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(OBSOLETE)

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*****This Key2Act plugin is no longer maintained*****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

Document #: ORDST2226

Customer #: AARONFIT0001

Cust PO:

Req Ship: 4/12/2027

Ship Method: LOCAL DELIVERY

Whse: WAREHOUSE

Currency: Z-US\$

Line Items

Notes

Addresse

New

Delete

Insert

Item

128 SDRAM

333PROC

4.5HD

40X IDE

Configure Actions...

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

Items

Purchases

Quick Report

Item

Qty

UOM

2

Each

1

Each

2

Each

1

Each

WennSoft Job Codes

(ORDER) ORDST3934

Close Save Print WennSoft Job Codes Delete Copy Allocate Unallocate Dynamics GP

Document Properties

Document #: ORDST3934

Customer #: AARONFIT0001

Cust PO: 6/6/2019

Req Ship: 6/6/2019

Ship Method: LOCAL DELIVERY

Whse: WAREHOUSE

Currency: Z-US\$

ORDER (STDORD)

Aaron Fitz Electrical

Sales Rep:

Sales Terr:

Pay Terms: NET 30

Doc Date: 6/6/2019

Created By: scott.farnquist

Job Codes

1 : CLEANING : WAREHOUSE

2 : REPAIRING : WAREHOUSE

3 : INSTALLING : WAREHOUSE

OK Cancel

Line Items Notes Addresses Holds User Fields Audit Related Documents Purchases Quick Report FedEx Quote Email Audit Assemblies Tracking Numbers Interactions Shipment Manufacturing Orders

New Delete Insert Item Number Item Class Code UOM Schedule

(ALL) [1] Custom Group (BLANK) [1]

| Item | Description | xAdtl... | DS | Qty | Qty BO | Qty Fulfilled | UOM | Qty Al... | xZone | Price | Line Num | xCalculated Line... | xInvoice Line ... | Qty Remaining | Tax |
|----------|-------------|----------|----|-----|--------|---------------|------|-----------|-------|-------|-----------|---------------------|-------------------|---------------|-----|
| ^COV100G | | 0.00 | | 55 | 0 | 55 | Each | 0 | | 0.00 | 16,384.00 | 16,384 | 0 | 55 | |

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.