



WennSoft Signature (Key2Act) Integration

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Overview

The WennSoft Signature (Key2Act) Integration provides the ability to view and assign job cost codes and service calls for sales, purchasing, and inventory documents in SalesPad Desktop. WennSoft-related fields can also be viewed and updated for customers and customer addresses. The integration leverages the same database tables and fields as Dynamics GP and WennSoft, so that the same data is available across all platforms.

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Setup

Securities

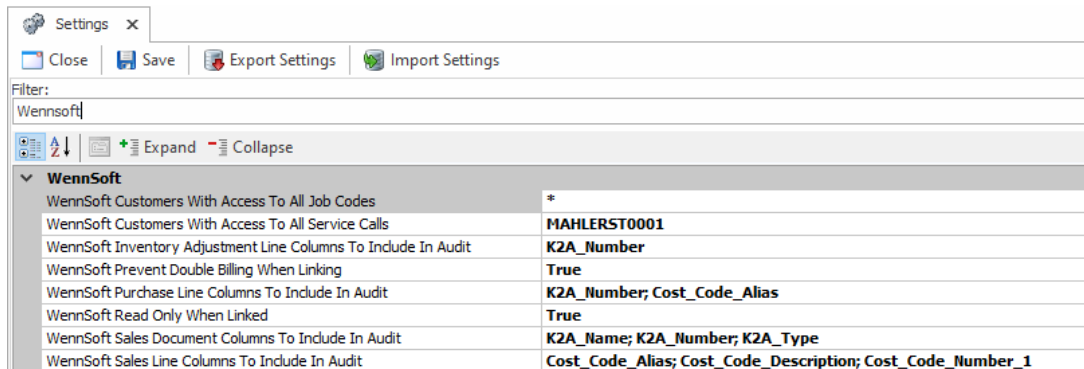
The following securities enable the various features of the WennSoft Signature integration:

Security	
<div><div><div><div><div></div><div></div></div><div>✓ Select All</div></div><div><div><div></div><div></div></div><div>■ Select None</div></div><div><div><div></div><div></div></div><div>Copy From...</div></div><div><div><div></div><div></div></div><div>Wennsoft</div></div><div><div><div></div><div></div></div><div>Search</div></div></div></div>	
Acce...	Name
<input type="checkbox"/>	acc
<input checked="" type="checkbox"/>	WennSoft Customer*
<input checked="" type="checkbox"/>	WennSoft Customer Address*
<input checked="" type="checkbox"/>	WennSoft Inventory Adjustment Dock*
<input checked="" type="checkbox"/>	WennSoft Inventory Adjustment Line Dock*
<input checked="" type="checkbox"/>	WennSoft New Customer*
<input checked="" type="checkbox"/>	WennSoft PO Line Search*
<input checked="" type="checkbox"/>	WennSoft Purchase Line Dock*
<input checked="" type="checkbox"/>	WennSoft Purchase Line Monitor*
<input checked="" type="checkbox"/>	WennSoft Receipt Line Search*
<input checked="" type="checkbox"/>	WennSoft Receiving
<input checked="" type="checkbox"/>	WennSoft Sales Document Dock*
<input checked="" type="checkbox"/>	WennSoft Sales Line Dock*
<input checked="" type="checkbox"/>	WennSoft Sales Search*

Securities with a * have sub-securities that control other aspects of those features.

Settings

The following settings control particular features of the WennSoft Signature functionality:



WennSoft Customers With Access To All Job Codes	*
WennSoft Customers With Access To All Service Calls	MAHLERST0001
WennSoft Inventory Adjustment Line Columns To Include In Audit	K2A_Number
WennSoft Prevent Double Billing When Linking	True
WennSoft Purchase Line Columns To Include In Audit	K2A_Number; Cost_Code_Alias
WennSoft Read Only When Linked	True
WennSoft Sales Document Columns To Include In Audit	K2A_Name; K2A_Number; K2A_Type
WennSoft Sales Line Columns To Include In Audit	Cost_Code_Alias; Cost_Code_Description; Cost_Code_Number_1

- *Wennsoft Customers With Access To All Job Codes* - Configure which customers have access to select any Job Code during Sales Entry. * for all. Blank for none.
- *WennSoft Customers With Access To All Service Calls* - Configure which customers have access to select any open Service Call during Sales Entry. * for all. Blank for none. The primary usage is for a few specific internal or testing customers to have full access to all open Service Calls.
- *Wennsoft Inventory Adjustment Line Columns To Include In Audit* - WennSoft inventory adjustment line columns that will be audited. If left blank, no auditing will be done when a WennSoft inventory adjustment line column is updated. Users must log out and back in for changes to take effect. Defaults to 'K2A_Number'.
- *WennSoft Prevent Double Billing When Linking* - If true, Sales Order to Purchase Order (SOP to POP) linking plugins will not be allowed to link to documents assigned to WennSoft if the originating document is also assigned to WennSoft to prevent double billing. Users must log out and back in for changes to take effect. Defaults to True.
- *WennSoft Purchase Line Columns To Include In Audit* - WennSoft purchase line columns that will be audited. If left blank, no auditing will be done when a WennSoft purchase line column is updated. Users must log out and back in for changes to take effect. Defaults to 'K2A_Number; Cost_Code_Alias'.
- *WennSoft Read Only When Linked* - If true, the WennSoft plugins will be read-only when Sales Order to Purchase Order (SOP to POP) linked. Defaults to True.
- *WennSoft Sales Document Columns To Include In Audit* - WennSoft sales document columns that will be audited. If left blank, no auditing will be done when a WennSoft sales document column is updated. Users must log out and back in for changes to take effect. Defaults to 'K2A_Number; K2A_Type'.
- *WennSoft Sales Line Columns To Include In Audit* - WennSoft sales line columns that will be audited. If left blank, no auditing will be done when a WennSoft sales line

column is updated. Users must log out and back in for changes to take effect.
Defaults to 'Cost_Code_Alias'.

Sales

Plugins within the main Sales Entry screen allow assigning WennSoft job cost codes and service calls to sales documents and sales lines, a search screen provides the ability to search for sales documents based on job cost code and service call information, and Sales Monitor has been updated to provide visibility of job cost and service call assignments.

WennSoft Sales Document And Line Plugins

In Sales Entry, there are dockable plugins at the document and line level to specify job and service call information for sales transactions. These plugins are enabled with the WennSoft Sales Document Dock and WennSoft Sales Line Dock securities. They can be launched from the plugin lists in the document header and the Line Items tab, and they can be set to automatically launch when a document is opened via their Auto Run and Dock sub-securities.

Sales Documents

CloseSavePrintDeleteCopyAllocateUnallocateDynamics GPPurchase

Document Properties

Document #:
Customer #:
Cust PO:
Res Ship:
Ship Method:
Whse:
Currency:

STDORD1048
WAHLERSTOC
9/25/2023
GROUND
WAREHOU...
Z-US\$

ORDER (STDORD)
Hahler University
Sales Rep: SAN...
Pay Terms: NET...
Doc Date: 9/25/2...
Created By: sa

Shipping Address

Mahler State University
Sharon DeBourne
4321 McDaniel Rd
Minneapolis, MN 55404-4000
P: (612) 555-0159
F: (612) 555-0159

☐ Ship Complete

Additional Properties

Batch/Q:
Price Level:

PENDING PURCH
RETAIL

No Holds

Totals - GM: [\$9,199.40] [50.02%]

Misc Charge:
Discount:
Discount %:
Freight:
Tax:
Total:
Payment:

0.00
0.00
0.00%
0.00
0.00
18,389.95
0.00

Accept Payment

WennSoft Sales Document

Type:
Job Number:
Job Name:
Default Cost Code:

☐ Unbilled
☒ Job Cost
☐ Service Management
1023
Magnussen Residence Hall Refit
26-2400-001-2

Apply To All

Line Items

NewDeleteInsert

NotesAddressesHoldsUser FieldsAuditRelated DocumentsPurchasesQuick ReportFedEx QuoteEmail AuditAssembliesTracking NumbersInteractionsShipmentManufacturing OrdersResourcesService T...

Item Number
HWIR-CJM-0001

Item Class Code
RETAIL

UORM Schedule
PHONE 1-19

Available
17.00

Onhand
20.00

Item

Description

Comment

Vendor

DS

NI

Qty

Qty

Qty BO

UORM

Req S...

Whse

Cost

Price

Ext Price

Margin %

HWIR-CJM... Control interface/Me...

1

1

1

0

Each

9/25/...

WARE...

3.2

6,589.95

6,589.95

50.07%

3-A2998A Redmount UPS

ADVANCE...

1

0

0

1

Each

9/25/...

WARE...

5.9...

11,800...

11,800...

50.00%

WennSoft Sales Line

Cost Code
Cost Code Alias
26-2400-001-2

Project Number
Mahler St Uni.

Cost Code Description
Switch & Panel Boards Is...

The document-level plugin must be filled out before the line level plugin. The type starts as Unbilled, and it can be set to either Job Cost or Service Management. The available options in both plugins update based on which type is assigned.

When a type of Job Cost is selected, the other visible fields are Job Number, Job Name, and Default Cost Code. The Job Number provides a dropdown list of all possible jobs. The setting Wennsoft Customers With Access To All Job Codes controls whether certain customers are allowed to have jobs for other customers assigned to their sales documents. The Job Name automatically updates once a Job Number is selected.

WennSoft Sales Document

Type: ☐ Unbilled ☒ Job Cost ☐ Service Management

Job Number: 1023

Job Name:

Default Cost Code:

Job Number	Job Name	Customer Num
1009	Proj #1-Bldg A Allo...	104
1010	Proj#1-Bldg B Alloc...	104
1011	Proj#1-Bldg C Alloc...	104
1012	Project #1 Reimbu...	104
1014	Proj#2-HVAC AIA ...	101
1015	Project #2 ELEV AIA	101
1016	Proj #3 Job #1 Ra...	102
1017	Proj #3 Job #2 Ra...	102
1018	Time & Matl Billing J...	102
1019	Chicago Rate Class...	DOWNTOWN001
1020	Cook County Prev ...	CENTRALI0001
1022	Ott Residence Hall ...	MAHLERST0001
1023	Magnussen Reside...	MAHLERST0001

Cost Code: 26-2400

Cost Code Alias: 26-2400-001-2

The Default Cost Code can be used to set the cost code that will be automatically assigned for new sales lines. The dropdown shows all of the cost codes that are configured for the selected job. The Apply To All button can be used to apply the default cost code to all sales lines on the document, overwriting any other cost codes that have been assigned.

WennSoft Sales Document

Type: ☐ Unbilled ☒ Job Cost ☐ Service Management

Job Number: 1023

Job Name: Magnussen Residence Hall Refit

Default Cost Code: 26-2400-001-2 Apply To All

Cost Code Alias	Cost Code Description
26-2400-001-2	Switch & Panel Boards 1st Flr
26-2400-002-2	Switch & Panel Boards 2nd Flr

The sales line plugin is used to assign individual cost codes to sales lines. The dropdown shows all of the cost codes that are configured for the selected job for this sales document. Selecting a new cost code will update the cost code for this sales line.

WennSoft Sales Line

Cost Code: 26-2400-001-2

Cost Code	Cost Code Alias	Cost Code Description
26-2400-001-2	26-2400-001-2	Switch & Panel Boards 1st Flr
26-2400-002-2	26-2400-002-2	Switch & Panel Boards 2nd Flr

When a type of Service Management is selected, the other visible fields are Service Call Id and Description. The line level plugin is disabled for service calls, because the service call only needs to be specified at the document level.

The screenshot shows the 'WennSoft Sales Document' window. The 'Type' section has three radio buttons: 'Unbilled', 'Job Cost', and 'Service Management' (which is selected). Below this, the 'Service Call Id' field is a dropdown menu showing '170401-0002'. The 'Description' field is an empty text box. At the bottom, there is a tabbed interface with tabs for 'Interactions', 'Shipment', 'Manufacturing Orders', 'Resources', and 'Service T'.

The screenshot shows the 'WennSoft Sales Line' window. A yellow warning banner at the top states: 'Disabled - Service Calls do not assign cost codes at the line level.' Below this, the 'Cost Code' field is a disabled dropdown menu. At the bottom, there is a table with three columns: 'Cost Code Alias', 'Project Number', and 'Cost Code Description'.

The Service Call Id field provides a dropdown list of all possible service calls. The setting Wennsoft Customers With Access To All Service Calls controls whether certain customers are allowed to have service calls for other customers assigned to their sales documents. The Description automatically updates once a Service Call Id is selected.

The screenshot shows the 'WennSoft Sales Document' window with the 'Service Call Id' dropdown menu expanded. The 'Type' section shows 'Service Management' selected. The 'Service Call Id' dropdown shows '170401-0012'. The 'Description' field is a table with three columns: 'Service Call Id', 'Service Description', and 'Customer Num'. The table contains one row with the values '170401-0012', 'ULTIMATE CONTRACT', and '102'. The 'Description' field is currently empty.

Changes to job and service call information is updated when the sales document is saved. This updates the same database tables and fields that GP and WennSoft use, so there is no risk of data being out of sync between these systems.

If a sales document must be changed back to an Unbilled status, the current Job Number or Service Call ID must be removed first. This will clear all WennSoft data for that document when the changes are saved.

WennSoft Sales Search Screen

The WennSoft Sales Search screen is available in the WennSoft Signature category in the ribbon once it is enabled via security. It displays only those sales documents which are linked to jobs or service calls in WennSoft. This screen offers some of the available actions from the Sales Batch Processing screen, such as Transfer, Forward, Allocate, and Unallocate, as well as other standard search functionality like printing and emailing. These actions are enabled via sub-securities.

[illegible]

This screen looks very similar to the main Sales Document Search screen, but it also offers some search capabilities that are specific to WennSoft fields. The main Search By fields provide WennSoft Number and WennSoft Name as options. The Document Types section includes the ability to filter to Jobs and/or Service Calls specifically.

The WennSoft Sales Search grid also provides several WennSoft fields in addition to the standard sales document fields. The WennSoft Type (“Job Number” or “Service Call Id”), the WennSoft Number (Job Number or Service Call Id), and the WennSoft Name (Job Name or Service Call Description) are available for visibility, and they can be used for standard grid sorting and filtering.

Sales Monitor Updates

The standard Sales Monitor has been updated to provide visibility of several WennSoft fields. The WennSoft Type (“Job Number”, “Service Call Id”, or “Unbilled”), the WennSoft Number (Job Number or Service Call Id), and the WennSoft Name (Job Name or Service Call Description) are available for visibility, and they can be used for standard grid sorting and filtering abilities.

Sales Monitor												
<div> <div>Close</div> <div>Refresh</div> <div>Hide Auto Queues</div> <div>Expand All</div> <div>Collapse All</div> <div>Refresh manually</div> <div>Last Refresh: 2:16 PM</div> <div>Search:</div> <div>Sales Rep: (all)</div> </div>												
<div> <div>ALL</div> <div>QUOTES</div> <div>ORDERS (STDOORD)</div> </div>												
ID	Count	Total	Cost	Doc#	WennSoft Name	WennSoft Number	WennSoft Type	Customer	Req Ship Date	Total	Rep	Status
<div> <div>STDOQUOTE QUOTE</div> <div> <div>NEW_QUOTE</div> <div>PENDING_QUOTE</div> <div>APPROVED_QUOTE</div> <div>EMAIL</div> <div>SALES_QUOTES</div> </div> </div>												
<div> <div>ORDER ORDER</div> <div>STDOORD ORDER</div> <div> <div>NEW_ORDER</div> <div>REVIEW_DOCS</div> <div>PENDING_PURCH...</div> <div>PENDING_SERVICE</div> <div>COMPLETE_PROD</div> <div>COMPLETE_SERV</div> <div>RDY_PICK</div> <div>RDY_SHIP</div> <div>RDY_INVOICE</div> </div> </div>												
<div> <div>Batch: NEW_ORDER</div> <div> <div>ORDST2232</div> <div>STDOORD1003</div> <div>STDOORD1004</div> <div>STDOORD1005</div> <div>STDOORD1006</div> <div>STDOORD1007</div> <div>STDOORD1008</div> <div>STDOORD1022</div> <div>STDOORD1030</div> <div>STDOORD1032</div> <div>STDOORD1044</div> <div>STDOORD1046</div> <div>STDOORD1049</div> <div>STDOORD1050</div> <div>STDOORD1052</div> </div> </div>												
<div> <div>Unbilled</div> <div>Service Call</div> <div>Job</div> <div>Job</div> <div>Service Call</div> <div>Job</div> <div>Job</div> <div>Job</div> <div>Job</div> <div>Unbilled</div> <div>Job</div> <div>Unbilled</div> <div>Job</div> <div>Job</div> <div>Service Call</div> </div>												
<div> <div>Boswell General Hospital</div> <div>CEDAR FAMILY COUNSELING</div> <div>CEDAR FAMILY COUNSELING</div> <div>CEDAR FAMILY COUNSELING</div> <div>CEDAR FAMILY COUNSELING</div> <div>Mahler State University</div> <div>Mahler State University</div> <div>Mahler State University</div> <div>CEDAR FAMILY COUNSELING</div> <div>Mahler University</div> <div>Mahler University</div> <div>Mahler University</div> <div>Aaron Fitz Electrical</div> <div>Aaron Fitz Electrical</div> <div>CEDAR FAMILY CLINIC</div> </div>												
<div> <div>04/12/2027</div> <div>11/08/2022</div> <div>11/09/2022</div> <div>11/09/2022</div> <div>11/09/2022</div> <div>02/01/2023</div> <div>01/20/2023</div> <div>02/06/2023</div> <div>03/07/2023</div> <div>03/24/2023</div> <div>08/04/2023</div> <div>08/25/2023</div> <div>10/19/2023</div> <div>10/19/2023</div> <div>01/11/2024</div> </div>												
<div> <div>34,240.00</div> <div>3,739.65</div> <div>650.00</div> <div>314.00</div> <div>100.00</div> <div>920.00</div> <div>1,000.00</div> <div>239.95</div> <div>417.25</div> <div>0.00</div> <div>2,489.90</div> <div>70,009.95</div> <div>399.50</div> <div>49.90</div> <div>64.15</div> </div>												
<div> <div>GARY W.</div> <div>SANDRA M.</div> <div>SANDRA M.</div> <div>SANDRA M.</div> <div>SANDRA M.</div> <div>SANDRA M.</div> <div>SANDRA M.</div> <div>SANDRA M.</div> <div>SANDRA M.</div> <div>SANDRA M.</div> <div>SANDRA M.</div> <div>SANDRA M.</div> <div>PAUL W.</div> <div>PAUL W.</div> <div>SANDRA M.</div> </div>												
<div> <div>FP</div> <div>FP</div> <div>FP</div> <div>FP</div> <div>FP</div> <div>BO PBO...</div> <div>FP</div> <div>BO PBO...</div> <div>FP</div> <div>ZL FPD</div> <div>FP</div> <div>FP</div> <div>BO PBO...</div> <div>FP</div> <div>FP</div> </div>												
<div> <div>114,634.25</div> </div>												

Purchasing

A plugin within the main Purchase Entry screen allows assigning WennSoft job cost codes and service calls to PO lines, search screens provide the ability to search for PO lines and receipt lines based on job cost code and service call information, a new WennSoft Purchase Line Monitor provides job cost and service call columns on a monitor screen based around PO lines, and a tab on the Receiving screen provides job and service information for PO lines at the time of receipt.

WennSoft Purchase Line Dockable Plugin

In Purchase Entry, there is a dockable plugin at the line level for specifying job and service call information for PO lines. This plugin is enabled with the WennSoft Purchase Line Dock security. It can be launched from the PO line items plugin list, and it can be set to automatically launch when a document is opened via its Auto Run and Dock sub-security.

Purchase Order Search

(STANDARD) PO2107

Close

Save

Print

Copy

Cancel

Dynamics Gp

Release

PO Properties

Purch. Order #:

PO2107

PO Status:

New

PO Type:

STANDARD

Vendor ID:

ABC0001

Vendor Name:

ABC Plumbing Company

Currency:

Z-US\$

PO Dates

PO Date:

3/6/2023

Required Date:

3/6/2023

Promised Date:

3/6/2023

Promised Ship:

3/6/2023

Other

Queue:

PURCHASE REQ

Terms:

NET 30

Shipping Method:

GROUND

Buyer:

Confirm With:

Revision Number:

0

Location

On Hold

Ship To Address

Ship to Customer

Edit Address

Fabrikam, Inc.

Taylor Stewart-Cray

4277 West Oak Parkway

Chicago, IL 60661-4277

P: (312) 436-2671

F: (312) 436-2896

Totals

Discount:

0.00

Freight:

0.00

Misc. Charge:

0.00

Tax:

0.00

Total

18.65

Line Items

Notes

Addresses

User Fields

Links

Quick Report

Audit

Receipts

Email Audit

Resources

Item Number

Item Class Code

UOM Schedule

Available

Onhand

HDWR-SRG-0001

RETAIL

PHONE 1-10

24.00

38.00

Item #

Description

NE

Comment

Vendor Item #

Location

Qty

UOM

Unit Cost

Extd. Cost

HDWR-SRG-0001

Surge Protector Panel

HDWR-SRG-0001

WAREHOUSE

1

Each

18.65

18.65

WennSoft Purchase Line

Type:

Unbilled

Job Cost

Service Management

Job Number:

1001

Job Name:

Simple CC Job / Std Billing

Cost Code:

01-3000-002-2

This plugin contains all the functionality of the separate sales plugins. Each PO line can be assigned to either a job cost code or a service call. Lines on the same PO can be assigned to different jobs and/or service calls. All of the differences between job and service call fields on the sales plugins apply to this plugin as well.

Changes to job and service call information are updated when the purchase order is saved. This updates the same database tables and fields that GP and WennSoft use, so there is no risk of data being out of sync between these systems.

WennSoft PO Line Search Screen

The WennSoft PO Line Search screen is available in the WennSoft Signature category in the

ribbon once it is enabled via security. It displays only those PO lines which are linked to jobs or service calls in WennSoft. This screen has sub-securities to control standard search screen functionality such as allowing screen layout customization, various search restrictions, and the ability to print and export the grid results.

WennSoft Type	WennSoft Number	WennSoft Name	Vendor ID	PO Number	Item Number	Item Description	Qty Order	UOM	Location Code	Queue
Job Number	1001	Simple CC Job / Std Billing	ADVANCE0001	PO2107	HD-20	Surge Protector Panel	1	EACH	WAREHOUSE	PURCHASE REQ
Job Number	1018	Time & Mat Billing Job	ADVANCE0001	PO2108	HD-40	40 Gg Hard Drive	1	EACH	WAREHOUSE	PURCHASE REQ
Job Number	1016	Proj #3 Job #1 Rate Class	ADVANCE0001	PO2112	HD-20	2.0 TB Solid State Disk	100	EACH	WAREHOUSE	COMPLETE
Service Call Id	170401-0002	ULTIMATE CONTRACT	ADVANCE0001	PO2113	HD-40	4.0 TB Solid State Disk	25	EACH	WAREHOUSE	COMPLETE
Job Number	1008	ELEC/Proj ADA Rate Class MLIW	ADVANCE0001	PO2113	HD-20	2.0 TB Solid State Disk	10	EACH	WAREHOUSE	PURCHASE REQ
Job Number	1020	Cook County Prevailing Job	ADVANCE0001	PO2120	HD-40	4.0 TB Solid State Disk	10	EACH	WAREHOUSE	PURCHASE REQ

This screen looks very similar to the main Purchase Order Search screen, but it shows information at the purchase line level instead of the purchase order level, and it also offers some search capabilities that are specific to WennSoft fields. The main Search By fields offer WennSoft Number and WennSoft Name as options. The Document Types section provides the ability to filter to Jobs and/or Service Calls specifically.

The WennSoft Purchase Line Search grid also displays several WennSoft fields in addition to the standard purchase line fields. The WennSoft Type ("Job Number" or "Service Call Id"), the WennSoft Number (Job Number or Service Call Id), and the WennSoft Name (Job Name or Service Call Description) are available for visibility, and they can be used for standard grid sorting and filtering. Sorting by these fields will visually group rows that have the same job number or service call ID.

WennSoft Receipt Line Search Screen

The WennSoft Receipt Line Search screen is available in the WennSoft Signature category in the ribbon once it is enabled via security. It displays only those receipt lines which are linked to jobs or service calls in WennSoft. This screen has sub-securities to control standard search screen functionality such as allowing screen layout customization, various search restrictions, and the ability to print and export the grid results.

WennSoft Type	WennSoft Number	WennSoft Name	Vendor ID	PO Number	Receipt Number	Receipt Type	Item Number	Qty Shipped	Unit Of Measure	Unit Cost	Location	Queue
Job Number	1001	Simple CC Job / Std Billing	ADVANCE0001	PO2108	RCT1218	Shipment	HD-20	1	EACH	50.00	WAREHOUSE	SALESPAD R/C
Service Call Id	170401-0002	ULTIMATE CONTRACT	ADVANCE0001	PO2113	RCT1221	Shipment	HD-20	1	EACH	75.00	WAREHOUSE	SALESPAD R/C

This screen looks very similar to the main Purchase Receipt Search screen, but it shows information from the receipt line level instead of the receipt level, and it also offers some search capabilities that are specific to WennSoft fields. The main Search By fields offer

WennSoft Number and WennSoft Name as options. The Document Types section provides the ability to filter to Jobs and/or Service Calls specifically.

The WennSoft Receipt Line Search grid also displays several WennSoft fields in addition to the standard receipt line fields. The WennSoft Type (“Job Number” or “Service Call Id”), the WennSoft Number (Job Number or Service Call Id), and the WennSoft Name (Job Name or Service Call Description) are available for visibility, and they can be used for standard grid sorting and filtering. Sorting by these fields will visually group rows that have the same job number or service call ID.

WennSoft Purchase Line Monitor

The WennSoft Purchase Line Monitor screen is available in the WennSoft Signature category in the ribbon once it is enabled via security. It relies on Purchase Order workflow, and requires at least one PO workflow to be defined. This screen has sub-securities to control standard monitor screen functionality such as allowing PO forwarding and sending POs to specific workflow queues.

<

This screen looks very similar to the main Purchase Order Monitor screen, but it shows information at the purchase line level instead of the purchase order level. It also provides several WennSoft fields in addition to the standard purchase line fields. The WennSoft Type ("Job Number" or "Service Call Id"), the WennSoft Number (Job Number or Service Call Id), the WennSoft Name (Job Name or Service Call Description), the Cost Code Alias, the Cost Code Description, and the Cost Type are available for visibility, and they can be used for standard grid sorting and filtering.

WennSoft Receiving Tab

The WennSoft Receiving tab is available on the main Receiving screen once it is enabled via security. This tab is readonly, and it is meant to provide job cost and service call information at the time of receiving. This information is rolled down automatically from the PO line to the receipt line when the receipt is created by this screen's processing.

Receiving

Close

Items

In Transit Items (Beta)

Save

Search

Receive Selected

Receipt Type: Shipment

Clear

Receipt Date: 11/29/2023

Search Criteria

Vendor:

PO#:

Barcode Scan:

Item Number	Item Description	PO#:	Ordered	Received	To Recv.	Req. Date	Vendor ID	NI	Bin	Rcpt. Site	Serial/Lot(s)	Vendor Doc...	Receipt Bat...	Landed Cos...
3-E4472A	Power Dist Unit Install...	PO2121	20	0		6/14/2023	ABC0001			WAREHOUSE			SALESPAD ...	
3-E4472A	Power Dist Unit Install...	PO2121	20	0		6/14/2023	ABC0001			WAREHOUSE			SALESPAD ...	
3-E4472A	Power Dist Unit Install...	PO2120	1	0		6/14/2023	ABC0001			WAREHOUSE			SALESPAD ...	
3-E4472A	Power Dist Unit Install...	PO2119	1	0		6/13/2023	ABC0001			WAREHOUSE			SALESPAD ...	
3-E4472A	Power Dist Unit Install...	PO2118	1	0		6/12/2023	ABC0001			WAREHOUSE			SALESPAD ...	
3-E4472A	Power Dist Unit Install...	PO2116	1	0		6/8/2023	ABC0001			WAREHOUSE			SALESPAD ...	

Audit

Item User Fields

Inventory Lot UDFs

Inventory Serial UDFs

WennSoft Receiving

WennSoft Purchase Line information cannot be edited during Receiving and is read-only.

Type:

Unbilled

Job Cost

Service Management

Job Number:

1020

Job Name:

Cook County Prevailing Job

Cost Code:

23-2100-001-2

Preventing Double Billing

Because job cost codes and service calls can be assigned to both sales lines and purchase lines, this creates a risk of double billing. If a job cost code or service call is assigned to a sales line, and also to its linked purchase line, then each of those lines will affect the billing for its assigned code. This could double up on billing for the same job/service, or it could apply the same cost to multiple different jobs/service calls. Typically, this is avoided by declaring a business rule to only assign job cost codes and service calls to sales documents, or only to purchase orders. In the event that assigning to both document types is needed, SalesPad has some built-in protections to help prevent double billing.

A global setting exists to automatically remove WennSoft-assigned documents as possibilities when creating new SOP to POP links for existing documents:

- *WennSoft Prevent Double Billing When Linking* - If true, Sales Order to Purchase Order (SOP to POP) linking plugins will not be allowed to link to documents assigned to WennSoft if the originating document is also assigned to WennSoft to prevent double billing. Users must log out and back in for changes to take effect. Defaults to True.

Another global setting prevents the use of WennSoft plugins for lines that have SOP to POP links, so that they cannot be assigned to job cost codes or service calls once linked:

- *WennSoft Read Only When Linked* - If true, the WennSoft plugins will be read-only when Sales Order to Purchase Order (SOP to POP) linked. Defaults to True.

SalesPad recommends that both of these settings stay enabled to help prevent double billing.

Inventory

Plugins within the main Inventory Transaction Entry screen allow assigning WennSoft job cost codes and service calls to inventory adjustments and lines.

WennSoft Inventory Adjustment And Line Plugins

In Inventory Transaction Entry, for adjustment-type documents only, there are dockable

plugins at the document and line level that allow specifying job and service call information for adjustment transactions. These plugins are enabled with the WennSoft Sales Document Dock and WennSoft Sales Line Dock securities. They can be launched from the plugin lists in the document header and the Lines tab, and they can be set to automatically launch when a document is opened via their Auto Run and Dock sub-securities.

Inv Trx Search x 000000000000000000178 x

Close Save Delete Print

Transaction Properties

Doc Type: ADJUSTMENT Batch ID: INVENTORY BATCH
Doc Number: 000000000000000000178 Default Location: WAREHOUSE
Doc Date: 11/29/2023

WennSoft Inventory Adjustment

Type: ☐ Unbilled ☒ Job Cost ☐ Service Management
Job Number: 1020
Job Name: Cook County Prevailing Job
Default Cost Code: Apply To All

Lines Notes Audit

New Delete

Item Number	Item Description	Site	Quantity	UOM	Reason Code
100XLG	Green Phone	WAREHOUSE	1	EACH	
A100	Audio System	WAREHOUSE	1	EACH	

WennSoft Inventory Adjustment Line

Cost Code: 23-2100-001-2
Project Number Cost Code Alias Cost Code Description
23-2100-001-2 Hydronic Piping 1st Flr

These plugins contain mostly the same functionality as the sales plugins. The document is assigned for either a job or a service call. A default cost code can be assigned and rolled down to all lines. Lines on the adjustment can be assigned to different cost codes for the same job. All of the same differences between job and service call fields on the sales plugins apply to these plugins as well.

The main difference between the inventory plugins and the sales plugins is that the inventory plugins will allow certain information to be populated at the line level for service calls. Inventory adjustment lines can be assigned a Billing Amount and an Equipment record.

WennSoft Inventory Adjustment

Type: ☐ Unbilled ☐ Job Cost ☒ Service Management
Service Call Id: 170401-0002
Description: ULTIMATE CONTRACT

WennSoft Inventory Adjustment Line

Billing Amount: -30.0000000000
Equipment: 0000000063

The Equipment field displays a dropdown with all of the possible WennSoft equipment records. All columns are visible by default, but unnecessary columns can be hidden, or made visible again with standard Column Chooser functionality. Note that WennSoft equipment is not the same as equipment within SalesPad, and it must be managed within WennSoft/GP.

Item Number	Item Description	Site	Quantity	UOM	Reason Code
100XLG	Green Phone	WAREHOUSE	1	EACH	
A100	Audio System	WAREHOUSE	1	EACH	

Equipment ID	Equipment Type	Equipment Sublocation	Contract Number	Wennsoft Model Number	Wennsoft Serial Number	Warranty Expiration	Inactive/Retired
0000000063	ROOF TOP UNIT	SE CORNER OF ROOF		C6000	XZNVBNJHOIWT		<input type="checkbox"/>
0000000064	ELEVATOR-FREIGHT	SHIPPING & RECEIVING	0000000028	SERIES 4000	ZNV834NB282		<input type="checkbox"/>

Changes to job and service call information is updated when the inventory adjustment is saved. This updates the same database tables and fields that GP and WennSoft use, so there is no risk of data being out of sync between these systems.

Customers

Tabs exist on the main Customer Card and Customer Address Card for entering WennSoft fields for these entities, and the New Customer form has tabs that allow entering these fields at the time of customer creation.

WennSoft Customer Tab

The WennSoft Customer tab is available on the main Customer Card once it is enabled via security. This tab provides all of the WennSoft fields that can be set for customers.

Customizing the layout is possible via a sub-security, so that fields can be hidden and rearranged as desired.

Customer Search	Customer: [AARONFIT0001] Aaron Fitz Electrical																																																																																																																																		
Close Refresh Save Print Dynamics GP Quote Order Invoice Return																																																																																																																																			
Customer Properties Customer: AARONFIT0001 Customer Name: Aaron Fitz El... Short Name: Aaron Fitz Elec... Cust Class: USA-ILM... Price Level: Pay Terms: NET 30 Sales Rep: West, Paul Sales Terr: TERRITO... Currency: Z-US\$ Trade Discount: 0.00% Tax Reg Num: Queue:	Primary Address Information Bob Fitz One Microsoft Way Redmond, WA 98052-63 P1: (425) 555-0101 Ship To Address Information Bob Fitz 11403 45 St. South Chicago, IL 60603-0776 P1: (312) 555-0102 Default Shipping Information Method: LOCAL DELIVERY <input type="checkbox"/> Ship Complete <input type="checkbox"/> On Hold																																																																																																																																		
Open Sales Documents <table border="1"> <thead> <tr> <th>Type</th> <th>Doc#</th> <th>Doc Date</th> <th>Batch</th> <th>PO</th> <th>Total</th> <th>Req Ship</th> </tr> </thead> <tbody> <tr> <td>QUOTE</td> <td>QTEST1024</td> <td>4/12/2027</td> <td>EMAIL</td> <td></td> <td>34,240.00</td> <td>11/11/2022</td> </tr> <tr> <td>INVOICE</td> <td>STDINV2260</td> <td>4/12/2027</td> <td>SOP INVOICES</td> <td></td> <td>481.35</td> <td>4/12/2027</td> </tr> <tr> <td>FULFILLMENTO...</td> <td>FULORD1008</td> <td>4/12/2027</td> <td>FULORD</td> <td></td> <td>192.45</td> <td>4/12/2027</td> </tr> <tr> <td>FULFILLMENTO...</td> <td>FULORD1006</td> <td>4/12/2027</td> <td>FULORD</td> <td></td> <td>5,828.55</td> <td>4/12/2027</td> </tr> <tr> <td>FULFILLMENTO...</td> <td>FULORD1003</td> <td>4/12/2027</td> <td>FULORD</td> <td></td> <td>49.85</td> <td>4/12/2027</td> </tr> <tr> <td>FULFILLMENTO...</td> <td>FULORD1000</td> <td>4/12/2027</td> <td>FULORD</td> <td></td> <td>358.25</td> <td>4/12/2027</td> </tr> <tr> <td>ORDER</td> <td>ORDST2226</td> <td>4/12/2027</td> <td>REVIEW_DOCS</td> <td></td> <td>930.20</td> <td>4/12/2027</td> </tr> <tr> <td>QUOTE</td> <td>QTEST1022</td> <td>3/5/2027</td> <td>SALES QUOTES</td> <td></td> <td>85.55</td> <td>11/12/2022</td> </tr> <tr> <td>ORDER</td> <td>1001</td> <td>3/3/2023</td> <td>ORDER</td> <td></td> <td>39.95</td> <td>3/3/2023</td> </tr> </tbody> </table>		Type	Doc#	Doc Date	Batch	PO	Total	Req Ship	QUOTE	QTEST1024	4/12/2027	EMAIL		34,240.00	11/11/2022	INVOICE	STDINV2260	4/12/2027	SOP INVOICES		481.35	4/12/2027	FULFILLMENTO...	FULORD1008	4/12/2027	FULORD		192.45	4/12/2027	FULFILLMENTO...	FULORD1006	4/12/2027	FULORD		5,828.55	4/12/2027	FULFILLMENTO...	FULORD1003	4/12/2027	FULORD		49.85	4/12/2027	FULFILLMENTO...	FULORD1000	4/12/2027	FULORD		358.25	4/12/2027	ORDER	ORDST2226	4/12/2027	REVIEW_DOCS		930.20	4/12/2027	QUOTE	QTEST1022	3/5/2027	SALES QUOTES		85.55	11/12/2022	ORDER	1001	3/3/2023	ORDER		39.95	3/3/2023																																																												
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WennSoft Customer Address Tab

The WennSoft Customer Address Fields tab is available on the main Customer Address Card once it is enabled via security. This tab provides all of the WennSoft fields that can be set for customer addresses. Customizing the layout is possible via a sub-security, so that fields can be hidden and rearranged as desired.

Customer Search x Customer: [AARONFIT0001] Aaron Fitz Electrical x Contact: PRIMARY/Bob Fitz x

Close Save

Customer

Customer ID: AARONFIT0001 Customer Name: Aaron Fitz Electrical

Address

Code: PRIMARY

Alt Comp. Name: Aaron Fitz Electrical

Contact Name: Bob Fitz

Address: One Microsoft Way

Zip: 98052-6399

State: WA

City: Redmond

Country Code: USA

Country: USA

Contact Information

Contact Type: (425) 555-0101

Phone 1: (425) 555-0101

Phone 2:

Phone 3:

Fax: (312) 555-0101

Email:

Email To:

Email CC:

Email BCC:

Web Site:

Login:

Password:

Other Address Info

Warehouse:

Sales Rep:

Sales Territory:

Ship Method: LOCAL DELIVERY

Tax Code: USASTCITY-6*

Ups Zone:

File Location 1:

File Location 2:

☐ Do Not Mail

☐ Do Not Email

☐ Do Not Fax

☐ Do Not Text

Comments

Add Comment

Contact Audit Contact User Fields WennSoft Customer Address Fields Contact Resources

WennSoft Affiliate

WennSoft Region

WennSoft Branch

User ID

Technician ID

Technician Team

Customer Name

WennSoft New Customer Tabs

The WennSoft New Customer tab and the WennSoft Customer Address Fields tab are available on the main New Customer screen once they are enabled via security. These tabs provide all of the WennSoft fields that can be set for customers and customer addresses. Customizing the layout is possible via sub-securities, so that fields can be hidden and rearranged as desired.

New Customer

Customer Properties

Customer ID: (AUTO ASSIGNED)

Name:

Short Name:

Statement Name:

Contact/Addr Code:

Location/Whse:

Customer Class Properties

Customer Class:

Sales Person:

Sales Territory:

Shipping Method:

WennSoft New Customer

Wennsoft Affiliate

Wennsoft Region

Wennsoft Branch

User ID

Technician ID

Technician Team

Corporate Customer Num

PO Required

Contact Person

Contact Name

Address

Code:

Alt Comp. Name:

Contact Name:

Address:

Zip:

State:

City:

Country Code:

Country:

Contact Information

Contact Type:

Phone 1:

Phone 2:

Phone 3:

Fax:

Email:

Email To:

Email CC:

Email BCC:

Web Site:

Login:

Password:

Comments

Add Comment

Contact User Fields

WennSoft Affiliate

WennSoft Region

WennSoft Branch

User ID

Technician ID

Technician Team

Customer Name

Phone 1

Map Grid

Fax

Service Area

OK Cancel

Limitations

- Service Calls must be open in order to be assigned.
- Labor cost codes for jobs are not currently supported.

- Subcontractor and Retention code codes for jobs are not currently supported (no WennSoft integration procedures yet).
- The SOP Billing configuration is not currently supported, only the Job Cost configuration is supported (Signature Job Cost > Setup > Job Cost Setup > Posting Options > Sales/Revenue Accounts for SOP Billing From > SOP)
- While jobs and service calls can be set up for specific customers, WennSoft does not prevent them from being assigned to documents for other customers. SalesPad Desktop provides settings for controlling whether jobs and service calls can be assigned to other customers' documents.

Please contact your Cavallo Account Executive if you are interested in this licensed module.