

BMS QuoteWerks Integration

User Guide

Version 4.0.29

February 4, 2020

Copyright Agreement

The purchase and use of all Software and Services is subject to the Agreement as defined in Kaseya's "Click-Accept" EULATOS as updated from time to time by Kaseya at

http://<u>www.kaseya.com</u>/legal.aspx. If Customer does not agree with the Agreement, please do not install, use or purchase any Software and Services from Kaseya as continued use of the Software or Services indicates Customer's acceptance of the Agreement."

Contents

Contents

| Introduction | i |
|------------------------------------|-----|
| Prerequisites | i |
| Installation | i |
| Setup Wizard Configuration | ii |
| QuoteWerks Configuration | ii |
| Set the Access Key | iii |
| Setup BMS Credentials | vi |
| QuoteWerks Configuration | vi |
| BMS Services Menu Item | vi |
| Contact Manager Setup | ix |
| Usage Guide | 11 |
| Tray Icon | 11 |
| Settings | 11 |
| BMS Contact Manager | 14 |
| BMS Service Manager | 15 |
| Saving Quotations | 16 |
| Quotation Transfer Process | 17 |
| Opportunity Creation/Update | 18 |
| Follow Up Activity Creation/Update | 18 |
| Converting Quotations | 18 |
| | |

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.

| | s complete the following window |
|----------------------------|---|
| 🔀 BMS QuoteWerks Connector | Setup — 🗆 🗙 |
| | Completed the BMS QuoteWerks Connector Setup Wizard Click the Finish button to exit the Setup Wizard. |
| | Launch BMS QuoteWerks Connector |
| | Back Finish Cancel |

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.

| 🔗 Setup | | × | |
|---|------------------------|----------------------|--|
| Setup BMS / | QuoteWerks Integration | Į Į | |
| INI Setup will attempt to communicate with your QuoteWerks installation and setup the integration with your Kaseya accound. When the setup completes: • The Kaseya connector will be automatically started with QuoteWerks. Click Next to continue, or Cancel to exit Setup. • Click Next to continue, or Cancel to exit Setup. | | | |
| | Starting QuoteWerks | | |
| QueteWarks Autom | Progress | | |
| QuoteWerks Automated Login | | | |
| Ø Setup | | × | |
| Setup BMS / | QuoteWerks Integration | نې | |
| INI Setup will attempt to communicate with your QuoteWerks installation and setup the integration with your Kaseya accound. When the setup completes: • The Kaseya connector will be automatically started with QuoteWerks. Click Next to continue, or Cancel to exit Setup. | | | |
| | Setup Completed | | |
| | | | |
| 😨 <u>Help</u> | | < Back Next > Cancel | |

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.



Tools|Options menu and grant this developer access key access to the QuoteWerks databases.

| P Help | < Back | Next > | Cancel |
|--------|--------|--------|--------|

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.

| AU | Less Rey. | |
|----------------------|--|---------------------------------------|
| BM | ISAccessKey Validate Access | |
| f t ce A Fo | Your Developer Access Key access request is still pending approval by the QuoteWerks administrator. | Verks. n abov / tab o to the |
| | ОК | |

Access Kou

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

| Options X | | | | |
|---|--|--|--|--|
| Documents Document Items Payment Leasing Field Links Print Misc Regional Synchronization Cloud Account Security Installation Accounting Company | | | | |
| Enable individual Product Data Source level security. Enable Audit Trail Backup files | | | | |
| Audit Trail Transaction Record Macros | | | | |
| | | | | |
| | | | | |
| Allow file to be opened by installations using a different serial #. | | | | |
| ☐ Record failed login attempts ☐ Record successful login/logoff (includes duration) | | | | |
| Edit Developer Access Key | | | | |
| Durchers Access Key | | | | |
| Developer Access Key BMSAccessKey | | | | |
| API Access Level Pending Approval * | | | | |
| The QuoteWerks backend de a method for developers to ga write to the QuoteWerks data or revoke this access. | | | | |
| Developer Access Key Access Level | | | | |
| BMSAccessKey Pending Approval | | | | |
| | | | | |
| | | | | |
| | | | | |
| New Edit Delete | | | | |
| | | | | |
| | | | | |
| them to take effect. | | | | |

- 5. Select the Security tab.
- 6. Locate the API Access group box.

You will see your access key added to the list, with an access level of Pending Approval.

- 7. Select this item and click the Edit button
- 8. Change the access level to Full, then click Ok.

| Edit Developer Access Key | | |
|---------------------------|---------------------------|--|
| Developer Access Key | BMSAccessKey | |
| Access Level | Full 👻 | |
| | <u>O</u> k <u>C</u> ancel | |

9. Click **Ok** on the options window to confirm the changes.

The access key has been approved.

10. Verify approval by returning to the setup wizard and clicking the Validate Access button.

t D

| Access Key: | |
|------------------------------|--|
| BMSAccessKe | y Validate Access |
| If the access a be submitted | $\frac{1}{2}$ |
| A QuoteWerk Tools Options | Your Developer Access Key has full access from QuoteWerks. 1 |
| QuoteWerks (| ОК |

Setup BMS Credentials

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

| Setup BMS Credentials Please supply your Kaseya credentials to be user when connect | {Õ}~ | | |
|---|--------------------|--|--|
| Please supply your Kaseya credentials to be user when connect | | | |
| QuoteWerks. • Test the connection to the server where your tenant is howed in the credentials supplied. • Test the authentication with the credentials supplied. Click Next to continue, or Cancel to exit Setup. Server Server URL: Tenant Name: Username: Password: | ing with osted. | | |
| Help Kext > | Cancel | | |
| 1. First, specify the server URL where your account is host | ted. For exam | | |
| <pre>https://psa.pulseway.com</pre> | | | |
| <pre>https://psaemea.pulseway.com</pre> | | | |
| https://www.vorexlogin.com | | | |
| | | | |

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.

| Customize Menus for 'Administrator' | x | | | |
|---|-------------------|--|--|--|
| Customizing Menus You can create custom menu items for the WorkBook, and Product Lookup menus. | | | | |
| Menus available for customization: | | | | |
| File Menu Edit Menu Products Menu Tools Menu Contacts Menu Reports Menu Utilities Menu Utilities Menu Product Lookup Context Menu | Define Menu Items | | | |
| | | | | |

- 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.

| Create new | 'Products Menu' Item | | |
|--|--|--|--|
| | Disabled 🗖 | | |
| Caption: | BMS Services | | |
| Action: | Run External Application | | |
| | File 📼 | | |
| Command: | C:\Program Files (x86)\Kaseya\QWConnector \QWConnector.exe -p | | |
| | 🛃 🖅 | | |
| | When multiple items selected, run for each item. | | |
| Start In: | | | |
| Window: | Normal 🚽 🗖 Publish to All User Menus | | |
| Owner: | Administrator 🔹 🔽 Publish to My Menu | | |
| | | | |
| Access Hight | S. View | | |
| 8a ≤Inside S | Sales> | | |
| Administr | ator | | |
| 🍇 < Outsid | e Sales> | | |
| Administr | ator | | |
| 🍇 <shippir< td=""><td>ng> 🗖</td></shippir<> | ng> 🗖 | | |
| {Group ha | s no members} | | |
| 8 Administrator | | | |
| | | | |
| | | | |
| | | | |
| | <u>O</u> k <u>C</u> ancel | | |

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.

| Publish Menu Items for Displa | ıу | | | |
|-----------------------------------|---------------------|------------------|--|--|
| 'Products Menu' | | | | |
| Menu Items Apply to | Menu Items Apply to | | | |
| Menu Items to display for 'Admini | strator': | | | |
| Menu Item | Owner | Add | | |
| | | Eemove • • | | |
| | | | | |
| <u> </u> | | | | |

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.

| Calcal Casta Manager | |
|---|---|
| ACT! | Kaseva BMS (3rd party) settings |
| ACT1 For Web Autotask ConnectWise GoldMine Google Contacts Kasewa BMS (3rd party) Maximizer MS CRM Outlook Peachtree Quict&Books QuicteWerks salesforce.com SalesLogix SugarCRM | Look for Kaseya BMS QuoteWerks Connector in the tray area, right click and click on settings in the context menu to setup the integration with your Kaseya |
| | ☐ How to use QuoteWerks with the contact manager. Select Kaseya BMS as QuoteWerks contact manager, which will allow you to filter and select contacts from your BMS instance. |
| | <u>k</u> |

| Introduction | i |
|----------------------------|-----|
| Prerequisites | i |
| Installation | i |
| Setup Wizard Configuration | ii |
| QuoteWerks Configuration | ii |
| Set the Access Key | iii |

| Setup BMS Credentials | vi |
|------------------------------------|----|
| QuoteWerks Configuration | vi |
| BMS Services Menu Item | vi |
| Contact Manager Setup | ix |
| Usage Guide | 11 |
| Tray Icon | 11 |
| Settings | 11 |
| BMS Contact Manager | 14 |
| BMS Service Manager | 15 |
| Saving Quotations | 16 |
| Quotation Transfer Process | 17 |
| Opportunity Creation/Update | |
| Follow Up Activity Creation/Update | |
| Converting Quotations | |
| - | |

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

| | \sim | 🖻 😴 🗱 🕄 🖓 6/2/ |
|--|--------|-------------------|
| Exit | | Check for Updates |
| Help | > | About |
| Kaseya Service Manager Kaseya Contact Manager Settings | | |

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

| Settings | | x |
|--|---|---|
| Authentication | | BMS by Kaseya |
| Server | NG | |
| Server URL: | https://staging.vorexlogin.com | Test |
| Tenant Name: | trigital | |
| Integrator Cre | dentials: | |
| Username: | global_admin | |
| Password: | ***** | Test |
| QuoteWerks Se To have access lookups, vendor QuoteWerks sec application to a | curity to QuoteWerks backend database th rs and more, a developer key must be curity settings, so that QuoteWerks w cces to such information. | at include information such as e given full rights access in ill know that it is Ok to allow this |
| Access Key: | BMSAccessKey | Validate Access |
| | | Save Cancel |

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.

| Settings | x |
|--|---------------------------|
| Werks. | BMS by Kaseya |
| Authentication Mapping | |
| Default QuoteWerks Item Type for QuoteWerks | s Items with no Item Type |
| Map Item Type | |
| If any QuoteWerks ItemType are not mapped use the following type: Item Type: | |
| Product | |
| Default Opportunity Status | |
| Default 'Open' Status: | No Decision |
| Default 'Closed-Won' Status: | Won |
| Default 'Closed-Lost' Status: | Lost |
| Save to Kaseya BMS on Saving Quote? | |
| | Save Cancel |

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.

| Settings | | | |
|----------------|---|----------------------|----------------------|
| Ma | 8 | Map Item Types | by Kaseya |
| 强 Authenticati | | QuoteWerks Item Type | Kaseya BMS Item Type |
| Default O | ٠ | Product | Product |
| Delault Q | | Service | Service |
| | | Labor | Service |
| If any Ou | | ManagedService | Service |
| mapped i | | FixedPrice | Service |
| Item Ty | | | |
| Product | | | |
| Hoddet | | | |
| Default O | | | |
| | | | |
| Default 'Or | | | _ |
| Default 'Cl | | | - |
| Default 'Ch | | | |
| Serdare Ch | | | |
| Course has Mar | | | |
| Save to Kas | | | Cancel |
| | | | |
| | | | Save Cancel |
| | | | |

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 | |
|----|---|------------------------|
| | Werks. | BMS by Kasey |
| | Authentication and Mapping a Product Mappings | |
| | Default QuoteWerks Item Type for QuoteWerks I | tems with no Item Type |
| | Map Item Type | |
| n | If any QuoteWerks ItemType are not | |
| | mapped use the following type: | |
| | Item Type: | |
| | Product | |
| | Propduct Properties Mapping | |
| | Product Name: | Manufacturer Part # |
| | Product Number: | Internal Part # |
| 25 | Product UPC: | |
| | Product SKU: | |
| | | |
| | | |
| | | |
| , | | Save |
| | | Save |

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 LOO | OKUP Our Products | scriptio | n | Search For | Q | | | | |
| B Docume | 🗄 Document Items 📧 Sold to / Ship to 🂫 Sale Info 📔 Notes 🔓 🕼 Custom 🖏 Units | | | | | | | | |
| Sold to: | | s. | Laskur (| | N 20. | | | | ~ |
| | 🗿 - 📕 🗿 🔿 🆑 🔍 🗖 | 7 | 🔊 соокир С | ontact | | | | | ~ |
| Company | Sam Awad | C | | | | | | | |
| Contact | Kaseya Limited | C | Lookup | : Account Na | me 🔹 🖡 | aseya | | KN | |
| Title | | Т | | | | | | | by Kaseya |
| Address | 2495 Village View Drive, Suite 100 | A | Results | | | | | | |
| | | | | | | Drag a column here to g | group by this column. | | |
| | | | | Account | Location | First Name | Last Name | Email | Phone |
| City | Henderson | 9 | Kaseya | Limited | Las Vegas | Sam | Awad | sam.awad@kaseya.com | 888-888-8888 |
| State | NV Zip 89074 | S | Kaseya | Limited | Las Vegas | Moe | Tarhini | moe.tarhini@kaseya.com | 888-888-8888 |
| Country | UNITED STATES | 5 | | | | | | | |
| Phone | 888-888-8889 ext. | 1 | | | | | | | |
| Mobile | | ~ | | | | | | | |
| F dx | ext. | 1 | | | | | | | |
| Drofile | sam.awadi@kaseya.com | 1 | | | | | | | |
| Tionic | 45400 | | | | | | | | |
| | 40400 | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | \odot | Page 1 | 🕯 of 1 🛛 🔊 | $\mathbf{\mathfrak{d}}$ | | | Page Size: 20 • |
| | | | Use for: | | | | | | |
| | | | Solo | to Shi | ip to Bill to | All | | | Close |
| | | 14 | | | | | | | |

- 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:

Usage Guide

| Lookup Services | | | | | - 0 |
|-------------------------|----------------------------------|-------------|-----------|--------------------|--------------|
| Lookup: Filter services | Q | | E | BMS | 5 by Kase |
| Results | | | | | |
| | Drag a column here to group by t | his column. | | | |
| Name | Description | Unit Price | Unit Cost | Taxable | Active |
| Fixed Fee Service | Fixed Fee Service | \$144.00 | \$120.00 | | True |
| Onsite Support | Onsite Support | \$180.00 | \$180.00 | | True |
| Server Management | Server Management | \$250.00 | \$200.00 | | True |
| | | | | | |
| | | | | | |
| Page 1 : of 1 | | Qty: 1.0 | 0 0 | Page Select/Add | Size: 20 |

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

 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 A | S | x |
|--------------|------------------------------------|----------------|
| Details: | Demo Quote Friday, June 02, 2017 | <u>0</u> k |
| Doc No: | {Next Available} | <u>C</u> ancel |
| Status: | Open . | |
| Project No: | {Next Available} | |

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 | <u>o</u> k |
| Create/Update Follow up Activity | <u>C</u> ancel |

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.

| | d Produ | cts Bund | les Conf | igurator E | est |) Latest | Compare | (Contacts | ر Contact | Purchasing | QuickBooks | |
|-------------|-------------------------|----------------------|-------------------|------------------|-------------|--------------|-----------|------------------------|--------------|--------------|--------------|--|
| - Search F | To | 9 | | | | | | | | | | |
| s 🍄 Custon | n 🛛 🐻 Links | \$ | | | | | | | | | | |
| 9189.75 | fit Margin C 28.22 % | Commission \$0.00 | P A | . ⊻ - ¢ | E AQ | ыю | | | | | | |
| | Cost Modifier | Unit Cost | Price Modifier | Unit Price | Tax Code | Unit List | E: Pri | t. Vendor ce Part # | | Vendor | Manufacturer | |
| | | \$459.00 | | \$573.75 | Y | \$665.55 | \$573. | 75 3C8951 | в | Our Products | ABC Stereo | |
| n service | | \$75.00 | | \$150.00 | N | \$0.00 | \$150. | 00 | | Vorex | | |
| lementation | | \$0.00 | | \$0.00 | N | \$0.00 | \$0. | 00 | | Vorex | | |

| Prog | ress |
|------|---|
| Σ | Adding Product: Consulting and implemetatie |

Opportunity Creation/Update

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

| Opportunity | | | | × |
|--------------|-----------------------------|---------------------|--------------------|----|
| General | | | | |
| Opportunity | | | | |
| Opportunity: | << Create New Opportunity | y >> | | - |
| | Demo Quote - Friday, June (| 02, 2017 (AAAQ1036) | | |
| Type: | Application Development | | | • |
| Status: | Open | | | * |
| Description: | | | | |
| | | | | |
| | | | | |
| | | | | |
| Close Date: | Sunday, July 02, 2017 🔹 | Rating: | Cold | • |
| Source: | Campaign 🔹 | Probability (%): | 0.00 | \$ |
| Location: | Main | | | - |
| Contact: | Business Main | | | • |
| Sales Rep: | Andrew McGovern | | | - |
| | | | | |
| | | | Save <u>C</u> ance | |

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.

| ③ Create Activity | | | | | | ; | × |
|-------------------|------------------------|------|------|-------------|----------|--------|---|
| Subject: | << Create New Activity | - DC | C A/ | AQ1036 > > | | | |
| Due Date: | Friday, June 09, 2017 | • | [| Specify Tim | e | | 1 |
| Type: | Appointment | - | | Start Time: | 5:27 PM | ۰. | |
| Assign To: | Andrew McGovern | * | | End Time: | 5:27 PM | ۵. | |
| | | | | Reminder: | - none - | • | |
| Notes: | | | l | | | | 1 |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | 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:

💆 QuoteWerks - [Access Dental - Friday, June 02, 2017 <AAAQ1023> for Acc Eile Edit View Products Tools Contacts Reports Utilities Window Help ro <u>N</u>ew.... Ctrl+N Open... Ctrl+O Ctrl+W Close QL <u>S</u>ave... Ctrl+S 멅 Save As Template... Save As Next Revision... Insert Document... Duplicate... Delete... Rename... Properties... Approve Quote Convert to Order Convert to Invoice... Convert to Lost Sale... Print/E-mail/Deliver... Ctrl+P Import Document... Export to Document Transport File... Access Dental - Friday, June 02, 2017 <AAAQ1023> LOCAL - Lenny Kravitz - Wednesday, May 31, 2017 <AAAQ1022> STAGING - AUBMC - Thursday, May 18, 2017 <AAAQ1021> Haigazian University - Friday, May 05, 2017 <AAAQ1015> Test Name - Thursday, May 11, 2017 <AAAQ1020> VSA - Tuesday, May 09, 2017 - R Test <AAAQ1019> AALL Tech Transmission - Tuesday, May 09, 2017 - 3 <AAAQ1018> AALL Tech Transmission - Tuesday, May 09, 2017 - 3 <AAAO1013> Login as another User... Exit

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.

| Convert this Quote 'AAAQ | 1036' to an Order | |
|--|---|-----------------------|
| Conversion Option(s) | | |
| Doc Status for new Order: | Change Doc Stat | us of Quote to : |
| Open | Closed | |
| Allocate Inventory for the second | his Order. | |
| 📃 Apply default literature f | for new Order | |
| Remove Non-Selected | Optional Items. | |
| - Superseded Revisions | | |
| | | |
| The following is a list of all | the superseded revisions for this | document. |
| The following is a list of all Please select the revisions | the superseded revisions for this that vou would like to delete: | : document. |
| The following is a list of all Please select the revisions DocNo | the superseded revisions for this that you would like to delete: Date Created | document. |
| The following is a list of all Please select the revisions DocNo | the superseded revisions for this that you would like to delete: Date Created | : document. Amount |
| The following is a list of all Please select the revisions DocNo | the superseded revisions for this that you would like to delete: Date Created | : document. |
| The following is a list of all Please select the revisions DocNo | the superseded revisions for this : that you would like to delete: Date Created | : document. |
| The following is a list of all Please select the revisions DocNo | the superseded revisions for this : that you would like to delete: Date Created | : document. |
| The following is a list of all Please select the revisions DocNo | the superseded revisions for this : that you would like to delete: Date Created | Amount |
| The following is a list of all Please select the revisions DocNo | the superseded revisions for this : that you would like to delete: Date Created | Amount |

- 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.

The quotation in BMS will have the status Accepted.

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