WennSoft Signature (Key2Act) Integration

Megan De Freitas - 2024-11-22 - Extended Modules

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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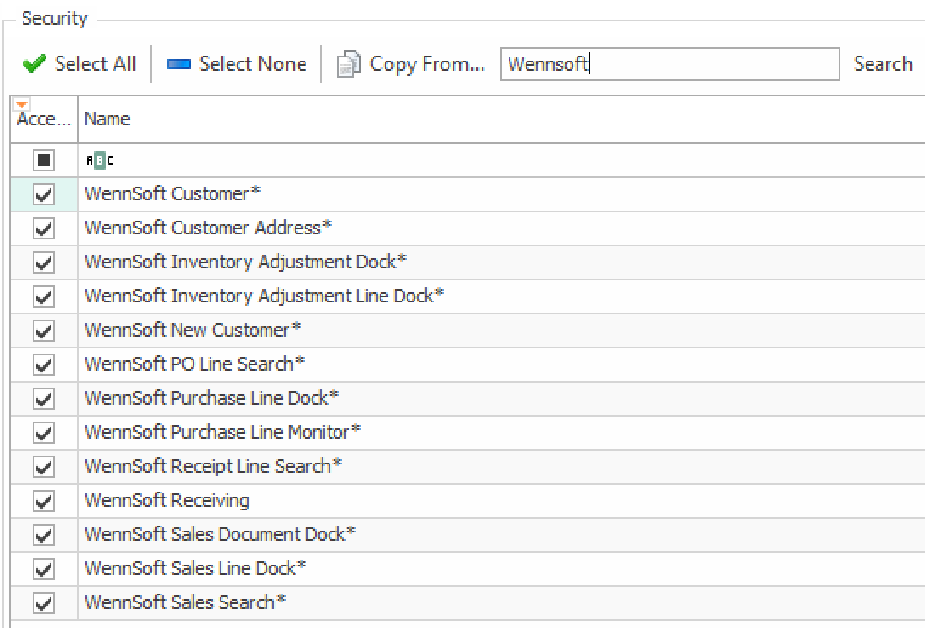
Setup

Securities

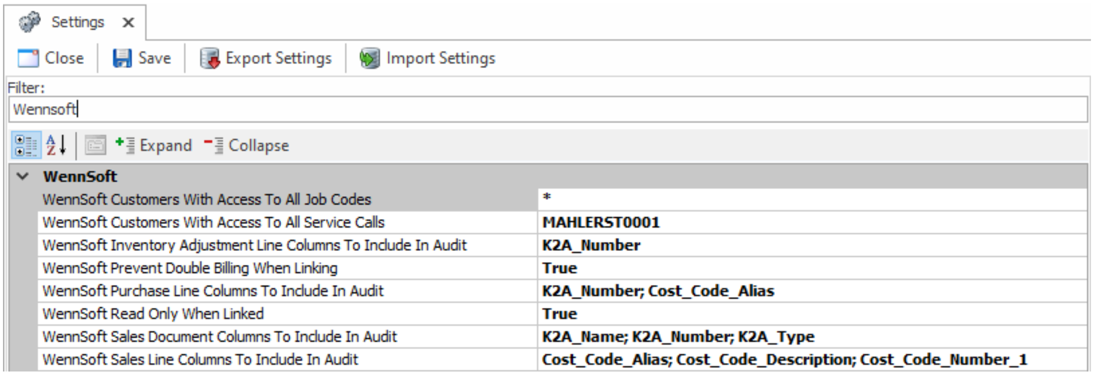
The following securities enable the various features of the WennSoft Signature integration:



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* - 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

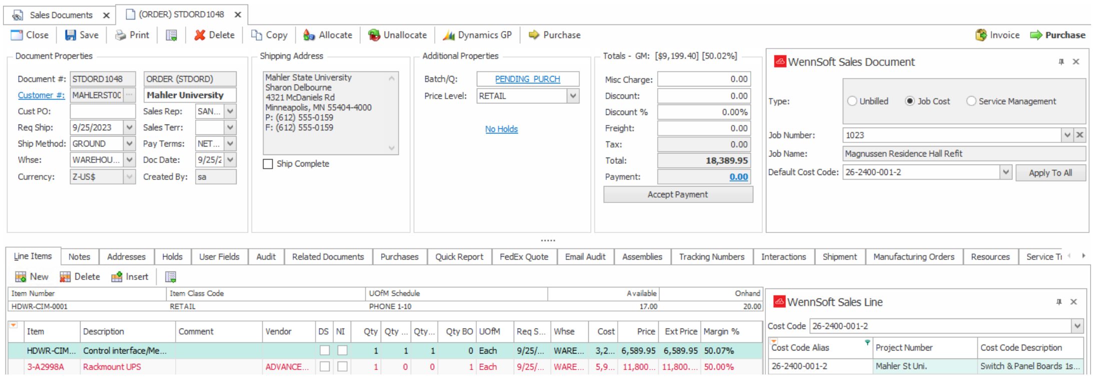
column is updated. Users must log out and back in for changes to take effect. Defaults to ‘Cost_Code_Alias’.

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.

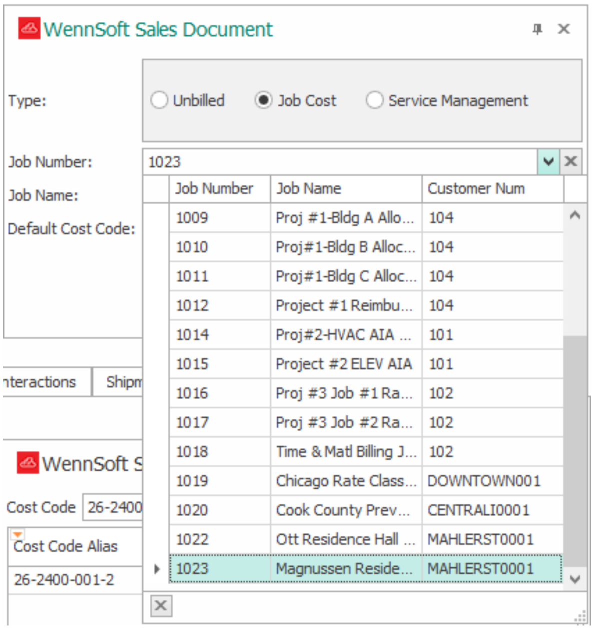
WennSoft Sales Document And Line Plugins

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.

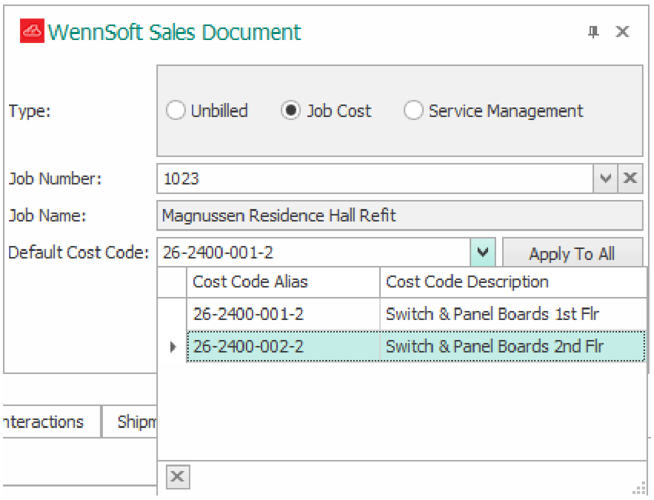


The document-level plugin must be filled out before the line level plugin. The type starts as Unbilled, and it can be set to either Job Cost or Service Management. The available options in both plugins update based on which type is assigned.

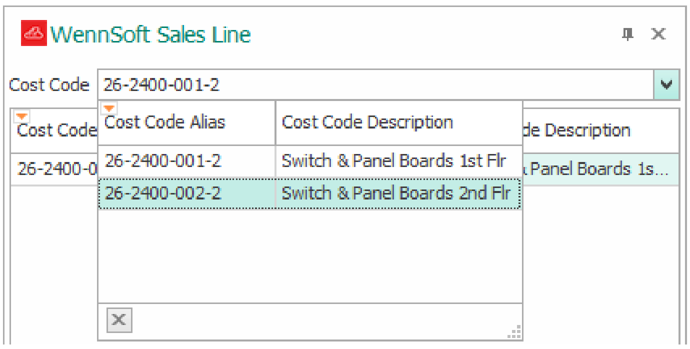
When a type of Job Cost is selected, the other visible fields are Job Number, Job Name, and Default Cost Code. The Job Number provides a dropdown list of all possible jobs. The setting Wennsoft Customers With Access To All Job Codes controls whether certain customers are allowed to have jobs for other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



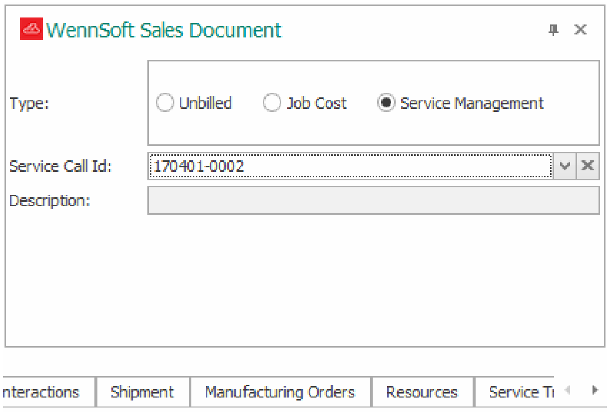
The Default Cost Code can be used to set the cost code that will be automatically assigned for new sales lines. The dropdown shows all of the cost codes that are configured for the selected job. The Apply To All button can be used to apply the default cost code to all sales lines on the document, overwriting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

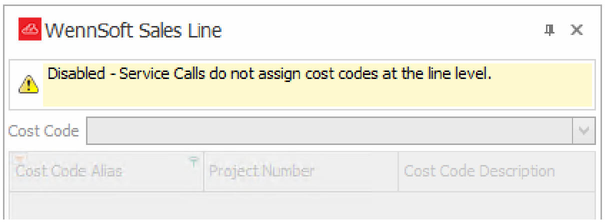


The sales line plugin is used to assign individual cost codes to sales lines. The dropdown shows all of the cost codes that are configured for the selected job for this sales document. Selecting a new cost code will update the cost code for this sales line.

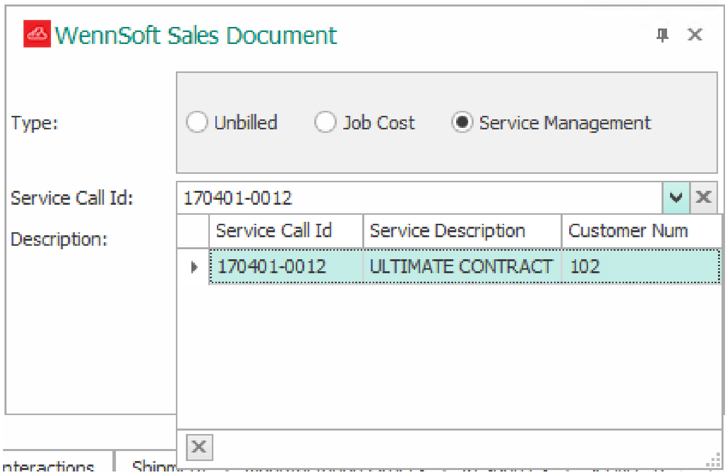


When a type of Service Management is selected, the other visible fields are Service Call Id and Description. The line level plugin is disabled for service calls, because the service call only needs to be specified at the document level.





The 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.

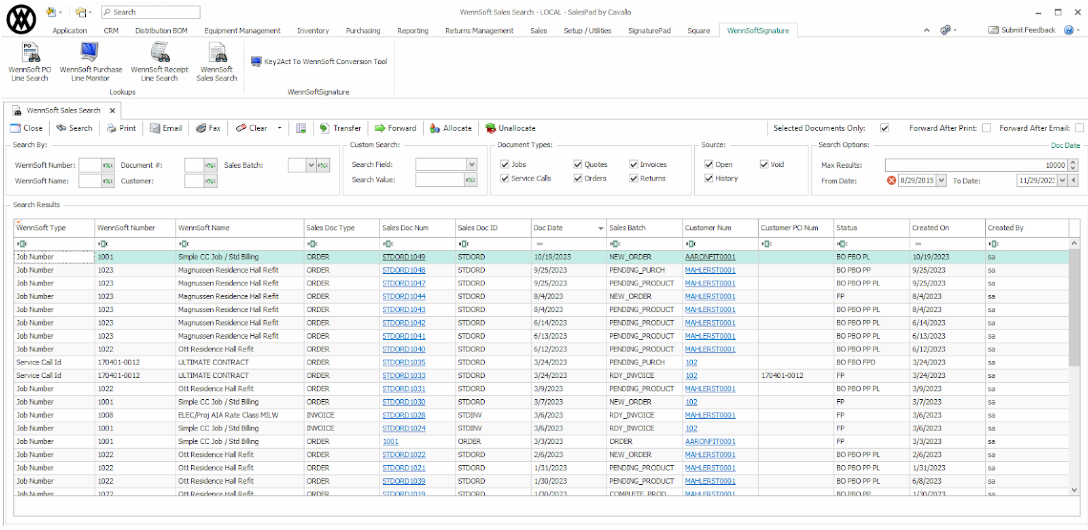


Changes to job and service call information is updated when the sales document is saved. This updates the same database tables and fields that GP and WennSoft use, so there is no risk of data being out of sync between these systems.

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.

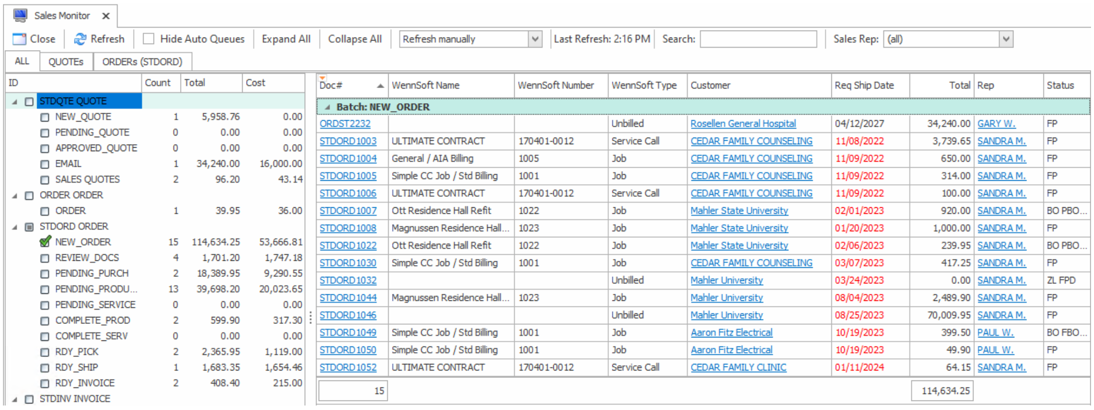


This screen looks very similar to the main Sales Document Search screen, but it also offers some search capabilities that are specific to WennSoft fields. The main Search By fields provide WennSoft Number and WennSoft Name as options. The Document Types section includes the ability to filter to Jobs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

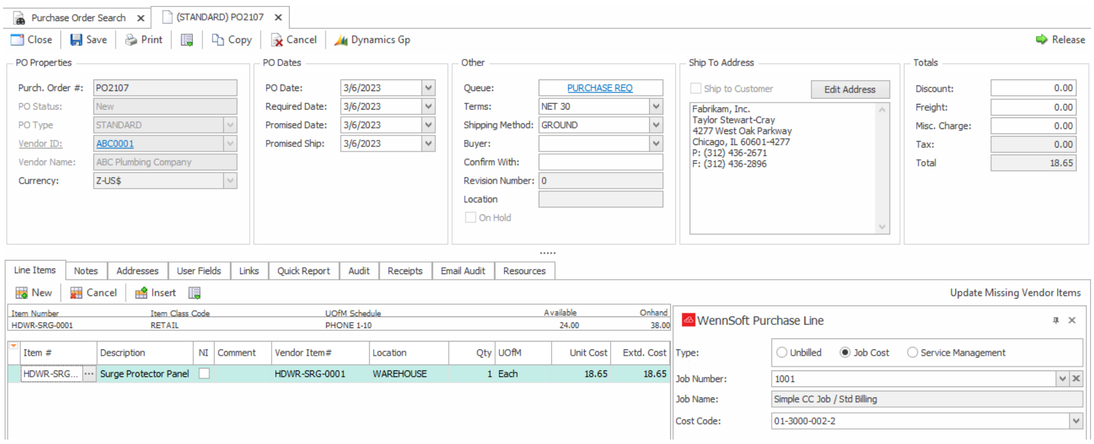


Purchasing

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.

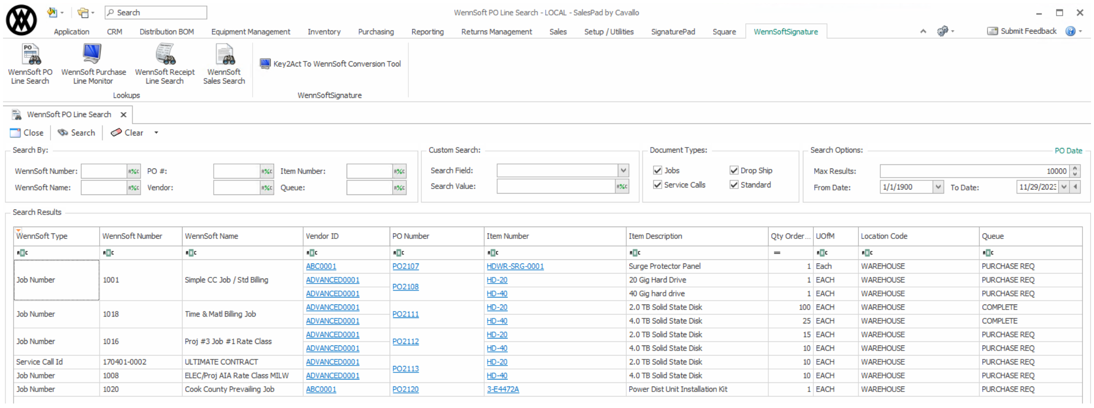


This plugin contains all the functionality of the separate sales plugins. Each PO line can be assigned to either a job cost code or a service call. Lines on the same PO can be assigned to different jobs and/or service calls. All of the differences between job and service call fields on the sales plugins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

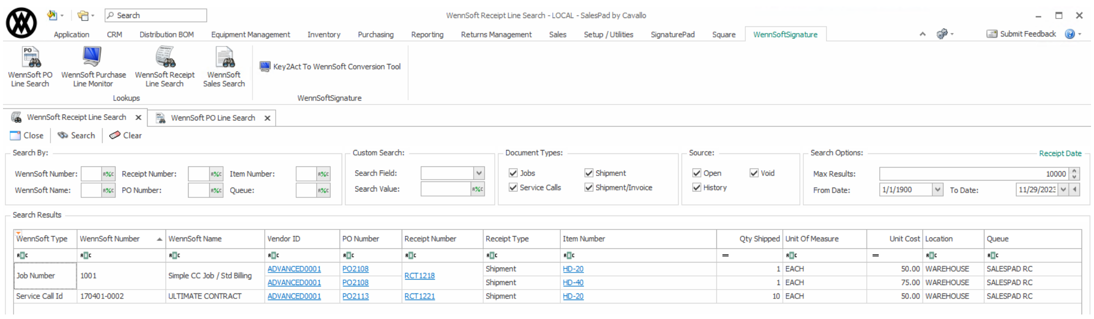


This screen looks very similar to the main Purchase Order Search screen, but it shows information at the purchase line level instead of the purchase order level, and it also offers some search capabilities that are specific to WennSoft fields. The main Search By fields offer WennSoft Number and WennSoft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



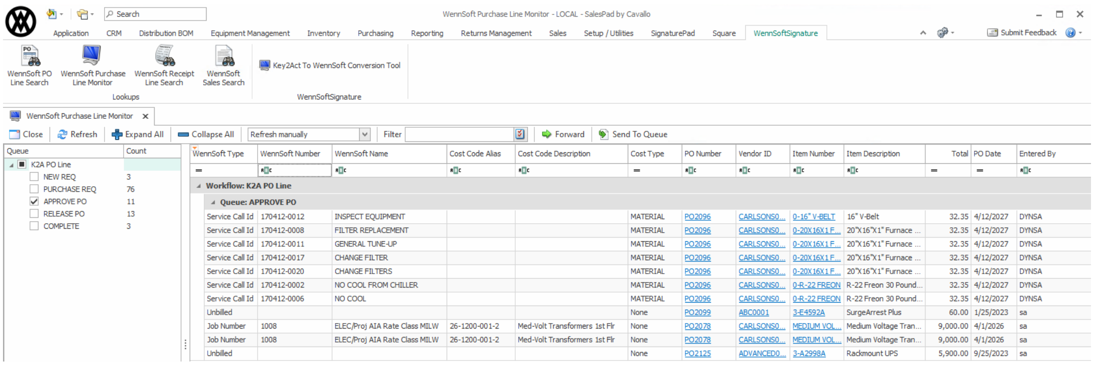
This screen looks very similar to the main Purchase Receipt Search screen, but it shows information from the receipt line level instead of the receipt level, and it also offers some search capabilities that are specific to WennSoft fields. The main Search By fields offer

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

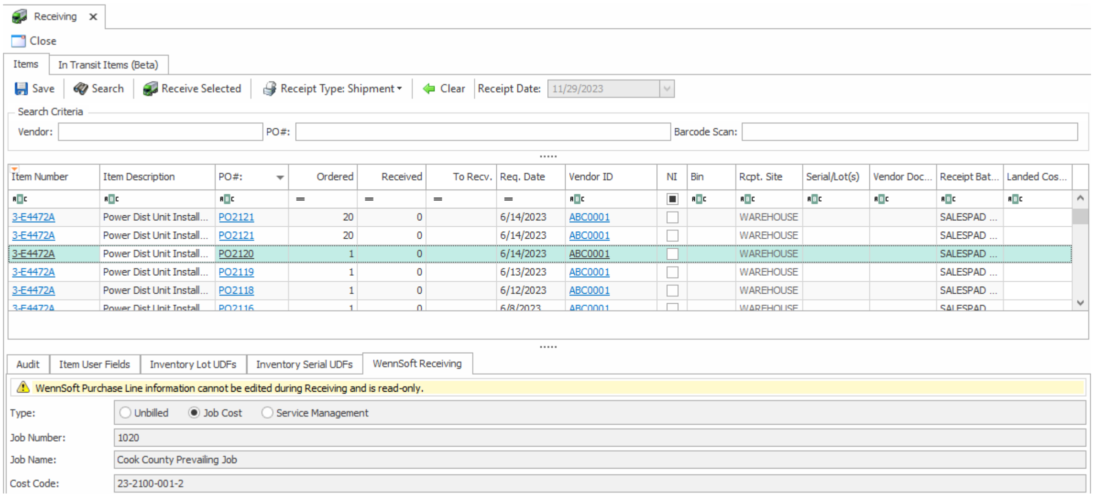
The WennSoft Purchase Line Monitor screen is available in the WennSoft Signature category in the ribbon once it is enabled via security. It relies on Purchase Order workflow, and requires at least one PO workflow to be defined. This screen has sub-securities to control standard monitor screen functionality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



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.

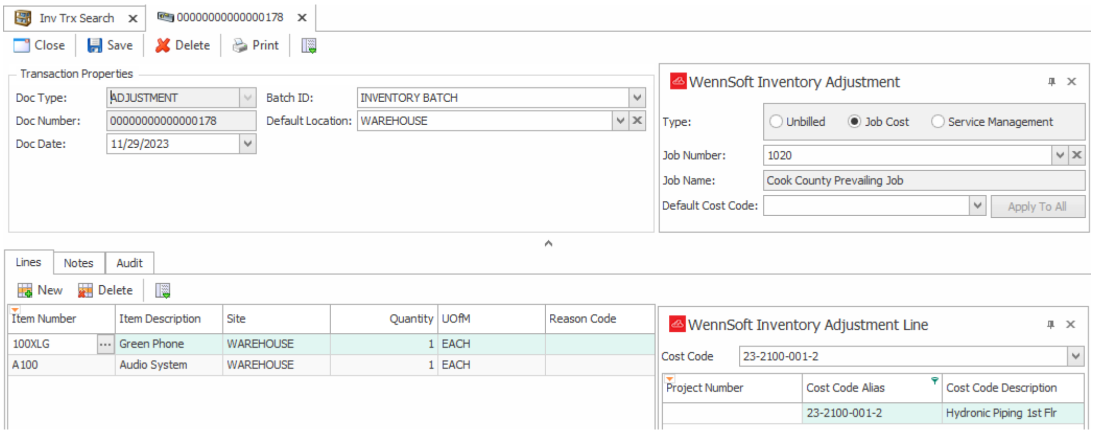
SalesPad recommends that both of these settings stay enabled to help prevent double billing.

Inventory

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

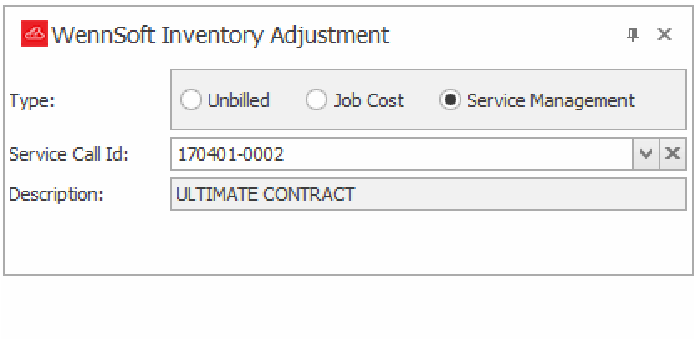
WennSoft Inventory Adjustment And Line Plugins

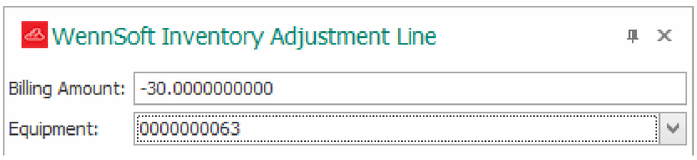
In Inventory Transaction Entry, for adjustment-type documents only, there are dockable plugins at the document and line level that allow specifying job and service call information for adjustment transactions. These plugins are enabled with the WennSoft Sales Document Dock and WennSoft Sales Line Dock 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.



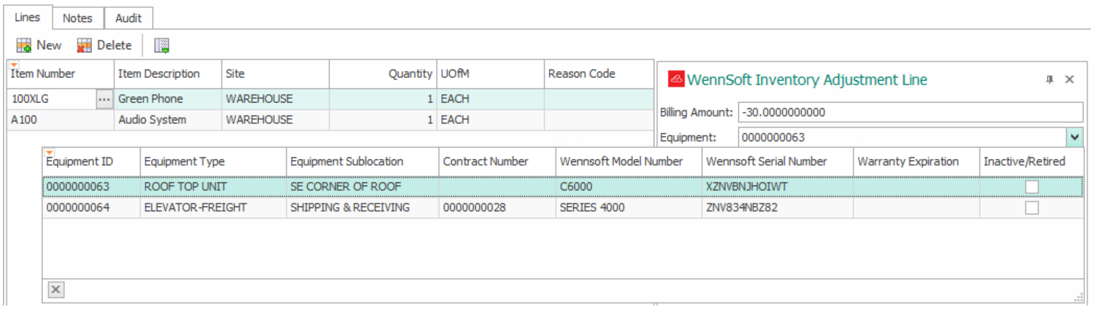
These plugins contain mostly the same functionality as the sales plugins. The document is assigned for either a job or a service call. A default cost code can be assigned and rolled down to all lines. Lines on the adjustment can be assigned to different cost codes for the same job. All of the same differences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





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.



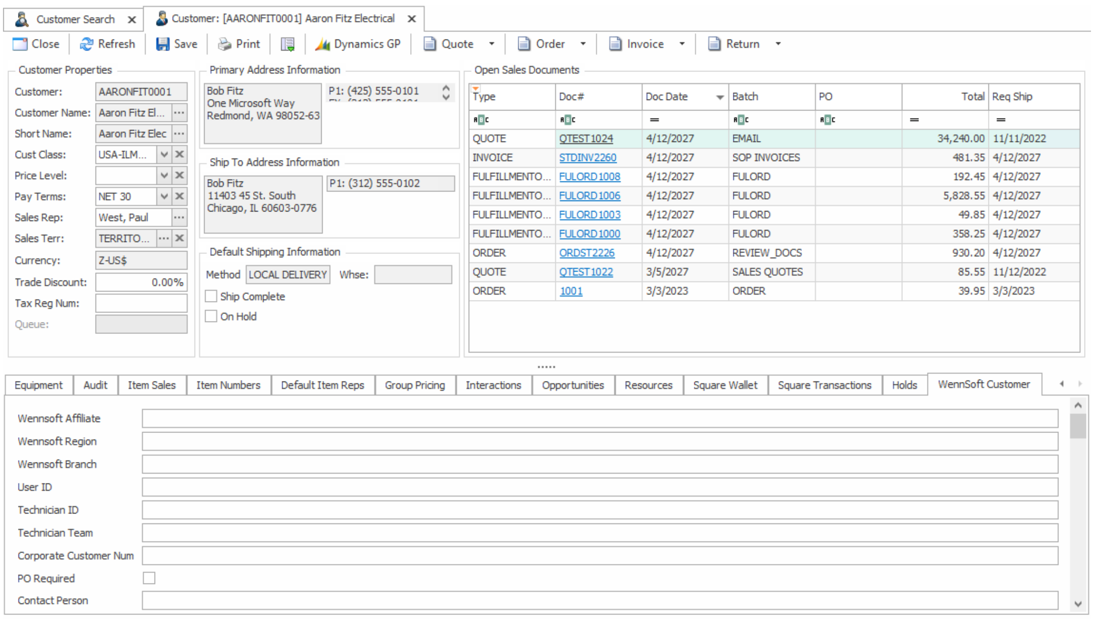
Changes to job and service call information is updated when the inventory adjustment is saved. This updates the same database tables and fields that GP and WennSoft use, so there is no risk of data being out of sync between these systems.

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.

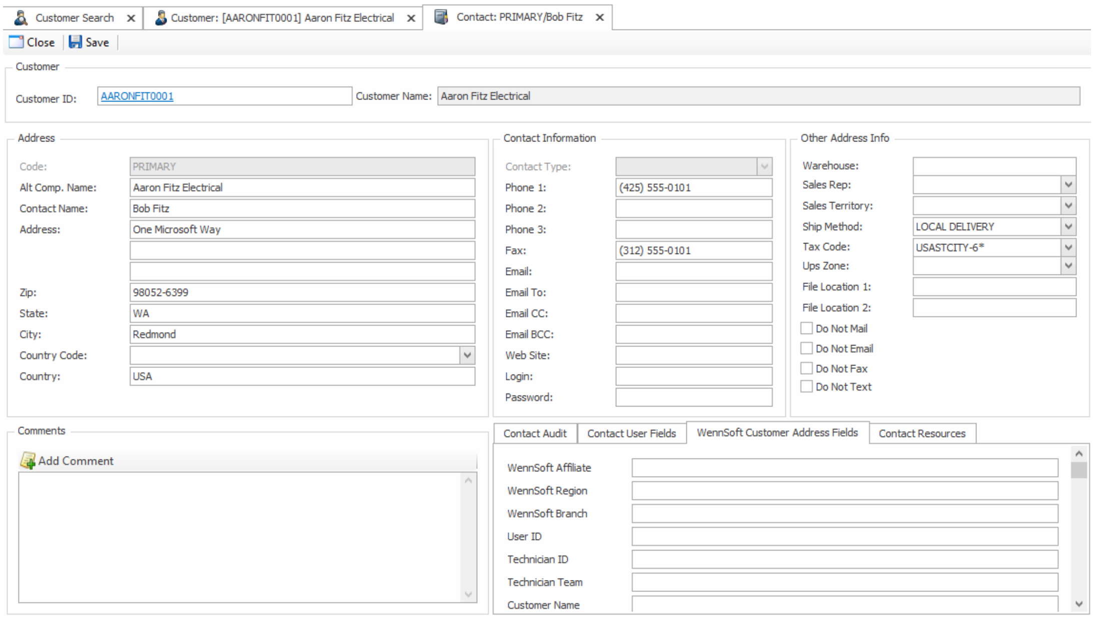
WennSoft Customer Tab

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.



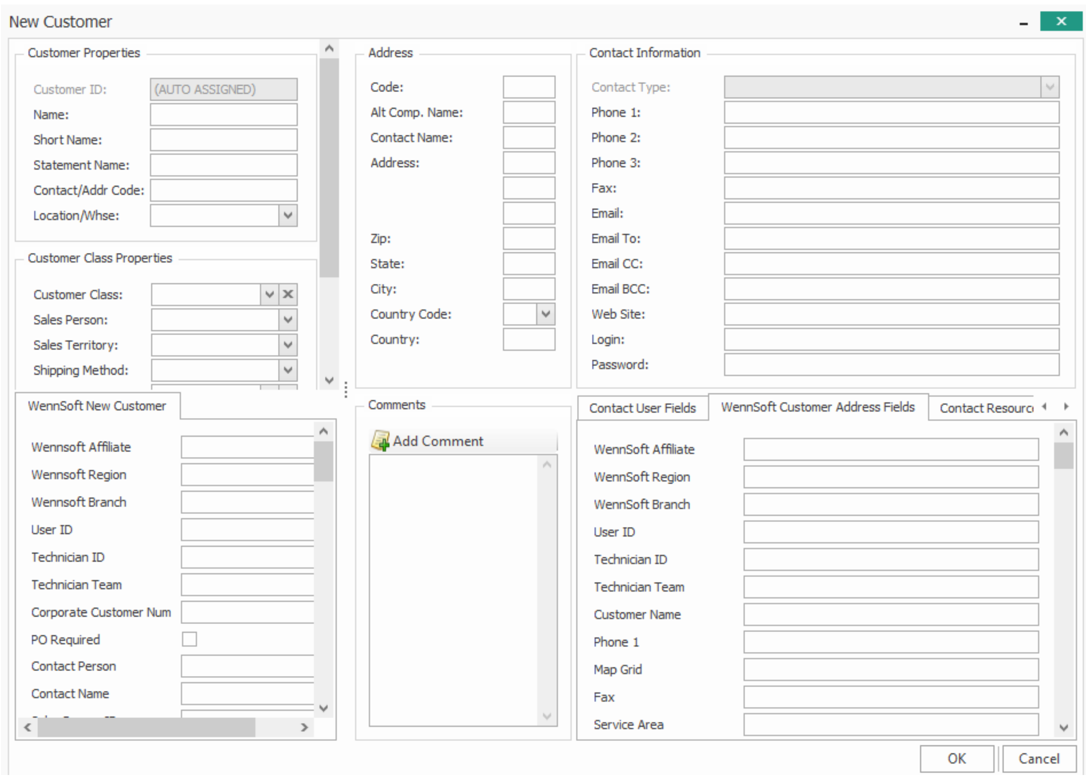
WennSoft Customer Address Tab

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.



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.



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.