

# WENNSOFT INTEGRATION

Make informed decisions with 100% visibility into your data

## Complete visibility and control

Consolidate your sales and purchasing information, track your inventory, and manage jobs and service calls with ease using the SalesPad<sup>®</sup> WennSoft Integration. Manage your service business with advanced order control by implementing workflow and automation features and drive efficiency to the fullest extent. Gain complete visibility by directly tying your sales and purchasing data from WennSoft to SalesPad's powerful order intelligence capabilities.

Rather than spending time and resources manually entering data, improve visibility across your entire organization when all your relevant order information is automatically consolidated in one place. Avoid jumping between multiple screens when locating job and service call information related to your orders, and simplify sales and customer service as a result. Synchronize your data across SalesPad, Microsoft Dynamics GP, and WennSoft Signature, and experience a seamless flow of information.

-  Increase visibility
-  Easier inventory management
-  Reduce manual steps
-  Easily find orders related to jobs or service calls

## WennSoft

Specializing in field service management and accounting, WennSoft's, formerly known as Key2Act, solutions improve efficiency, streamline workflows, and enhance customer service. WennSoft's tools are designed to manage field service jobs, from labor, to parts, to job costs, and more. Monitor and oversee every stage of your projects, from planning to completion. With WennSoft, keep service calls and jobs on time and on budget.

Doc#	WennSoft Name	WennSoft Number	WennSoft Type	Customer	Req Ship Date	Total	Rep	Status	Gross Margin %
Batch: NEW_ORDER									
ORDST2232			Unbilled	Rosellen General Hospital	04/12/2027	34,240.00	GARY W.	FP	50.00%
STDORD1003	ULTIMATE CONTRACT	170401-0012	Service Call	CEDAR FAMILY COUNSELING	11/08/2022	3,739.65	SANDRA M.	FP	100.00%
STDORD1004	General / AIA Billing	1005	Job	CEDAR FAMILY COUNSELING	11/09/2022	650.00	SANDRA M.	FP	92.31%
STDORD1005	Simple CC Job / Std Billing	1001	Job	CEDAR FAMILY COUNSELING	11/09/2022	314.00	SANDRA M.	FP	83.33%
STDORD1006	ULTIMATE CONTRACT	170401-0012	Service Call	CEDAR FAMILY COUNSELING	11/09/2022	100.00	SANDRA M.	FP	50.00%
STDORD1007	Ott Residence Hall Refit	1022	Job	Mahler State University	02/01/2023	920.00	SANDRA M.	BO PBO PP PL	50.00%
STDORD1008	Magnussen Residence ...	1023	Job	Mahler State University	01/20/2023	1,000.00	SANDRA M.	FP	98.14%
STDORD1022	Ott Residence Hall Refit	1022	Job	Mahler State University	02/06/2023	239.95	SANDRA M.	BO PBO PP PL	46.66%
STDORD1030	Simple CC Job / Std Billing	1001	Job	CEDAR FAMILY COUNSELING	03/07/2023	417.25	SANDRA M.	FP	49.22%
						14	114,570.10		

Never lose track of job or service call data again by following everything directly in Sales Monitor



### Key Features

- Assign jobs in SalesPad:** Easily assign sales documents, purchase orders, and inventory adjustments to jobs and service calls, all without leaving SalesPad.
- Customer-specific jobs:** Control whether sales documents can be assigned to any job or service call, or only the jobs assigned to that customer.
- PO receipt rolldown:** Job and service call assignments on PO lines automatically roll down to their receipt lines when you receive them in SalesPad.
- Maintain WennSoft customer data:** Fill out WennSoft fields for customers and contacts in SalesPad, whether you're creating a new customer or contact or updating an existing one.
- Job search capabilities:** Filter and search documents by their job and service information on specialized search screens as well as Sales Monitor.
- Shared database:** See and modify the same job and service information whether you're working in SalesPad or Dynamics GP.
- Tailored processes:** Utilize SalesPad workflows to tailor your processes based on job and service call data.

The screenshot displays the 'WennSoft Sales Search' application window. The interface includes a top navigation bar with various modules like CRM, Distribution BOM, and Equipment Management. Below this is a toolbar with icons for search, print, and email. The main area is divided into search filters and a results table.

**Search Filters:**

- Search By:** WennSoft Number, WennSoft Name, Document #, Customer.
- Custom Search:** Search Field, Search Value.
- Document Types:** Jobs, Quotes, Invoices, Service Calls, Orders, Returns.
- Search Options:** Max Results (10000), From Date (10/10/201), To Date (1/10/2024).

**Search Results Table:**

WennSoft Type	WennSoft Number	WennSoft Name	Sales Doc Type	Sales Doc Num	Sales Doc ID	Doc Date	Sales Batch	Customer Num	Status	Created On	Created By
Job Number	1001	Simple CC Job / Std Billing	ORDER	STDORD1050	STDORD	10/19/2023	NEW_ORDER	AARONFIT0001	FP	10/19/2023	sa
Job Number	1001	Simple CC Job / Std Billing	ORDER	STDORD1049	STDORD	10/19/2023	NEW_ORDER	AARONFIT0001	BO FBO PL	10/19/2023	sa
Job Number	1023	Magnussen Residence Hall Refit	ORDER	STDORD1048	STDORD	9/25/2023	PENDING_PURCH	MAHLERST0001	BO PBO PP	9/25/2023	sa
Job Number	1023	Magnussen Residence Hall Refit	ORDER	STDORD1047	STDORD	9/25/2023	PENDING_PRODUCT	MAHLERST0001	BO PBO PP PL	9/25/2023	sa
Job Number	1023	Magnussen Residence Hall Refit	ORDER	STDORD1044	STDORD	8/4/2023	NEW_ORDER	MAHLERST0001	FP	8/4/2023	sa
Job Number	1023	Magnussen Residence Hall Refit	ORDER	STDORD1043	STDORD	8/4/2023	PENDING_PRODUCT	MAHLERST0001	BO PBO PP PL	8/4/2023	sa
Job Number	1023	Magnussen Residence Hall Refit	ORDER	STDORD1042	STDORD	6/14/2023	PENDING_PRODUCT	MAHLERST0001	BO PBO PP PL	6/14/2023	sa
Job Number	1023	Magnussen Residence Hall Refit	ORDER	STDORD1041	STDORD	6/13/2023	PENDING_PRODUCT	MAHLERST0001	BO PBO PP PL	6/13/2023	sa
Job Number	1022	Ott Residence Hall Refit	ORDER	STDORD1040	STDORD	6/12/2023	PENDING_PRODUCT	MAHLERST0001	BO PBO PP PL	6/12/2023	sa
Service Call Id	170401-0012	ULTIMATE CONTRACT	ORDER	STDORD1036	STDORD	3/24/2023	REVIEW_DOCS	102	FP	3/24/2023	sa
Service Call Id	170401-0012	ULTIMATE CONTRACT	ORDER	STDORD1035	STDORD	3/24/2023	PENDING_PURCH	102	BO FBO FPD	3/24/2023	sa
Service Call Id	170401-0012	ULTIMATE CONTRACT	ORDER	STDORD1033	STDORD	3/24/2023	RDY_INVOICE	102	FP	3/24/2023	sa
Job Number	1022	Ott Residence Hall Refit	ORDER	STDORD1031	STDORD	3/9/2023	PENDING_PRODUCT	MAHLERST0001	BO PBO PP PL	3/9/2023	sa
Job Number	1001	Simple CC Job / Std Billing	ORDER	STDORD1030	STDORD	3/7/2023	NEW_ORDER	102	FP	3/7/2023	sa
Job Number	1008	ELEC/Proj AIA Rate Class MILW	INVOICE	STDORD1028	STDINV	3/6/2023	RDY_INVOICE	MAHLERST0001	FP	3/6/2023	sa
Job Number	1001	Simple CC Job / Std Billing	INVOICE	STDORD1024	STDINV	3/6/2023	RDY_INVOICE	102	FP	3/6/2023	sa
Job Number	1023	Magnussen Residence Hall Refit	ORDER	STDORD1017	STDORD	1/27/2023	PENDING_PRODUCT	MAHLERST0001	BO PBO PP	1/27/2023	sa
Job Number	1022	Ott Residence Hall Refit	ORDER	STDORD1016	STDORD	1/26/2023	RDY_INVOICE	MAHLERST0001	FP	1/26/2023	sa
Job Number	1022	Ott Residence Hall Refit	INVOICE	STDORD1015	STDINV	1/26/2023	RDY_INVOICE	MAHLERST0001	FP	1/26/2023	sa
Job Number	1022	Ott Residence Hall Refit	INVOICE	STDORD1014	STDINV	1/26/2023	RDY_INVOICE	MAHLERST0001	FP	1/26/2023	sa
Job Number	1022	Ott Residence Hall Refit	INVOICE	STDORD1012	STDINV	1/26/2023	RDY_INVOICE	MAHLERST0001	BO PBO PP P-PD	1/26/2023	sa
Job Number	1022	Ott Residence Hall Refit	ORDER	STDORD1011	STDORD	1/26/2023	COMPLETE_PROD	MAHLERST0001	BO PBO PP PL	1/26/2023	sa
Job Number	1022	Ott Residence Hall Refit	ORDER	STDORD1010	STDORD	1/25/2023	RDY_PICK	MAHLERST0001	BO PBO PP PL	1/25/2023	sa
Job Number	1022	Ott Residence Hall Refit	ORDER	STDORD1009	STDORD	1/25/2023	PENDING_PRODUCT	MAHLERST0001	BO FBO PL	1/25/2023	sa

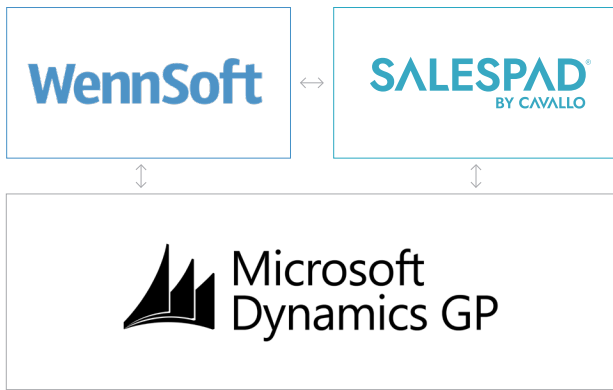
### Specialized Search Screens

Increase your visibility with specialized search by PO Line, Purchase Line, Receipt Line, and Sales



**With the WennSoft Signature Integration, gain a significant reduction in:**

- Inventory loss
- Carrying cost
- Replacement cost
- Costly expediting fees, acquisition, and service costs



**Consolidate information seamlessly**

Job and service call information is automatically updated across SalesPad, GP, and WennSoft, so there’s no need to add the information manually into multiple systems.

- Sales documents
- Purchase orders
- Inventory adjustments
- Job cost codes
- Service calls

“The biggest gains we see over using GP (for order processing) with WennSoft is that it now takes less than half the time to process an order.”

- **Vince Dawson**, General Manager, Boland Trane

