

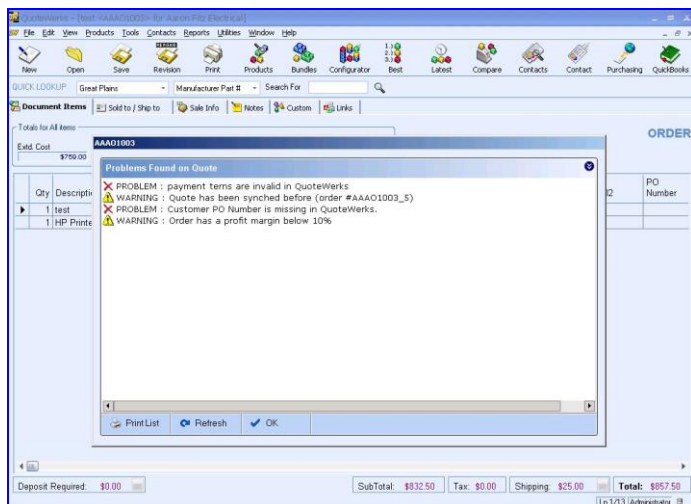
Linked Systems 2015 for QuoteWerks

ELIMINATE DUPLICATE DATA ENTRY :

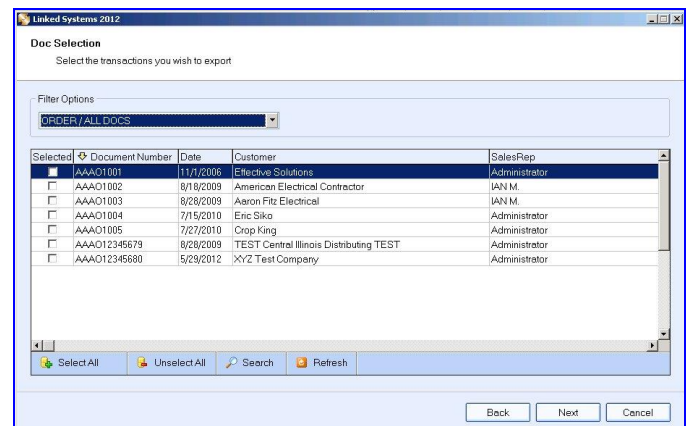
Linked Systems 2012 for QuoteWerks® (**Linked Systems**) provides integration between **QuoteWerks®** and Microsoft Dynamics GP® (**Great Plains**). Get the most out of the applications that you already own. This ten year old product provides six major integration points to save you valuable time:

- **Validate your Orders**
- **Export Orders**
- **Add Items**
- **Add Customers**
- **Generate Purchase Orders**
- **Synchronize Vendors**

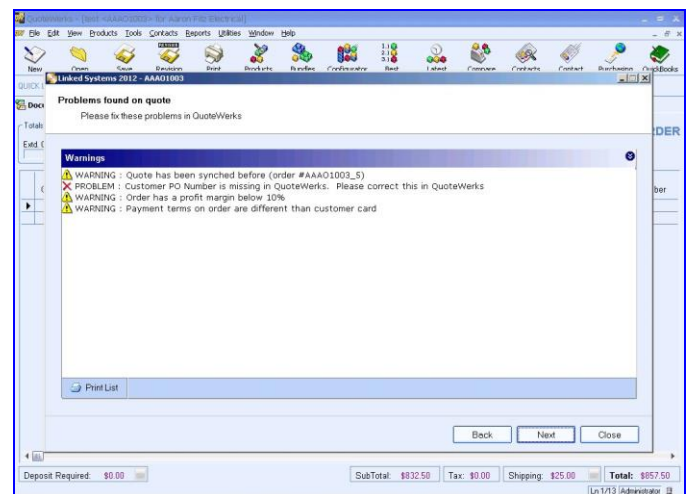
VALIDATE YOUR ORDERS: Automatically check the quote in QuoteWerks and warn salespeople if information is missing before they convert that quote to an order. Fix order data in Linked Systems/QuoteWerks before it is sent to Great Plains and ship your orders faster.



EXPORT MULTIPLE ORDERS: Export multiple orders from QuoteWerks at one time using the batch interface. This interface can be run directly from QuoteWerks, outside of QuoteWerks from a shortcut or directly from Great Plains.



EXPORT A SINGLE ORDER: Export the current quote/order on your screen in QuoteWerks to Great Plains by selecting Tools/Export to Great Plains from the QuoteWerks menu. This is an optional interface which is easier to use because you are dealing with only one order



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ADD ITEMS TO GREAT PLAINS : Add new items from QuoteWerks to Great Plains as needed to export orders. Linked Systems will prompt the user to select Item Classes and any other info you require for each item. All item cards will be created within Great Plains including the item maintenance card, price list card, quantities/sites card, purchasing card and vendor cards.

QUOTEWERKS PART #	DESCRIPTION	OPTIONS	ITEM CLASS	EXISTING ITEMS
100DLGVY2Y3N	test	Add Item	RETAIL	
32X IDC5H9A	HP Printer	Add Item	RETAIL	

SYNCHRONIZE GREAT PLAINS INVENTORY TO QUOTEWERKS: Access Great Plains items via the QuoteWerks product lookup and add to QuoteWerks quotes to reduce data entry errors.

Mfg Part #	Description	Cost	Price	List	Vendor Part #	Manufacturer	Availability
3A3543A	DOS Drive	\$3,000.00	\$0.00	\$0.00			
3B3813A	Keyboard	\$50.00	\$0.00	\$0.00			
3B3897A	CD-ROM Media	\$400.00	\$0.00	\$0.00			
3C2084A	Flackmount Kit	\$700.00	\$0.00	\$0.00			
3C2524A	SCSI Cable	\$80.00	\$0.00	\$0.00			
3C8905	test	\$402.00	\$0.00	\$0.00			
3C8905g	Lab stimulant used	\$402.00	\$0.00	\$0.00			
3C2084A	Printer	\$950.00	\$0.00	\$0.00			
3C2057A	Male Adapter	\$5.00	\$0.00	\$0.00			
3C2059A	Female Adapter	\$5.00	\$0.00	\$0.00			
3E4471A	Extractor Fan	\$100.00	\$0.00	\$0.00			
3E4472A	Power Dist Unit	\$50.00	\$0.00	\$0.00			
3E4550A	Supplement Plus	\$60.00	\$0.00	\$0.00			
3J0994A	RS-232C Modem	\$2,150.00	\$0.00	\$0.00			
4J9HD	4.5 gig Hard Drive	\$184.50	\$0.00	\$0.00			
409P9DC	400 Processor	\$393.30	\$0.00	\$0.00			
40V-IDE	40x CD-ROM	\$39.60	\$0.00	\$0.00			
450P9DC	450 Processor	\$566.10	\$0.00	\$0.00			
4A3591A	4 GB PwD	\$950.00	\$0.00	\$0.00			
4A3629A	4GB 4 Pin Memory	\$400.00	\$0.00	\$0.00			

ADD CUSTOMERS TO GREAT PLAINS: Link to existing Great Plains customer and/or add new customers from QuoteWerks to Great Plains as needed to export orders. If you elect to add a customer, Linked Systems will the prompt the user for customer classes, customer number and other customer card info that you require. You can also elect to just use existing customers.

Customer #	Customer Name	Contact Name	Address ID	Address 1
ADVANCED0001	Advanced Paper Co.	Manoj Monat	PRIMARY	456 19th St
ADVANCED0002	Advanced Tech Satellite System	Grant Lasko	PRIMARY	8765 66 Ave
AMERICAN0002	American Electrical Contractor	Sue Almasy-Wicker	PRIMARY	3456 North C
AMERICAN0001	American Science Museum	Andrew MacWilliams	PRIMARY	789 North C
ASTORSH0001	Astor Suites	Pat Turner	BILLING	987 West A
ATMORERE0001	Atmore Retirement Center	Jane Donato	PRIMARY	567 W 7th S
BAKERSE0001	Baker's Emporium Inc.	Arthur Holmes	PRIMARY	789 Univers
BERRYME0001	Berry Medical Center	Accounting	BILLING	Suite 189
BLUEYON0001	Blue Yonder Airlines		BILLING	P.O. Box 54
BOYLESC0001	Boyle's Country Inn's	Sarah Parnell	PRIMARY	1234 Burke
BREAKTHR0001	Breakthrough Telemarketing	Marie Perry	BILLING	15 Abutus
CASTLEIN0001	Castle Inn Resort	Helen Cholakis	BILLING	Box 3673

RESOLVE BILLTO AND SHIPTO CONFLICTS: Use the QuoteWerks address, add addresses to Great Plains or select existing Great Plains addresses to export orders.

Ship to Options

☒ Existing GP Address ☐ New GP Address ☐ One time Ship to

Other GP Address

Address ID: PRIMARY

Customer Name: American Electrical Contractor

Contact: Sue Almasy-Wicker

Address 1: 3456 North Calumet Avenue

Address 2:

Address 3:

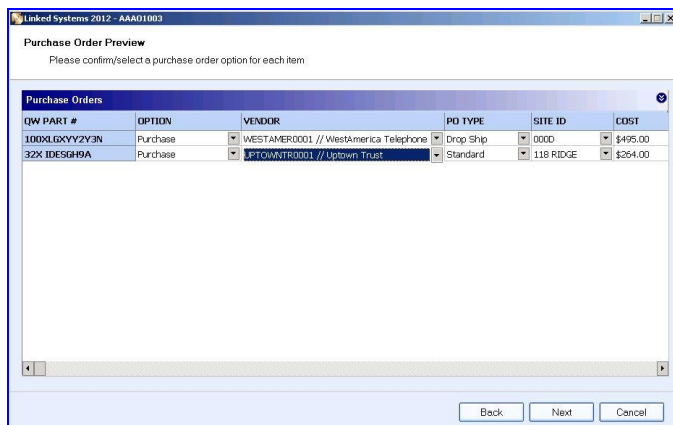
City: Iowa City

State: IA Zip Code: 52240-1827

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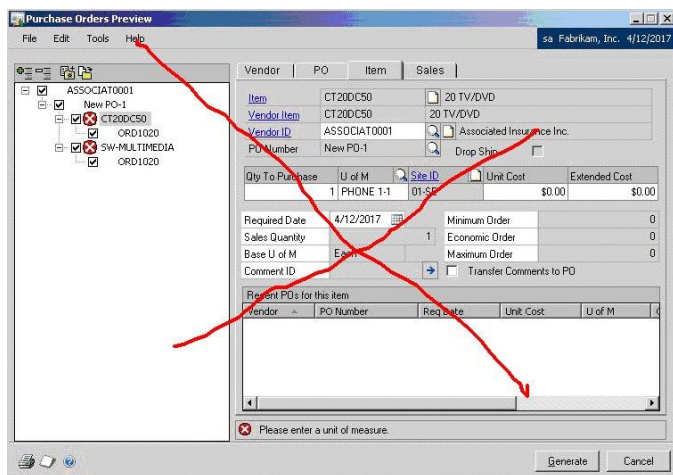
GENERATE PURCHASE ORDERS:

Automatically create standard and/or drop ship purchase orders from QuoteWerks orders. Vendors will be read automatically from QuoteWerks. Purchase orders can be linked to sales orders. Per item, you can choose to pull an item from stock, generate a purchase order, back order it, select site id's and edit costs as needed.



ELIMINATE PO GENERATION ERRORS:

Sites and vendor item numbers will be automatically assigned for each item purchased in Great Plains. This is done automatically by Linked Systems so you will never have to manually generate purchase orders in Great Plains SOP again.



YOU DEFINE THE BUSINESS RULES: Our software is a custom application that is used by thousands of users worldwide. It is 90% pre-built so you don't have to spend money reinventing the wheel and we will customize the other 10% to match *your* business rules. You can specify how customers are handled, define how new items are added, decide how purchase orders and sales orders are generated and customize the warnings as needed. We have 20 years of experience working with Great Plains so we can quickly customize anything you need.

WARNING SELECTED	OPTIONS AVAILABLE	ACTIONS TO TAKE
1 If order has already been synched	Display Problem	We do not want orders to be resynched
2 If order exceeds credit limit	Display Problem	Don't allow them to convert to order
3 If customer is on hold	Display Problem	Don't allow them to convert to order
4 If payment terms on quote differ from gp	Display warning	Allow them to synch
5		
6		
7 If Soldto address missing in quotewerks	Display Problem	Soldto should always match Bilto when converting to order - should require user to complete - if we cannot copy the Bilto automatically, have users choose a GP Val
8 If Soldto addresses missing in quotewerks	Display Problem	Bilto is required - should match GP record when converting to order - users should have to choose a GP value
9 If Shipto addresses missing in quotewerks	Display Problem	Shipto is required by our software when converting to order - User must fix this problem in QuoteWerks and then refresh the synch preview or re-run synch. This problem cannot be corrected in the synch. Users can enter any value.
10 If Soldto address is not linked in quotewerks	Display Problem	Soldto should always match Bilto when converting to order - should require user to complete - if we cannot copy the Bilto automatically, have users choose a GP Val
11 If Soldto addresses is not linked in quotewerks	Display Problem	Bilto is required - should match GP record when converting to order - users should have to choose a GP value
12 If Shipto addresses is not linked in quotewerks	Display Problem	Shipto is required by our software when converting to order - User must fix this problem in QuoteWerks and then refresh the synch preview or re-run synch. This problem cannot be corrected in the synch. Users can enter any value.
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