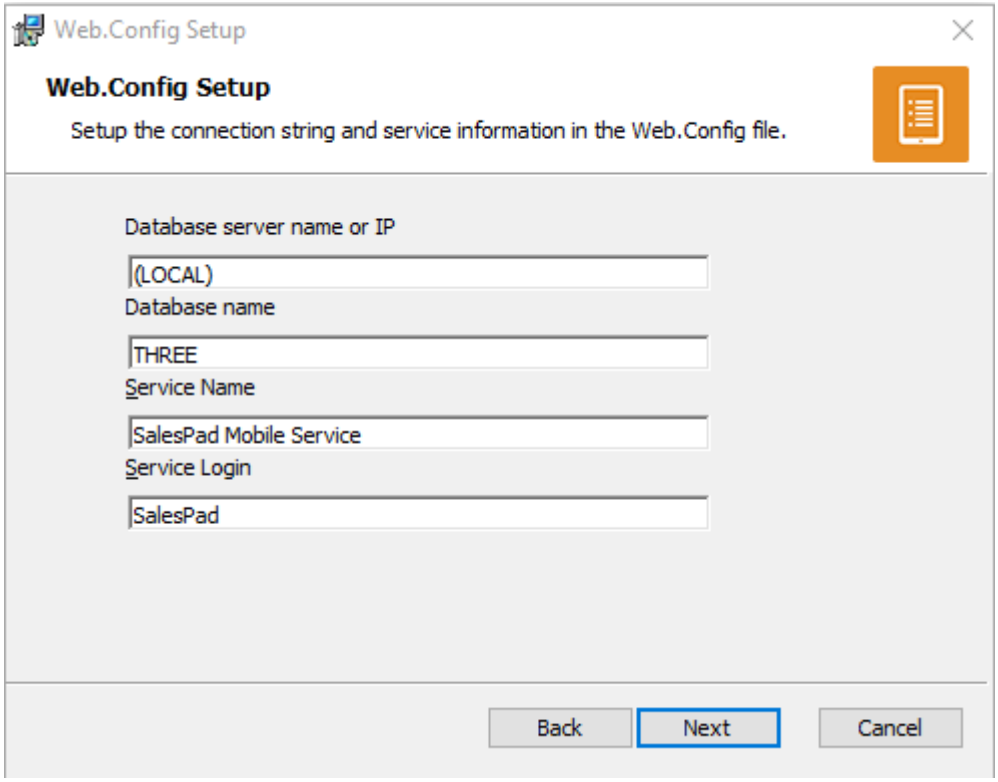
When running the SalesPad Mobile service from the Mobile Server module via the Start button or installed as a Windows service via the Install As Service button, the server will look for a SalesPad Desktop user with the same name as the mobile user who started the service. If there is a SalesPad Desktop user with the same name, the server will use that user’s security settings.

For example, if SalesPad Mobile and SalesPad Desktop both have a system user called "MobileUsers" and someone logs into the SalesPad GP Mobile Server as MobileUsers and starts the service, the server will use the SalesPad Desktop security settings for MobileUsers’s security group.

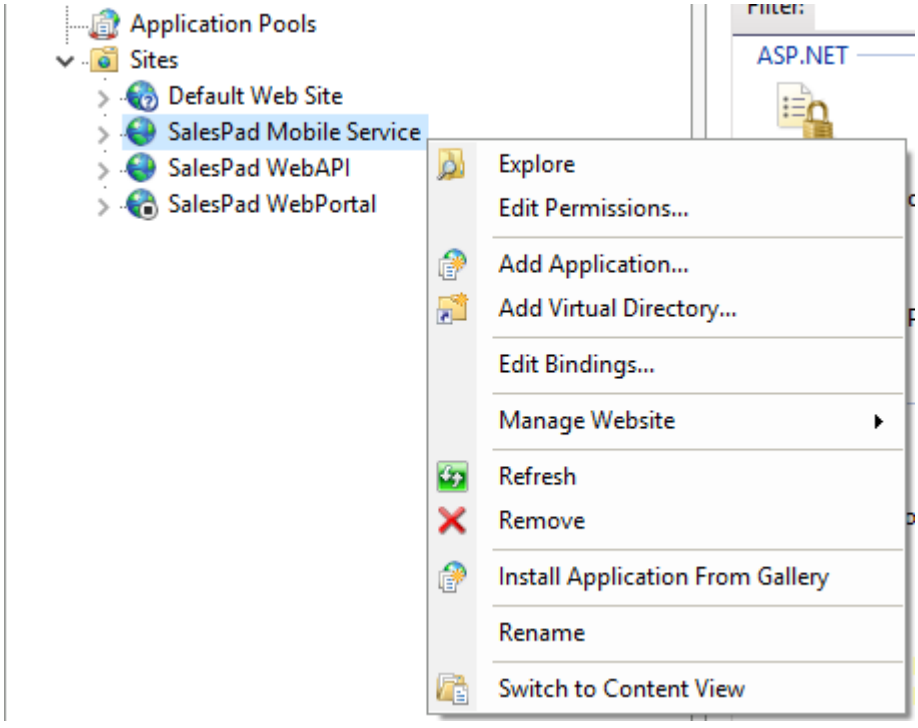


If the SalesPad Mobile Server is running in IIS, the installer initially determines which SalesPad Desktop user

the server will use. The user entered in the Service Login field will be the SalesPad Desktop user which the server uses.



This user can be changed in the server's Web.Config file. In the IIS Manager, right-click on **SalesPad Mobile Service** and select **Explore** to access the Web.Config file.



Near the top of the Web.config file is a line starting with "

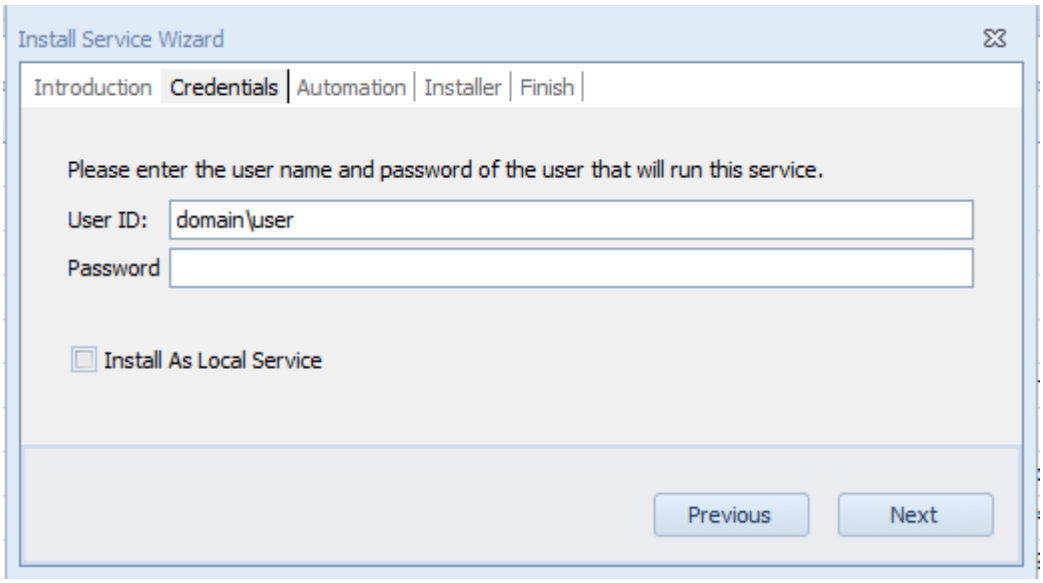
```
<?xml version="1.0" encoding="utf-8"?>
<configuration>
  <appSettings>
    <add key="aspnet:UseTaskFriendlySynchronizationContext"
    <add key="connectionString" value="server=(LOCAL);datab
    <add key="username" value="SalesPad"/>
    <add key="userTimeout" value="20"/>
  </appSettings>
```

Smart Printing

Understanding how the Smart Printing plugin functions in SalesPad Mobile requires an understanding of Smart Printing within SalesPad Desktop. For a review on Smart Printing in SalesPad Desktop, please refer to this documentation.

Note : SalesPad Mobile only supports emailing and printing to an actual printer.

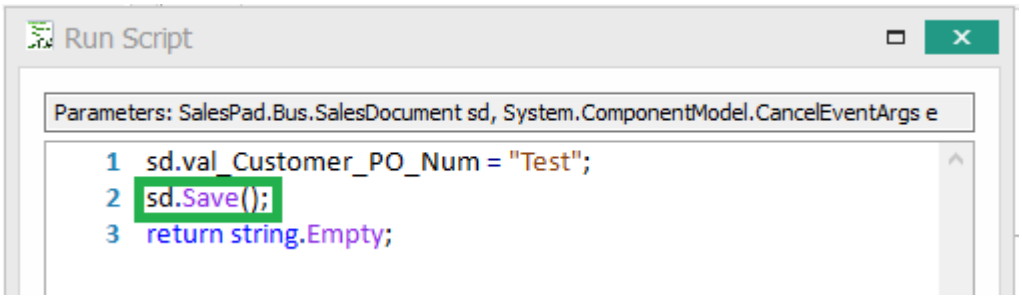
If the server is being run as a Windows Service, the Windows user running the service must have sufficient permissions for printing to work. If the Install As Local Service checkbox is checked, the Local System account which the server uses is unlikely to have the correct permissions, so it's recommended to enter a Windows user when installing or reconfiguring the service.



Run Script

Understanding how the Run Script plugin functions in SalesPad Mobile requires an understanding of Run Script within SalesPad Desktop. For a review on Run Script in SalesPad Desktop, please refer to this documentation.

In order for changes to a sales document to save correctly, be sure to call the sales document's "Save" method in the script. If there are unsaved changes to a sales document, SalesPad Mobile will discard the changes instead of prompting to save them.



Sales Document Splitting

Understanding how sales document splitting functions in SalesPad Mobile requires an understanding of sales

document splitting within SalesPad Desktop. For a review on sales document splitting in SalesPad Desktop, please refer to this documentation.

Note: SalesPad Mobile only supports automatic splitting.