SedonaOffice

The #1 Financial Software for Security Companies

QuoteWerks Integration

Reference Guide

Last Updated: January 15, 2009

This QuoteWerks Integration Reference Guide is for use by SedonaOffice customers only. This guide is to be used in conjunction with an approved training class provided by SedonaOffice, and is not meant to serve as an operating or setup manual.

SedonaOffice reserves the right to modify the SedonaOffice product described in this guide at any time and without notice. Information in this guide is subject to change without notice. Companies, names and data used in examples herein are fictitious unless otherwise noted. In no event shall SedonaOffice be held liable for any incidental, indirect, special, or consequential damages arising out of or related to this guide or the information contained herein. The information contained in this document is the property of SedonaOffice.

This guide will be updated periodically, be sure to check our website at www.sedonaoffice.com for the most current version.

Copyright 2009

Table of Contents

Overview....5
What is QuoteWerks....5
Purpose of this Guide....5
SedonaOffice Application Knowledge....6
Flow of Information....6
Sales Contacts – Prospects....7
Opening the QuoteWerks application from a prospect....7
Selecting a "New" quote for a prospect....8
Signing into QuoteWerks....8
QuoteWerks "Sold to/Ship to" Tab with prospect information passed over....9
Parts, Items, and Recurring Items....10
QuoteWerks DB Setup from the Tools menu....10
QuoteWerks Export Wizard....11
Mapping Fields tab allows customizing data transfer into a Job....12
Notes Mapping allows QuoteWerks notes fields to map to SedonaOffice Job Notes....13
Export Products Button....14
The "Available for Sales" box must be checked for a part to be made available through QuoteWerks. Remember, the Manuf Part Code should be filled in for all parts to be used in QuoteWerks....15
Editing Items in QuoteWerks....16
View of Part Edit screen in QuoteWerks....16
Product Fields Reserved for SedonaOffice....17
Product Fields Reserved for SedonaOffice – DO NOT EDIT!....17
Creating the body of a quote....18
From the Product Lookup function items are highlighted and added to a quote....18
The bill of materials as shown in the "Document Items" tab....18
Rules for a successful Job creation from a QuoteWerks quote....19
Press the Save button to save a quote in QuoteWerks....19
Save the quote file in QuoteWerks....20
QuoteWerks Icon on Open Jobs List opens the "QuoteWerks Orders to Process" list....22
Highlight the appropriate Order and Select "Create Sedona Job"....23
Unable to Import from QuoteWerks....23
Customizing Your QuoteWerks....24

Importing Parts Data into QuoteWerks....24
SedonaOffice SedonaParts.txt File Layout....25
Controlling QuoteWerks Database Update....26
Exporting Data into SedonaOffice Jobs....27

Overview

The purpose of this guide is to provide users of SedonaOffice and QuoteWerks with an understanding of the interface between the two products.

What is QuoteWerks

QuoteWerks is a third party application developed and supported by QuoteWerks. It is integrated with SedonaOffice to provide a Bill of Materials quoting application that can take advantage of the Enterprise nature of the SedonaOffice nature of the application.

As a quoting application, QuoteWerks combines Parts and Inventory information from SedonaOffice with SedonaOffice Sales contact information to provide detailed proposals to your prospects. The interface to transfer data into QuoteWerks and further transfer Job information from a quote into the SedonaOffice Job Management module is provided by SedonaOffice.

Purpose of this Guide

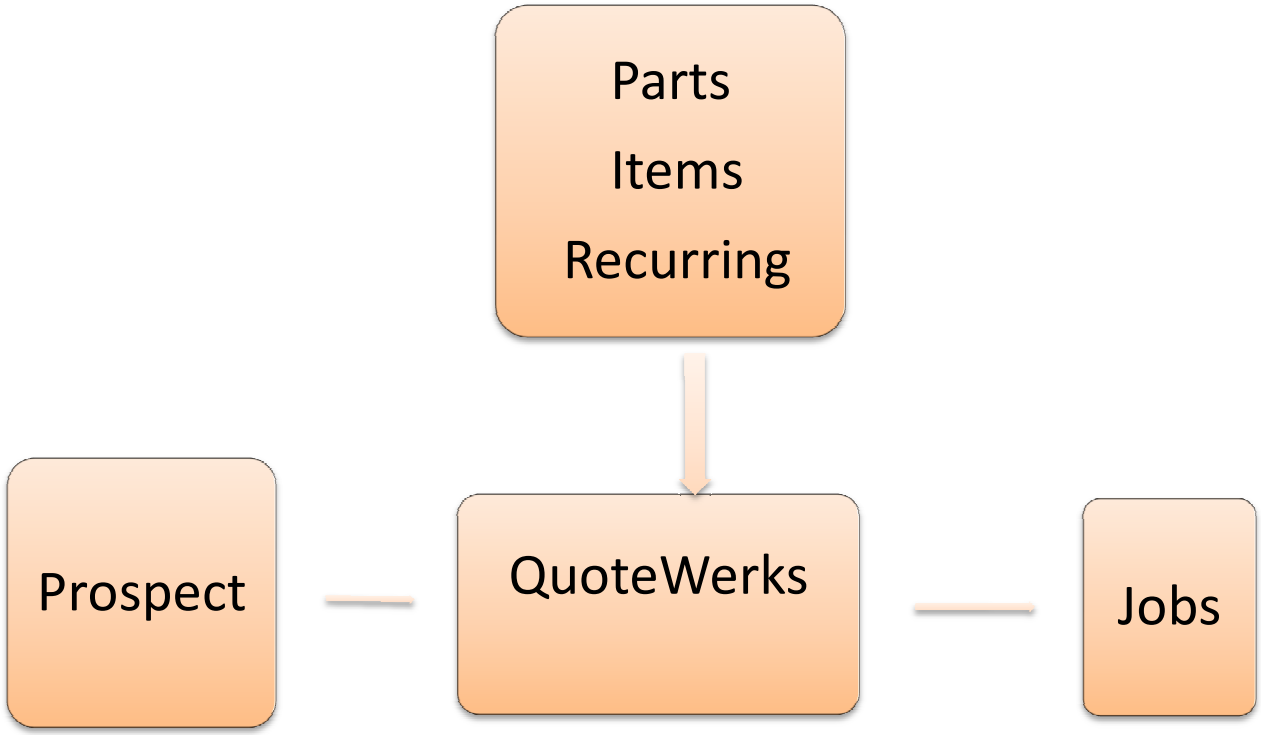
The purpose of this guide is to review the flow of information between the SedonaOffice and QuoteWerks applications and guide the users in optimizing this process.

This guide is not intended to provide the understanding or the process of creating and maintaining quotes.

SedonaOffice Application Knowledge

This guide assumes the user has knowledge of the quoting process and understands the SedonaOffice setup and processing rules for Sales, Inventory, and Job Management.

Flow of Information

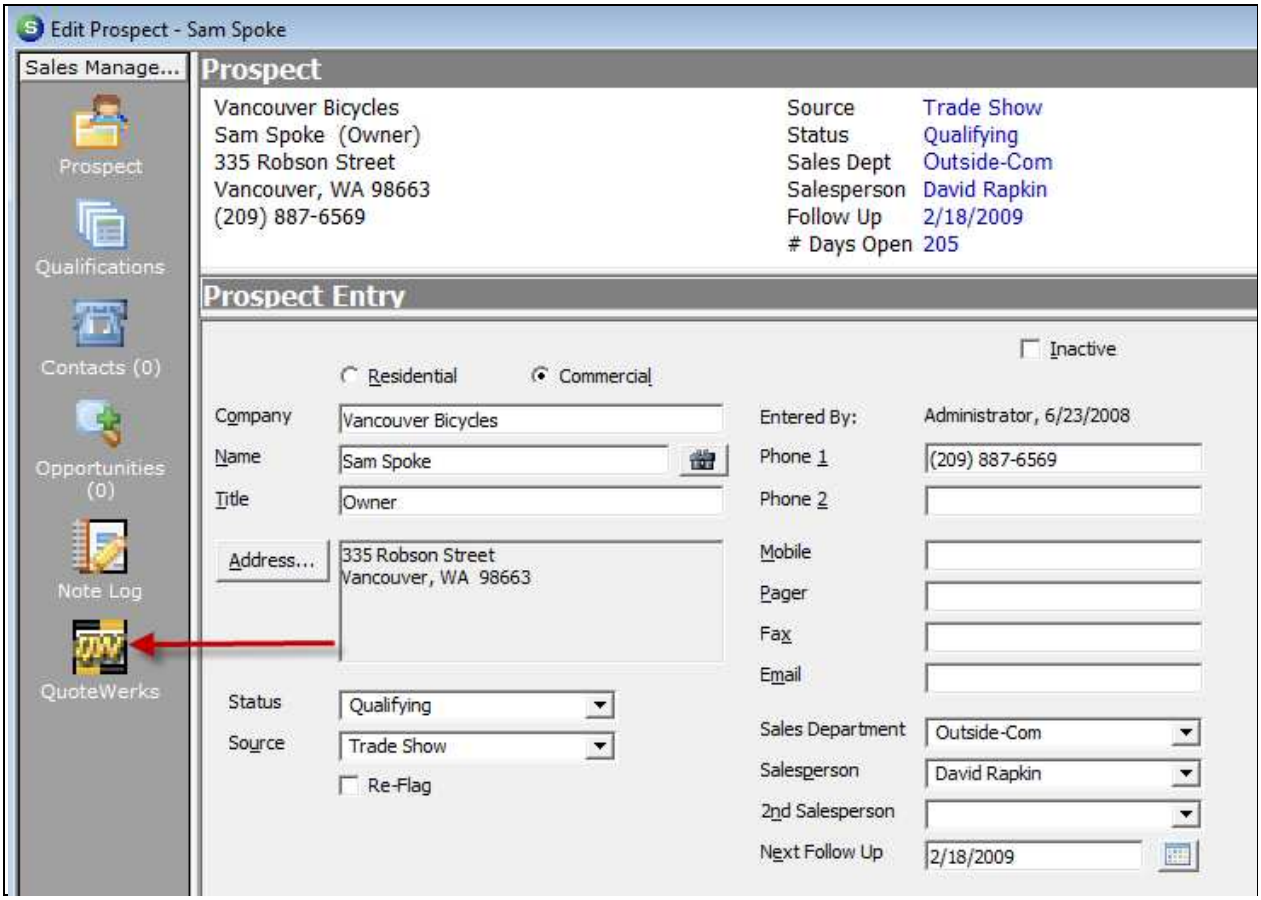


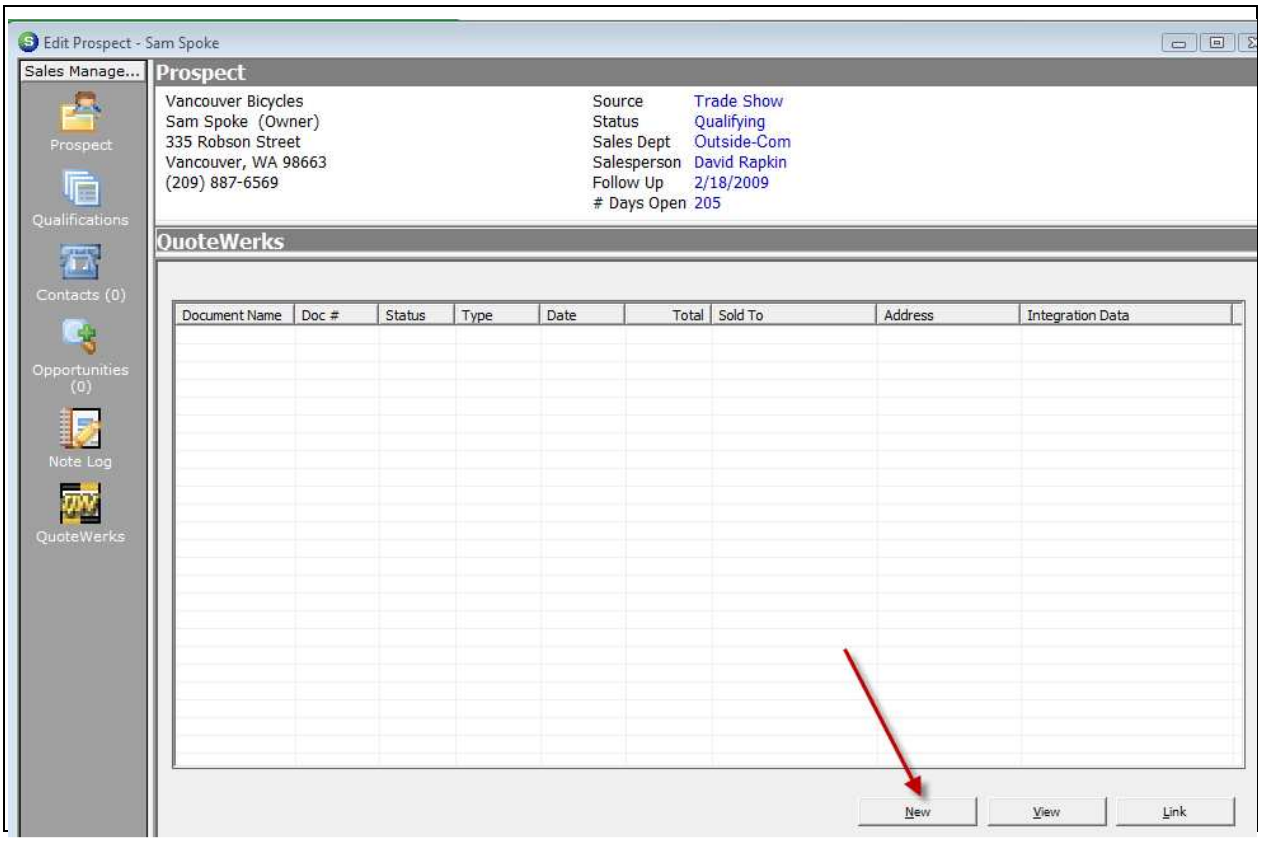
The flow of information is from SedonaOffice Prospect into QuoteWerks, from SedonaOffice Parts, Items and Recurring Items into QuoteWerks, and from QuoteWerks into the SedonaOffice Job.

Sales Contacts – Prospects

Prospect information is passed into QuoteWerks when the "QuoteWerks" button is selected from the Sales Management Menu. When a Prospect is open in Sales Management and the QuoteWerks button is pushed, a menu is presented showing existing quotes for that prospect and presenting a "New" and "View" buttons at the bottom of the form. The View button will open an existing quote selected from the list. If New is selected, the Prospect contact information will be passed into QuoteWerks for the "Sold To" "Ship To" and "Bill To" information shown in the QuoteWerks Sold to/Ship to Tab.

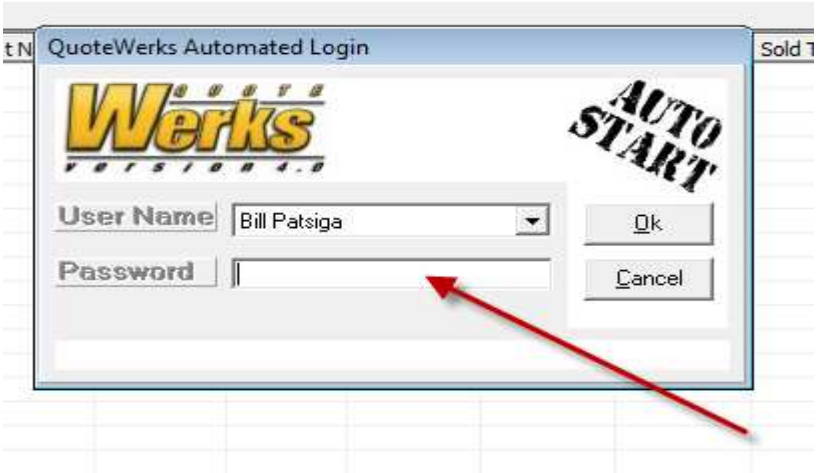
Opening the QuoteWerks application from a prospect

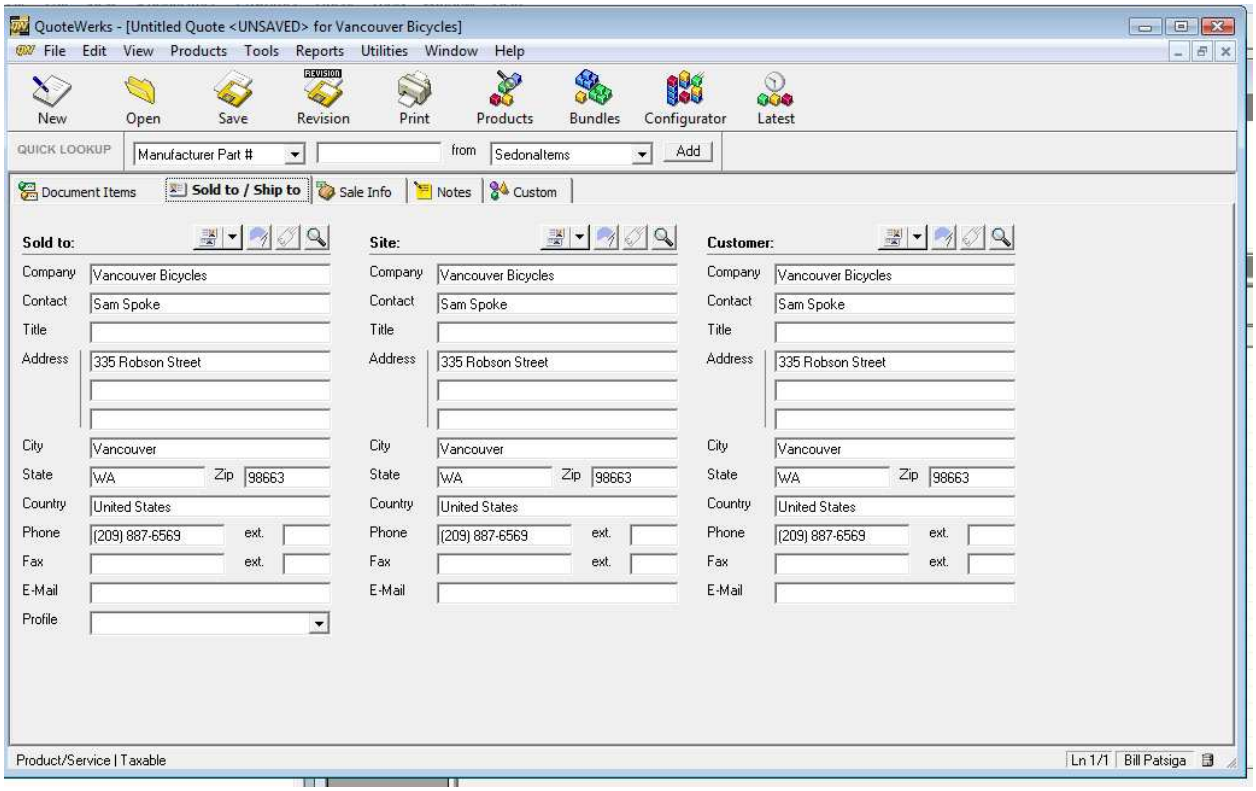




Selecting a "New" quote for a prospect

Signing into QuoteWerks



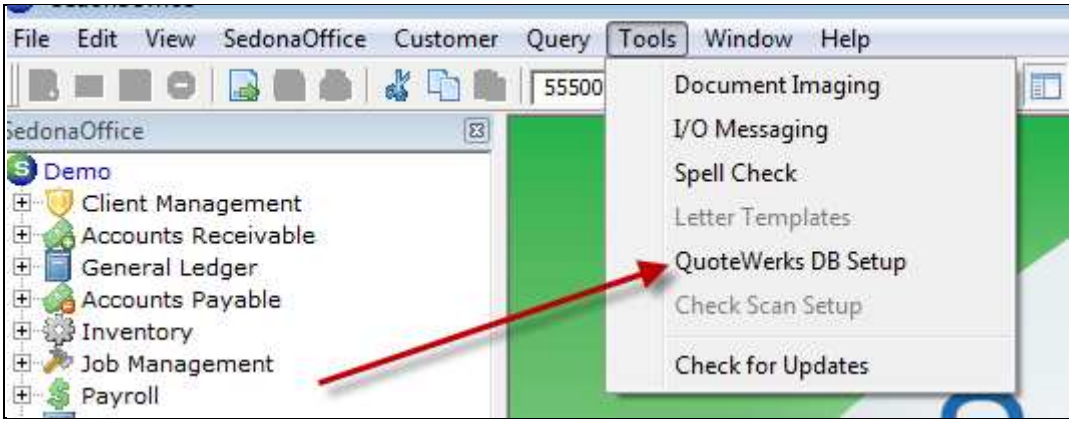


QuoteWerks "Sold to/Ship to" Tab with prospect information passed over

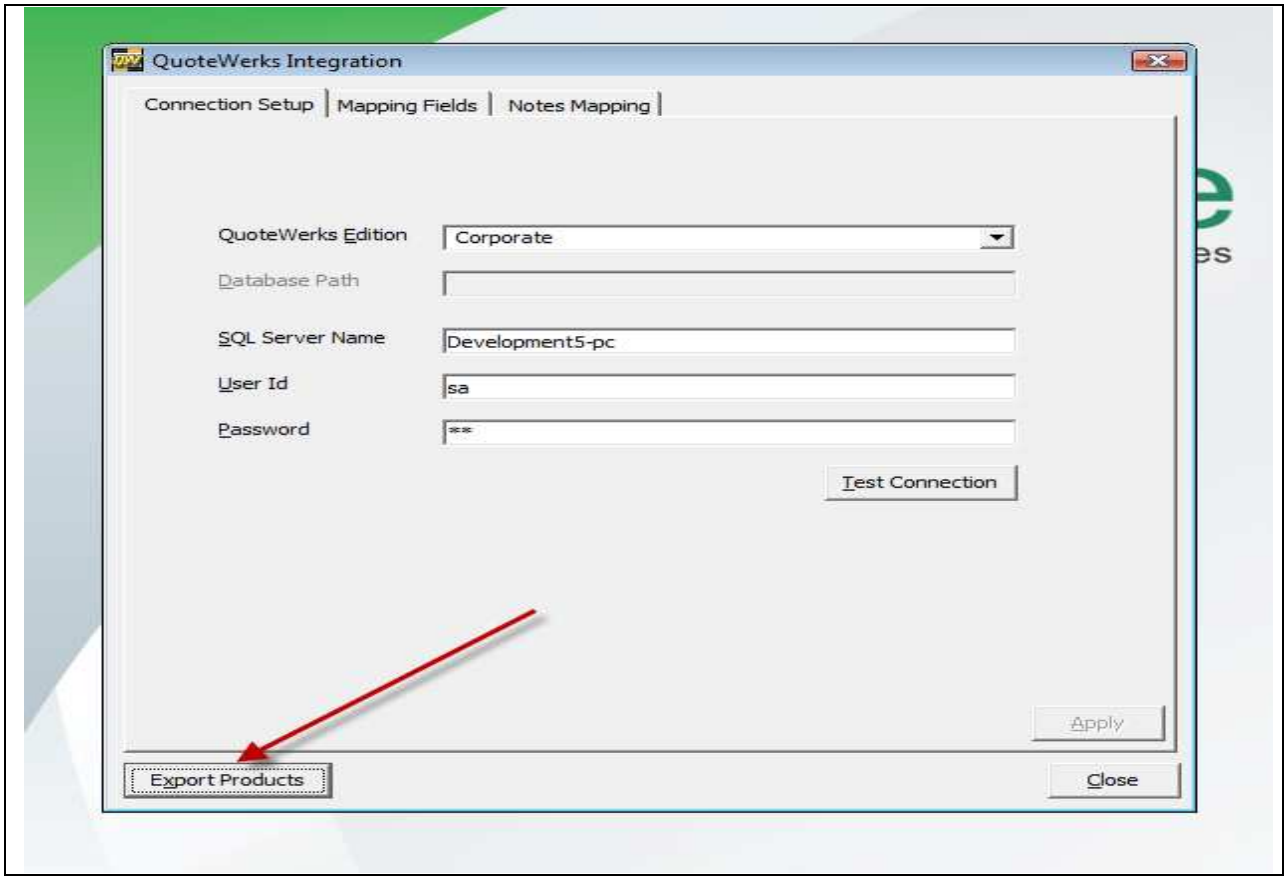
When the user initiates a QuoteWerks quote from the SedonaOffice Sales module the contact information will fill in the "Sold to/Ship to" tab as shown above. The SedonaOffice Job application will use the middle address for the SedonaOffice Job Site and the far right column will create the SedonaOffice Customer Bill To for the resulting Customer created in the SedonaOffice Job management.

Parts, Items, and Recurring Items

Parts information from Inventory, the Item Code table and the Recurring Items from SedonaOffice are specifically exported from the SedonaOffice database and used to populate the QuoteWerks database. This information is exported by using the Tool, QuoteWerks DB Setup. It is found on the SedonaOffice main toolbar under the "Tools" drop down list.

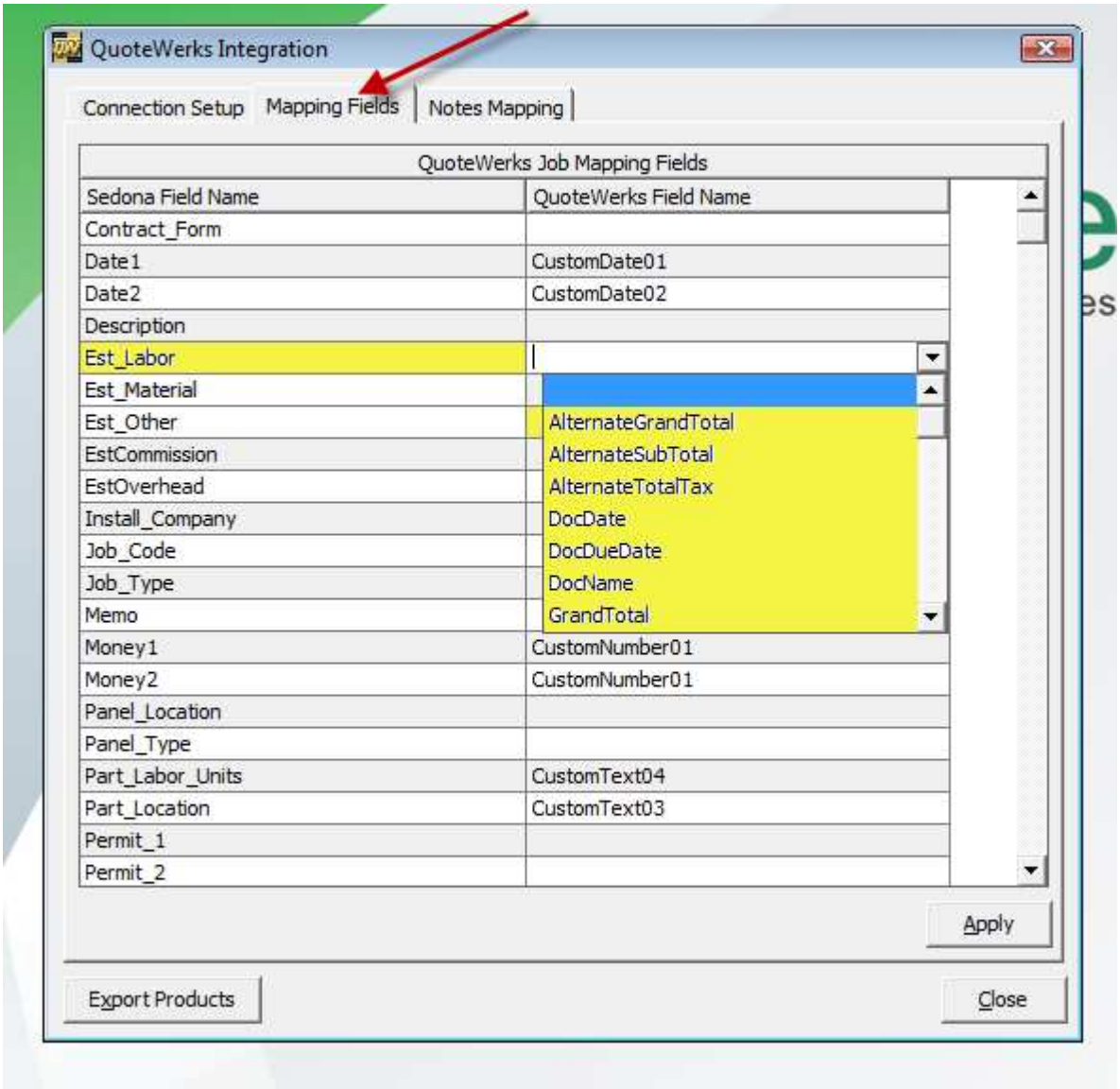


QuoteWerks DB Setup from the Tools menu



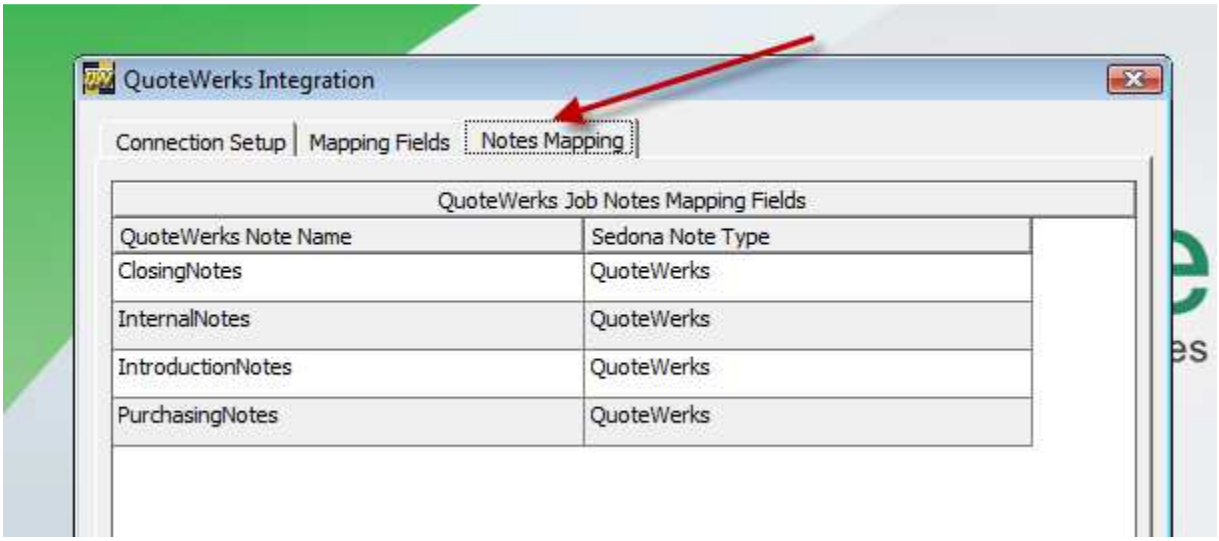
QuoteWerks Export Wizard

Pressing the "Export Products" button will copy all Parts, Item Codes, and Recurring Item Codes into the QuoteWerks database. It will OVERWRITE the existing QuoteWerks database first erasing the existing QuoteWerks database and creating a new database from the current information in SedonaOffice.



Mapping Fields tab allows customizing data transfer into a Job

The use of the Mapping Field tab allows the users to set up a customized flow of information from the QuoteWerks quote into a SedonaOffice Job. What is shown above is the ability to send data from the QuoteWerks quote into the SedonaOffice field Est_Labor. The example above shows a QuoteWerks field being selected from a list of QuoteWerks source fields.

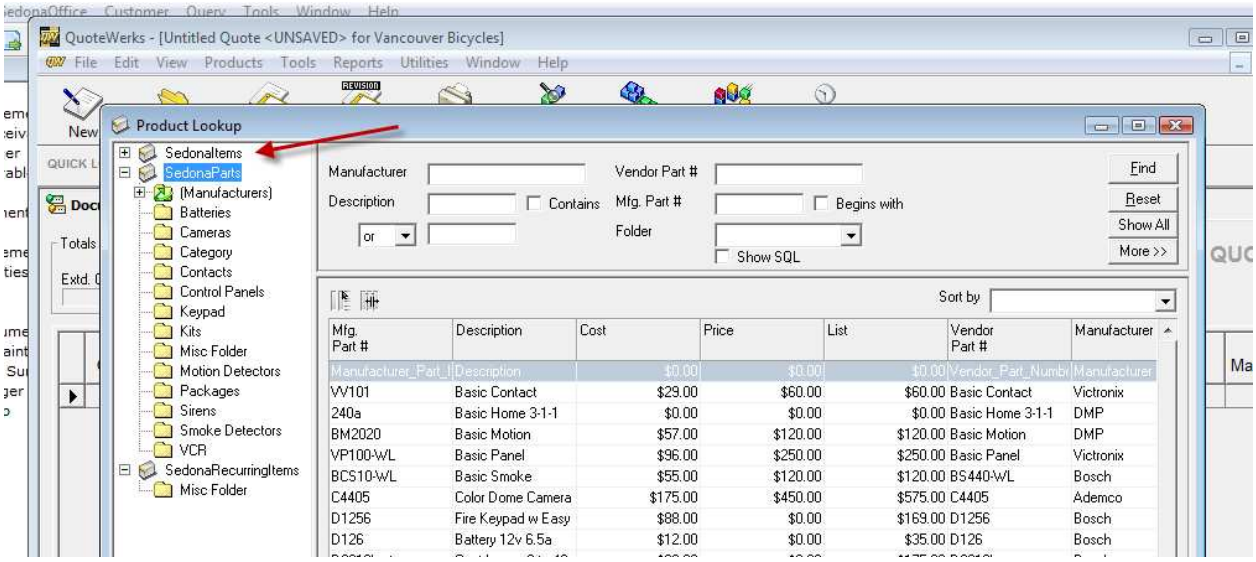


Notes Mapping allows QuoteWerks notes fields to map to SedonaOffice Job Notes

The Notes Mapping Tab is used to control the flow of QuoteWerks notes information into the SedonaOffice Job notes fields. The user can set up the mapping into any SedonaOffice Note Type that the user desires.

Export Products Button

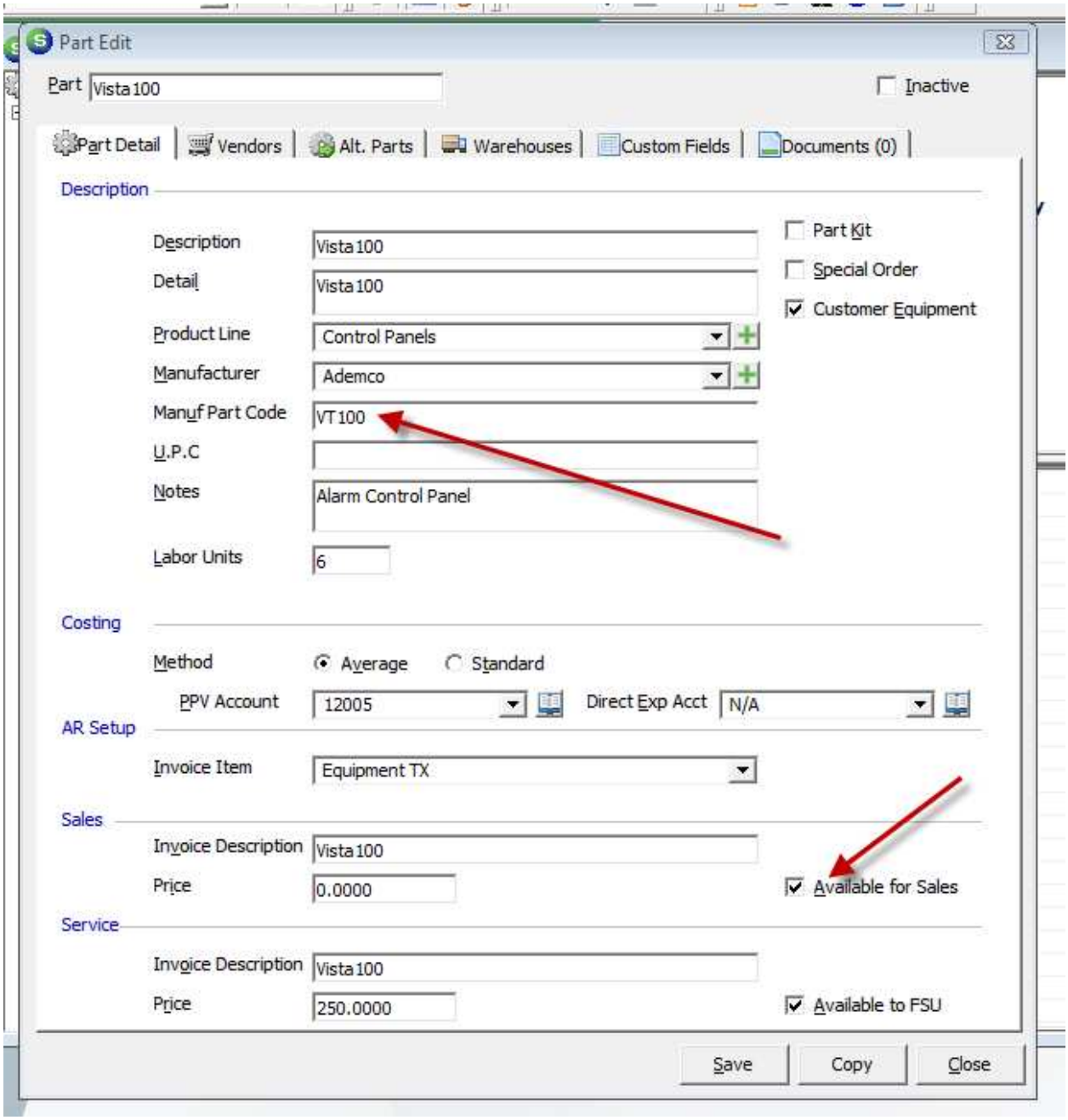
When the "Export Products" button is pushed from the QuoteWerks Integration wizard the QuoteWerks Database is recreated. All existing part, Item Code and Recurring Item Code files in QuoteWerks are overwritten with current data from SedonaOffice.



The Export Button creates QuoteWerks Product Files

The Export function is set up to create three major product files; SedonaItems, SedonaParts, and SedonaRecurringItems. He SedonaParts File will create subfolders based on Product Line.

NOTE: A key field for part lookup in QuoteWerks is the Manufacturer Part Code. Be sure that this field is filled in for all parts in SedonaOffice that you wish to make Available for Sales.

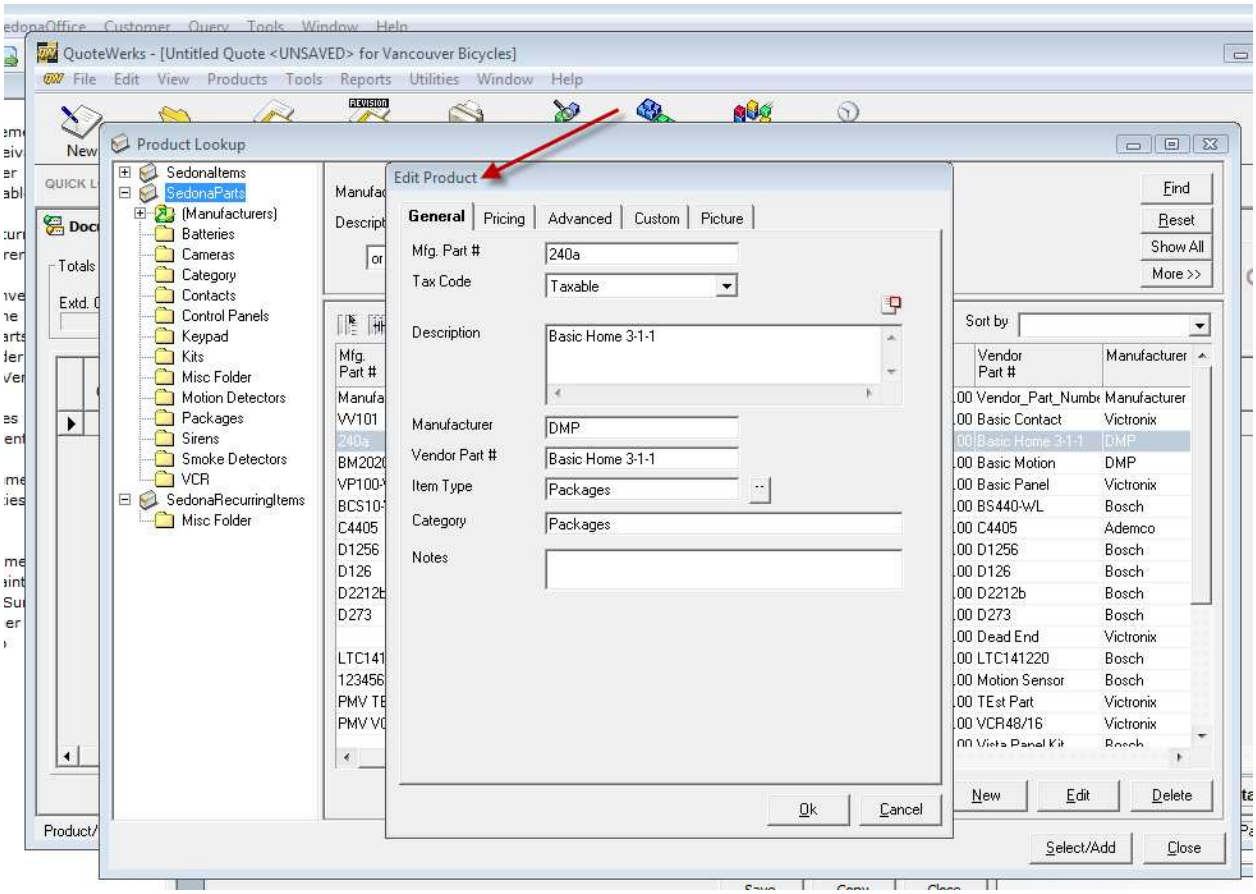


Showing SedonaOffice Part Edit with Manufacture's Part Number filled in and "Available for Sales" checked.

The "Available for Sales" box must be checked for a part to be made available through QuoteWerks. Remember, the Manuf Part Code should be filled in for all parts to be used in QuoteWerks.

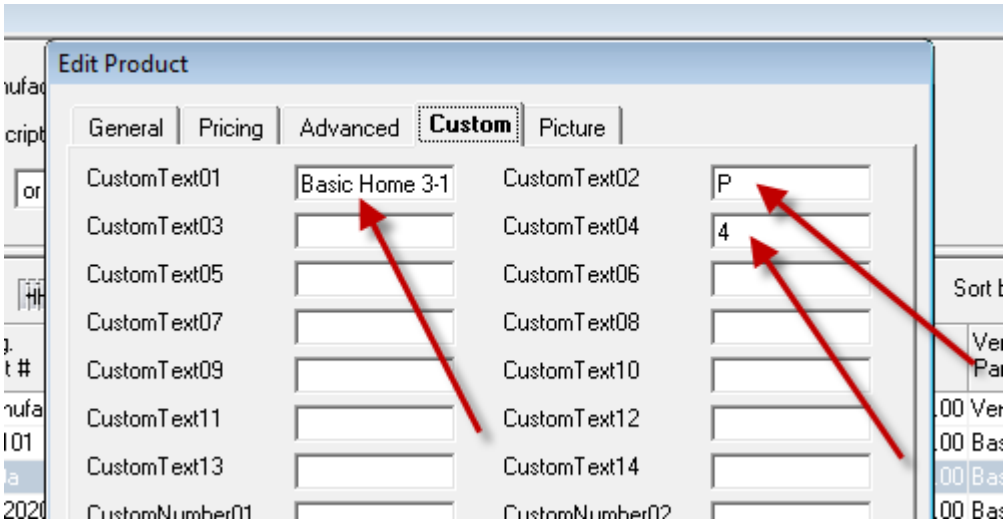
Editing Items in QuoteWerks

Items in the QuoteWerks database can be edited. The various data fields in QuoteWerks can be used for creating data that will allow you to calculate quotes in your specific manner. When editing product information there are a few fields that can not be edited.



View of Part Edit screen in QuoteWerks

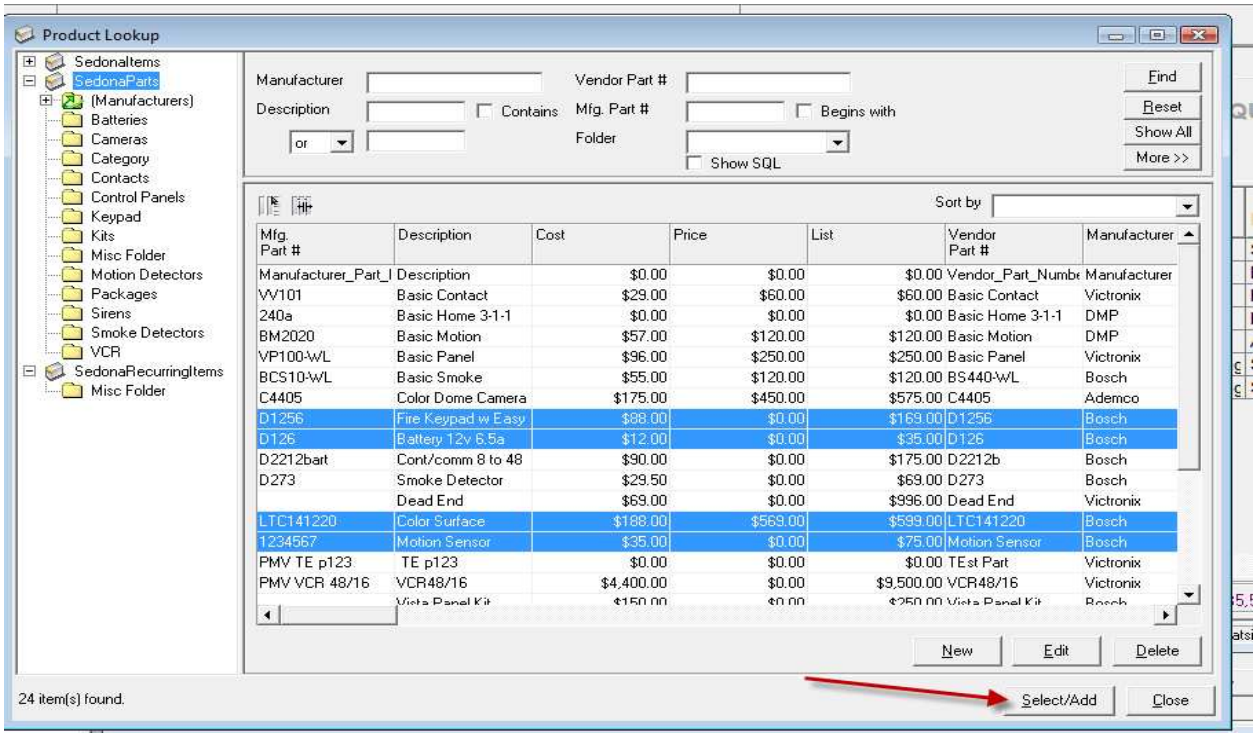
Product Fields Reserved for SedonaOffice



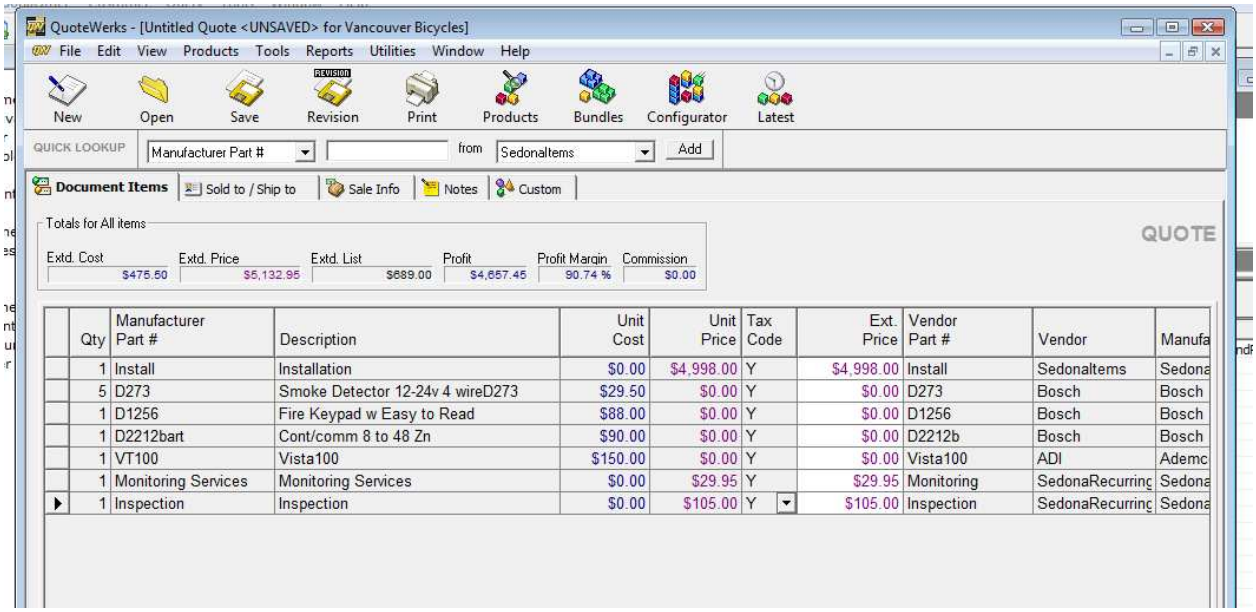
Product Fields Reserved for SedonaOffice – DO NOT EDIT!

When editing Product information, under the "Custom" tab, the fields CustomText01, CustomTexto2 and CustomText04 are reserved for SedonaOffice use. If you overwrite or change this information SedonaOffice Jobs may not work properly. Do not change theses fields.

Creating the body of a quote



From the Product Lookup function items are highlighted and added to a quote



The bill of materials as shown in the "Document Items" tab

Rules for a successful Job creation from a QuoteWerks quote

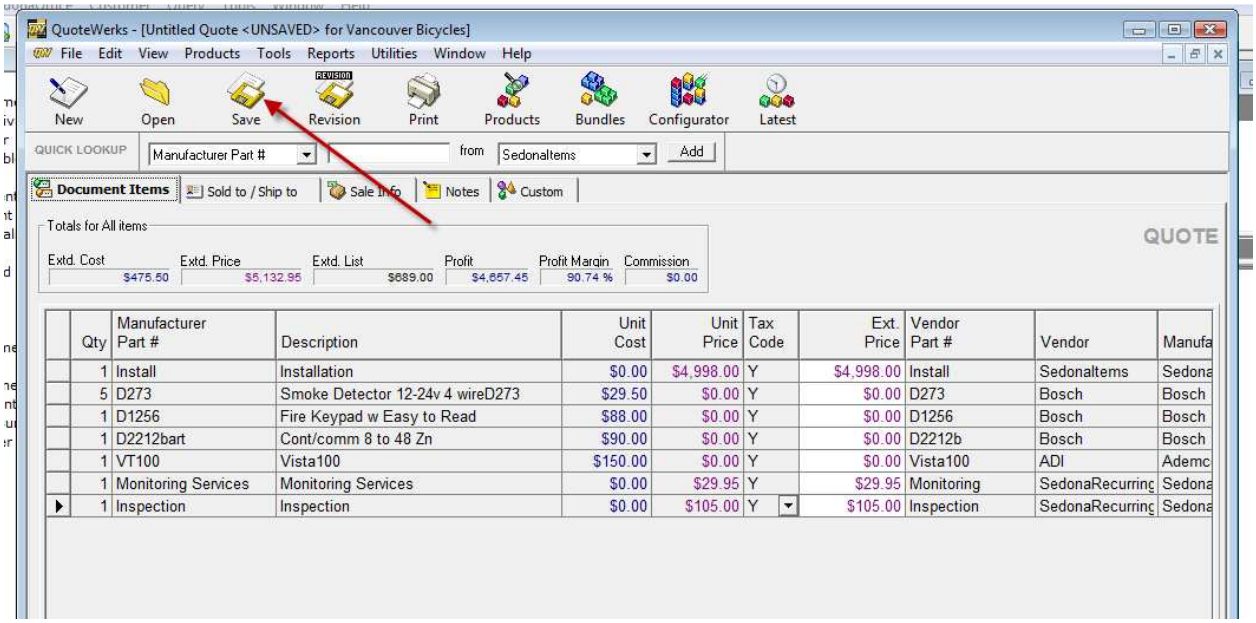
Document Items must not contain blank lines – The Job creation interface will process the document items into a job setup. It will create the Job Sales Summary form the document items.

SedonaItems in the quote will become line items in the Installs Section.

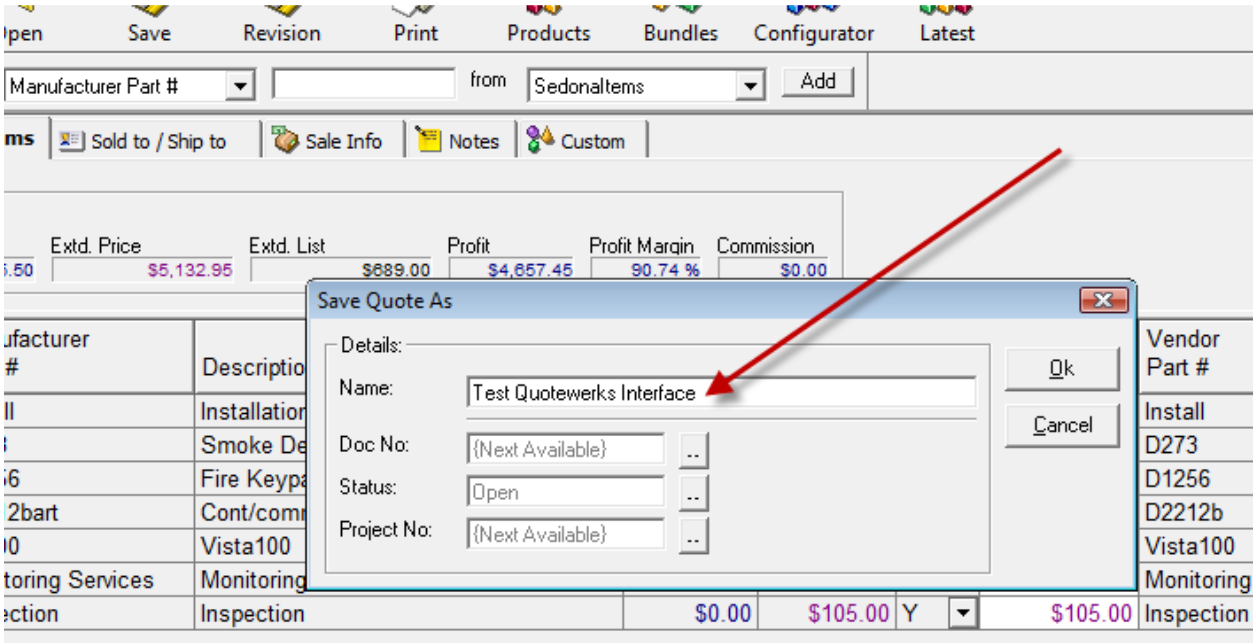
SedonaParts in the quote will become line items in the Parts section.

SedonaRecurringItems in the quote will become line items in the Recurring section.

Before a quote can be turned into a Job, it must be saved in QuoteWerks.



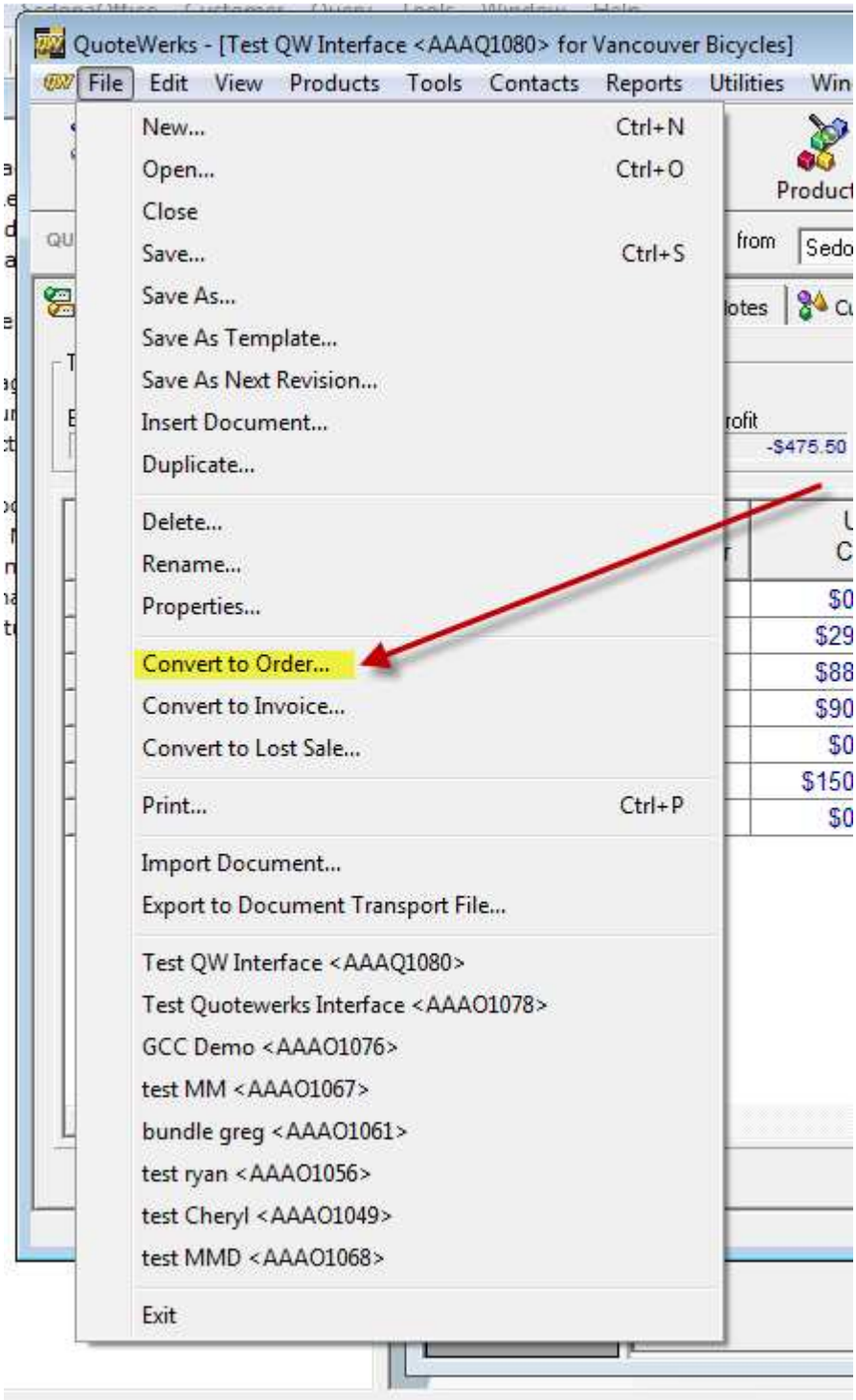
Press the Save button to save a quote in QuoteWerks



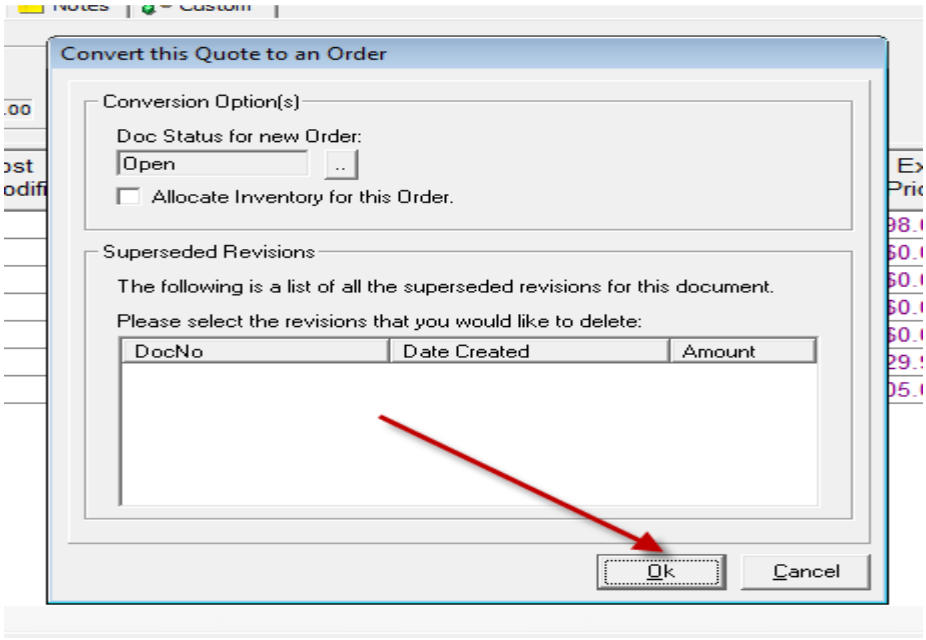
Save the quote file in QuoteWerks

Once the file has been saved it can be turned into an Order. An Order in QuoteWerks becomes a Job in SedonaOffice.

A quote is turned into an order by going to the drop down File menu and selecting the “Convert to Order” option.

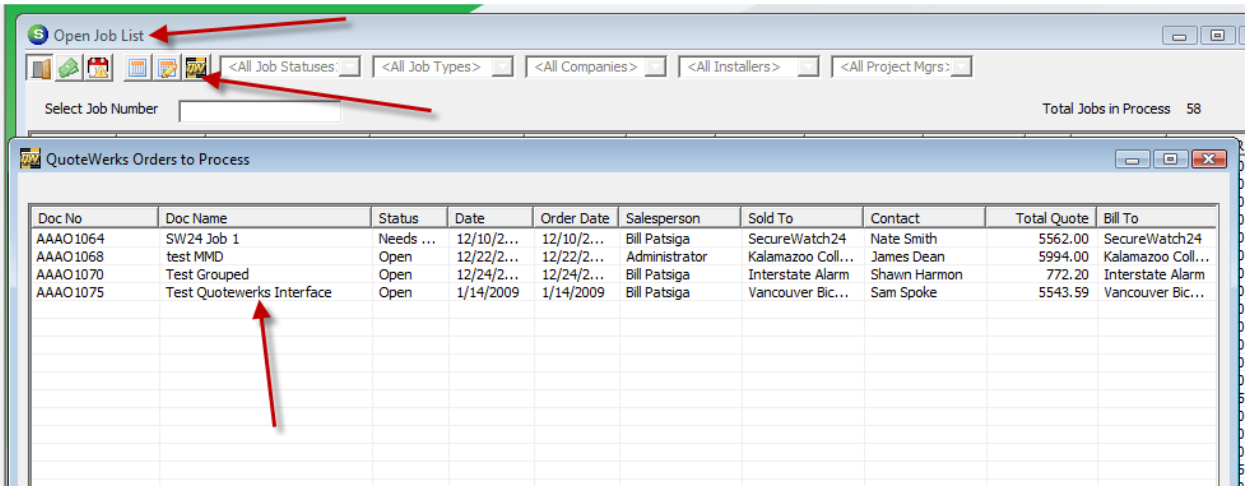


Selecting this option will bring up the following dialog box:



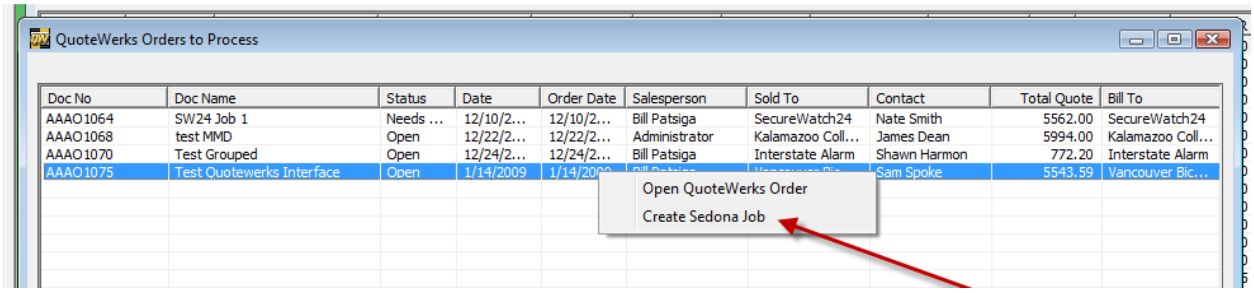
Selecting “Ok” will convert the quote to an Order

Once a quote has been turned into an Order it can be found in SedonaOffice, Job Management, Job Queue under the “QuoteWerks” icon



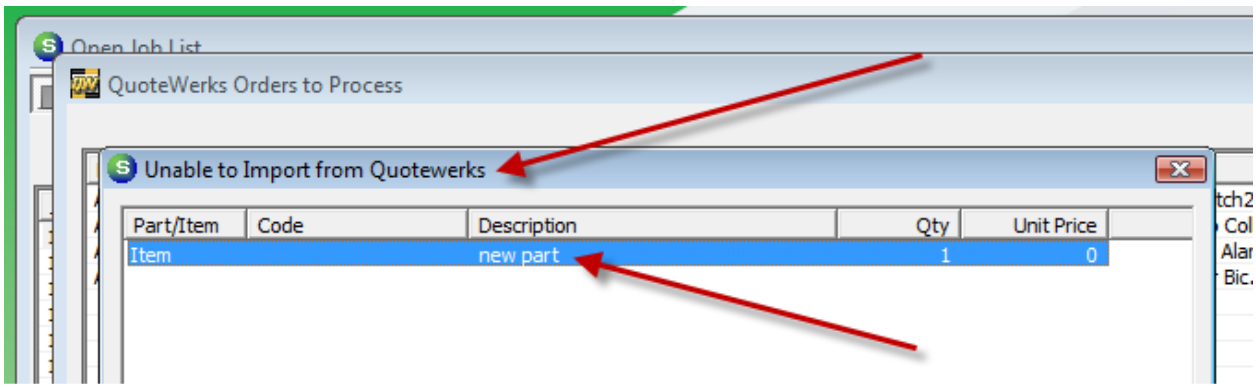
QuoteWerks Icon on Open Jobs List opens the “QuoteWerks Orders to Process” list

Once the Quote has been turned into an Order within QuoteWerks, The SedonaOffice QuoteWerks Interface moves the order to the QuoteWerks Orders to Process list. From here an Order is selected and the Job creation process is begun.



Highlight the appropriate Order and Select "Create Sedona Job"

This will initiate the Job creation process.



Unable to Import from QuoteWerks

Unable to import from QuoteWerks will occur when any item is on the quote that is not already existing in the SedonaOffice data base. Every part, item code, and recurring item code must be set up in SedonaOffice in order for a quote to import. Any blank lines, comments, or additional lines in the body of a quote will cause the job creation to fail. To correct this situation, go into SedonaOffice and add the missing part, item or recurring item or clean up the quote in order to have the import function work correctly

In the example above, an item with the name "new part" was found in the quote and did not exist in the SedonaOffice database and therefore caused the job creation to stop at this point.

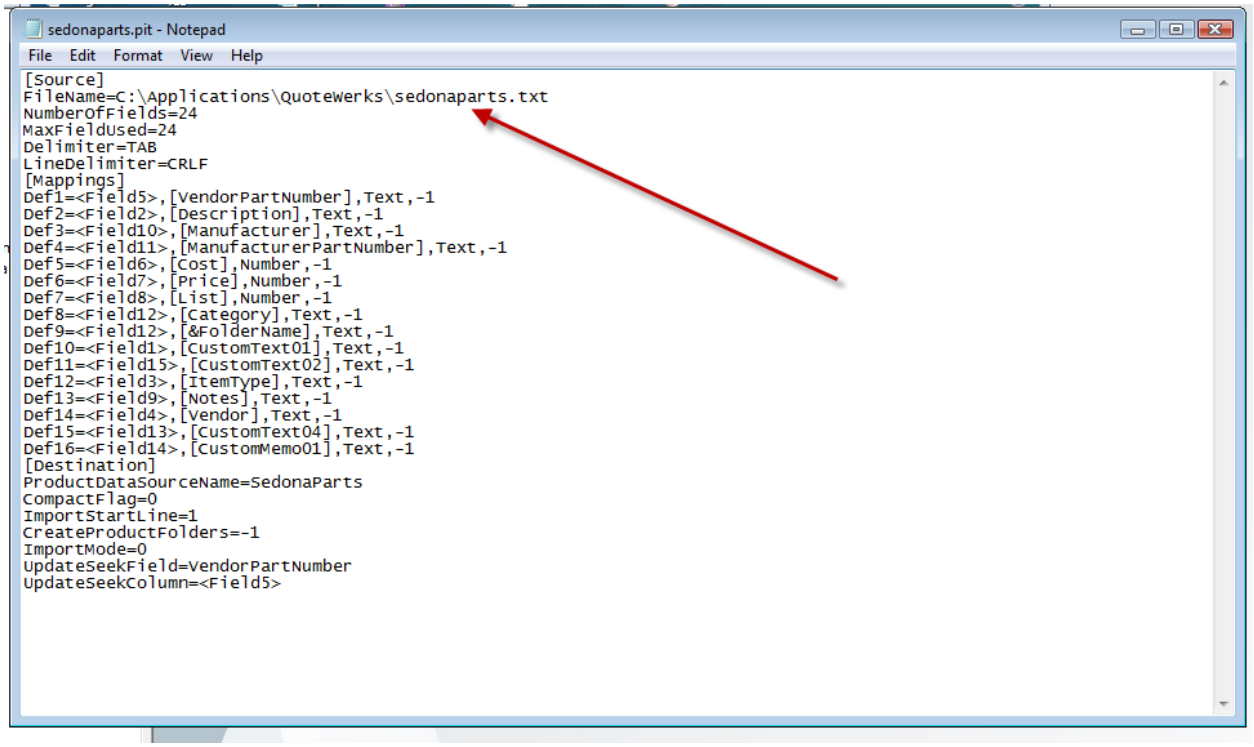
Customizing Your QuoteWerks

There are several areas that users may choose to customize the interfacing of information between the SedonaOffice and QuoteWerks. The reasons typically include the desire to use additional factors in developing quotes. This has included the use of the SedonaOffice Parts custom fields and other information.

Importing Parts Data into QuoteWerks

The parts, items and recurring items are imported into QuoteWerks via a QuoteWerks file called the ".pit" file, a copy of which is shown below. This file controls what information is taken from SedonaOffice and where it is placed into the QuoteWerks files as it builds the QuoteWerks products database. If you wish to change the data mapping this file is where it is controlled. It is showing where the SedonaOffice field is being placed in the QuoteWerks part records.

For example below, "Field5" from the SedonaOffice Part record is being placed into "VendorPartNumber" in QuoteWerks.



Sedonaparts.pit File

The mapping of the SedonaOffice Parts fields is defined in the SedonaParts.txt file. All available data elements from the part that could be brought into QuoteWerks are defined and mapped. The fields refer to the following listing of SedonaOffice part fields:

Field1 = Part_Code

Field2 = Description

Field3 = Product_Line

Field4 = Vendor

Field5 = Vendor_Part_Number

Field6 =Purchase_Cost

Field7 = Sales_Price

Field8 = List_Price

Field9 = Notes

Field10 = Manufacturer

Field11 = Manufacturer_Part_Number

Field12 = Category

Field13 = Labor_Units

Field14 = Part_Detail

Field15 = SedonaType

Field16 = UserTable1

Field17 = UserTable2

Field18 = UserTable3

Field19 = UserText1

Field20 = UserText2

Field21 = UserText3

Field22 = UserText4

Field23 = UserText5

Field24 = UserMoney1

Field25 = UserMoney2

SedonaOffice SedonaParts.txt File Layout

These fields can be mapped into the QuoteWerks product files by editing the .pit file. Definition lines in the pit file can be added for additional data element or edited to change the use.

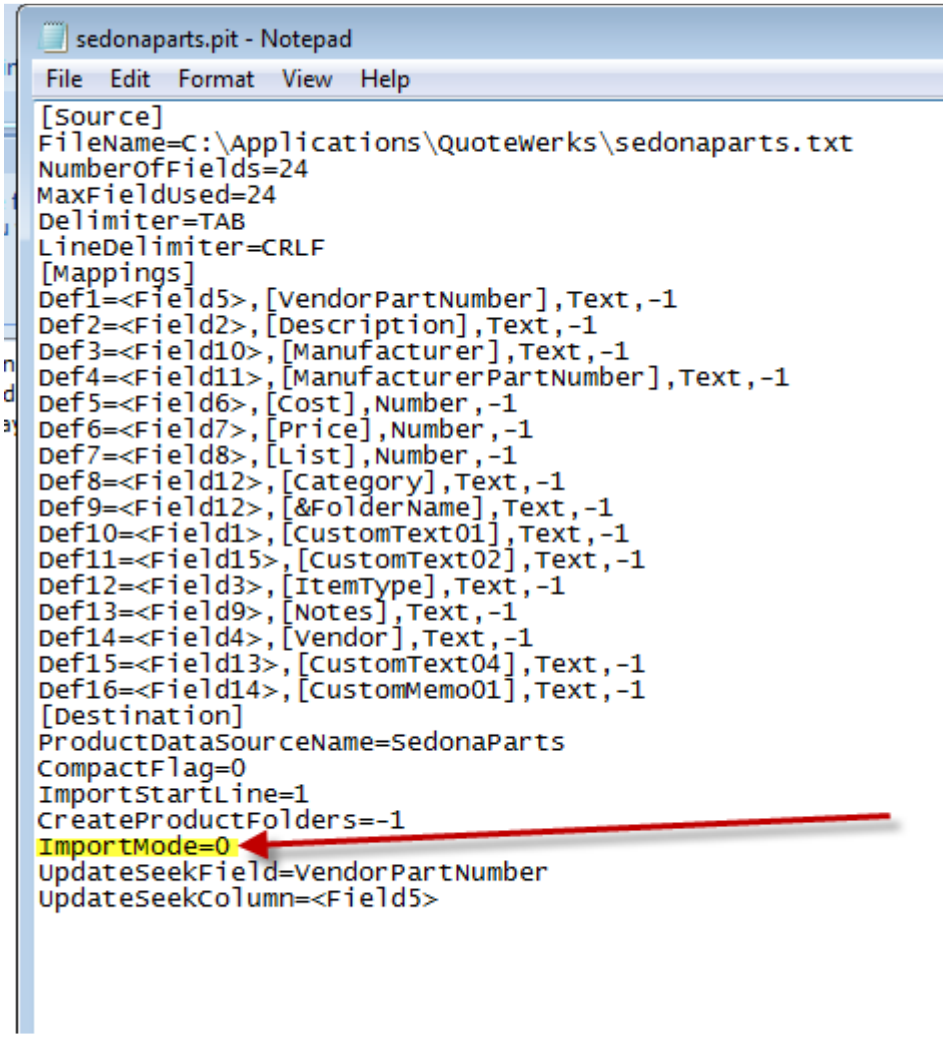
Remember, in the pit file and use of QuoteWerks, DO NOT CHANGE the mapping into QuoteWerks field CustomText01, CustomText02, or CustomText04

Controlling QuoteWerks Database Update

The basic SedonaOffice to QuoteWerks interface is setup to completely overlay the QuoteWerks database when the export function is run. If you choose to change this you will lose some control over the closed loop information cycle but you can preserve changes and added relationships that you may create in QuoteWerks.

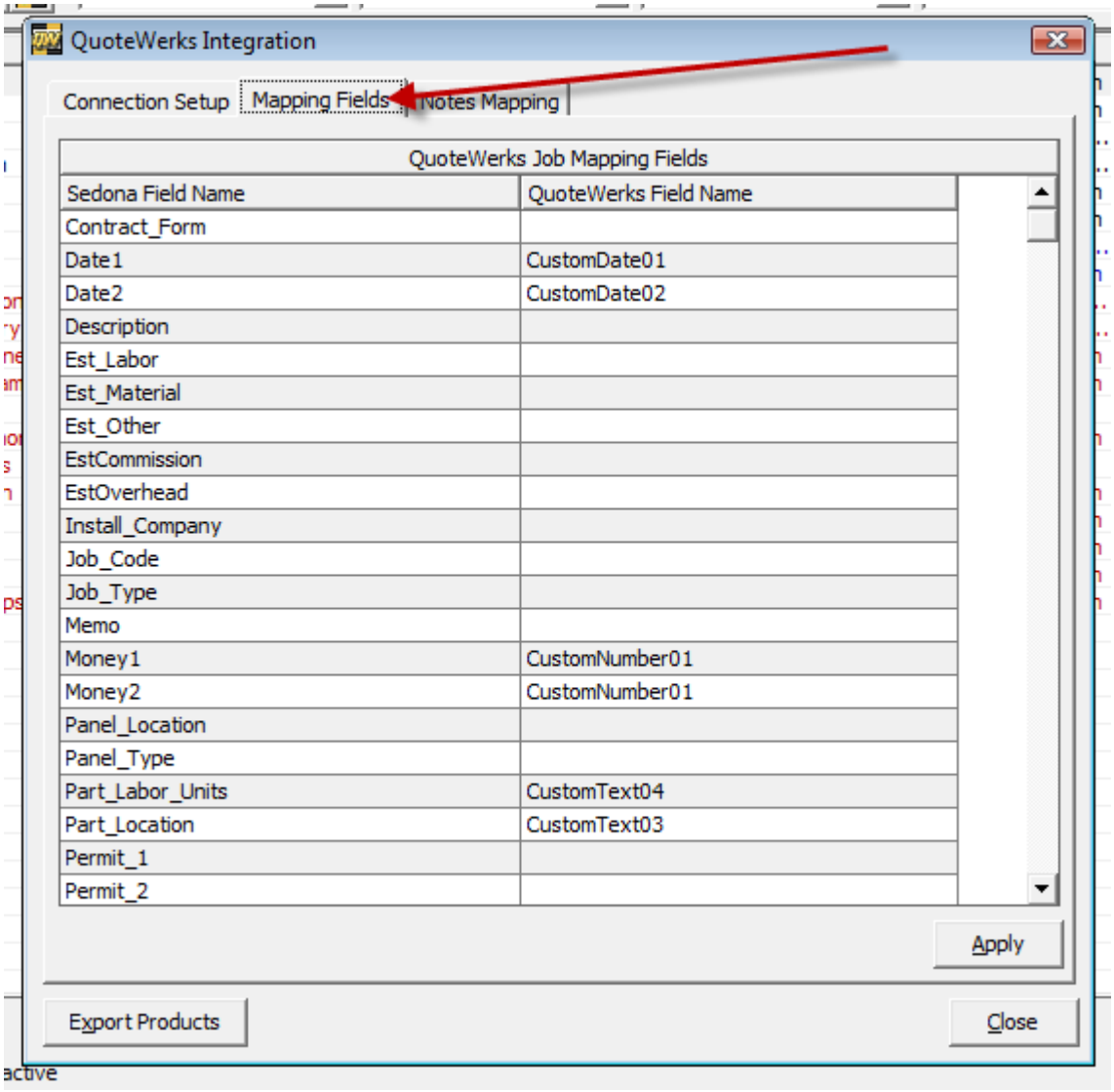
This process is controlled by the ImportMode value which is shown below set to 0. This default setting will delete the old and create a new QuoteWerks Database from the SedonaOffice inventory and item code files.

If the user sets the value for ImportMode = 2, then QuoteWerks will update the database, add new product information and well as update information. It will not delete products that are no longer in the SedonaOffice files. This is why the import mode is set to keep integrity of the information flow. Changing to update mode means that obsolete products will remain in QuoteWerks and possibly be selected by sales, thereby causing the Job Creation process to fail.

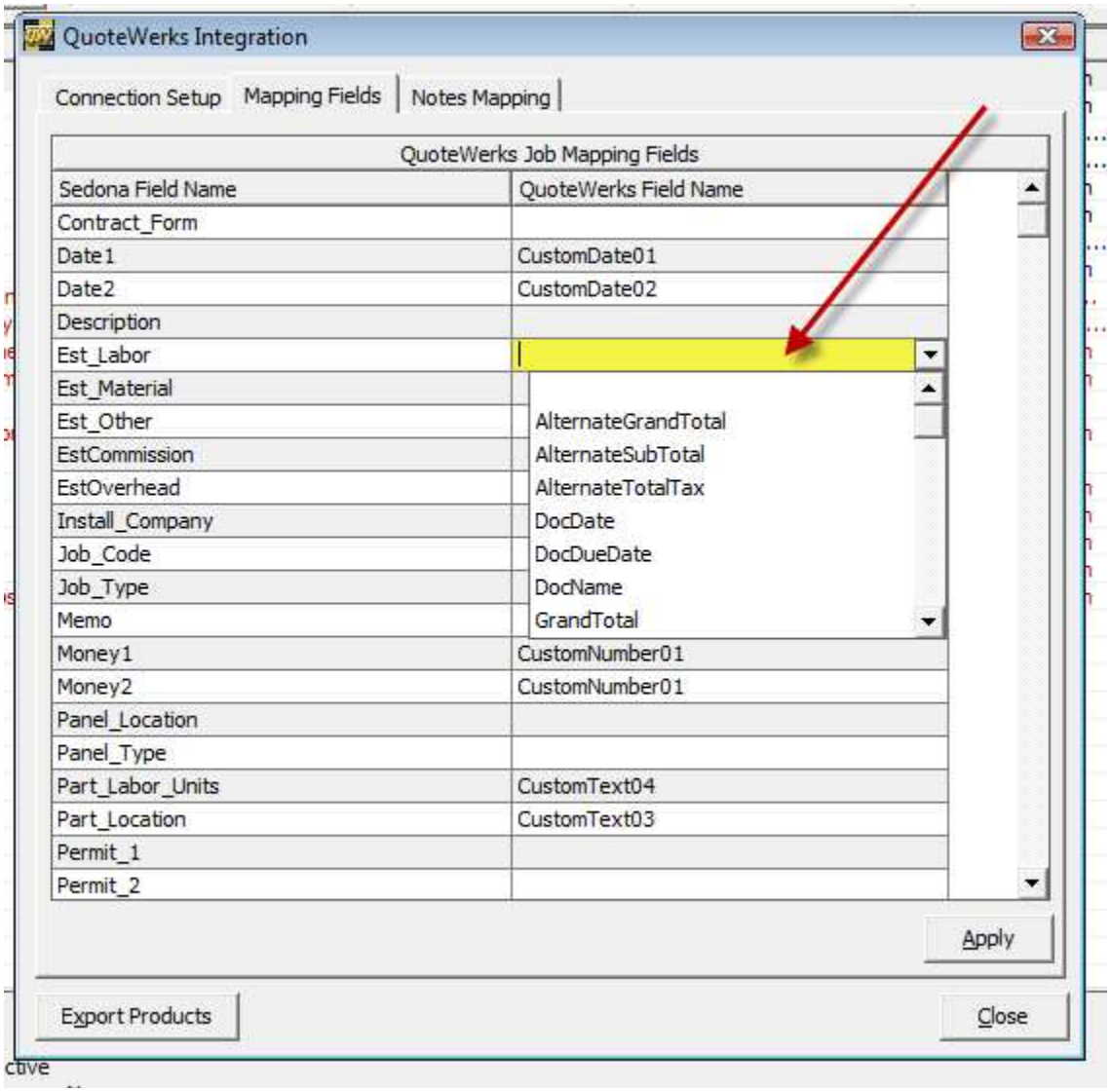


Exporting Data into SedonaOffice Jobs

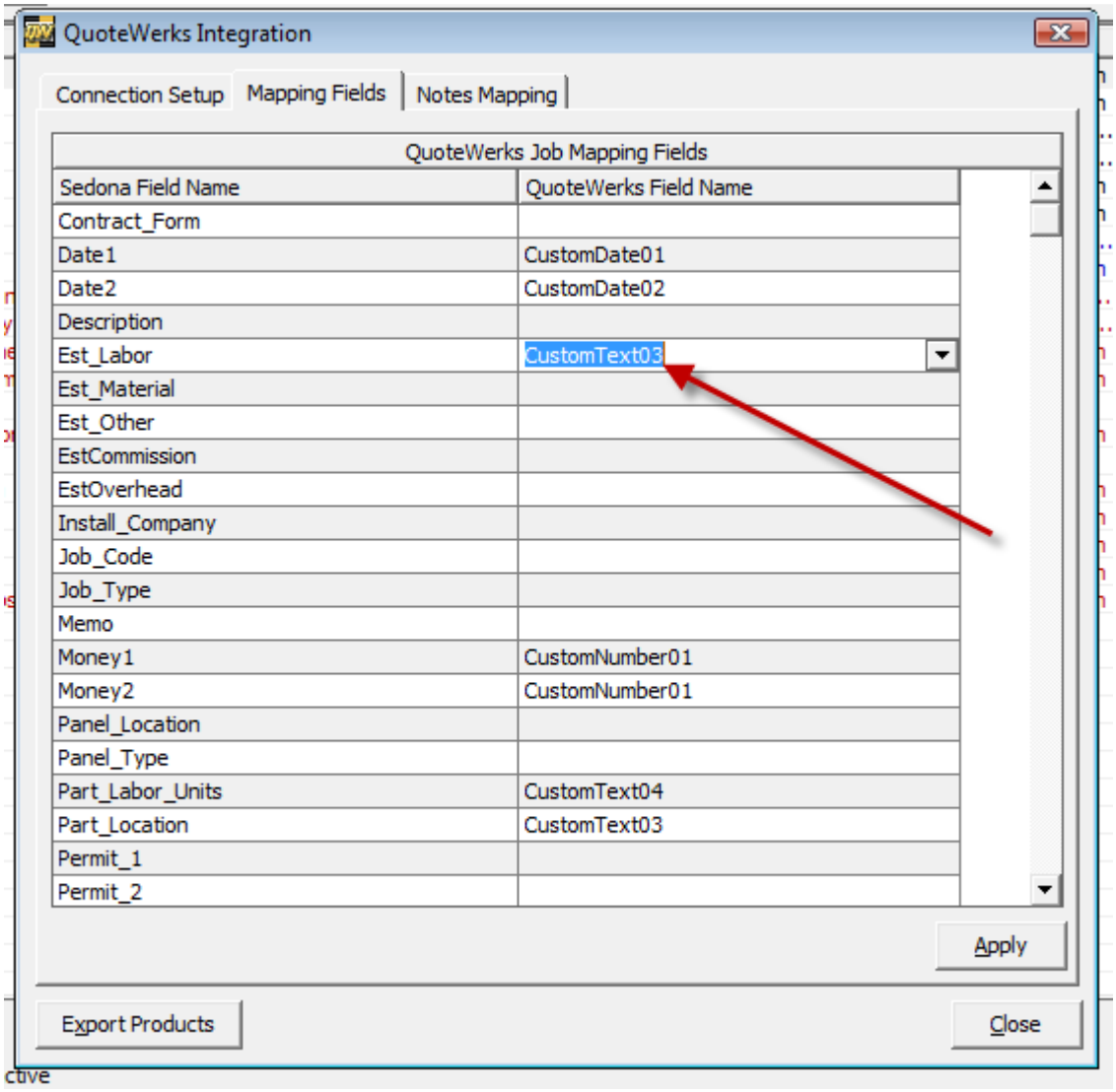
The data that can be transferred from QuoteWerks into SedonaOffice Jobs can be customized. The mechanism used to define the transfer of data into the Job is the QuoteWerks Integration utility, Mapping Fields tab.



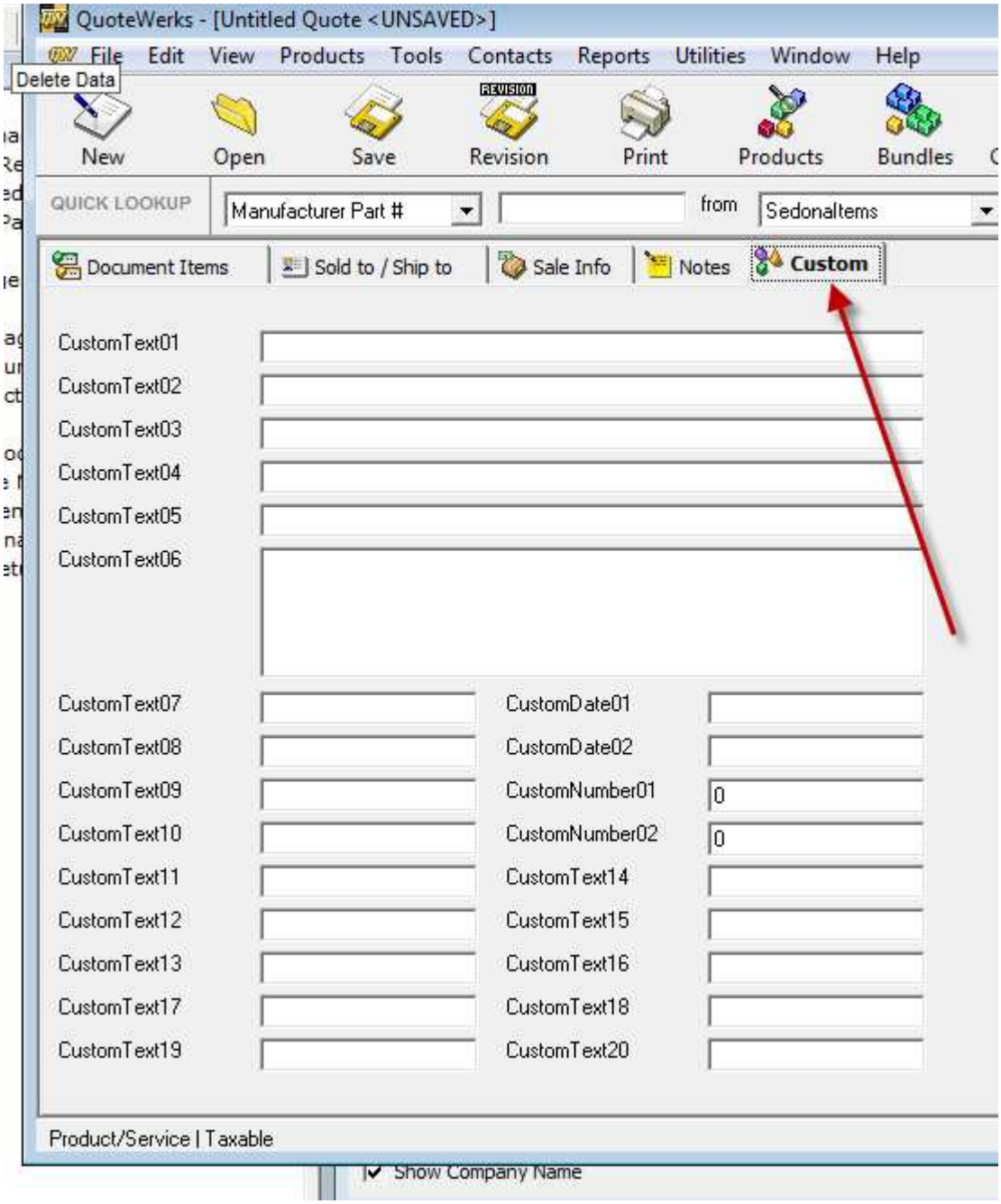
The example below will show how to map a QuoteWerks field into the “Est_Labor” field in a SedonaOffice Job.



First select the QuoteWerks field to pull the data from. Here it is shown highlighted in Yellow. Putting your cursor on the field will give you the drop down list of available fields



Here, “CustomText03” is selected to be mapped into the SedonaOffice Job field Est_Labor.



Remember, the Custom fields in QuoteWerks are available to be mapped as well as all Product fields and other quote information. Shown above is the “Custom” tab within QuoteWerks and the Custom fields available.

NOTE: CustomNumber01 and CustomNumber02 are used by SedonaOffice and should not be written into in your use of QuoteWerks.