



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

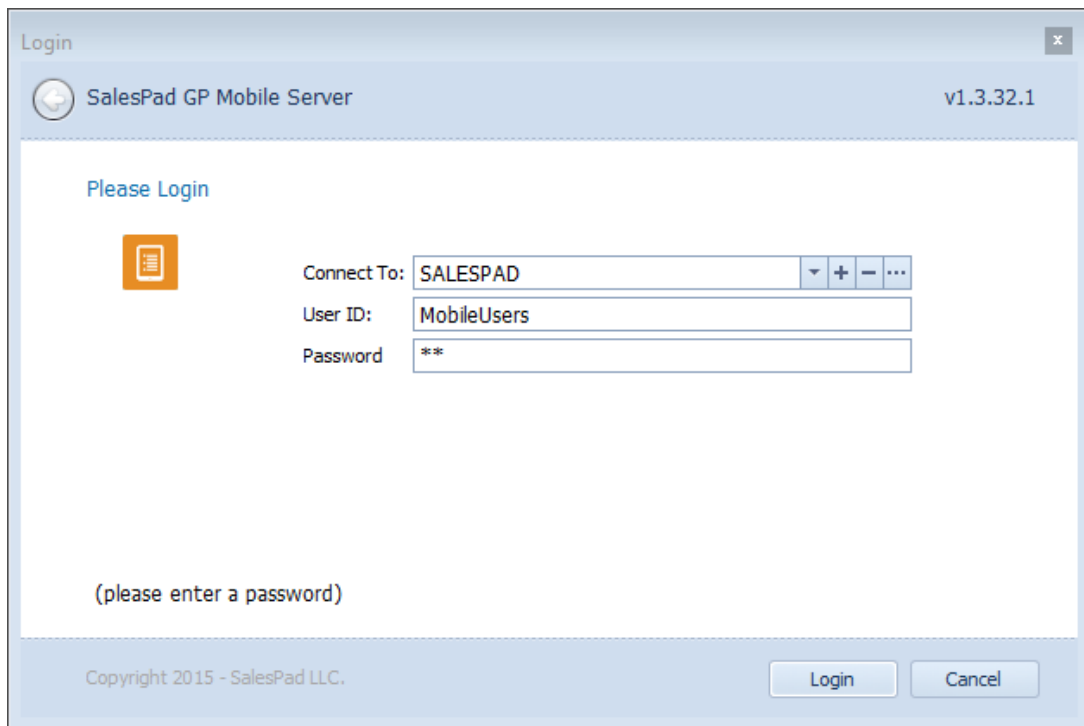
Understanding how workflow functions in SalesPad Mobile requires an understanding of workflow within SalesPad Desktop. For a review on workflow in SalesPad Desktop, please refer to [this documentation](#).

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.



The image shows a 'Login' dialog box for 'SalesPad GP Mobile Server' version v1.3.32.1. The dialog has a title bar with a close button. Inside, there's a 'Please Login' instruction and an orange icon of a document with a list. Below this, there are three input fields: 'Connect To:' with a dropdown menu showing 'SALESPAD', 'User ID:' with 'MobileUsers', and 'Password:' with '***'. A note '(please enter a password)' is below the password field. At the bottom, there's a copyright notice 'Copyright 2015 - SalesPad LLC.' and two buttons: 'Login' and 'Cancel'.

Login

SalesPad GP Mobile Server v1.3.32.1

Please Login

Connect To: SALESPAD

User ID: MobileUsers

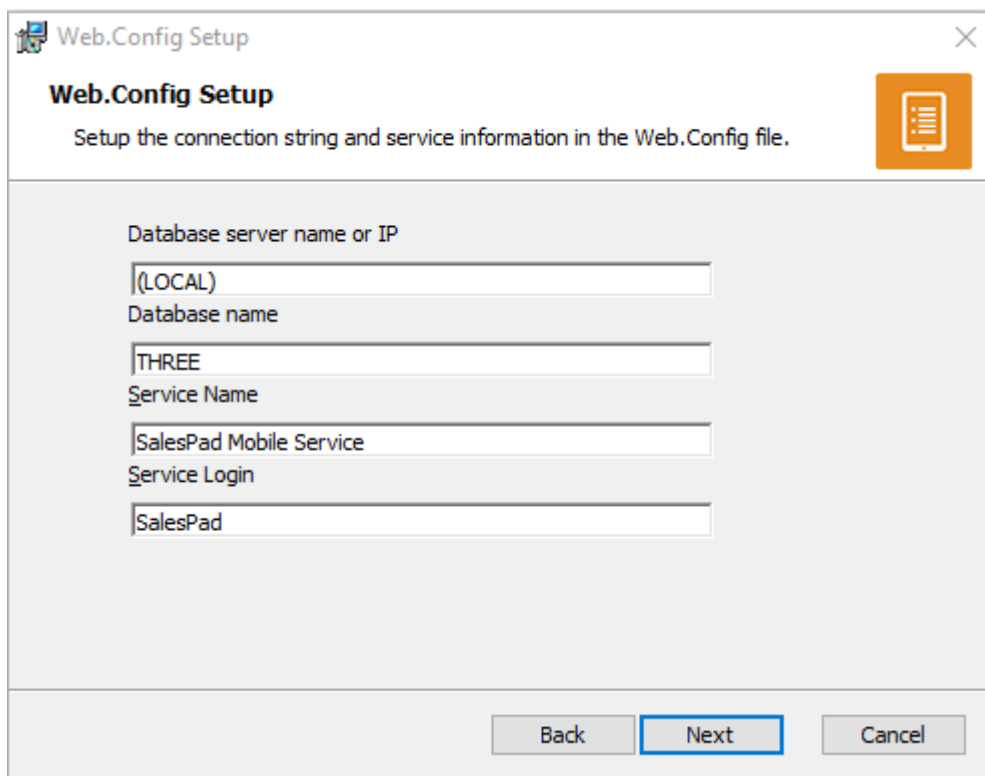
Password: ***

(please enter a password)

Copyright 2015 - SalesPad LLC.

Login Cancel

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.



The image shows a 'Web.Config Setup' dialog box. The title bar says 'Web.Config Setup' with a close button. The main title is 'Web.Config Setup' and the subtitle is 'Setup the connection string and service information in the Web.Config file.' There's an orange icon of a document with a list. Below this, there are five input fields: 'Database server name or IP' with '(LOCAL)', 'Database name' with 'THREE', 'Service Name' with 'SalesPad Mobile Service', 'Service Login' with 'SalesPad', and 'Service Password' with 'SalesPad'. At the bottom, there are three buttons: 'Back', 'Next' (highlighted with a blue border), and 'Cancel'.

Web.Config Setup

Web.Config Setup

Setup the connection string and service information in the Web.Config file.

Database server name or IP

(LOCAL)

Database name

THREE

Service Name

SalesPad Mobile Service

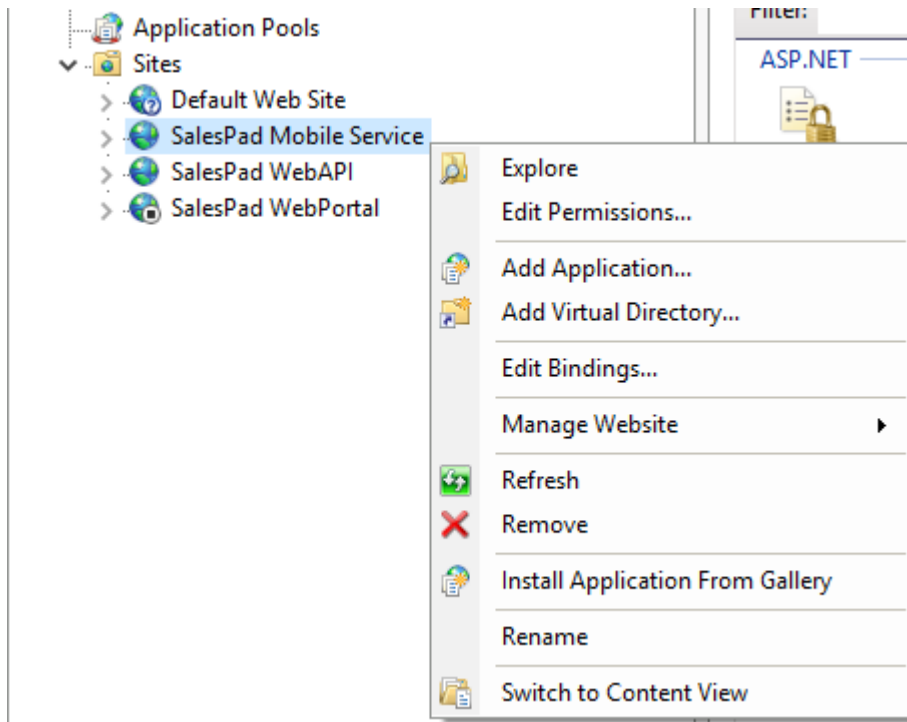
Service Login

SalesPad

Service Password

Back Next Cancel

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 "

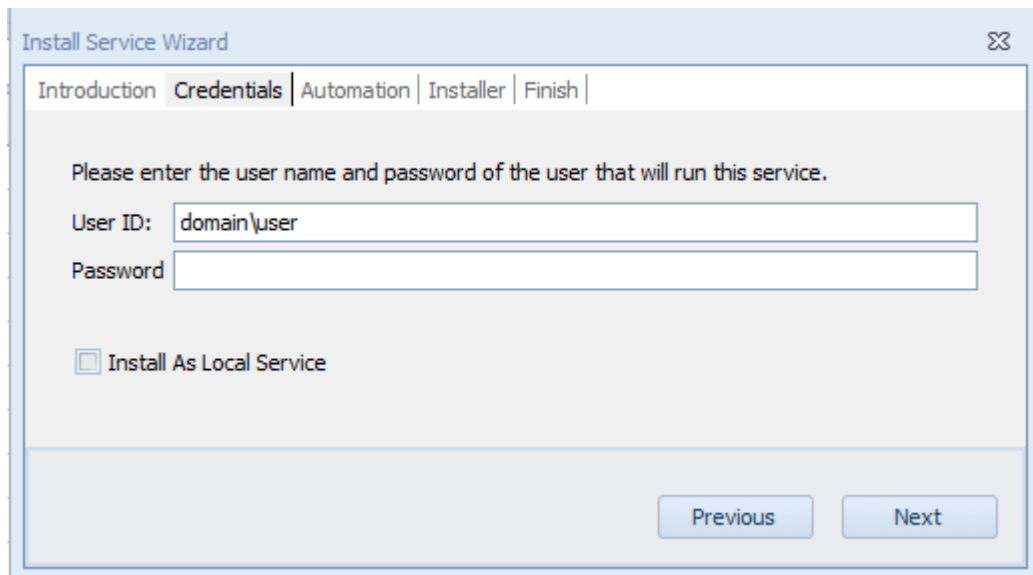
```
<?xml version="1.0" encoding="utf-8"?>
<configuration>
  <appSettings>
    <add key="aspnet:UseTaskFriendlySynchronizationContext"
    <add key="connectionString" value="server=(LOCAL) ;datab
    <add key="username" value="SalesPad"/>
    <add key="userTimeout" value="20"/>
  </appSettings>
```

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.

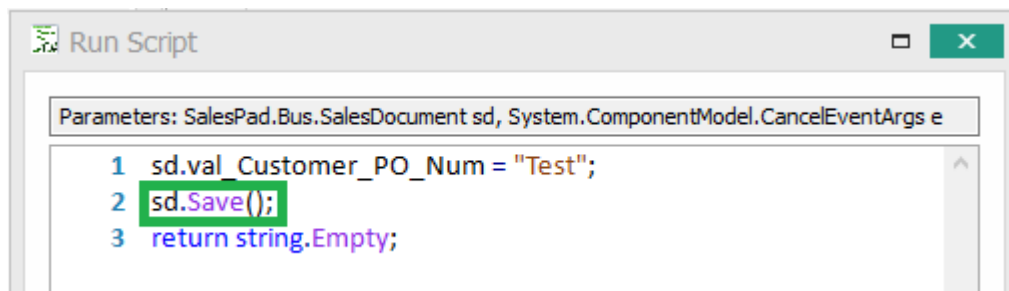


The image shows a screenshot of the 'Install Service Wizard' window, specifically the 'Credentials' tab. The window has a title bar with the text 'Install Service Wizard' and a close button. Below the title bar is a tabbed interface with five tabs: 'Introduction', 'Credentials' (selected), 'Automation', 'Installer', and 'Finish'. The main area contains the instruction 'Please enter the user name and password of the user that will run this service.' followed by two input fields: 'User ID:' with the text 'domain\user' and 'Password:' which is empty. Below these fields is a checkbox labeled 'Install As Local Service' which is unchecked. At the bottom right, there are two buttons: 'Previous' and 'Next'.

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.



The image shows a screenshot of the 'Run Script' dialog box. It has a title bar with the text 'Run Script' and standard window controls. Below the title bar is a text box containing the parameters: 'Parameters: SalesPad.Bus.SalesDocument sd, System.ComponentModel.CancelEventArgs e'. Below this is a code editor with three lines of code: '1 sd.val_Customer_PO_Num = "Test";', '2 sd.Save();', and '3 return string.Empty;'. The second line, 'sd.Save();', is highlighted with a green box.

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.