CAVALLO®

KEY2ACT

Building insights with field service action

What is Cavallo's Key2Act connector?

The Key2Act connector brings Key2Act's job and service-call data together in Cavallo SalesPad® to simplify your sales process so you can focus on more critical tasks. Stop manually updating your orders: Data about jobs and service calls are included automatically, increasing visibility across your operation.

You should use the Key2Act Integration if:

- You struggle to sync your jobs and services with your sales documents
- Your sales and customer service personnel have to switch among Microsoft Dynamics GP, SalesPad, and Key2Act to manage their processes

What does it look like in action?

See job and service-call information within your sales documents automatically — there's no need to add the information manually into multiple systems. Consolidate information seamlessly, and accurately track your quotes for jobs and services.

With the Key2Act Integration, you can:

- View Job and Service Call data: Name, Description, Cost Code
- Automatically sync Job and Service Call data among SalesPad, Dynamics GP, and Key2Act
- Increase visibility into job and service call data with SalesPad sales data
- Utilize Workflow and Profit Manager to tailor your processes based on Key2Act job and service call data

Top value points:

- Easily manage the sales process for your jobs and service calls from SalesPad
- Quickly find job and service-call information without leaving the context of your sales documents
- Simplify sales and customer service by consolidating data where it's needed

How can I expand my software tool kit?

The Key2Act connector is just one tool in your distribution software tool kit. Build out your complete distribution software solution with the SalesPad suite's additional features and modules — including next-level functionality like automated tasks and workflow, CRM tools, EDI, barcoding, and more. Elevate every process in your Order-to-Cash cycle, from selling to order fulfillment to shipping and payment collection, and accelerate their efficiency by uniting them under one powerfully flexible solution.