



BMS QuoteWerks Integration

User Guide

Version 4.0.29

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Introduction

This guide documents how to install and use the *QuoteWerks Connector* tool, developed to integrate BMS with QuoteWerks.

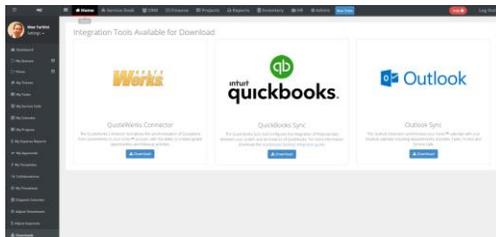
Prerequisites

The following applications and libraries are required to ensure smooth installation and usage on the target machine.

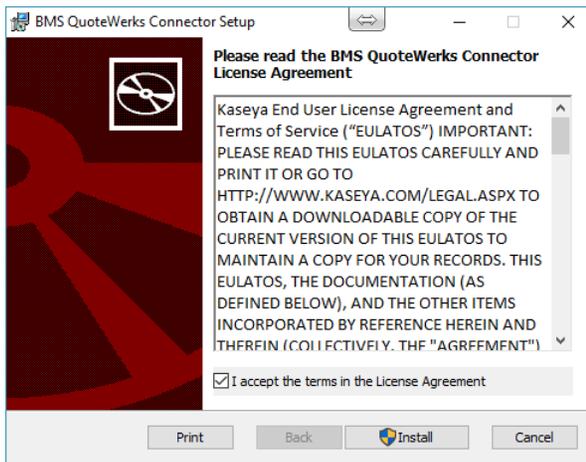
- Windows Vista and above
- Microsoft .NET Framework 4.5 - <https://www.microsoft.com/en-gb/download/details.aspx?id=30653> (<https://www.microsoft.com/en-gb/download/details.aspx?id=30653> \h)
- The QuoteWerks application - <http://www.quotewerks.com/> (<http://www.quotewerks.com/> \h)
 - Only a licensed version will work with *QuoteWerks Connector*.
 - QuoteWerks must run in administrative mode
 - A BMS username assigned the **Administrator** role.

Installation

1. Open the Home > **Downloads** page in BMS.
2. Locate the **QuoteWerks Connector** integration tool and click **Download**.

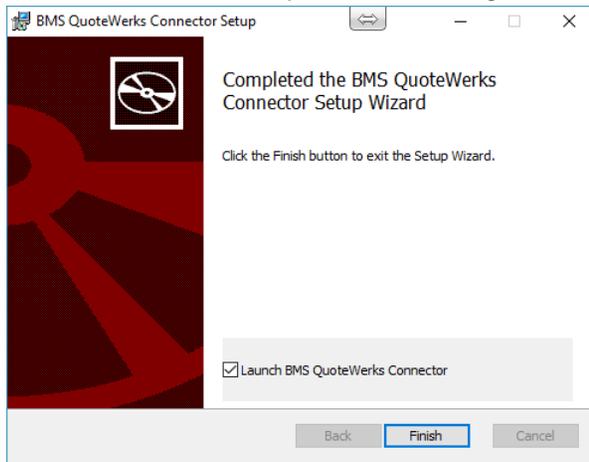


3. Run the setup file (QWConnectorSetup.msi).



4. Accept the license agreement and click **Install**.

Once installation is complete the following window displays.



5. Click Finish to launch *BMS QuoteWerks Connector*.

Setup Wizard Configuration

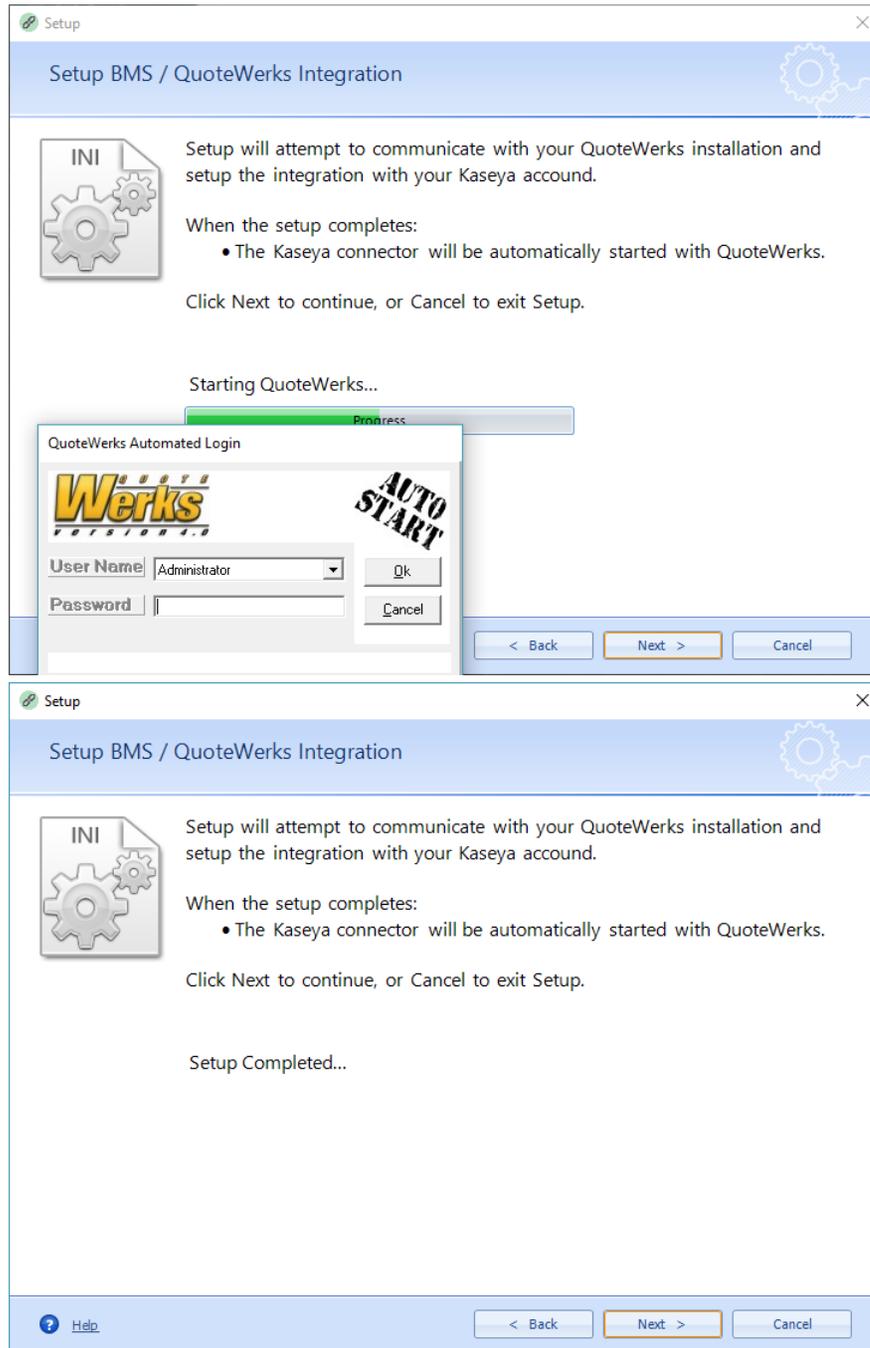
This section describes how to configure the integration between BMS and QuoteWerks.

QuoteWerks Configuration

The first time the *QuoteWerks Connector* application runs, a setup wizard attempts to locate an existing QuoteWerks installation on the target machine.



The setup wizard attempts to start QuoteWerks if it is not found running. Once started and logged in, setup continues processing configuration parameters, then displays its success status.

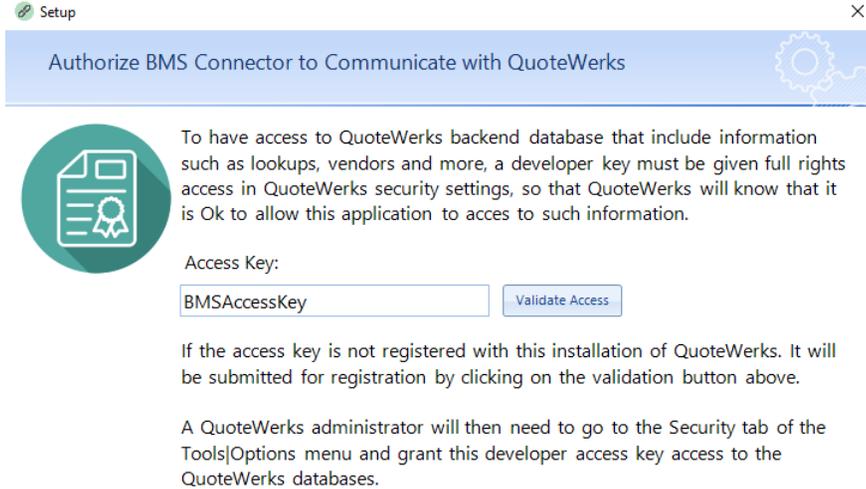


Initial QuoteWerks configuration is complete. Click the **Next** button.

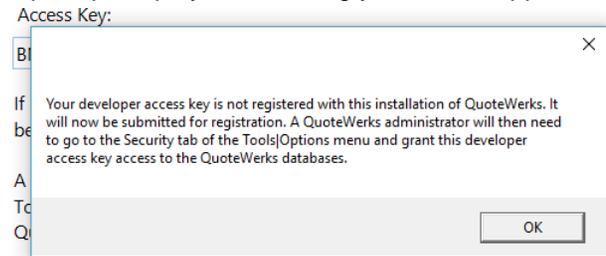
Set the Access Key

After the initial configuration the setup wizard prompts you to specify an access key. The key provides access to the QuoteWerks API.

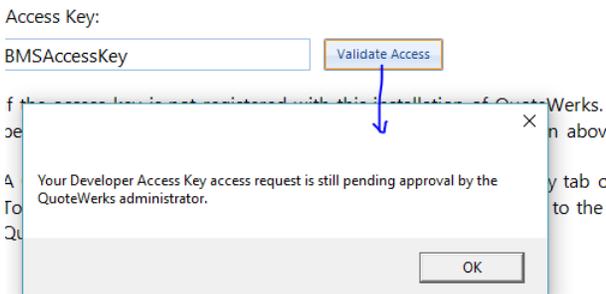
1. Enter any string you want. If the access key entered does not already exist, the wizard automatically registers it in QuoteWerks.



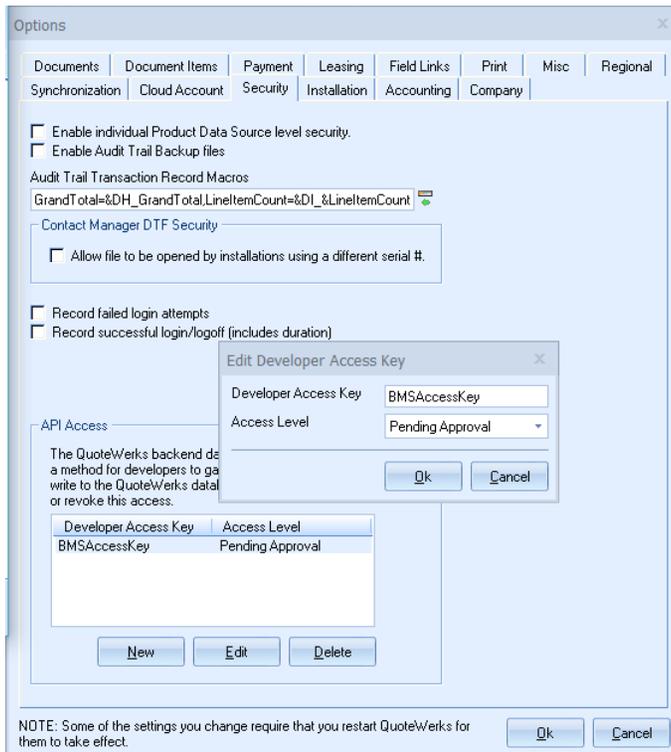
2. A prompt displays, instructing you how to approve the key in QuoteWerks to grant access.



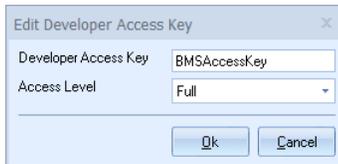
3. A second prompt tells you your access key is pending approval.



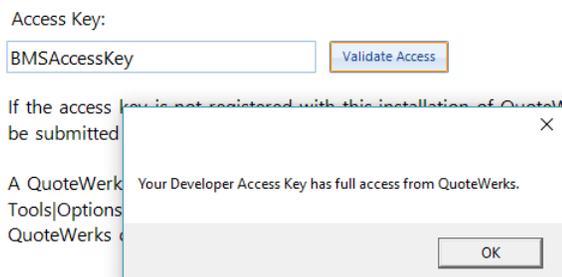
- To approve the access key, open the QuoteWerks > Tools > **Options** window.



- Select the **Security** tab.
- Locate the **API Access** group box.
You will see your access key added to the list, with an access level of **Pending Approval**.
- Select this item and click the **Edit** button
- Change the access level to **Full**, then click **Ok**.



- Click **Ok** on the options window to confirm the changes.
The access key has been approved.
- Verify approval by returning to the setup wizard and clicking the **Validate Access** button.



Setup BMS Credentials

The setup wizard then prompts the user to specify the credentials of the BMS account to use when integrating with QuoteWerks.

1. First, specify the server URL where your account is hosted. For example:
<https://psa.pulseway.com>
<https://psaemea.pulseway.com>
<https://www.vorexlogin.com>
2. Then enter the tenant name, username and password.

Note: The Kaseya® BMS™ username must be assigned the Administrator role.

3. Click **Test** to verify connection to the account is successful.

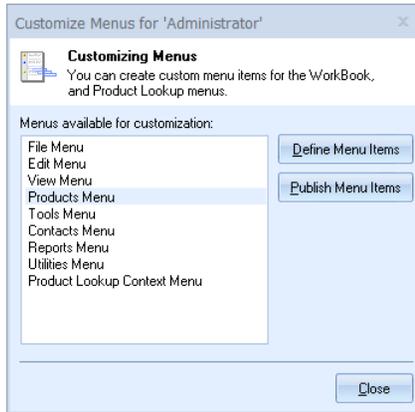
QuoteWerks Configuration

The following configuration steps are required in QuoteWerks. These cannot be automated by the setup wizard.

BMS Services Menu Item

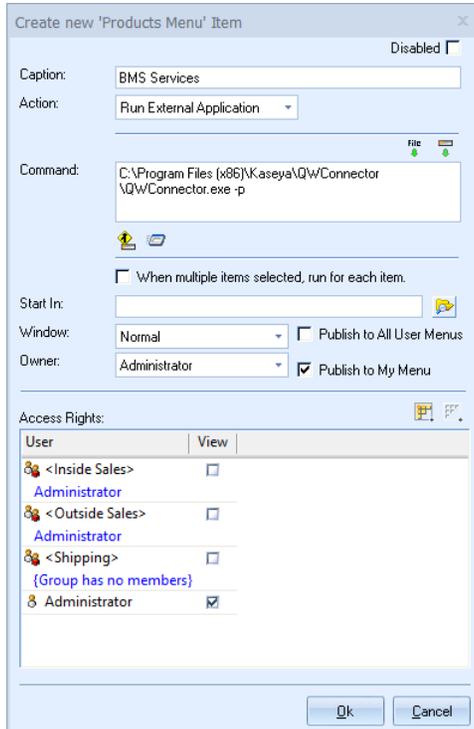
In this step you add a new custom menu option to the QuoteWerks application. The new menu option is used to open the **BMS Services Manager** window from within QuoteWerks.

1. Select the Tools > **Customize Menus...** menu item.



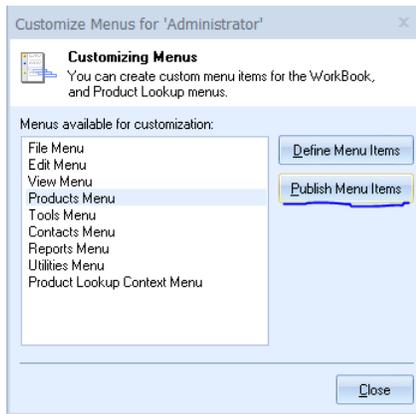
2. Select **Products Menu**.
3. Select **Define Menu Items**. A popup displays.
4. Click **New**.
5. Enter the following in the **Create New Product Menu Item** window.
 - **Caption** - **BMS Services**
 - **Action** - **Run External Application**
 - **Command** - **C:\Program Files (x86)\Kaseya\QWConnector\QWConnector.exe -p**

The command points to the location of the *QuoteWerks Connector* application executable. The `-p` parameter indicates the application is open to the services window.

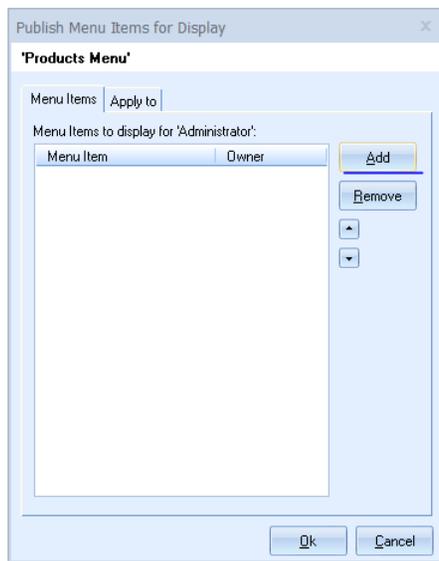


6. Click **OK** to save your changes.
You must now publish the new menu item you just created.

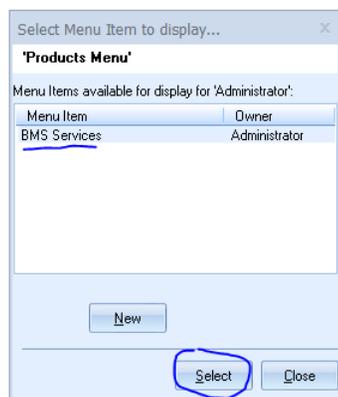
- 7. Select the **Publish Menu Items** button on the **Customize Menus** window.



- 8. Click **Add** to add the new menu item to the **Products Menu**.

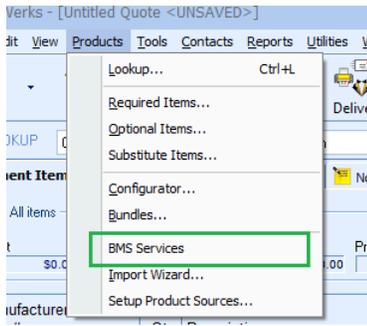


- 9. Click **Select** for the menu item you just created.



Your new menu item has been published.

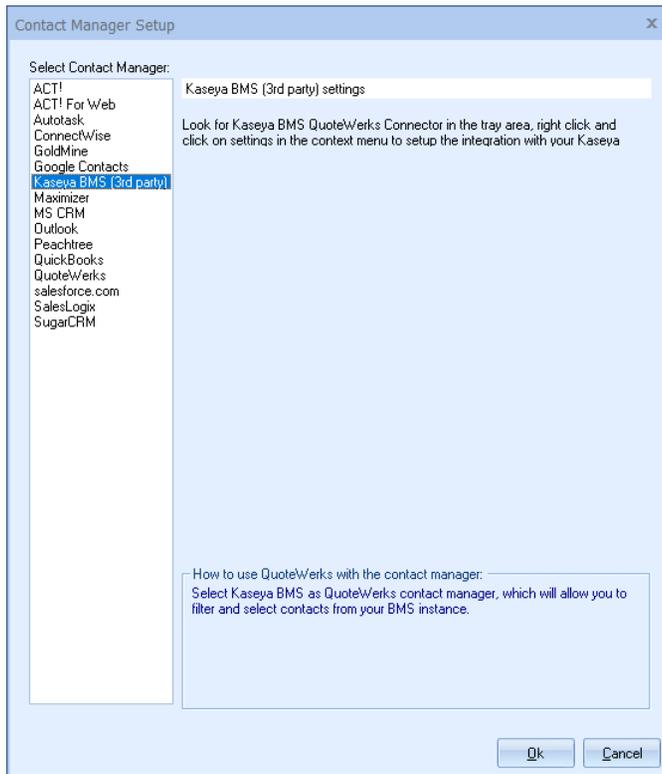
10. Select it from the QuoteWerks toolbar.



Contact Manager Setup

In this step you instruct QuoteWerks to use the BMS Contact Manager when selecting the contact for a quotation.

1. Select **Contacts** in the toolbar menu
2. Select **Setup Contact Manager**. A list of options displays.
3. Select **Kaseya BMS (3rd party)** from the list.
4. Click **Ok**.



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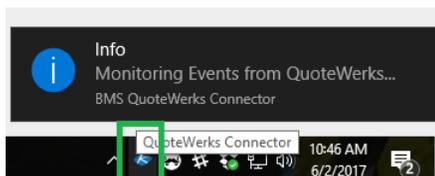
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Usage Guide

This section describes how to use the QuoteWerks tool.

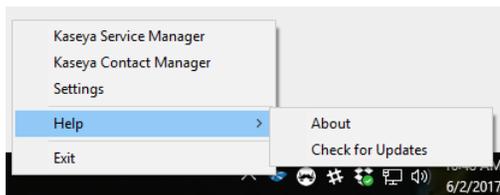
Tray Icon

When the QuoteWerks application starts, the *QuoteWerks Connector* tool starts automatically. The system tray displays a Kaseya icon.



The user can right click the icon to access various options:

- **Service Manager** - Open the BMS service manager.
- **Contact Manager** - Opens the BMS contact manager.
- **Settings** - Sets *QuoteWerks Connector* options.
- **Help**
 - **About**
 - **Check for Updates**
- **Exit**



Settings

Clicking the **Settings** option on the *QuoteWerks Connector* system tray icon displays the **Settings** window. Options include:

- Revising the authentication and security parameters defined while initially setting up the QuoteWerks integration tool.

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- Changing the server URL and tenant credentials, in addition to validating access to the QuoteWerks application backend API.

The screenshot shows the 'Settings' window for QuoteWerks BMS by Kaseya, with the 'Authentication' tab selected. The window title is 'Settings'. The QuoteWerks logo is on the left and the BMS by Kaseya logo is on the right. Below the logos are two tabs: 'Authentication' (selected) and 'Mapping'. The 'Authentication' section is divided into two parts. The top part is titled 'Server' and contains fields for 'Server URL' (https://staging.vorexlogin.com), 'Tenant Name' (trigital), and 'Integrator Credentials' (Username: global_admin, Password: *****). There are 'Test' buttons next to the Server URL and Password fields. The bottom part is titled 'QuoteWerks Security' and contains an 'Access Key' field (BMSAccessKey) and a 'Validate Access' button. At the bottom of the window are 'Save' and 'Cancel' buttons.

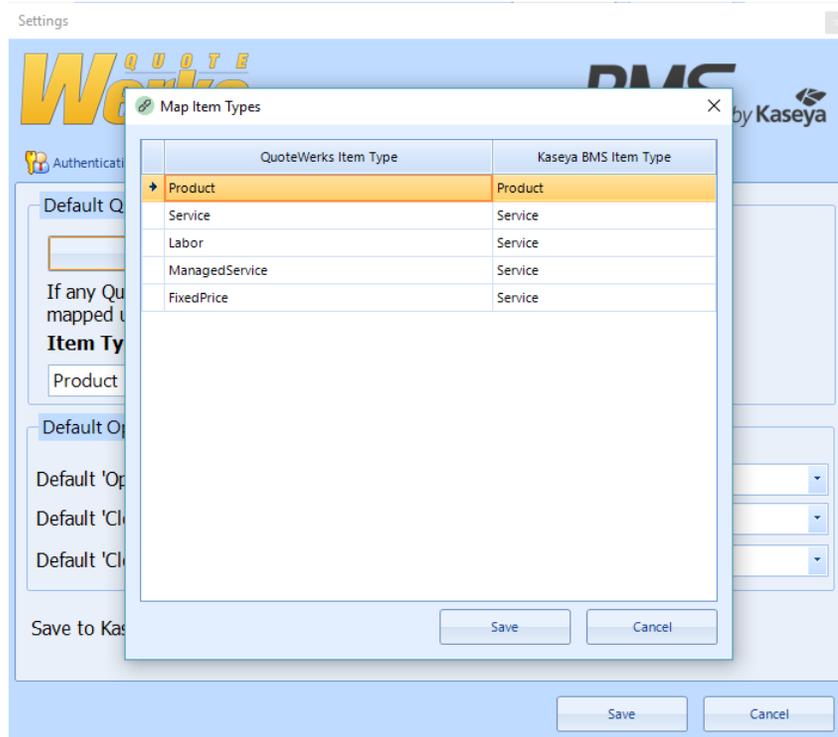
On the **Mapping** tab, you can configure advanced mapping options:

- Map QuoteWerks item types compared to BMS.
- Set Default Statuses for created opportunities.
- Set the option to save QuoteWerks quotations automatically in BMS.

The screenshot shows the 'Settings' window for QuoteWerks BMS by Kaseya, with the 'Mapping' tab selected. The window title is 'Settings'. The QuoteWerks logo is on the left and the BMS by Kaseya logo is on the right. Below the logos are two tabs: 'Authentication' and 'Mapping' (selected). The 'Mapping' section is divided into two parts. The top part is titled 'Default QuoteWerks Item Type for QuoteWerks Items with no Item Type' and contains a 'Map Item Type' button and a dropdown menu for 'Item Type' (set to Product). The bottom part is titled 'Default Opportunity Status' and contains three dropdown menus: 'Default 'Open' Status' (No Decision), 'Default 'Closed-Won' Status' (Won), and 'Default 'Closed-Lost' Status' (Lost). At the bottom of the window is a checkbox 'Save to Kaseya BMS on Saving Quote?' which is checked. At the bottom of the window are 'Save' and 'Cancel' buttons.

By default item types in QuoteWerks map to products in BMS automatically.

- *QuoteWerks Connector* checks for an item type while creating a quote in BMS. Products defined in the BMS inventory are checked to see if the item already exists. If not found, the item is created automatically in BMS as a product.
- You can change this default behavior by clicking the **Map Item Type** button.



In the second part of the mapping tab, the user can set the mapping defaults for opportunity statuses. BMS opportunities can be created or updated when saving or converting a quotation in QuoteWerks. The drop-downs mapped to each QuoteWerks status—open, lost, won—show the possible values to map to in BMS.

On the **Product Mappings** tab, you can configure advance product mapping options:

- Map QuoteWerks item types compared to BMS.
- Map Product Name for created product to BMS.
- Map Product Number for created product to BMS.

Note: "Product Name" and "Product Number" are required fields in BMS, these fields have to be filled with information in the Quote in QuoteWerks.

- Set Product UPC for created product to BMS.

- Set Product SKU for created product to BMS.

Settings

QuoteWerks **BMS** by Kaseya

Authentication Mapping **Product Mappings**

Default QuoteWerks Item Type for QuoteWerks Items with no Item Type

Map Item Type

If any QuoteWerks ItemType are not mapped use the following type:
Item Type:
Product

Product Properties Mapping

Product Name: Manufacturer Part #

Product Number: Internal Part #

Product UPC:

Product SKU:

Save Cancel

BMS Contact Manager

The **Contact Manager** enables users to select a BMS CRM account contact from within QuoteWerks and add it to a quote.

Note: See [Contact Manager Setup](#) (page ix) to configure this integration.

To access the **Contact Manager** window the user can:

- Click the contact or filter buttons in the **Sold To/Ship To** tab of the quotation being worked on.
- Use the context menu of the system **tray icon** (page 11).

QUICK LOOKUP Our Products Description Search For

Document Items Sold to / Ship to Sale Info Notes Custom Links

Sold to: Sam Awad

Company Kaseya Limited

Title

Address 2495 Village View Drive, Suite 100

City Henderson

State NV Zip 89074

Country UNITED STATES

Phone 888-888-8888 ext.

Mobile

Fax ext.

E-Mail sam.awad@kaseya.com

Profile 45400

Lookup Contact

Lookup: Account Name kaseya

BMS by Kaseya

Results

Drag a column here to group by this column.

Account	Location	First Name	Last Name	Email	Phone
Kaseya Limited	Las Vegas	Sam	Awad	sam.awad@kaseya.com	888-888-8888
Kaseya Limited	Las Vegas	Moe	Tarhini	moetarhini@kaseya.com	888-888-8888

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Use for:

Sold to Ship to Bill to All Close

Contact details updated in QuoteWerks.

- The list of contacts can be filtered by account name, first and last name, and other details.
- A contact is classified in the **use for** section, as **Sold To**, **Ship To**, **Bill To** or all three.

Note: Successful transfer of a quotation into BMS at a later stage requires a **Sold To** contact.

BMS Service Manager

The **Service Manager** enables users to add BMS services to a quotation in QuoteWerks.

Note: See [BMS Services Menu Item](#) (page vi) to configure this integration.

To access the **Service Manager** window:

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- Use the menu item of the **tray icon** (page 11) context menu.

Lookup Services

Lookup:

BMS by Kaseya

Results

Drag a column here to group by this column.

Name	Description	Unit Price	Unit Cost	Taxable	Active
Fixed Fee Service	Fixed Fee Service	\$144.00	\$120.00	<input type="checkbox"/>	True
Onsite Support	Onsite Support	\$180.00	\$180.00	<input type="checkbox"/>	True
Server Management	Server Management	\$250.00	\$200.00	<input type="checkbox"/>	True

Page 1 of 1 Page Size: 20 Qty: 1.00

Successfully loaded Service collection.

- Use this window to search for BMS defined services, set the required quantity, then add them to the list of items defined in the quotation.

Note: Adding the same item multiple times adds separate line items to the quotation, each with its own quantity.

Saving Quotations

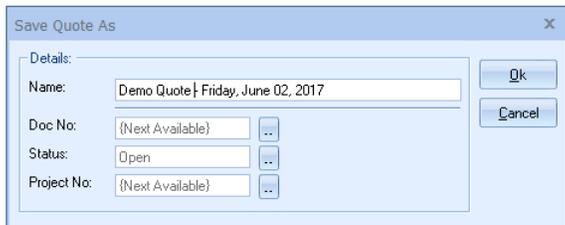
Saving a quotation in QuoteWerks can optionally transfer the quotation into BMS. Saving the quotation will also create or update opportunities and followup activities in BMS.

Note: This process only occurs if the **Save to BMS on Saving Quote** checkbox is checked in the **Settings** (page 11) > Mapping tab. If not checked, transfer occurs when the quote is converted in QuoteWerks.

Save to Kaseya BMS on Saving Quote?

Quotation Transfer Process

Once a user is satisfied with the items and details of a quote in QuoteWerks, the quotation is saved.



Save Quote As

Details:

Name: Demo Quote | Friday, June 02, 2017

Doc No: (Next Available) ..

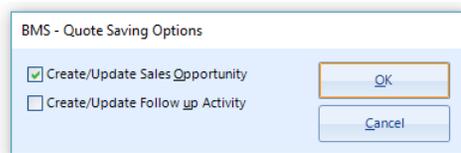
Status: Open ..

Project No: (Next Available) ..

Buttons: OK, Cancel

When integrated with BMS a small popup displays just after the save. The popup enables you to select two options for this particular transfer:

- **Create/Update Sales Opportunity**
- **Create/Update Follow up Activity**



BMS - Quote Saving Options

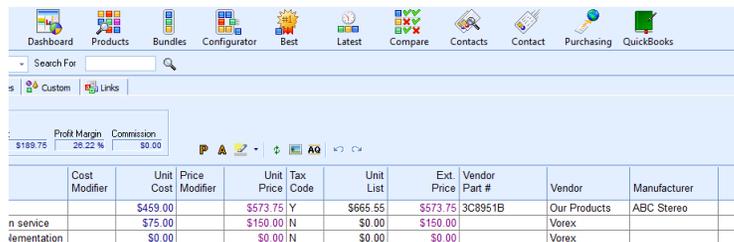
Create/Update Sales Opportunity

Create/Update Follow up Activity

Buttons: OK, Cancel

The transfer starts after clicking **OK**. The quotation is generated within BMS and includes all product and service line items from the QuoteWerks quotation.

Any products or services that do not already exist in BMS are automatically created.



Cost Modifier	Unit Cost	Price Modifier	Unit Price	Tax Code	Unit List	Ext. Price	Vendor Part #	Vendor	Manufacturer
	\$459.00		\$573.75	Y	\$665.55	\$573.75	3C8951B	Our Products	ABC Stereo
n service	\$75.00		\$150.00	N	\$0.00	\$150.00		Vorex	
ementation	\$0.00		\$0.00	N	\$0.00	\$0.00		Vorex	



Progress

Adding Product: Consulting and implemetati

Opportunity Creation/Update

If the **Create/Update Sales Opportunity** checkbox was checked, the **Opportunity** window below displays.

The screenshot shows the 'Opportunity' window with the following fields and values:

- Opportunity: << Create New Opportunity >>
- Opportunity: Demo Quote - Friday, June 02, 2017 (AAAQ1036)
- Type: Application Development
- Status: Open
- Description: (Empty text area)
- Close Date: Sunday, July 02, 2017
- Rating: Cold
- Source: Campaign
- Probability (%): 0.00
- Location: Main
- Contact: Business Main
- Sales Rep: Andrew McGovern

Buttons: Save, Cancel

Use this window to update an existing opportunity or create a new one. Enter data in the appropriate fields and click **Save**.

Follow Up Activity Creation/Update

If the **Create/Update Follow up Activity** checkbox was checked, the **Create Activity** window below displays.

The screenshot shows the 'Create Activity' window with the following fields and values:

- Subject: << Create New Activity - DOC AAAQ1036 >>
- Due Date: Friday, June 09, 2017
- Type: Appointment
- Assign To: Andrew McGovern
- Specify Time: (checked)
- Start Time: 5:27 PM
- End Time: 5:27 PM
- Reminder: - none -
- Notes: (Empty text area)

Buttons: Save, Cancel

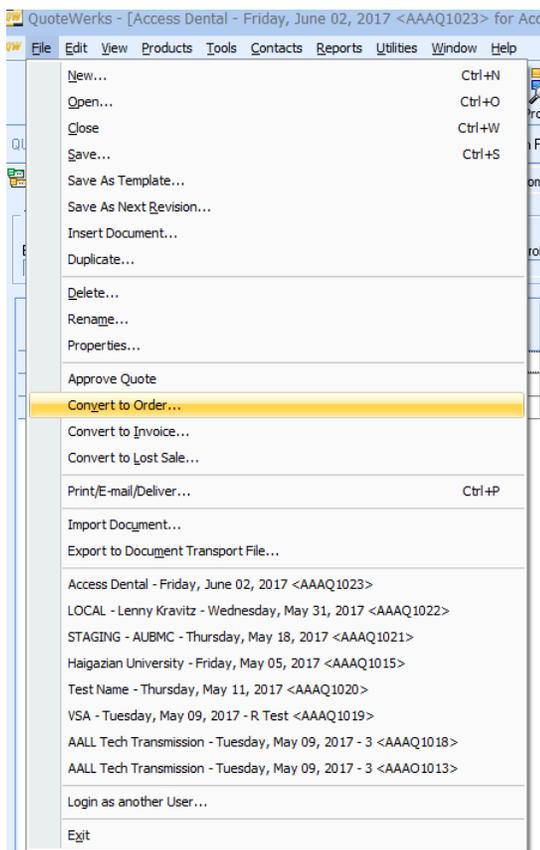
Use this window to update an existing followup activity or create a new one. Enter data in the appropriate fields and click **Save**.

This followup activity will be linked to both the created or updated opportunity and to the created or updated quotation. The followup activity will be added to the calendar of the assigned employee.

Converting Quotations

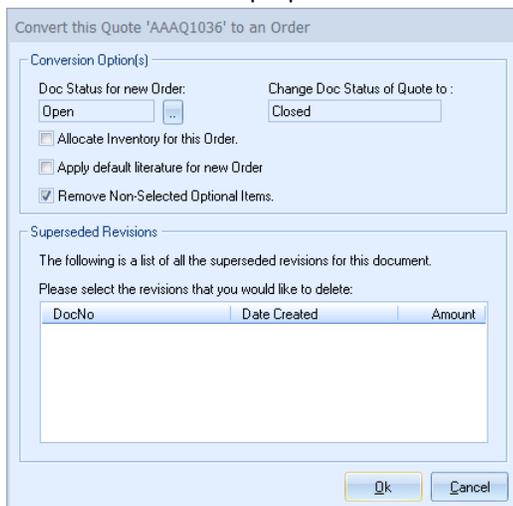
When QuoteWerks converts a quotation into an order the corresponding CRM quotation in BMS is marked as accepted. BMS users can then convert the order into projects, contracts, and sales orders. To convert a QuoteWerks quotation to an order:

1. Select the File > **Convert To Order** sub menu.



A **Convert Quote** popup window displays.

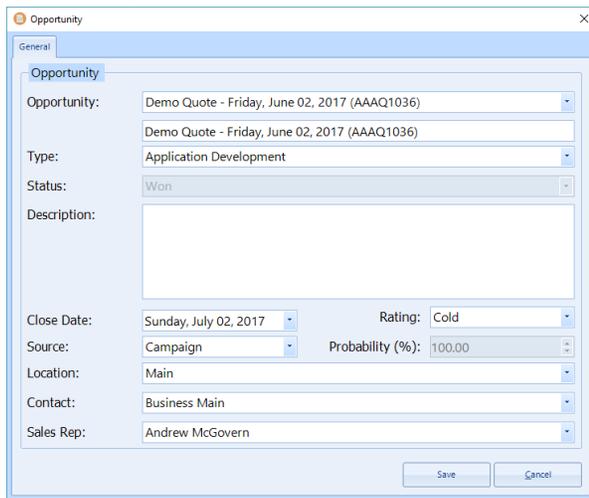
This window allows users to specify whether this quotation was won or lost, and set other QuoteWerks related properties.



2. Click **OK** to trigger the same workflow as **saving a quotation** (page 16). Differences include:
 - Related opportunities will be marked as **Won** or **Lost**.
 - The probability of related opportunities will be set to **100%** or **0%** based on whether the opportunity was **Won** or **Lost**.

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➤ The quotation in BMS will have the status **Accepted**.



The screenshot shows a software window titled "Opportunity" with a "General" tab. The form contains the following fields:

- Opportunity:** Demo Quote - Friday, June 02, 2017 (AAAQ1036)
- Type:** Application Development
- Status:** Won
- Description:** (Empty text area)
- Close Date:** Sunday, July 02, 2017
- Rating:** Cold
- Source:** Campaign
- Probability (%):** 100.00
- Location:** Main
- Contact:** Business Main
- Sales Rep:** Andrew McGovern

At the bottom right of the window are "Save" and "Cancel" buttons.