

SDA Menu Updates

use Ctrl+F to search by text

OLD MENU SYSTEM	LOCATION IN NEW MENU
ARCHITECT	RENAMED TO FILES/DOCS
New Quote File	Files/Docs >>
New Quote File based on current	Files/Docs >>
Open Dashboard download	DELETED
Open Quote File Location	Files/Docs
Upload file to quote location (browse)	Files/Docs
Dashboard Documents Manager	Files/Docs
<i>Open documents/files</i>	Files/Docs >> Dashboard Documents Manager
<i>Download documents/files</i>	Files/Docs >> Dashboard Documents Manager
File check-outs	NEW!!
E-Signatures	NEW!!
Reinsert user data in Quote File	Files/Docs
Add/edit (product) proposal content	Settings >>
Setup >	Settings >>
<i>User Setup</i>	Settings >>
<i>Update license via web</i>	Help >> Support Functions
<i>Set pricing schedule defaults</i>	Settings >>
<i>Add/edit File Types</i>	Settings >> Admin Settings
<i>Add/edit Doc Templates</i>	Settings >> Admin Settings
<i>Register as SalesDoc Architect user</i>	Settings >>
<i>Register CRM System</i>	Settings >>
<i>Register as SharePoint user</i>	Settings >> SharePoint Settings
<i>Refresh SalesDoc Architect config from cloud</i>	DELETED
<i>Re-initialize Quote File</i>	Help >> Support Functions
<i>Re-initialize SalesDoc Architect Desktop</i>	Help >> Support Functions
<i>Check for items with missing manufacturer</i>	Help >> Support Functions
<i>Check for files not uploaded to the shared location</i>	Help >> Support Functions
<i>Purge failed file upload requests</i>	Help >> Support Functions
<i>Quote File debug mode (Control-Alt-D)</i>	Help >> Support Functions
<i>Debug logging mode</i>	Help >> Support Functions
<i>Regenerate menu toolbar (Control-Alt-M)</i>	Help >> Support Functions
<i>Check SharePoint permissions</i>	Settings >> SharePoint Settings
<i>Create SharePoint subsite</i>	Settings >> SharePoint Settings

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OLD MENU SYSTEM	LOCATION IN NEW MENU
Updates >	Help >> Updates
<i>Download and install updates</i>	Help >> Updates
<i>Upload updates</i>	Help >> Updates
<i>Download and install BETA updates</i>	Help >> Updates
<i>Upload BETA updates</i>	Help >> Updates
<i>Re-download/re-install ALL non-beta updates</i>	Help >> Updates
<i>List uploaded files</i>	Help >> Updates
<i>Compact/repair databases</i>	Help >> Support Functions
Show/hide cost >	Pricing >>
Connect to external price list	Pricing >>
Approvals >	Files/Docs >> Approvals
<i>Approve Quote</i>	Files/Docs >> Approvals >> Approve Quote
<i>Unlock Quote File and clear approvals</i>	Files/Docs >> Approvals >> Unlock Quote File and clear approvals
Send email notification	Files/Docs >> Send email notification
Opportunities	Files/Docs >> Opportunities sub-menu
JUMP	NO CHANGE
INSERT	UPDATED
Note	Renamed to "Pricing schedule note"
OUTLINE	NEW!!
IMPORT	NO CHANGE
FILTER	NO CHANGE
OPTIONS	Pricing >> Pricing Options
ASSEMBLIES	Insert >> Assembly items
PRICE BOOK	Pricing >> Price Book
PART NOTES	Pricing >> Display part notes

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OLD MENU SYSTEM	LOCATION IN NEW MENU
GOAL SEEK	Pricing >> Goal Seek
UPDATE TAB(S)	NO CHANGE
OUTPUTS	NO CHANGE
SETTINGS	NEW!!
HELP	SUBSTANTIALLY UPDATED (Updates moved to here, along with some functions from Architect >> Setup)