Linked Systems 2014 for QuoteWerks - Modules

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**
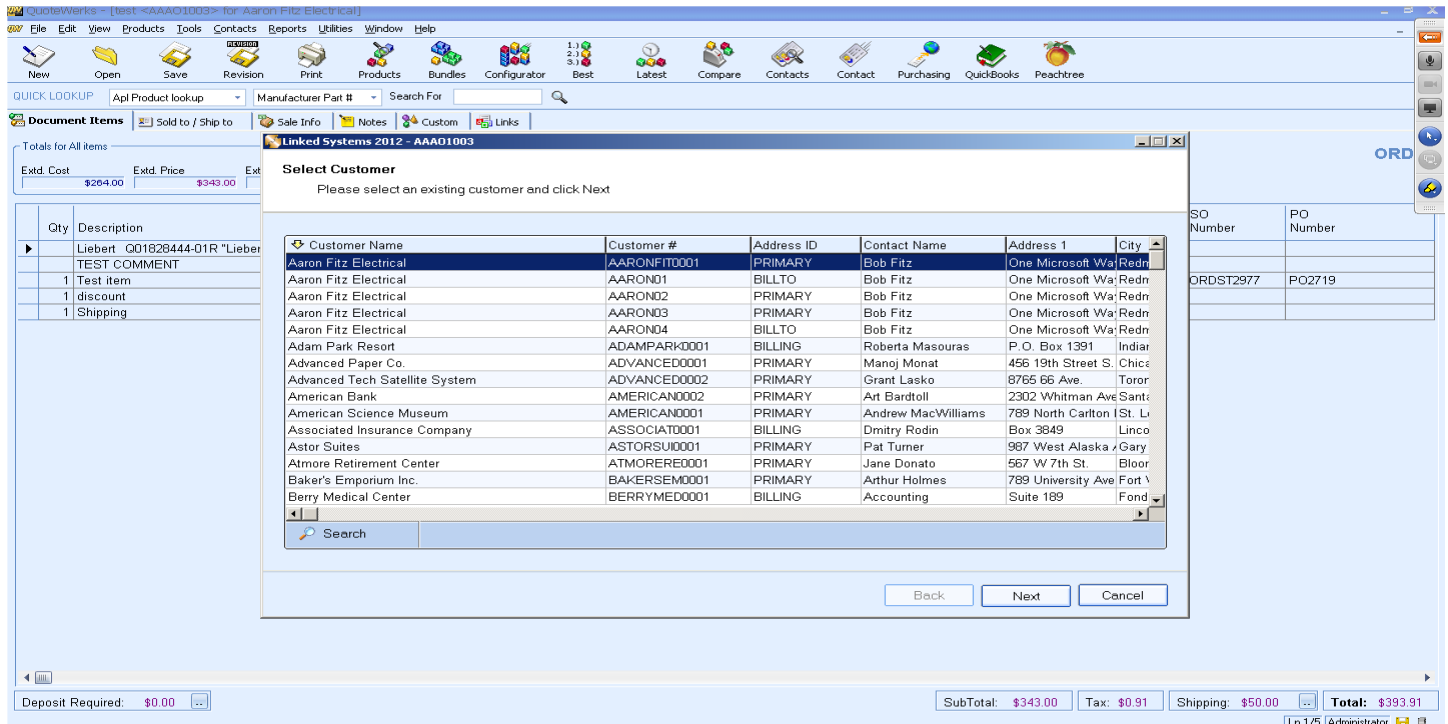
    a. **One-At-a-Time synch** - Export the current quote/order on your screen in QuoteWerks.

    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.

# Linked Systems 2014 for QuoteWerks - Modules

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
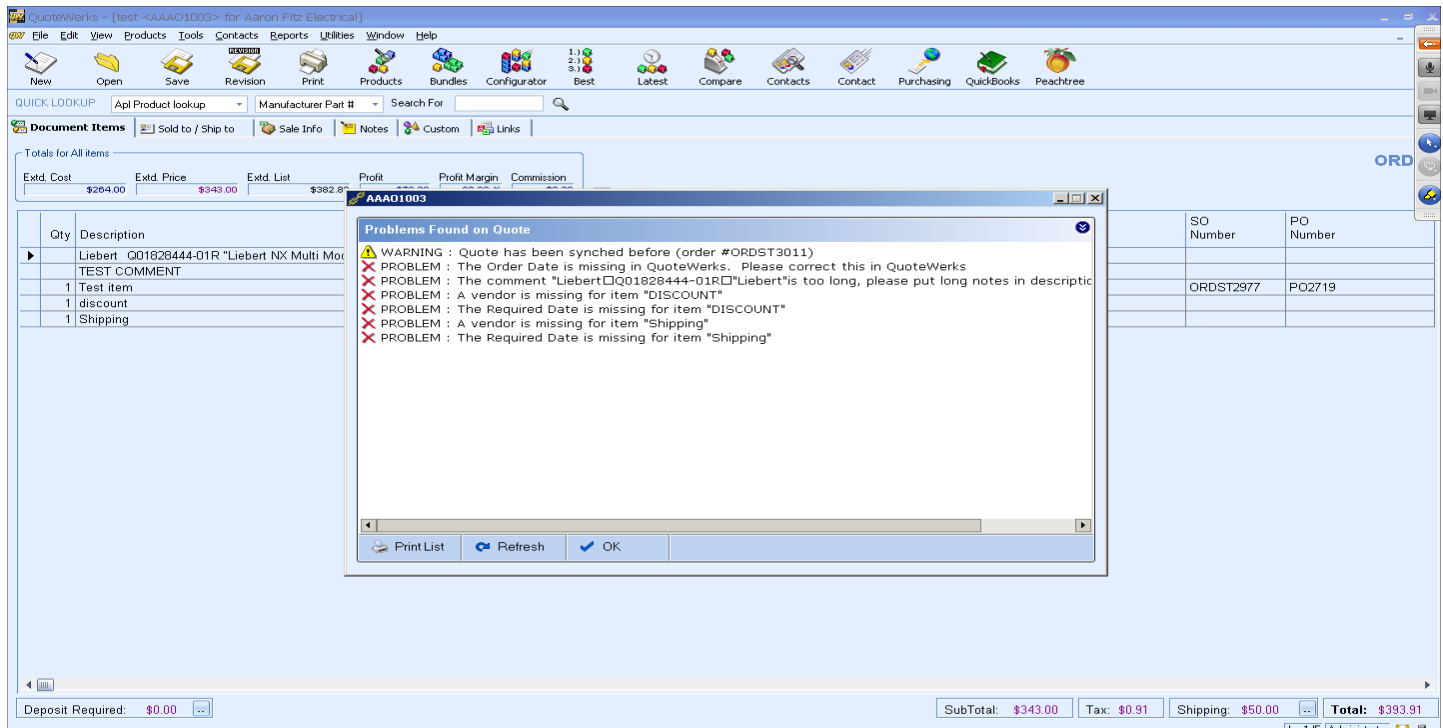
- **FUNCTION** : Salespeople can check the quote in QuoteWerks for problems.

- **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
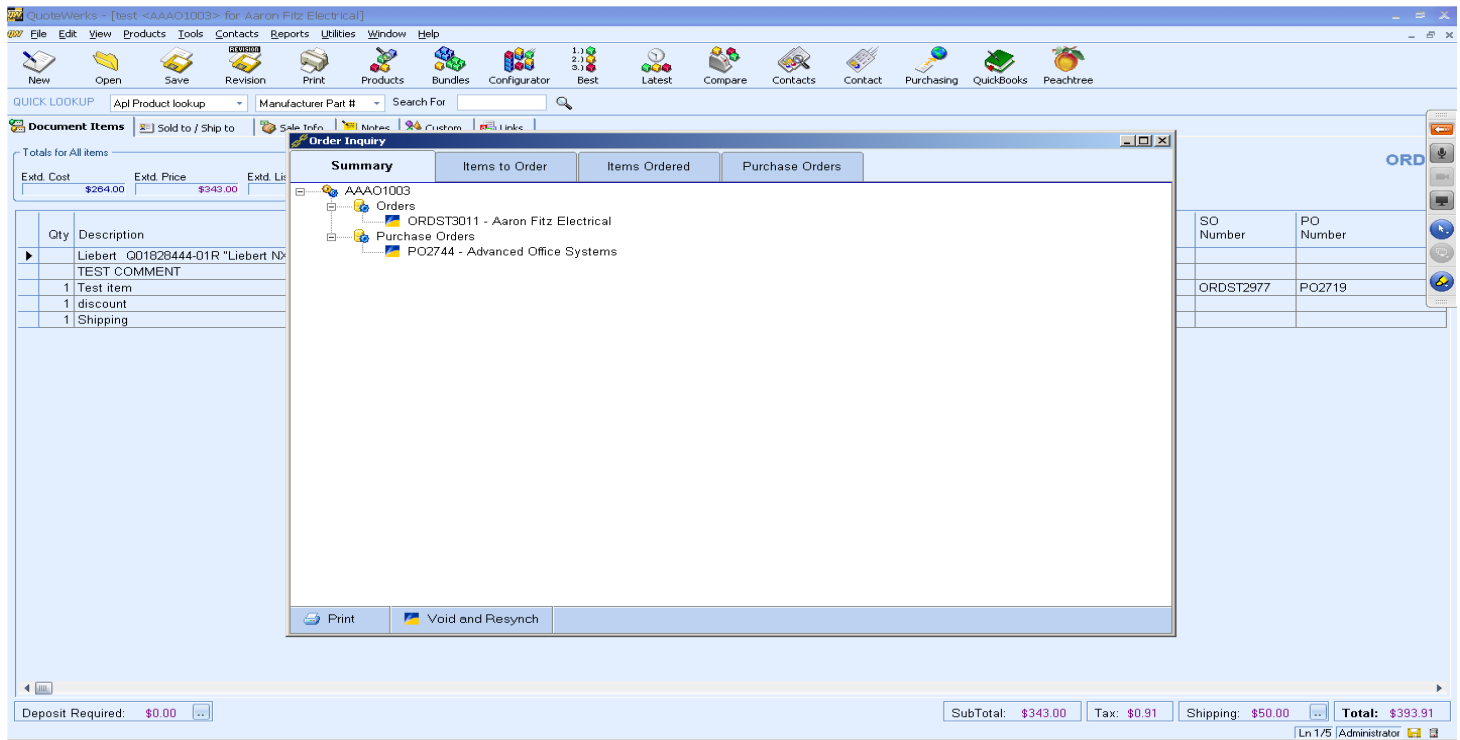
- **FUNCTION** : Salesperson can do order inquiries and lookup other GP information from Quotewerks.

- **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

- **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.

BATCH SYNCH

- **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

Linked Systems 2014 for QuoteWerks - Modules

ACCOUNTING DASHBOARDS

- **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.

ADDITIONAL REPORTS
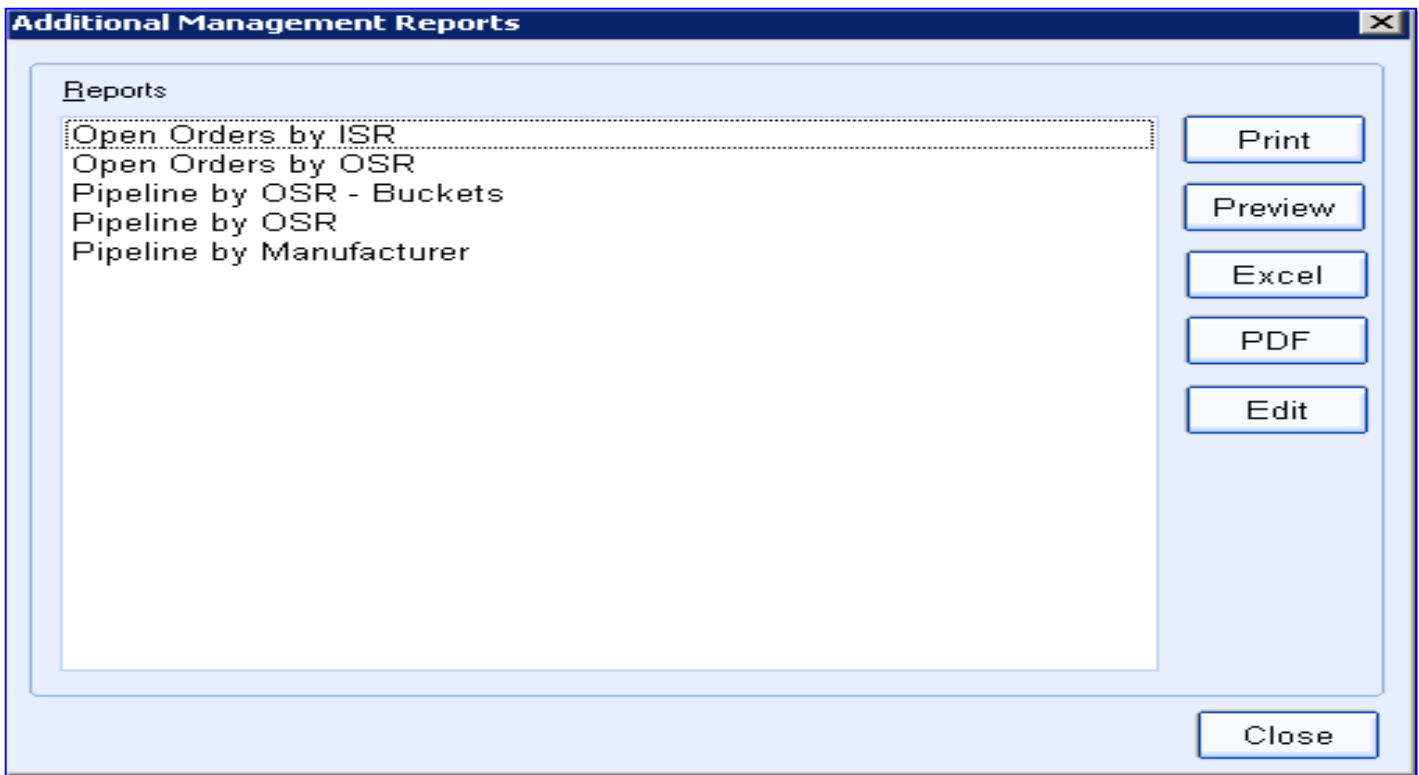
- **FUNCTION** : Additional management reports which can combine information from Quotewerks and Great Plains and/or your CRM into the same report

- **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.