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WennSoft Signature (Key2Act) Integration

Cavallo Support - 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:

Security	
<div><input checked="" type="checkbox"/> Select All <input type="checkbox"/> Select None <input type="button" value="Copy From..."/> <input type="text" value="Wennsoft"/> <input type="button" value="Search"/></div>	
Acce...	Name
<input type="checkbox"/>	ABC
<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:

Settings	
Close	Save
Export Settings	Import Settings
Filter:	
Wennsoft	
Expand Collapse	
WennSoft	
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 x (ORDER) STDORD 1048 x

Close Save Print Delete Copy Allocate Unallocate Dynamics GP Purchase Invoice Purchase

Document Properties

Document #: STDORD 1048
Customer #: MAHLERST001
Cust PO:
Req Ship: 9/25/2023
Ship Method: GROUND
Whse: WAREHOU...
Currency: Z-US\$

ORDER (STDORD)
Sales Rep: SA...
Sales Terr: ...
Pay Terms: NET...
Doc Date: 9/25/23
Created By: sa

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

Additional Properties
Batch/Q: PENDING PURCH
Price Level: RETAIL

Totals - GM: [\$9,199.40] [50.02%]
Misc Charge: 0.00
Discount: 0.00
Discount %: 0.00%
Freight: 0.00
Tax: 0.00
Total: 18,389.95
Payment: 0.00
Accept Payment

WenSoft 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

Line Items Notes Addresses Holds User Fields Audit Related Documents Purchases Quick Report FedEx Quote Email Audit Assemblies Tracking Numbers Interactions Shipment Manufacturing Orders Resources Service Ti

New Delete Insert

Item Number	Item Class Code	UOM	Schedule	Available	Onhand
HDWR-CIM-0001	RETAIL	PHONE 1-10		17.00	20.00

WenSoft Sales Line

Item	Description	Comment	Vendor	DS	NE	Qty	Qty	Qty	UOM	Req S	Whse	Cost	Price	Ext Price	Margin %
3-A2998A	Redmount UPS		ADVANCE...	<input type="checkbox"/>	<input type="checkbox"/>	1	1	1	0 Each	9/25/...	WARE...	3.2...	6,589.95	6,589.95	50.07%

Cost Code 26-2400-001-2

Cost Code Alias	Project Number	Cost Code Description
26-2400-001-2	Mahler St Un...	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.

WenSoft Sales Document

Type: ☐ Unbilled ☒ Job Cost ☐ Service Management

Job Number: 1023

Job Name:

Default Cost Code:

Interactions Shipment

WenSoft S

Cost Code 26-2400

Cost Code Alias

26-2400-001-2

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

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

Interactions Shipment

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.

WennSoft Sales Document

Type: ☐ Unbilled ☐ Job Cost ☒ Service Management

Service Call Id: 170401-0002

Description:

Interactions Shipment Manufacturing Orders Resources Service Transactions

WennSoft Sales Line

Disabled - Service Calls do not assign cost codes at the line level.

Cost Code:

Cost Code Alias	Project Number	Cost Code Description
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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.

WennSoft Sales Document

Type: ☐ Unbilled ☐ Job Cost ☒ Service Management

Service Call Id: 170401-0012

Description:

Service Call Id	Service Description	Customer Num
170401-0012	ULTIMATE CONTRACT	102

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.

WennSoft Sales Search - LOCAL - SalesRep by Cavallo

Application CRM Distribution BOM Equipment Management Inventory Purchasing Reporting Returns Management Sales Setup / Utilities SignaturePad Square WennSoftSignature

WennSoft Sales Search

Search By: WennSoft Number: [H] Document #: [H] Sales Batch: [H] Custom Search: [H] Search Field: [H] Search Value: [H] Document Types: ☒ Jobs ☒ Quotes ☒ Invoices ☒ Open ☒ Void ☒ History ☒ Service Calls ☒ Orders ☒ Returns

Selected Documents Only: ☒ Forward After Print: ☐ Forward After Email: ☐

Search Options: Max Results: 10000 From Date: 8/29/2015 To Date: 11/29/2022

WennSoft Type	WennSoft Number	WennSoft Name	Sales Doc Type	Sales Doc Num	Sales Doc ID	Doc Date	Sales Batch	Customer Num	Customer PO Num	Status	Created On	Created By
Job Number	1001	Simple CC Job / Std Billing	ORDER	STOORD1049	STORD	10/19/2023	NEW_ORDER	MAHLEST0001	BO PRO PL	sa	10/19/2023	sa
Job Number	1023	Magnussen Residence Hall Refit	ORDER	STOORD1048	STORD	9/25/2023	PENDING_PURCH	MAHLEST0001	BO PRO PP	sa	9/25/2023	sa
Job Number	1023	Magnussen Residence Hall Refit	ORDER	STOORD1047	STORD	9/25/2023	PENDING_PRODUCT	MAHLEST0001	BO PRO PP	sa	9/25/2023	sa
Job Number	1023	Magnussen Residence Hall Refit	ORDER	STOORD1044	STORD	8/4/2023	NEW_ORDER	MAHLEST0001	FP	sa	8/4/2023	sa
Job Number	1023	Magnussen Residence Hall Refit	ORDER	STOORD1043	STORD	8/4/2023	PENDING_PRODUCT	MAHLEST0001	BO PRO PP	sa	8/4/2023	sa
Job Number	1023	Magnussen Residence Hall Refit	ORDER	STOORD1042	STORD	6/14/2023	PENDING_PRODUCT	MAHLEST0001	BO PRO PP	sa	6/14/2023	sa
Job Number	1023	Magnussen Residence Hall Refit	ORDER	STOORD1041	STORD	6/13/2023	PENDING_PRODUCT	MAHLEST0001	BO PRO PP	sa	6/13/2023	sa
Job Number	1022	Olt Residence Hall Refit	ORDER	STOORD1040	STORD	6/12/2023	PENDING_PRODUCT	MAHLEST0001	BO PRO PP	sa	6/12/2023	sa
Service Call Id	170401-0012	ULTIMATE CONTRACT	ORDER	STOORD1038	STORD	3/24/2023	PENDING_PURCH	102	BO PRO PP	sa	3/24/2023	sa
Job Number	1022	Olt Residence Hall Refit	ORDER	STOORD1033	STORD	3/9/2023	PENDING_PRODUCT	MAHLEST0001	BO PRO PP	sa	3/9/2023	sa
Job Number	1001	Simple CC Job / Std Billing	ORDER	STOORD1030	STORD	3/7/2023	NEW_ORDER	102	FP	sa	3/7/2023	sa
Job Number	1008	ELEC/Prng AIA Rate Class RELW	INVOICE	STOORD1028	STORD	3/6/2023	REV_INVOICE	MAHLEST0001	FP	sa	3/6/2023	sa
Job Number	1001	Simple CC Job / Std Billing	INVOICE	STOORD1029	STORD	3/6/2023	REV_INVOICE	102	FP	sa	3/6/2023	sa
Job Number	1001	Simple CC Job / Std Billing	ORDER	STOORD1024	STORD	3/3/2023	ORDER	MAHLEST0001	FP	sa	3/3/2023	sa
Job Number	1022	Olt Residence Hall Refit	ORDER	STOORD1022	STORD	2/6/2023	NEW_ORDER	MAHLEST0001	BO PRO PP	sa	2/6/2023	sa
Job Number	1022	Olt Residence Hall Refit	ORDER	STOORD1021	STORD	1/31/2023	PENDING_PRODUCT	MAHLEST0001	BO PRO PP	sa	1/31/2023	sa
Job Number	1022	Olt Residence Hall Refit	ORDER	STOORD1039	STORD	1/30/2023	PENDING_PRODUCT	MAHLEST0001	BO PRO PP	sa	6/8/2023	sa
Job Number	1022	Olt Residence Hall Refit	ORDER	STOORD1035	STORD	1/30/2023	COMPLETE_PROD	MAHLEST0001	BO PRO PP	sa	1/30/2023	sa

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

Close

Refresh

Hide Auto Queues

Expand All

Collapse All

Refresh manually

Last Refresh: 2:16 PM

Search:

Sales Rep: (all)

ALL

QUOTES

ORDERS (STDORD)

ID	Doc #	WenSoft Name	WenSoft Number	WenSoft Type	Customer	Req Ship Date	Total	Rep	Status
Batch: NEW_ORDER									
NEW_QUOTE	1	5,958.75	0.00						
PENDING_QUOTE	0	0.00	0.00						
APPROVED_QUOTE	0	0.00	0.00						
EMAIL	1	34,240.00	16,000.00						
SALES_QUOTES	2	96.20	43.14						
ORDER_ORDER									
ORDER	1	39.95	36.00						
STDORD_ORDER									
NEW_ORDER	15	114,634.25	53,666.81						
REVIEW_DOCS	4	1,701.20	1,747.18						
PENDING_PURCH	2	18,389.95	9,290.55						
PENDING_PRODUC	13	39,698.20	20,023.65						
PENDING_SERVICE	0	0.00	0.00						
COMPLETE_PROD	2	599.90	317.30						
COMPLETE_SERV	0	0.00	0.00						
ROY_PICK	2	2,365.95	1,119.00						
ROY_SHIP	1	1,683.35	1,654.46						
ROY_INVOICE	2	408.40	215.00						
STDINW_INVOICE									

Doc #	WenSoft Name	WenSoft Number	WenSoft Type	Customer	Req Ship Date	Total	Rep	Status
ORDST2232			Unbilled	Rosellen General Hospital	04/12/2027	34,240.00	GARY W.	FP
STDORD1003	ULTIMATE CONTRACT	170401-0012	Service Call	CEDAR FAMILY COUNSELING	11/08/2022	3,739.65	SANDRA M.	FP
STDORD1004	General / AIA Billing	1005	Job	CEDAR FAMILY COUNSELING	11/09/2022	650.00	SANDRA M.	FP
STDORD1005	Simple CC Job / Std Billing	1001	Job	CEDAR FAMILY COUNSELING	11/09/2022	314.00	SANDRA M.	FP
STDORD1006	ULTIMATE CONTRACT	170401-0012	Service Call	CEDAR FAMILY COUNSELING	11/09/2022	100.00	SANDRA M.	FP
STDORD1007	Ott Residence Hall Refit	1022	Job	Mahler State University	02/01/2023	920.00	SANDRA M.	BO PBO...
STDORD1008	Magnussen Residence Hall...	1023	Job	Mahler State University	01/20/2023	1,000.00	SANDRA M.	FP
STDORD1022	Ott Residence Hall Refit	1022	Job	Mahler State University	02/06/2023	239.95	SANDRA M.	BO PBO...
STDORD1030	Simple CC Job / Std Billing	1001	Job	CEDAR FAMILY COUNSELING	03/07/2023	417.25	SANDRA M.	FP
STDORD1032			Unbilled	Mahler University	03/24/2023	0.00	SANDRA M.	ZL FPD
STDORD1044	Magnussen Residence Hall...	1023	Job	Mahler University	08/04/2023	2,489.90	SANDRA M.	FP
STDORD1046			Unbilled	Mahler University	08/25/2023	70,009.95	SANDRA M.	FP
STDORD1049	Simple CC Job / Std Billing	1001	Job	Aaron Fitz Electrical	10/19/2023	399.50	PAUL W.	BO PBO...
STDORD1050	Simple CC Job / Std Billing	1001	Job	Aaron Fitz Electrical	10/19/2023	49.90	PAUL W.	FP
STDORD1052	ULTIMATE CONTRACT	170401-0012	Service Call	CEDAR FAMILY CLINIC	01/11/2024	64.15	SANDRA M.	FP
15						114,634.25		

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

PO Dates

Other

Ship To Address

Totals

Line Items

Notes

Addresses

User Fields

Links

Quick Report

Audit

Receipts

Email Audit

Resources

Item Number

Item Class Code

UORM Schedule

Available

Onhand

Item #

Description

NT

Comment

Vendor Item #

Location

Qty

UORM

Unit Cost

Extd. Cost

WhenSoft Purchase Line

Type:

Job Number:

Job Name:

Cost Code:

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.

Queue	Count	WennSoft Type	WennSoft Number	WennSoft Name	Cost Code Alias	Cost Code Description	Cost Type	PO Number	Vendor ID	Item Number	Item Description	Total	PO Date	Entered By
KGA PO Line	3													
NEW REQ	3													
PURCHASE REQ	76													
APPROVE PO	11													
RELEASE PO	13													
COMPLETE	3													

Workflow: KGA PO Line	WennSoft Type	WennSoft Number	WennSoft Name	Cost Code Alias	Cost Code Description	Cost Type	PO Number	Vendor ID	Item Number	Item Description	Total	PO Date	Entered By
Queue: APPROVE PO													
Service Call Id	170412-0012	INSPECT EQUIPMENT				MATERIAL	PO2096	CARLSONSG...	0-16" V-BELT	16" V-Belt	32.35	4/12/2027	DYNSA
Service Call Id	170412-0008	FILTER REPLACEMENT				MATERIAL	PO2096	CARLSONSG...	20"X16"X1" Furnace ...	20"X16"X1" Furnace ...	32.35	4/12/2027	DYNSA
Service Call Id	170412-0011	GENERAL TUNE-UP				MATERIAL	PO2096	CARLSONSG...	20"X16"X1" F...	20"X16"X1" F...	32.35	4/12/2027	DYNSA
Service Call Id	170412-0017	CHANGE FILTER				MATERIAL	PO2096	CARLSONSG...	20"X16"X1" F...	20"X16"X1" F...	32.35	4/12/2027	DYNSA
Service Call Id	170412-0020	CHANGE FILTER				MATERIAL	PO2096	CARLSONSG...	20"X16"X1" F...	20"X16"X1" F...	32.35	4/12/2027	DYNSA
Service Call Id	170412-0002	NO COOL FROM CHILLER				MATERIAL	PO2096	CARLSONSG...	0.5-22 FRESH...	0.5-22 FRESH...	32.35	4/12/2027	DYNSA
Service Call Id	170412-0006	NO COOL				MATERIAL	PO2096	CARLSONSG...	0.5-22 FRESH...	0.5-22 FRESH...	32.35	4/12/2027	DYNSA
Unbilled													
Job Number	1008	ELEC:Proj ASA Rate Class MLW	26-1200-001-2	Med-Volt Transformers 1st Flr		None	PO2029	ABC0001	2.5-1500A	SurgeKrest Plus	60.00	1/25/2023	sa
Job Number	1008	ELEC:Proj ASA Rate Class MLW	26-1200-001-2	Med-Volt Transformers 1st Flr		None	PO2029	CARLSONSG...	MEDIUM VOL...	Medium Voltage Tran...	9,900.00	4/1/2026	sa
Unbilled							PO2125	ADVANCED...	2-A2098A	Rackmount UPS	5,900.00	9/25/2023	sa

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 read-only, 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.

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		6/12/2023	ABC0001			WAREHOUSE			SALESPAD ...	

Audit	Item User Fields	Inventory Lot UDFs	Inventory Serial UDFs	WennSoft Receiving
<p>WennSoft Purchase Line information cannot be edited during Receiving and is read-only.</p> <p>Type: <input type="radio"/> Unbilled <input checked="" type="radio"/> Job Cost <input type="radio"/> Service Management</p> <p>Job Number: 1020</p> <p>Job Name: Cook County Prevailing Job</p> <p>Cost Code: 23-2100-001-2</p>				

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

0000000000000000178

Close

Save

Delete

Print

Transaction Properties

Doc Type: ADJUSTMENT

Batch ID: INVENTORY BATCH

Doc Number: 0000000000000000178

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	WennSoft Inventory Adjustment Line		
100XLG	Green Phone	WAREHOUSE	1	EACH		Billing Amount: -30.0000000000		
A100	Audio System	WAREHOUSE	1	EACH		Equipment: 0000000063		

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	ZNV83#NBZ82		<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																																																																						
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 Whse: <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>STOINV2260</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	STOINV2260	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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Equipment	Audit	Item Sales	Item Numbers																																																																						
WennSoft Customer																																																																									
Wennsoft Affiliate Wennsoft Region Wennsoft Branch User ID Technician ID Technician Team Corporate Customer Num PO Required <input type="checkbox"/> Contact Person																																																																									

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: [AARONFET0001] Aaron Fitz Electrical x Contact: PRIMARY/Bob Fitz x

Close Save

Customer

Customer ID: AARONFET0001 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: PRIMARY

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/Wlse:

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.