

# Linked Systems 2014 for QuoteWerks - Modules

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## Overview of Modules

Linked Systems 2014 for QuoteWerks can include up to 7 modules depending on what options you choose to order. These are small modules that can be integrated into the QuoteWerks and Great Plains user interface or in some cases can be used standalone without running the QuoteWerks/great plains applications.

### 1. LAUNCHES FROM QUOTEWERKS MENU

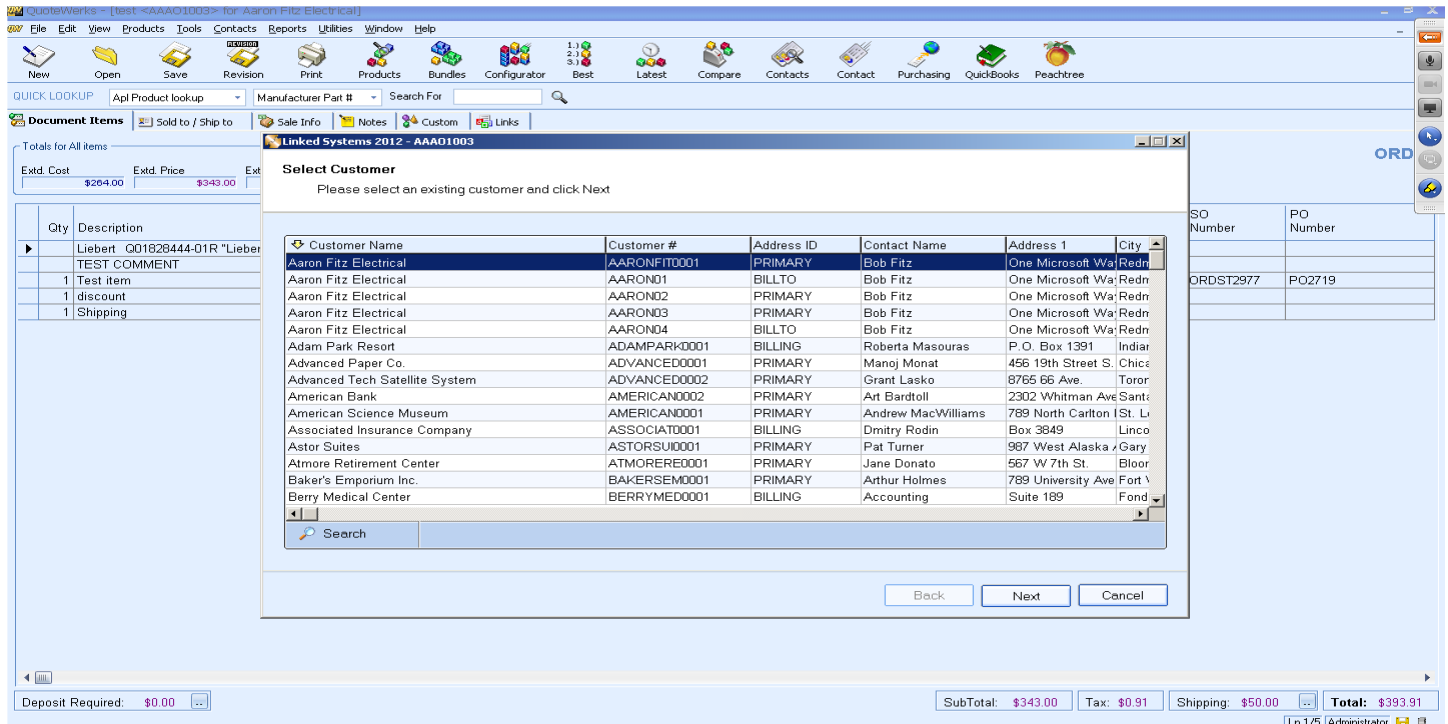
- a. **One-At-a-Time synch** - Export the current quote/order on your screen in QuoteWerks.
- b. **Quote Checker** - Salespeople can check the quote in QuoteWerks for problems.
- c. **Salesperson Dashboards** – Salesperson can do order inquiries and lookup other GP information from Quotewerks.
- d. **Print Order / Po / Picking ticket** - Print a Great Plains purchase order, sales order or invoice right from QuoteWerks without affecting the user licenses of MS Dynamics GP.

### 2. LAUNCHES FROM EXTERNAL SHORTCUT OR FROM GREAT PLAINS

- a. **Batch Synch** – Export multiple orders from Quotewerks.
- b. **Accounting Dashboards** – Accounting staff can keep organized with automatic lists of items to order, orders processed, orders in process. Accounting staff can perform maintenance that is tedious in gp like voiding and resynching orders, unlink po's from so's, deleting po's and orders, changing vendors on po's, ordering items that still need to be ordered, etc.
- c. **Additional Reports** - Additional management reports which can combine information from Quotewerks and Great Plains and/or your CRM into the same report.

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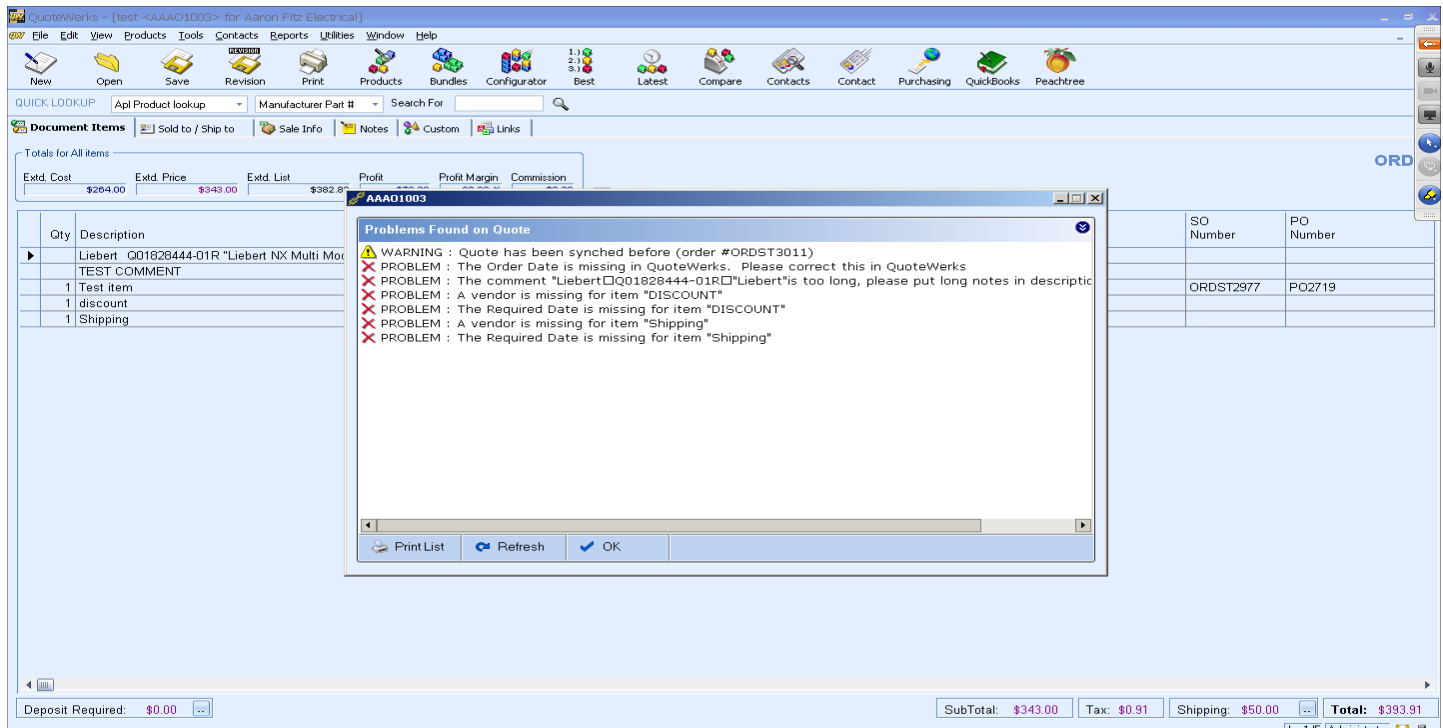
## ONE-AT-A-TIME SYNCH



- **FUNCTION** : Export the current quote/order on your screen in QuoteWerks.
- **HOW TO LAUNCH** : Select Tools menu from Quotewerks and select "Export to GP"
- **LICENSING** : Concurrent user (included with workstation licenses)
- **INTERFACE** : Wizard with steps to confirm customer, billto, shipto, new items, new customers, and purchase orders.
- **OPTIONS** : All options for this module are listed in the worksheets

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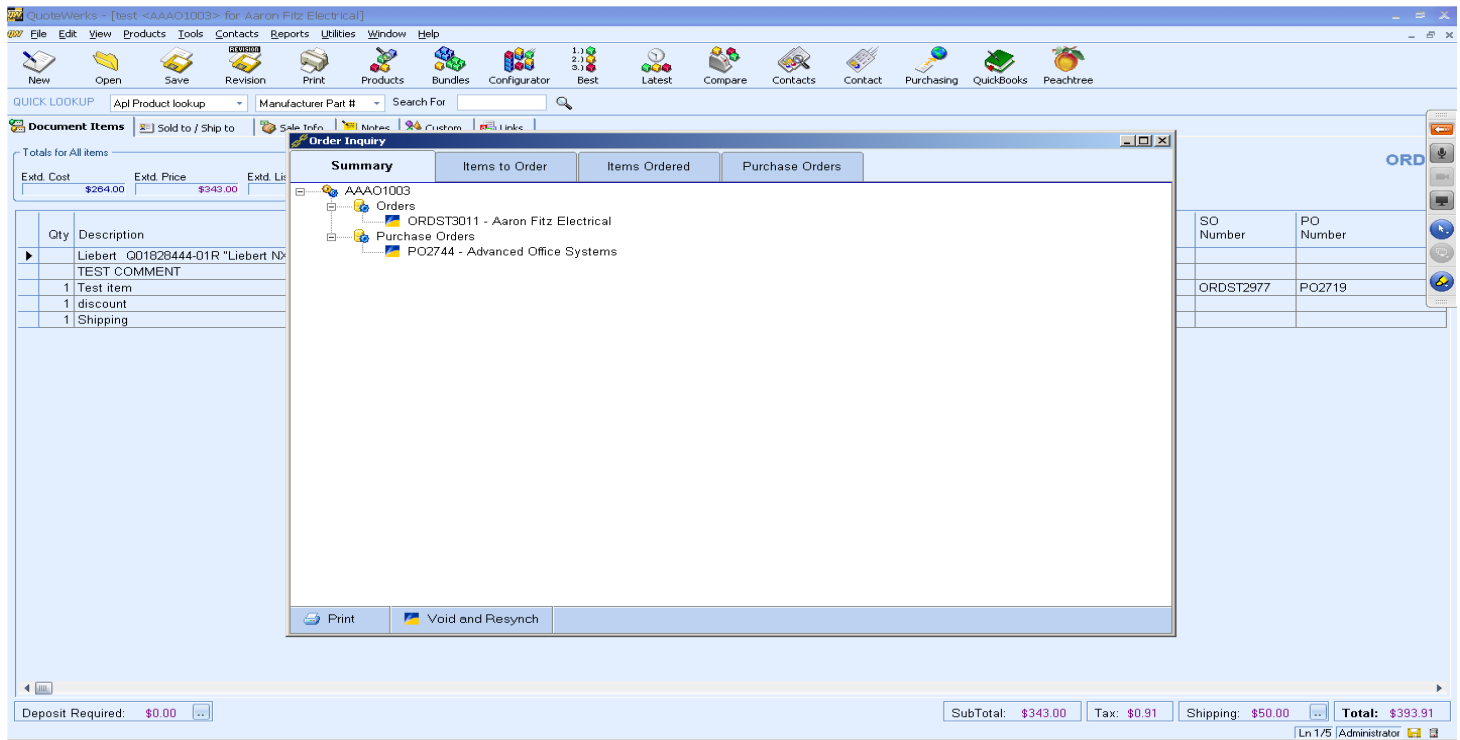
## QUOTE CHECKER



- **FUNCTION** : Salespeople can check the quote in QuoteWerks for problems.
- **HOW TO LAUNCH** : Select Tools menu from Quotewerks and select "Check Quote"
- **LICENSING** : Concurrent user (included with workstation licenses)
- **INTERFACE** : Wizard with steps to confirm customer, billto, shipto, new items, new customers,, select purchase orders and view log of orders/po's created.
- **OPTIONS** : Warnings that the user selects for one-at-a time synch and batch synch will be displayed here for the current quote in quotewerks. In addition, the user can display a vendor worksheet tab to capture info like quote #, vendor notes, tracking numbers, etc per vendor (rather than per item which quotewerks uses)

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## SALESPERSON DASHBOARDS



- **FUNCTION** : Salesperson can do order inquiries and lookup other GP information from Quotewerks.
- **HOW TO LAUNCH** : Select Tools menu from Quotewerks and select "Dashboard"
- **LICENSING** : Concurrent user (included with workstation licenses)
- **INTERFACE** : Tabbed interface with drill downs
- **OPTIONS** : Salespeople can do order inquiries and lookup customer, order, inventory and purchase order information from QuoteWerks in real-time without affecting the user licenses of MS Dynamics GP. Tabs available include : a) order inquiry for current quote selected in quotewerks - including detail like items ordered, items to order and purchase orders with drill downs to more detail, b) Lookup customer, order, inventory and purchase order info unrelated to current order in quotewerks, c) personal dashboards that show only the current salesperson's open orders or orders in progress. We can customize these dashboards any way you want per user.

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## PRINT ORDER / PO

The screenshot displays the QuoteWerks software interface. A 'Documents for AAA01003' dialog box is open, showing a list of available documents for printing. The list includes 'ORDST3011 - Packing Slip' and 'PO2744 - Advanced Office Systems'. To the right of the list are buttons for 'Print', 'Preview', 'PDF', 'Email', and 'Edit'. The background shows a quote/order form with fields for 'Totals for All Items', 'Deposit Required', 'SubTotal', 'Tax', 'Shipping', and 'Total'.

GP Item Part #	SO Number	PO Number
32X IDESGH9AB	ORDST2977	PO2719
DISCOUNT		
Shipping		

Ext. Cost	Ext. Price	Ext. List	Profit	Profit Margin	Commission
\$264.00	\$343.00	\$382.80	\$79.00	23.03 %	\$0.00

SubTotal: \$343.00 Tax: \$0.91 Shipping: \$50.00 Total: \$393.91

- **FUNCTION** : Print a Great Plains purchase order, sales order, picking ticket or invoice. This can be done for current quote/order on screen in quotewerks or the user can print any gp order/invoice from the dashboard (dashboard and print module work together)
- **HOW TO LAUNCH** : Select Reports menu from Quotewerks and select "Print Order/PO"
- **LICENSING** : Concurrent user (included with workstation licenses)
- **INTERFACE** : List of printouts available for current quote in quotewerks with buttons to print, preview, pdf, email and edit the printable forms.
- **OPTIONS** : Stock order, picking ticket, invoice and po forms that look like unmodified Dynamics GP forms are provided. We can customize these forms or add new forms to spec (billable time) or you can use the built in interface provided to customize them. Since our system reads info from quotewerks, great plains, linked systems and other crm systems, we do not use the dynamics reports writer, we use our own report writer which looks similar to Quotewerks' report writer.

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## BATCH SYNCH

**Linked Systems 2012**

**Doc Selection**  
Select the transactions you wish to export

Filter Options  
ORDER / ALL DOCS

Selected	Document Number	Date	Customer	SalesRep
<input checked="" type="checkbox"/>	AAAO1001	11/1/2006	Effective Solutions	Administrator
<input checked="" type="checkbox"/>	AAAO1002	8/18/2009	American Electrical Contractor	IAN M.
<input type="checkbox"/>	AAAO1003	8/28/2009	Aaron Fitz Electrical	IAN M.
<input type="checkbox"/>	AAAO1003-01	8/28/2009	Aaron Fitz Electrical	IAN M.
<input checked="" type="checkbox"/>	AAAO1004	7/15/2010	Eric Siko	Administrator
<input type="checkbox"/>	AAAO1005	7/27/2010	Crop King	Administrator
<input checked="" type="checkbox"/>	AAAO12345679	8/28/2009	TEST Central Illinois Distributing TEST	Administrator
<input type="checkbox"/>	AAAO12345680	5/29/2012	XYZ Test Company	Administrator
<input type="checkbox"/>	AAAO12345681	8/28/2009	Teklinks	Administrator
<input type="checkbox"/>	AAAO12345682	8/28/2009	Adam Park Resort	Administrator
<input type="checkbox"/>	AAAO12345683	1/17/2013	Teklinks	Administrator
<input type="checkbox"/>	AAAO12345684	8/28/2009	Adam Park Resort	Administrator

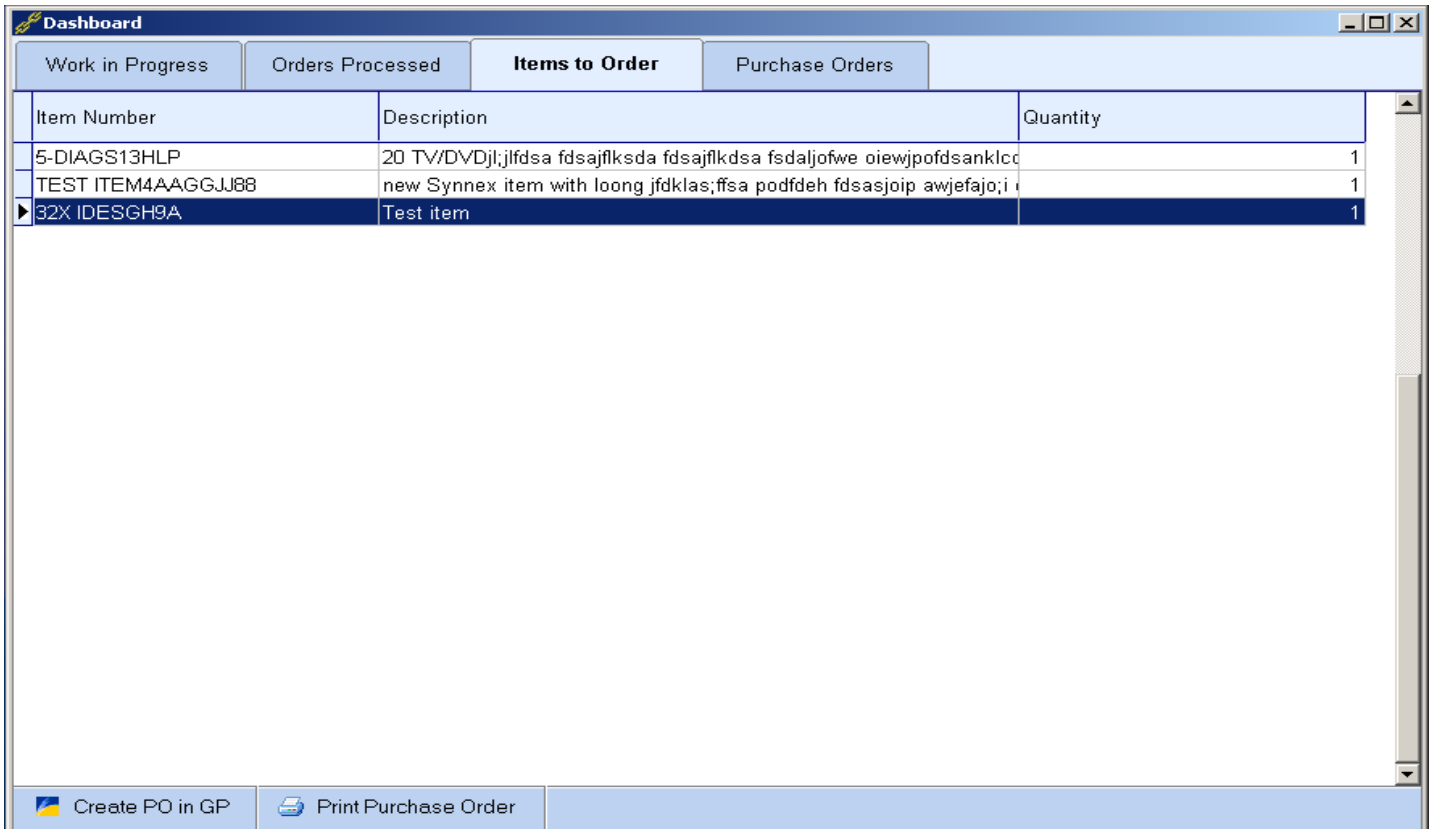
Select All Unselect All Search Refresh

Back Next Cancel

- **FUNCTION** : Export multiple orders from Quotewerks
- **HOW TO LAUNCH** : Run directly from a windows/citrix shortcut (designed to be run outside of quotewerks and Great Plains as a standalone module). You do not need to have quotewerks or great application installed to launch this module.
- **LICENSING** : Unlimited users / Site License. However, this is designed for one accounting user to export all orders for the entire company several times a day.
- **INTERFACE** : Wizard with steps to select orders to export, view/fix warnings, configure purchase orders and view log of orders/po's created.
- **OPTIONS** : All options for this module are listed in the worksheets

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## ACCOUNTING DASHBOARDS



The screenshot shows a software window titled "Dashboard" with a tabbed interface. The "Items to Order" tab is selected. Below the tabs is a table with three columns: "Item Number", "Description", and "Quantity". The table contains three rows of data. At the bottom of the window, there are two buttons: "Create PO in GP" and "Print Purchase Order".

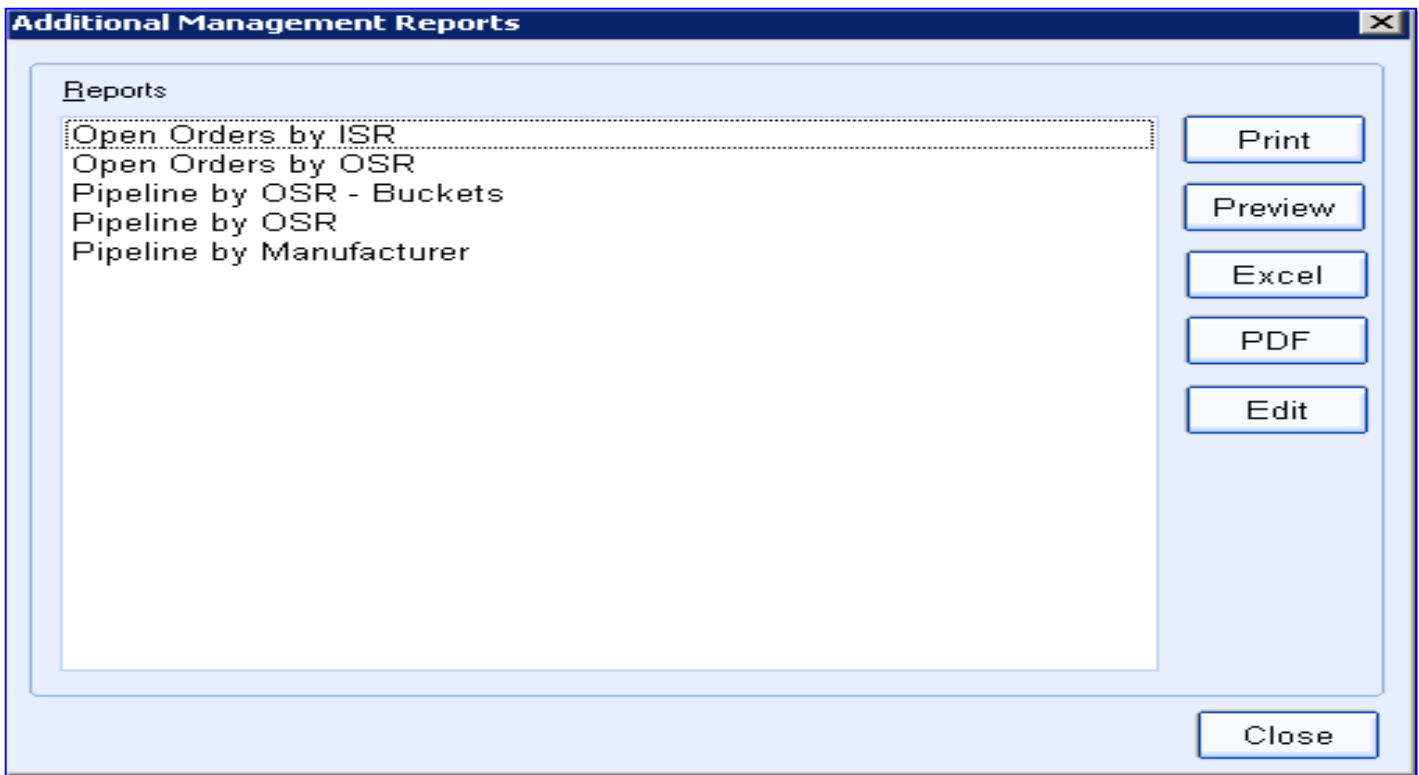
Item Number	Description	Quantity
5-DIAGS13HLP	20 TV/DVDjl;jlfsda fdsajflksda fdsajflksda fsdaljofwe oiewjpofdsanklcc	1
TEST ITEM4AAGGJJ88	new Synnex item with loong jfdklas;ffsa podfdeh fdsasjoip awjefajo;i	1
32X IDESGH9A	Test item	1

- **FUNCTION** : Accounting staff can keep organized with automatic lists of items to order, orders processed, orders in process. Accounting staff can perform maintenance that is tedious in gp like voiding and resynching orders, unlink po's from so's, deleting po's and orders, changing vendors on po's, ordering items that still need to be ordered, etc.
- **HOW TO LAUNCH** : Run directly from a windows/citrix shortcut (designed to be run outside of quotewerks and Great Plains as a standalone module).
- **LICENSING** : Concurrent user (included with workstation licenses)
- **INTERFACE** : Tabbed interface with drill downs
- **OPTIONS** : We can display tabs to show you work in progress, orders processed, items to order, purchase orders. We can enable buttons per user to allow functions like a) void and resynch an order from quotewerks, b) create po in gp for an item that still remains to order, c) add / delete item from an order in quotewerks (and in related po/order in gp), d) change qty on items on order/po , e) change vendor on po.

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## ADDITIONAL REPORTS



- **FUNCTION** : Additional management reports which can combine information from Quotewerks and Great Plains and/or your CRM into the same report
- **HOW TO LAUNCH** : Run directly from a windows/citrix shortcut (designed to be run outside of quotewerks and Great Plains as a standalone module). You do not need to have quotewerks or great application installed to launch this module.
- **LICENSING** : Concurrent user (included with workstation licenses)
- **INTERFACE** : List of printouts with buttons to print, preview, pdf, email and edit the printable forms.
- **OPTIONS** : The reports list and the actual reports need to be built by Linked systems. If you provide the specs we can build the reports usually within 1-2 hours per report. Data can be read from any database source. Access can be restricted per user.