



[Knowledgebase](#) > [SalesPad](#) > [Sales](#) > [Kwiktag](#)

## Kwiktag

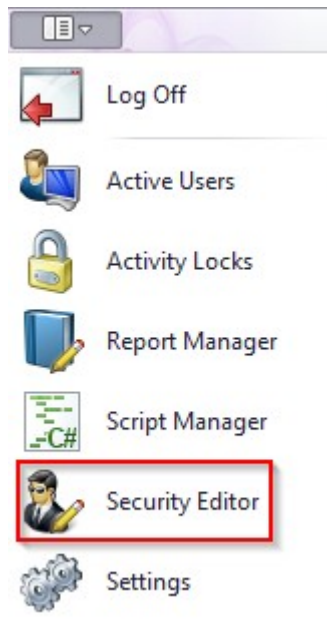
Megan De Freitas - 2024-11-22 - [Sales](#)

### 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.



Security

☒ Select All
 ☐ Select None

| Acc...                              | Name                    |
|-------------------------------------|-------------------------|
| <input checked="" type="checkbox"/> | Customer Kwiktag*       |
| <input checked="" type="checkbox"/> | Purchase Order Kwiktag* |
| <input checked="" type="checkbox"/> | Sales Document Kwiktag* |
| <input checked="" type="checkbox"/> | Vendor Kwiktag*         |

☒ Contains([Name], 'Customer Kwiktag') Or Contains([Name], 'Sales Document Kwiktag') Or Contains([Name], 'Purchase Order Kwiktag') Or ... Edit Filter

| Misc                                                               |      |
|--------------------------------------------------------------------|------|
| Allow User to Archive Documents                                    | True |
| Allow User to Create New Documents                                 | True |
| Allow User to Reserve Barcodes for and Upload Electronic Documents | True |
| Allow User to Reserve Barcodes for Physical Documents              | True |

**Allow User to Archive Documents**

Defaults to 'True'.

*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.

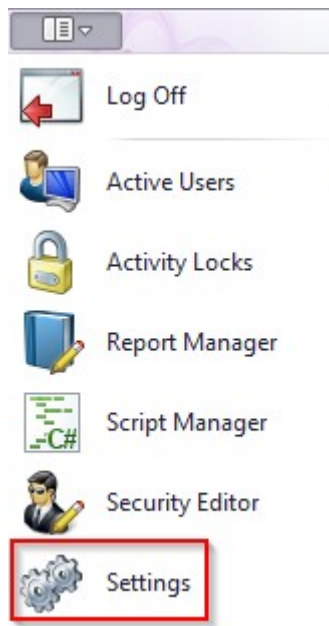
- All Sub-Securities are the same as those in customer KwikTag but apply to the sales documents card. All defaults are set to True.

*Vendor KwikTag* - Enables the KwikTag specific tab on the vendor card.

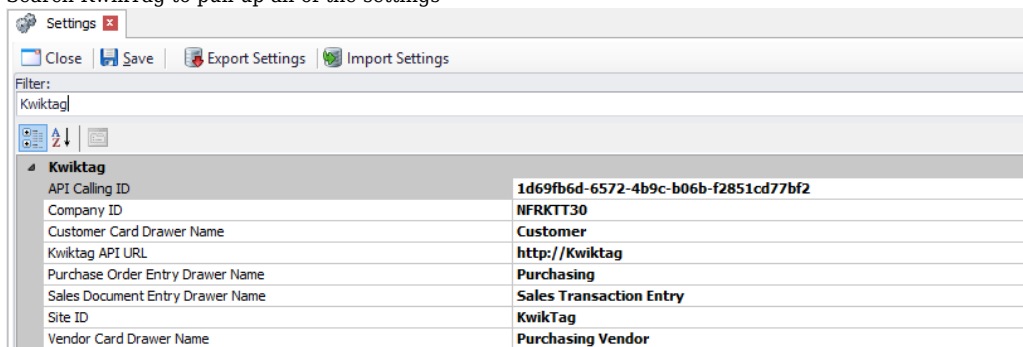
- All Sub-Securities are the same as those in customer KwikTag but apply to the vendor card. All defaults are set to True.

### 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.

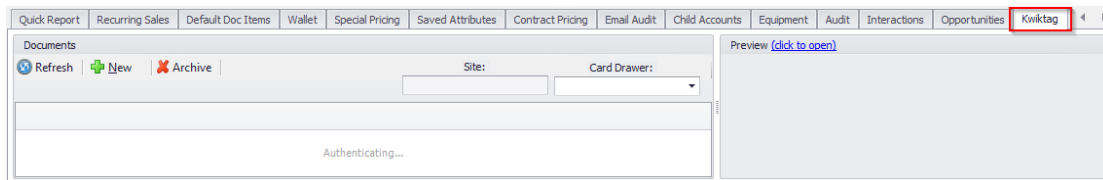
## Usage

### Setup

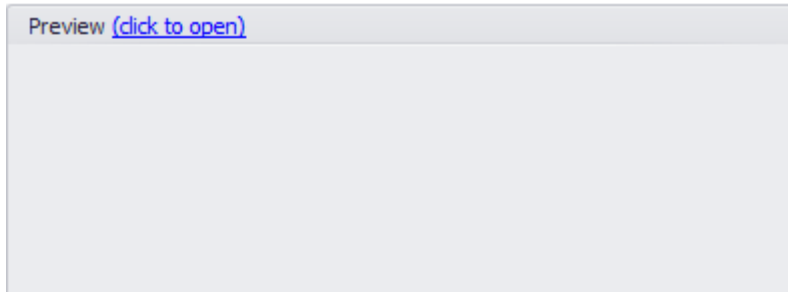
To setup KwikTag, please contact your KwikTag sales representation. KwikTag for SalesPad GP requires a DLL, contact your SalesPad sales rep for it.

### Interface

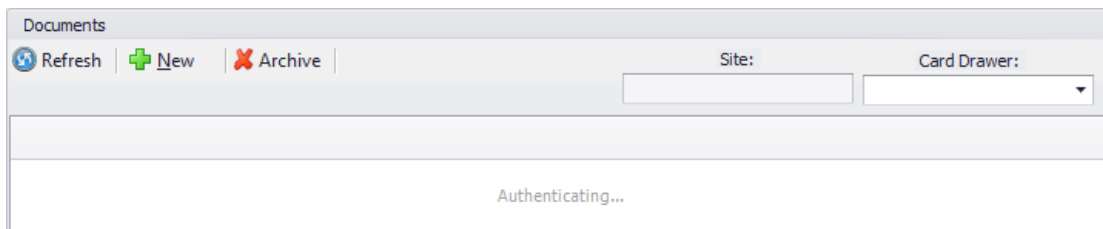
The KwikTag interface can be found in the post specific tabs on the Customer, Sales Document, Purchase Order, and Vendor cards.



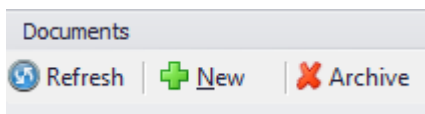
The preview area will show you what an image of the report or image of the document that you have selected on.



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.

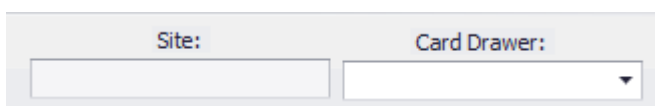


**Refresh** - Will refresh the server

**New** - Will add new documents

**Archive** - Will archive all of your documents

**Change User** - Will change the user



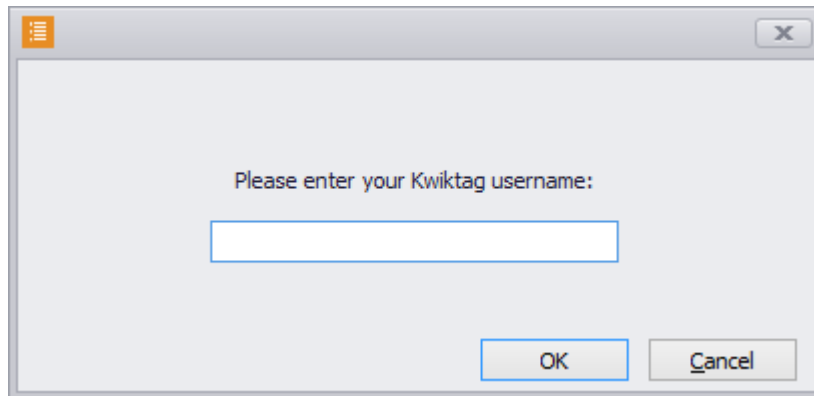
**Site** - where your documents are coming from.

**Card Drawer** - will pull documents from a different place.

#### Authenticating

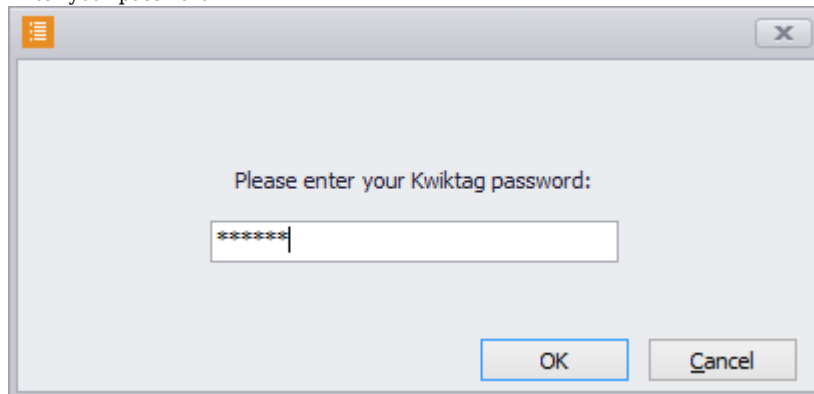
When you select a tab to view the KwikTag tab, KwikTag will need to authenticate.

1. First enter your KwikTag username



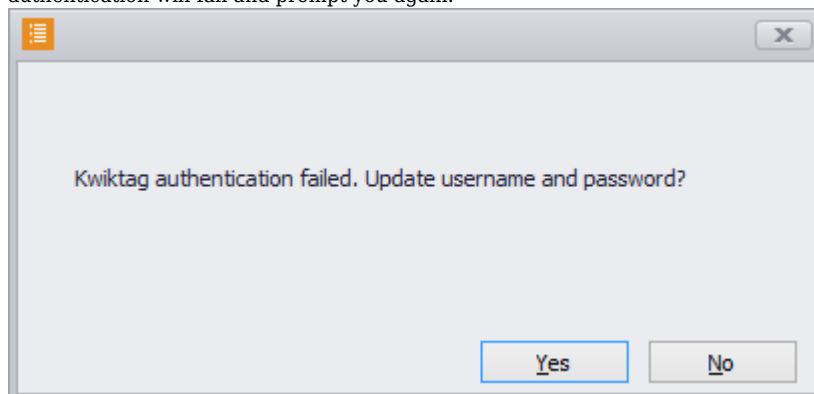
A standard Windows-style dialog box with a title bar containing a small icon and a close button (X). The main area contains the text "Please enter your Kwiktag username:" followed by a single-line text input field. At the bottom right, there are two buttons: "OK" and "Cancel".

2. Enter your password



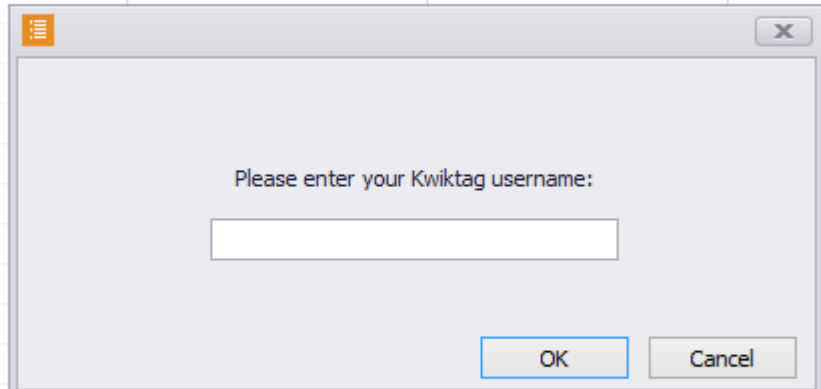
A standard Windows-style dialog box with a title bar containing a small icon and a close button (X). The main area contains the text "Please enter your Kwiktag password:" followed by a single-line text input field. The input field is partially filled with asterisks (\*\*\*\*\*). At the bottom right, there are two buttons: "OK" and "Cancel".

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.



A standard Windows-style dialog box with a title bar containing a small icon and a close button (X). The main area contains the text "Kwiktag authentication failed. Update username and password?". At the bottom right, there are two buttons: "Yes" and "No".

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



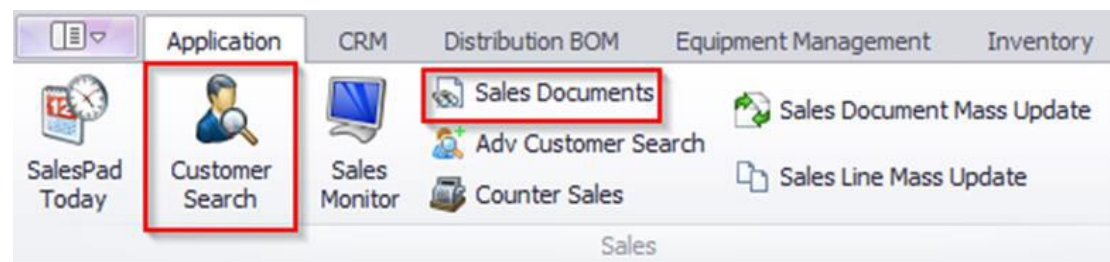
Please enter your Kwiktag username:

OK Cancel

## 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

**kwiktag**
Drawers    Work Queue    Cases    Forms    Reports    Search    Help
administrator

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Sales Transaction Entry

Showing 26

View Filter: X

| Company ID     | Currency ID | Customer ID  | Document ID |
|----------------|-------------|--------------|-------------|
| Fabrikam, Inc. | Z-US\$      | AARONFIT0001 |             |
| Fabrikam, Inc. | Z-US\$      | AARONFIT0001 |             |
| Fabrikam, Inc. | Z-US\$      | AARONFIT0001 |             |
| Fabrikam, Inc. | Z-US\$      | AARONFIT0001 |             |
| Fabrikam, Inc. | Z-US\$      | BLUEYOND0001 | 04/12       |
| Fabrikam, Inc. | Z-US\$      | AARONFIT0001 |             |
| Fabrikam, Inc. | Z-US\$      | AARONFIT0001 | 04/21       |
| Fabrikam, Inc. | Z-US\$      | AARONFIT0001 |             |
| Fabrikam, Inc. | Z-US\$      | AARONFIT0001 | 03/19       |
| Fabrikam, Inc. | Z-US\$      | AARONFIT0001 | 03/17       |
| Fabrikam, Inc. | Z-US\$      | AARONFIT0001 |             |
| Fabrikam, Inc. | Z-US\$      | AARONFIT0001 |             |
| Fabrikam, Inc. | Z-US\$      | ADAMPARK0001 |             |
| Fabrikam, Inc. | Z-US\$      | ADAMPARK0001 |             |
| Fabrikam, Inc. | Z-US\$      | AARONFIT0001 |             |
| Fabrikam, Inc. | Z-US\$      | ADAMPARK0001 |             |
| Fabrikam, Inc. | Z-US\$      | AARONFIT0001 |             |
| Fabrikam, Inc. | Z-US\$      | AARONFIT0001 |             |
| Fabrikam, Inc. | Z-US\$      | AARONFIT0001 |             |
| Fabrikam, Inc. | Z-US\$      | ADAMPARK0001 | 04/27       |

The screenshot shows a detailed view of a sales transaction entry. It includes a header section with company information, a main body with item details and quantities, and a footer with totals. The items listed are various types of hard drives (30 Gb, 40 Gb, 50 Gb) and their respective prices and discounts.

2. Go to Sales Document search and select a document

**Sales Documents** [X]

Close | Search | Print | Email | Fax

Search By

Document #:

PO#:

Search Results

| Source | Doc Date  | Sales Doc Type | Sales Doc Num           |
|--------|-----------|----------------|-------------------------|
| Open   | 4/12/2017 | QUOTE          | <a href="#">Q9019</a>   |
| Open   | 11/3/2014 | QUOTE          | <a href="#">Q5132</a>   |
| Open   | 4/12/2017 | ORDER          | <a href="#">1231311</a> |
| Open   | 4/12/2017 | ORDER          | <a href="#">290700</a>  |
| Open   | 4/12/2017 | ORDER          | <a href="#">D6793</a>   |
| Open   | 4/12/2017 | ORDER          | <a href="#">D6795</a>   |

- Click on the KwikTag post specific tab

Line Items | Notes | Addresses | Holds | User Fields | Audit | Related Documents | Purchases | Quick Report | FedEx Quote | Email Audit | Assemblies | Tracking Numbers | Interactions | **Kwiktag**

Documents

Refresh | New | Archive | Site:  Card Drawer:

Preview ([click to open](#))

- Select the document you want to work with

Documents

Refresh | New | Archive | Change User

| Company ID     | Currency ID | Customer ID  | Document D... | DocumentT... | Name           |
|----------------|-------------|--------------|---------------|--------------|----------------|
| Fabrikam, Inc. | Z-US\$      | BLUEYOND0... | 2017-04-12    |              | Blue Yonder... |

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

#### Customer Card

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

**Customer Search** [X]

Close | Search | Clear | New

Search By

Customer:  Contact:

City:  State:

Search Results

| Contact        | Cust#                     | Cust Name                  | Email |
|----------------|---------------------------|----------------------------|-------|
| Frank Kwan     |                           |                            |       |
| Jean Smith     |                           |                            |       |
| Bob Fitz       |                           |                            |       |
| Tim Bradley    | <a href="#">AARONF...</a> | Aaron Fitz Electrical /... |       |
| Thomas Hammond |                           |                            |       |

- Scroll to the KwikTag specific tab and select it.

Quick Report | Recurring Sales | Default Doc Items | Wallet | Special Pricing | Saved Attributes | Contract Pricing | Email Audit | Child Accounts | Equipment | Audit | Interactions | Opportunities | **Kwiktag**

Documents

Refresh New Archive Site: Card Drawer:

Authenticating...

Preview [\(click to open\)](#)

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

**kwiktag** administrator

Drawers Work Queue Cases Forms Reports Search Help

Sales Transaction Entry Showing 26 View Filter

| Company ID     | Currency ID | Customer ID  | Document ID |
|----------------|-------------|--------------|-------------|
| Fabrikam, Inc. | Z-US\$      | AARONFIT0001 |             |
| Fabrikam, Inc. | Z-US\$      | AARONFIT0001 |             |
| Fabrikam, Inc. | Z-US\$      | AARONFIT0001 |             |
| Fabrikam, Inc. | Z-US\$      | AARONFIT0001 |             |
| Fabrikam, Inc. | Z-US\$      | BLUEYOND0001 | 04/12       |
| Fabrikam, Inc. | Z-US\$      | AARONFIT0001 |             |
| Fabrikam, Inc. | Z-US\$      | AARONFIT0001 | 04/21       |
| Fabrikam, Inc. | Z-US\$      | AARONFIT0001 |             |
| Fabrikam, Inc. | Z-US\$      | AARONFIT0001 | 03/19       |
| Fabrikam, Inc. | Z-US\$      | AARONFIT0001 | 03/17       |
| Fabrikam, Inc. | Z-US\$      | AARONFIT0001 |             |
| Fabrikam, Inc. | Z-US\$      | AARONFIT0001 |             |
| Fabrikam, Inc. | Z-US\$      | ADAMPARK0001 |             |
| Fabrikam, Inc. | Z-US\$      | ADAMPARK0001 |             |
| Fabrikam, Inc. | Z-US\$      | AARONFIT0001 |             |
| Fabrikam, Inc. | Z-US\$      | AARONFIT0001 |             |
| Fabrikam, Inc. | Z-US\$      | AARONFIT0001 |             |
| Fabrikam, Inc. | Z-US\$      | AARONFIT0001 |             |
| Fabrikam, Inc. | Z-US\$      | ADAMPARK0001 | 04/27       |

8.50 x 11.00 in

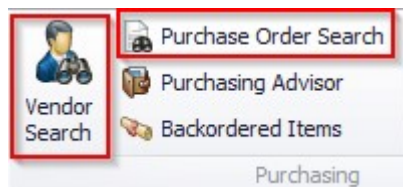
PACKING SLIP  
ORDER # D6972  
Shipping From: INVERHOUTEN  
Shipping To: UPS (040495)  
SHIP TO:  
Aaron Fit Services  
1205 Main Ave  
Channahon, IL 61015-0796  
P: (815) 500-0300  
F: (815) 500-0302

BILL TO:  
Aaron Fit Services  
1205 Main Ave  
Channahon, IL 61015-0796  
P: (815) 500-0300  
F: (815) 500-0302

| Quantity | Unit | Description | Unit Price | Total Price |
|----------|------|-------------|------------|-------------|
| 1        | 1    | 10000000    | 10000000   | 10000000    |
| 1        | 1    | 10000000    | 10000000   | 10000000    |
| 1        | 1    | 10000000    | 10000000   | 10000000    |
| 1        | 1    | 10000000    | 10000000   | 10000000    |

## 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



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](#)