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# Kwiktag

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# 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.



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*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

💞 Settings 🗵	
📑 Close 🛛 🐺 Save 🛛 🕃 Export Settings 🛛 🗐 Import Settin	ngs
Filter:	
Kwiktag	
⊿ Kwiktag	
API Calling ID	1d69fb6d-6572-4b9c-b06b-f2851cd77bf2
Company ID	NFRKTT30
Customer Card Drawer Name	Customer
Kwiktag API URL	http://Kwiktag
Purchase Order Entry Drawer Name	Purchasing
Sales Document Entry Drawer Name	Sales Transaction Entry
Site ID	KwikTag
Vendor Card Drawer Name	Purchasing Vendor

- 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
- $\circ~\textit{Site ID}$  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.

Quick Report	Recurring Sales	Default Doc Items	Wallet	Special Pricing	Saved Attributes	Contract Pricing	Email Audit	Child Acco	unts	Equipment	Audit	Interactions	Opportunities	Kwiktag	$\left  + \right\rangle$
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				Authenticating											

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.

Documents		
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		· · · · · ·
Authenticati	ng	

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:	Card Drawer:
	•

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

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: <b>:</b> :::			x
		Please enter your Kwiktag password:	
		*****	]
			1
		OK	<u>C</u> ancel

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



#### **Sales Documents**

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

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Sales Transa	ction Entry	Showing 2	6 View Fliter: 🗙								
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2. Go to Sales Document search and select a document

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	Close	🕉 Search	🍪 Print 📔 📓 En	nail 🛛 💣 Fax							
	Search By										
	Document #: PO#:										
	Search Resu	llts									
	Source	Doc Date	Sales Doc Type	Sales Doc Num							
	Open	4/12/2017	QUOTE	<u>Q9019</u>							
	Open	11/3/2014	QUOTE	<u>Q5132</u>							
	Open	4/12/2017	ORDER	<u>1231311</u>							
	Open	4/12/2017	ORDER	<u>290700</u>							
	Open	4/12/2017	ORDER	<u>D6793</u>							
	Open	4/12/2017	ORDER	D6795							

3. Click on the KwikTag post specific tab

Line Items	Notes	Addresses	Holds	User Fields	Audit	Related Documents	Purchases	Quick Report	FedEx Quo	e Email	Audit	Assemblies	Tracking Numbers	Interactions	Kwiktag
Documents										Preview	(click to	open)			
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4. Select the document you want to work with

Documents										
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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.

Customer Search	x		
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Customer:			Contact:
City:			State:
Contact	Cust#	Cust Name	Email
Frank Kwan			
Jean Smith			
Bob Fitz			
Tim Bradley	AADONE	Aaron Fitz Electrical /	
Thomas Hammond	AARONE	Adron Fitz Electrical 7	

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

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

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#### 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

About Us	Business Platforms	Case Studies	KwikApps	Resources	Support/Login	Contact
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