Kwiktag

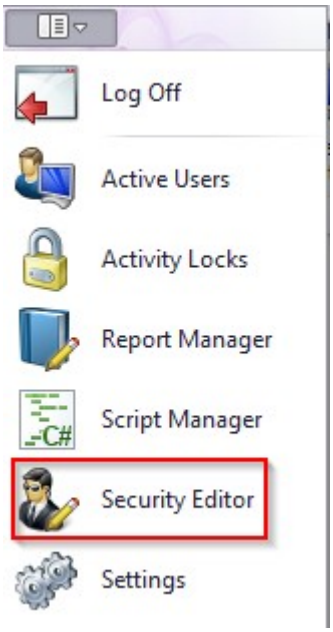
Cavallo Support - 2024-11-22 - Sales

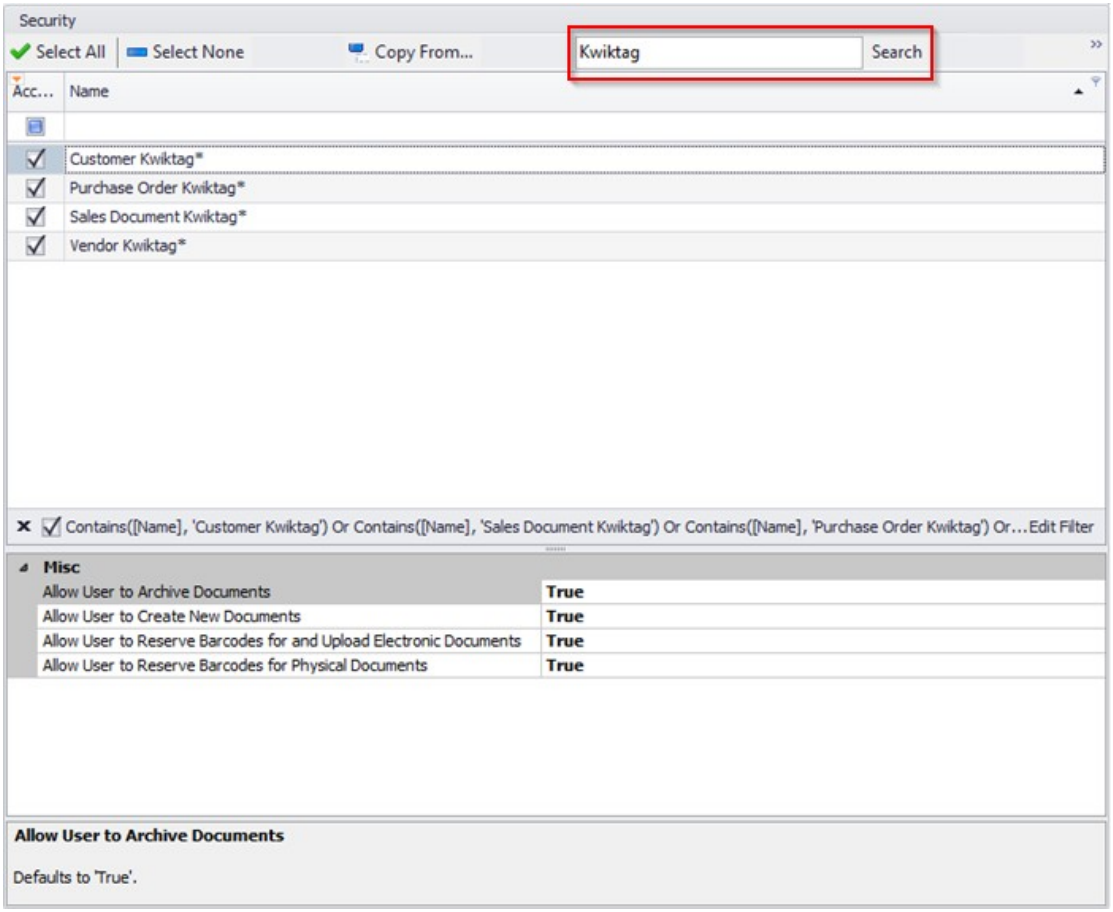
Overview

SalesPad GP can be used with KwikTag—a document management system that coordinates documents, departments, and different business processes in your organization. KwikTag is a web-based system integrated for Microsoft Dynamics GP. SalesPad GP can connect this for instant access to documents and files. Please consult your sales representative on custom for KwikTag if desired. Any issues outside of SalesPad GP with KwikTag must be relayed to KwikTag support.

Security

To enable KwikTag, open the **SalesPad** dropdown and select Security Editor.





Customer KwikTag – Enables the KwikTag specific tab on the customer card.

- *Allow User to Archive Documents* – Gives the user power to archive documents through SalesPad GP into KwikTag
- *Allow User to Create New Documents* – The user will be able to create new documents in the respective post specific tab
- *Allow User to Reserve Barcodes and Upload Electronic Documents* -
- *Allow User to Reserve Barcodes for Physical Documents* –

Purchase Order KwikTag – Enables the KwikTag specific tab on the purchase order card.

- All Sub-Securities are the same as those in customer KwikTag but apply to the purchase order card. All defaults are set to True.

Sales Document KwikTag – Enables the KwikTag specific tab on the sales document card.

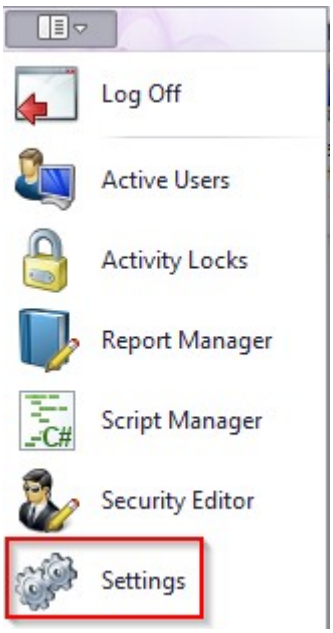
- All Sub-Securities are the same as those in customer KwikTag but apply to the sales documents card. All defaults are set to True.

Vendor KwikTag – Enables the KwikTag specific tab on the vendor card.

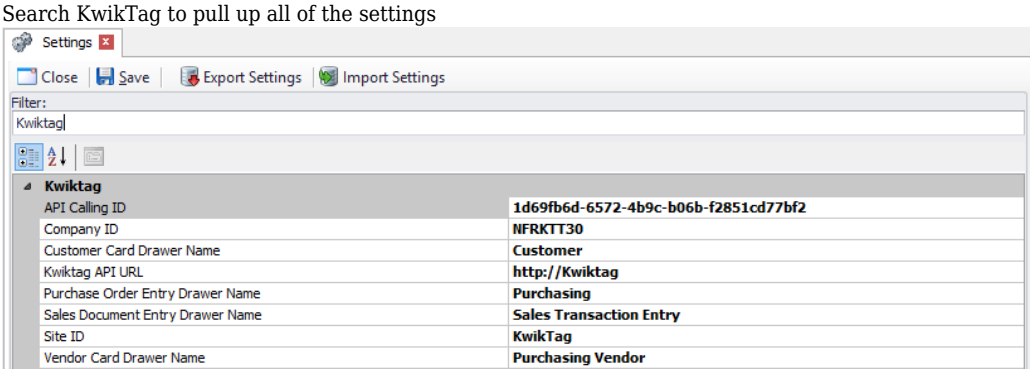
- All Sub-Securities are the same as those in customer KwikTag but apply to the vendor card. All defaults are set to True.

Settings

KwikTag requires certain Settings to be configured before use.



1. Search KwikTag to pull up all of the settings



   - *API Calling ID* – This is the API Calling ID from KwikTag. Contact your KwikTag Representative for more information
   - *Company ID* – The Company ID is unique to your company and will come from your KwikTag Representative *Customer Card Drawer Name* – The name of the drawer in KwikTag you have for the Customer card|
   - *KwikTag API URL* - The KwikTag API URL is the server where you have setup to call to KwikTag. Check with your network or IT professional for the name of this. Contact KwikTag for more information
   - *Purchase Order Entry Drawer Name* - The name of the drawer in KwikTag you have for the Purchase Order card *Sales Document Entry Drawer Name* - The name of the drawer in KwikTag you have for the Sales Document card
   - *Site ID* - The server name on your site.
   - *Vendor Card Drawer Name* - The name of the drawer in KwikTag you have for the Vendor card
2. Once you have the correct Settings entered, KwikTag will be ready for usage.

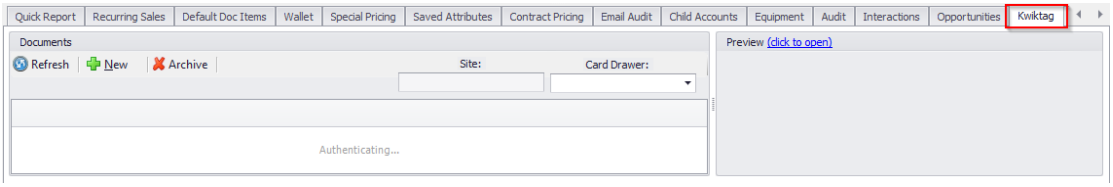
Usage

Setup

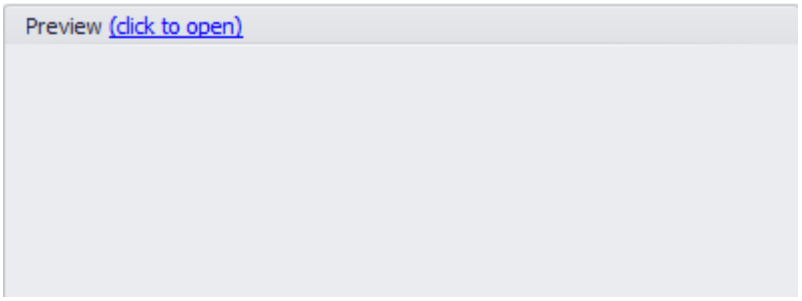
To setup KwikTag, please contact your KwikTag sales representation. KwikTag for SalesPad GP requires a DLL, contact your SalesPad sales rep for it.

Interface

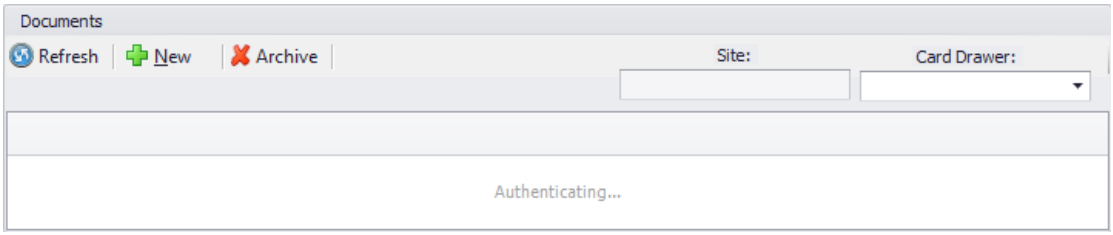
The KwikTag interface can be found in the post specific tabs on the Customer, Sales Document, Purchase Order, and Vendor cards.



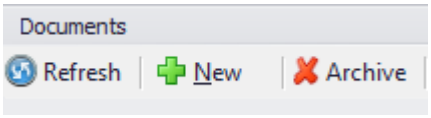
The preview area will show you what an image of the report or image of the document that you have selected on.



The documents tab will display all of the active documents that you have in your KwikTag server.



The Action Toolbar will use a variety of actions for your KwikTag drawer.

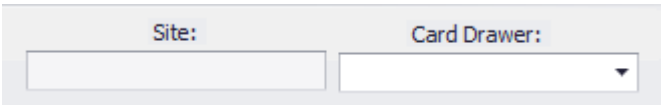


Refresh – Will refresh the server

New – Will add new documents

Archive – Will archive all of your documents

Change User – Will change the user



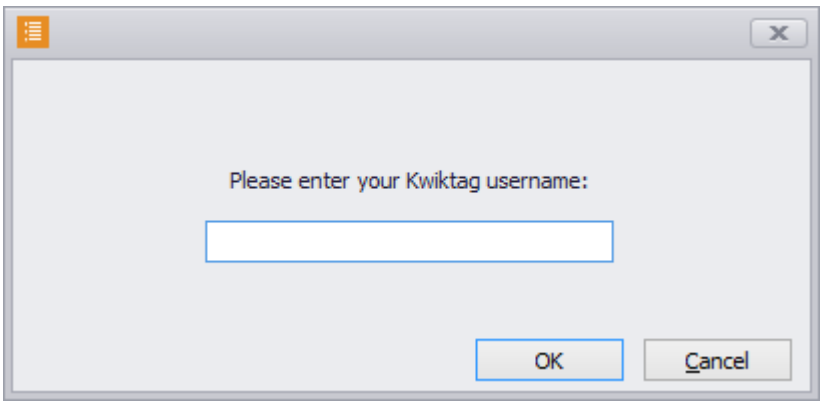
Site - where your documents are coming from.

Card Drawer - will pull documents from a different place.

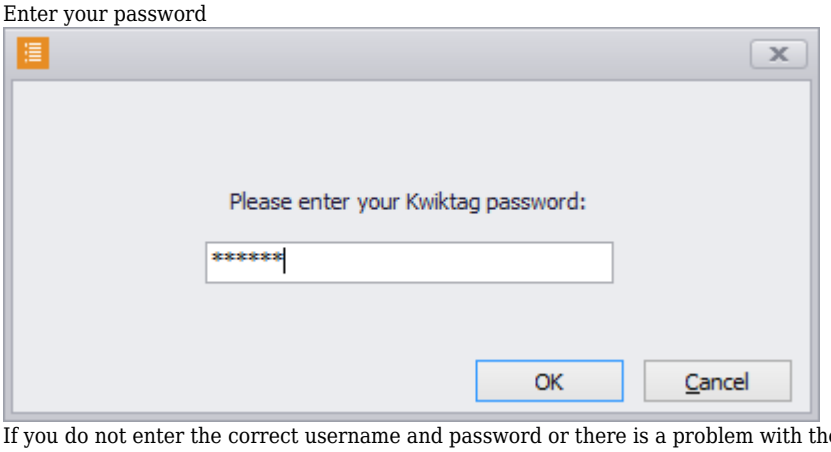
Authenticating

When you select a tab to view the KwikTag tab, KwikTag will need to authenticate.

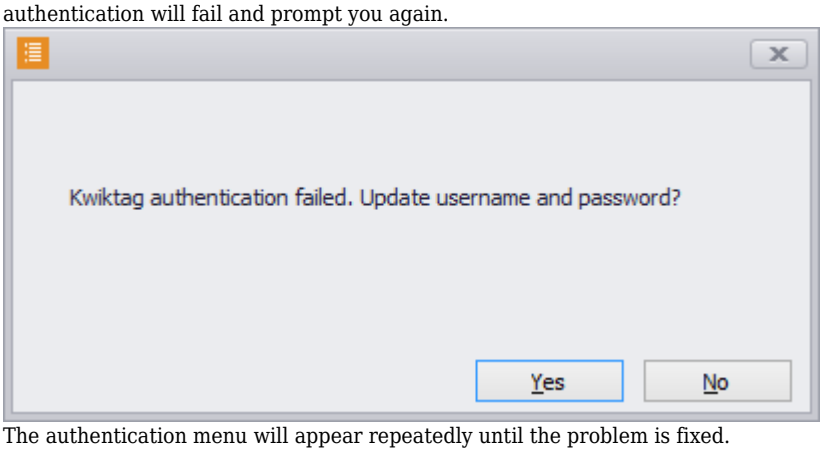
1. First enter your KwikTag username



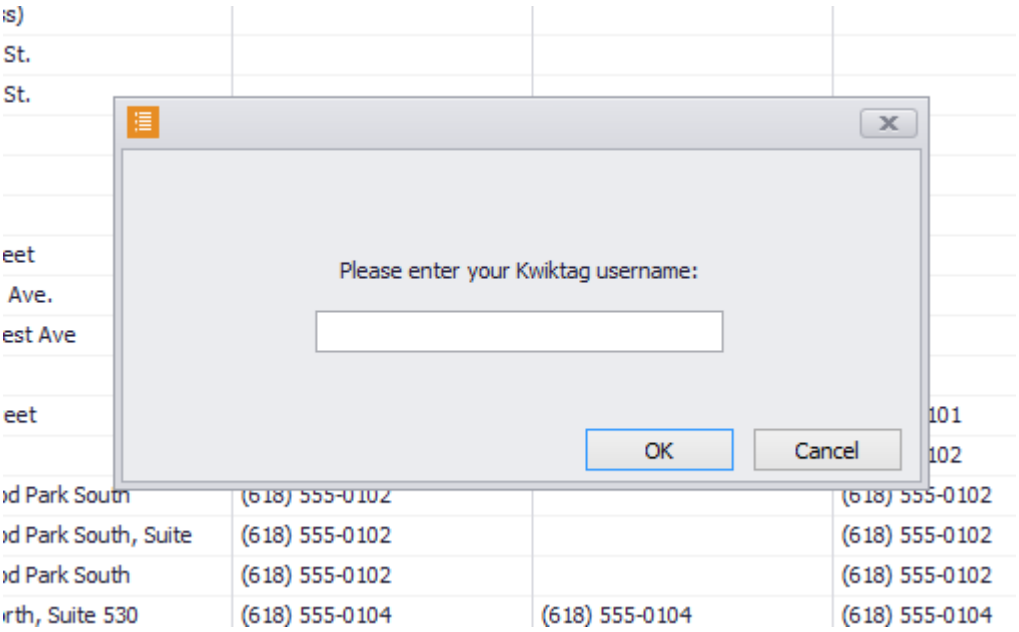
2. Enter your password



If you do not enter the correct username and password or there is a problem with the server, the authentication will fail and prompt you again.



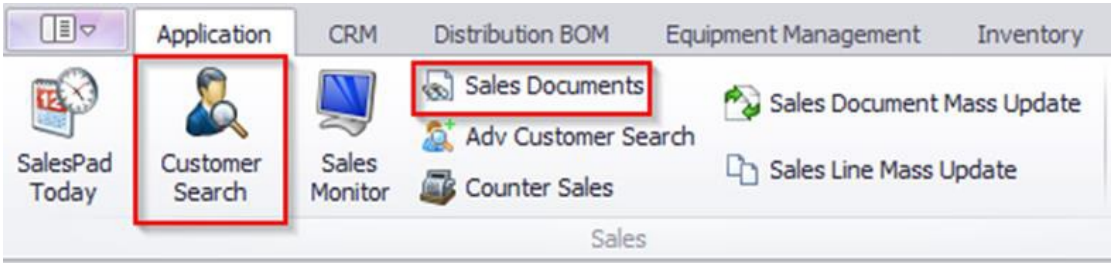
The authentication menu will appear repeatedly until the problem is fixed.



Sales Module

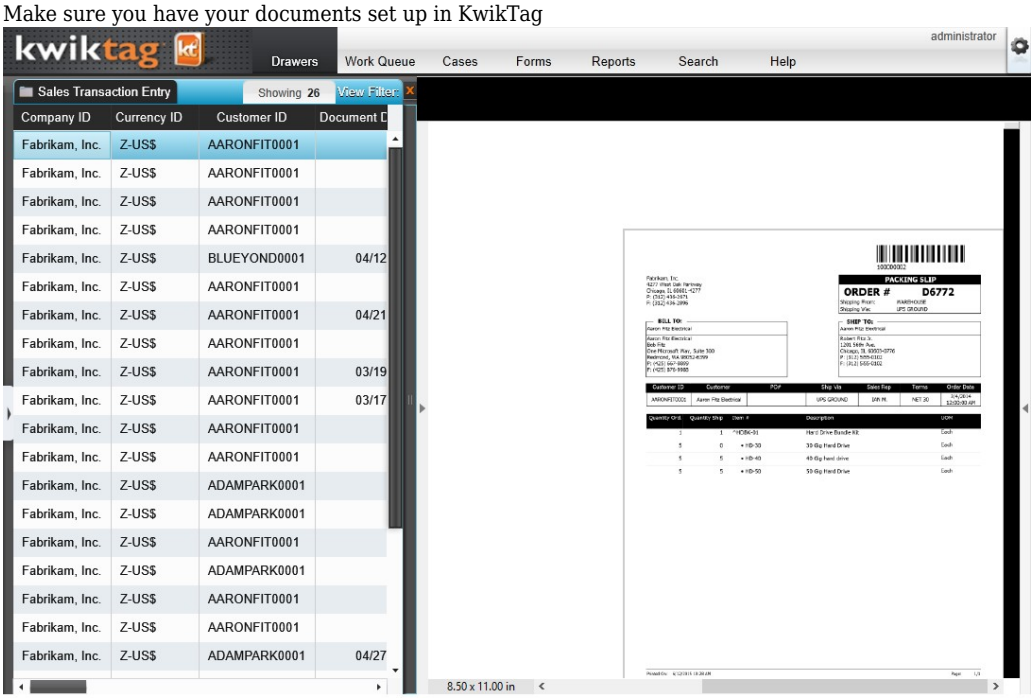
There are two modules that KwikTag is available in. Sales and Purchasing. Under Sales, you can find KwikTag under

Customer Search and Sales Documents.

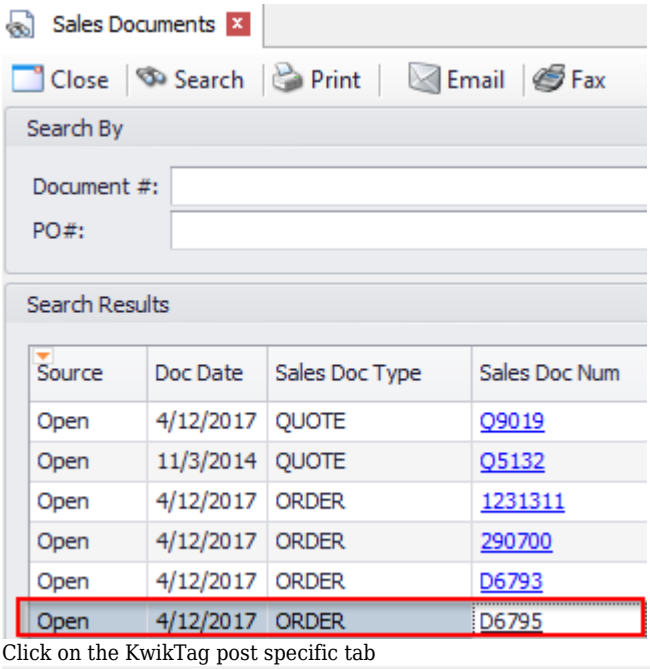


Sales Documents

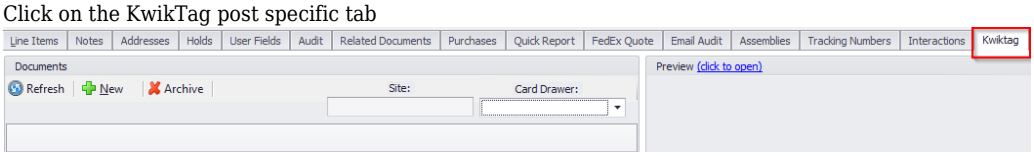
1. Make sure you have your documents set up in KwikTag



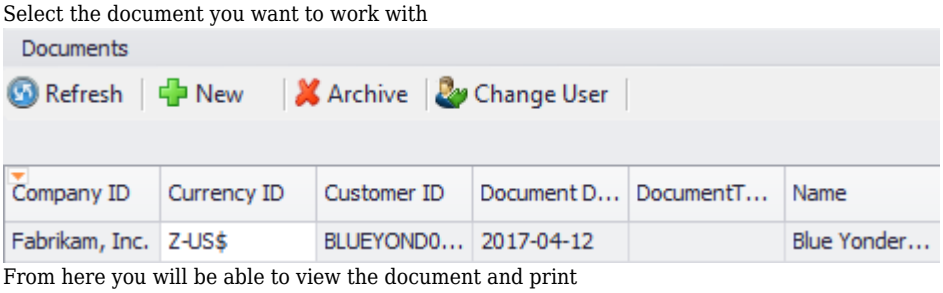
2. Go to Sales Document search and select a document



3. Click on the KwikTag post specific tab



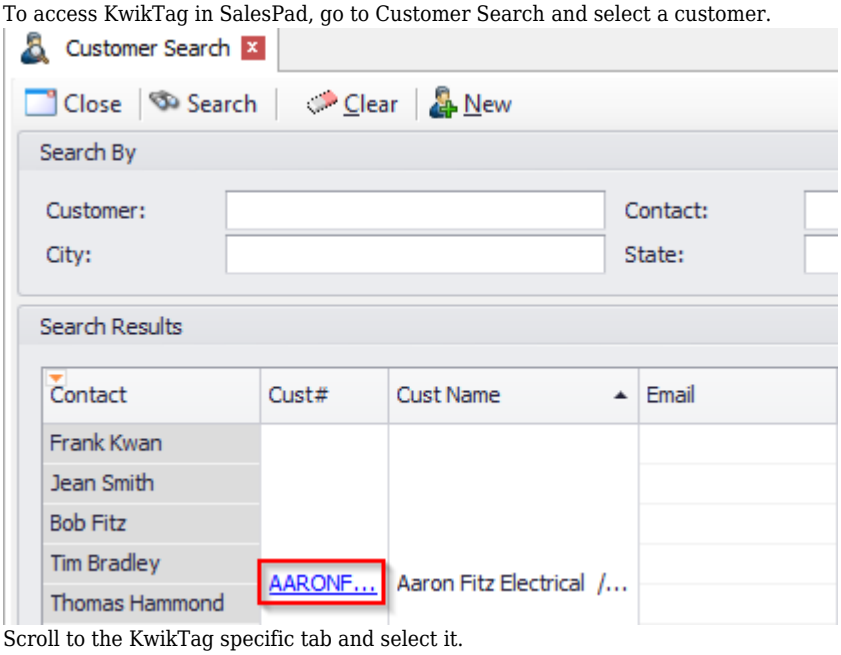
4. Select the document you want to work with



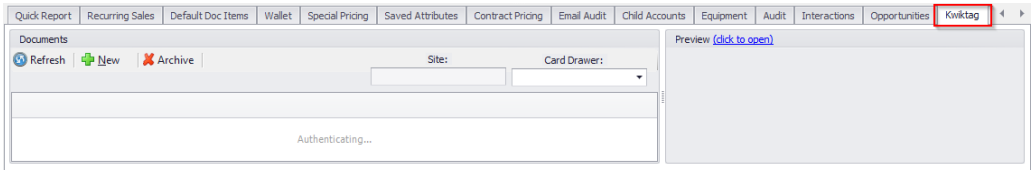
From here you will be able to view the document and print

Customer Card

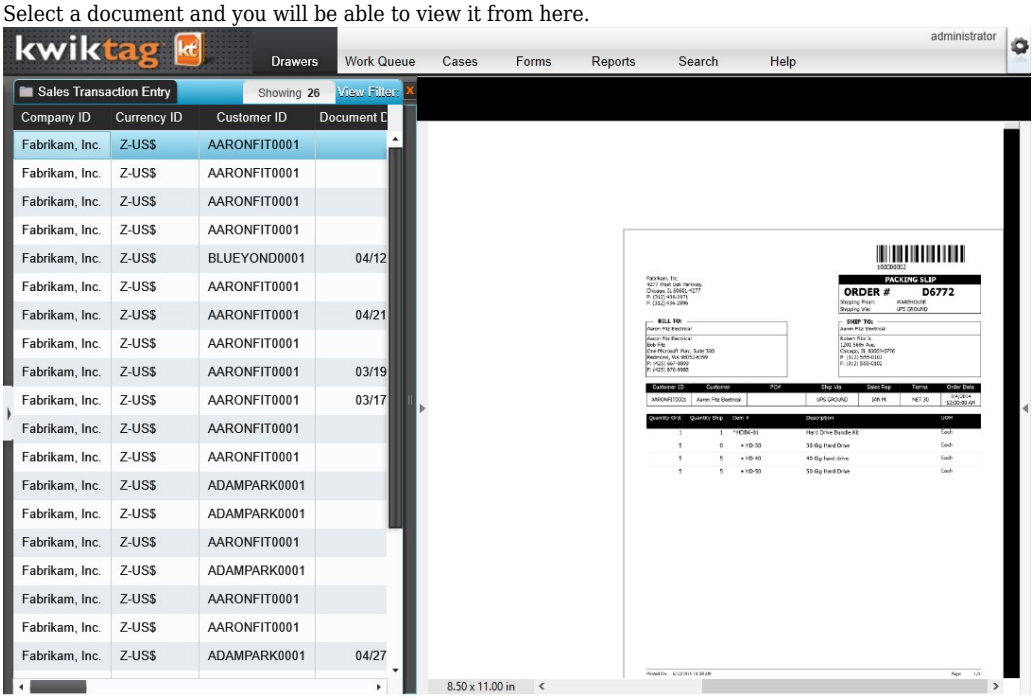
1. To access KwikTag in SalesPad, go to Customer Search and select a customer.



2. Scroll to the KwikTag specific tab and select it.

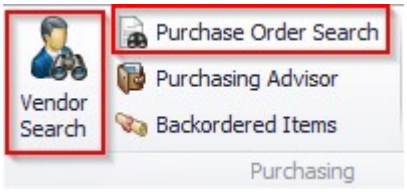


3. Select a document and you will be able to view it from here.



Purchasing Module

In the purchasing module, you can access KwikTag from clicking on Vendor Search and Purchase Order Search.



You can access this the same way that you would the Sales module features.

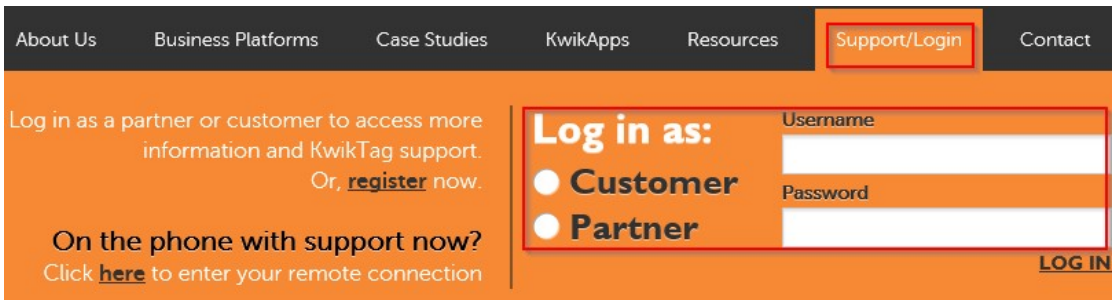
Scripting

KwikTag has the ability to automatically place barcodes on documents and send a reservation to KwikTag**,** which takes away the need to manually place physical barcodes on the document. For more information this or on scripting and printed reports, please contact your SalesPad sales representative.

KwikTag Support

SalesPad does not inherently support KwikTag issues. If you have trouble with KwikTag**,** please contact their support.

1. Go to the KwikTag website, and click Support/Login at the main menu
2. Login with your credentials


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Contact
Log in as a partner or customer to access more information and KwikTag support.
Or, register now.
On the phone with support now?
Click here to enter your remote connection
Log in as:
Customer
Partner
Username
Password
LOG IN