Key2Act (WennSoft) Integration (OBSOLETE)

Megan De Freitas - 2024-12-03 - Extended Modules

This Key2Act plugin is no longer maintained

It is replaced by the much more robust WennSoft Signature integration, which has documentation that is available [here](#).
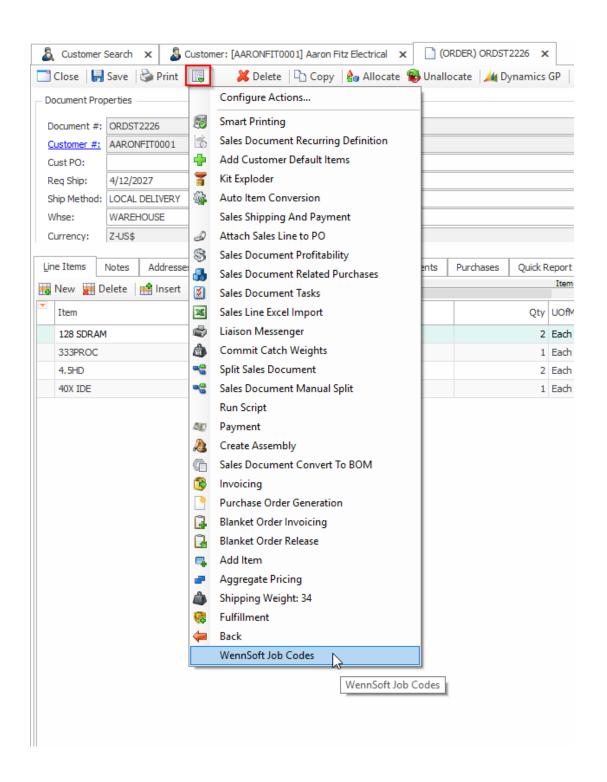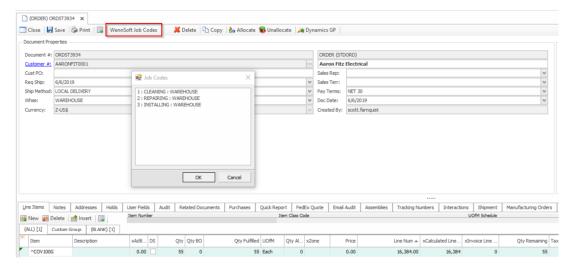
Overview

SalesPad integrates with Key2Act to allow users to set job codes on sales documents within SalesPad. These codes are then written to the Key2Act SQL tables, and can be viewed on sales documents in GP. For this integration to function, Key2Act/WennSoft for Microsoft Dynamics GP must be installed.

Note: This integration requires a .dll not provided with the core version of SalesPad. For more information on acquiring this .dll, please contact your territory manager.

Use

To use the plugin from a sales document, select the WennSoft Job Codes option from the sales document header.

| Customer Search | ✕ | Customer: [AARONFIT0001] Aaron Fitz Electrical | ✕ | (ORDER) ORDST2226 | ✕ |

☐ Close | 💾 Save | 🖨 Print | 🔳 | ✖ Delete | 🗐 Copy | 👥 Allocate | 🔄 Unallocate | 📊 Dynamics GP |

Document Properties

	Configure Actions...
Document #:	ORDST2226
Customer #:	AARONFIT0001
Cust PO:	
Req Ship:	4/12/2027
Ship Method:	LOCAL DELIVERY
Whse:	WAREHOUSE
Currency:	Z-US$

🔳 Smart Printing
🔳 Sales Document Recurring Definition
➕ Add Customer Default Items
🔺 Kit Exploder
⚙ Auto Item Conversion
🔧 Sales Shipping And Payment
🔗 Attach Sales Line to PO
Ⓢ Sales Document Profitability
🔷 Sales Document Related Purchases
☑ Sales Document Tasks
📊 Sales Line Excel Import
🖨 Liaison Messenger
🛍 Commit Catch Weights
🔳 Split Sales Document
🔳 Sales Document Manual Split
Run Script
💳 Payment
💰 Create Assembly
📋 Sales Document Convert To BOM
📄 Invoicing
📄 Purchase Order Generation
📋 Blanket Order Invoicing
📋 Blanket Order Release
🔳 Add Item
🔳 Aggregate Pricing
🛍 Shipping Weight: 34
🔳 Fulfillment
⬅ Back
WennSoft Job Codes

Line Items	Notes	Addresses		ents	Purchases	Quick Report
						Item

🔳 New 🔳 Delete 🔳 Insert

▼	Item		Qty	UOfM
	128 SDRAM		2	Each
	333PROC		1	Each
	4.5HD		2	Each
	40X IDE		1	Each

WennSoft Job Codes

Security

WennSoft Job Codes - Grants access to the plugin from the Sales Document Actions dropdown list.

Settings

Job Code UDF - A UDF on the Sales Document business object to store the job code. This is a string field that has no default value.