SedonaOffice The #1 Financial Software for Security Companies

QuoteWerks Integration

Reference Guide

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Overview

The purpose of this guide is to provide users of SedonaOffice and QuoteWerks with an understanding of the interface between the two products.

What is QuoteWerks

QuoteWerks is a third party application developed and supported by QuoteWerks. It is integrated with SedonaOffice to provide a Bill of Materials quoting application that can take advantage of the Enterprise nature of the SedonaOffice nature of the application.

As a quoting application, QuoteWerks combines Parts and Inventory information from SedonaOffice with SedonaOffice Sales contact information to provide detailed proposals to your prospects. The interface to transfer data into QuoteWerks and further transfer Job information from a quote into the SedonaOffice Job Management module is provided by SedonaOffice.

Purpose of this Guide

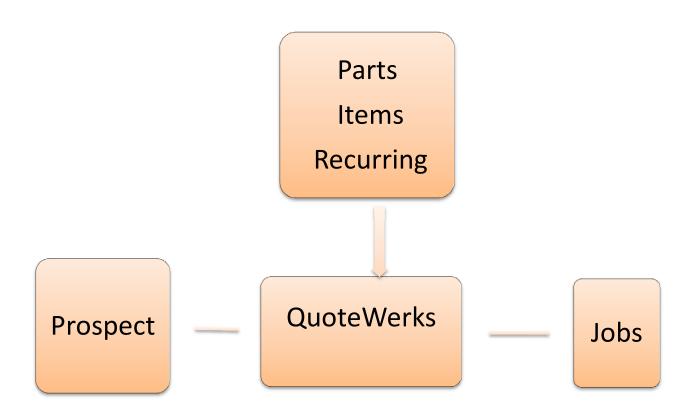
The purpose of this guide is to review the flow of information between the SedonaOffice and QuoteWerks applications and guide the users in optimizing this process.

This guide is not intended to provide the understanding or the process of creating and maintaining quotes.

SedonaOffice Application Knowledge

This guide assumes the user has knowledge of the quoting process and understands the SedonaOffice setup and processing rules for Sales, Inventory, and Job Management.

Flow of Information



The flow of information is from SedonaOffice Prospect into QuoteWerks, from SedonaOffice Parts, Items and Recurring Items into QuoteWerks, and from QuoteWerks into the SedonaOffice Job.

Sales Contacts – Prospects

Prospect information is passed into QuoteWerks when the "QuoteWerks" button is selected from the Sales Management Menu. When a Prospect is open in Sales Management and the QuoteWerks button is pushed, a menu is presented showing existing quotes for that prospect and presenting a "New" and "View" buttons at the bottom of the form. The View button will open an existing quote selected from the list. If New is selected, the Prospect contact information will be passed into QuoteWerks for the "Sold To" "Ship To" and "Bill To" information shown in the QuoteWerks Sold to/Ship to Tab.

Opening the QuoteWerks application from a prospect

Sales Manage	Prospect			
Prospect Qualifications	Vancouver I Sam Spoke 335 Robson Vancouver, (209) 887-6	(Owner) Street WA 98663	Source Status Sales Dept Salesperson Follow Up # Days Open	David Rapkin 2/18/2009
7-8	Prospect	Entry		
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Selecting a "New" quote for a prospect

Signing into QuoteWerks

QuoteWerks Automated Login	Alm
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User Name Bill Patsiga	<u>O</u> k
Password	Cancel

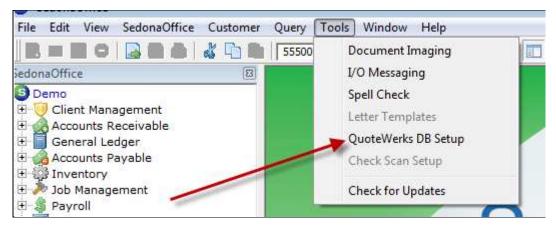
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Country	United States		Country	United States		Country	United States		
hone	(209) 887-6569	ext.	Phone	(209) 887-6569	ext.	Phone	(209) 887-6569	ext.	
ах		ext.	Fax		ext.	Fax	1	ext.	
-Mail			E-Mail	[E-Mail	1		
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QuoteWerks "Sold to/Ship to" Tab with prospect information passed over

When the user initiates a QuoteWerks quote from the SedonaOffice Sales module the contact information will fill in the "Sold to/Ship to" tab as shown above. The SedonaOffice Job application will use the middle address for the SedonaOffice Job Site and the far right column will create the SedonaOffice Customer Bill To for the resulting Customer created in the SedonaOffice Job management.

Parts, Items, and Recurring Items

Parts information from Inventory, the Item Code table and the Recurring Items from SedonaOffice are specifically exported from the SedonaOffice database and used to populate the QuoteWerks database. This information is exported by using the Tool, QuoteWerks DB Setup. It is found on the SedonaOffice main toolbar under the "Tools" drop down list.



QuoteWerks DB Setup from the Tools menu

ection Setup Mapping	Fields Notes Mapping		
QuoteWerks Edition	Corporate	_	
<u>S</u> QL Server Name	Development5-pc		
Password	Sa **	Test Connection	
rt Products			<u>Apply</u>
	Database Path SQL Server Name User Id Password	Database Path SQL Server Name Development5-pc User Id Password	Database Path SQL Server Name Development5-pc User Id Password Test Connection

QuoteWerks Export Wizard

Pressing the "Export Products" button will copy all Parts, Item Codes, and Recurring Item Codes into the QuoteWerks database. It will OVERWRITE the existing QuoteWerks database first erasing the existing QuoteWerks database and creating a new database from the current information in SedonaOffice.

	QuoteWerks Job Mapping Fields	
Sedona Field Name	QuoteWerks Field Name	1
Contract_Form	Age of the maine	1 -
Date1	CustomDate01	1 -
Date2	CustomDate02	
Description		1
Est Labor		1
Est_Material		1
Est_Other	AlternateGrandTotal	1
EstCommission	AlternateSubTotal	1
EstOverhead	AlternateTotalTax	
Install_Company	DocDate	
Job_Code	DocDueDate	
Job_Type	DocName	
Memo	GrandTotal 🗸 🗸	1
Money1	CustomNumber01	1
Money2	CustomNumber01]
Panel_Location		
Panel_Type		
Part_Labor_Units	CustomText04	
Part_Location	CustomText03	
Permit_1		
Permit_2		1
		Apply
	_	Phhy

Mapping Fields tab allows customizing data transfer into a Job

The use of the Mapping Field tab allows the users to set up a customized flow of information from the QuoteWerks quote into a SedonaOffice Job. What is shown above is the ability to send data from the QuoteWerks quote into the SedonaOffice field Est_Labor. The example above shows a QuoteWerks field being selected from a list of QuoteWerks source fields.

Connection Setup Mapping Fields	Notes Mapping	
(QuoteWerks Job Notes Mapping Fields	
QuoteWerks Note Name	Sedona Note Type	
ClosingNotes	QuoteWerks	
InternalNotes	QuoteWerks	
IntroductionNotes	QuoteWerks	
PurchasingNotes	QuoteWerks	

Notes Mapping allows QuoteWerks notes fields to map to SedonaOffice Job Notes

The Notes Mapping Tab is used to control the flow of QuoteWerks notes information into the SedonaOffice Job notes fields. The user can set up the mapping into any SedonaOffice Note Type that the user desires.

Export Products Button

When the "Export Products" button is pushed from the QuoteWerks Integration wizard the QuoteWerks Database is recreated. All existing part, Item Code and Recurring Item Code files in QuoteWerks are overwritten with current data from SedonaOffice.

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New	😔 Product Lookup	-						
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	- 🛅 Misc Folder	Part #				Pa	art #	
	Motion Detectors	Manufacturer_Part_						Manufacturer
•	Packages	VV101	Basic Contact	\$29.00	\$60.00	\$60.00 Ba	asic Contact	Victronix
	- 🛄 Sirens	240a	Basic Home 3-1-1	\$0.00	\$0.00	\$0.00 Ba	asic Home 3-1-1	DMP
	Smoke Detectors	BM2020	Basic Motion	\$57.00	\$120.00	\$120.00 Ba	asic Motion	DMP
		VP100-WL	Basic Panel	\$96.00	\$250.00	\$250.00 Ba	asic Panel	Victronix
	E SedonaRecurringItems	BCS10-WL	Basic Smoke	\$55.00	\$120.00	\$120.00 BS	6440-WL	Bosch
	- Misc Folder	C4405	Color Dome Camera	\$175.00	\$450.00	\$575.00 C4	1405	Ademco
		D1256	Fire Keypad w Easy	\$88.00	\$0.00	\$169.00 D	1256	Bosch
		D126	Battery 12v 6.5a	\$12.00	\$0.00	\$35.00 D	126	Bosch
		0120	ballony rev olog					booon

The Export Button creates QuoteWerks Product Files

The Export function is set up to create three major product files; Sedonaltems, SedonaParts, and SedonaRecurringItems. He SedonaParts File will create subfolders based on Product Line.

NOTE: A key field for part lookup in QuoteWerks is the Manufacturer Part Code. Be sure that this field is filled in for all parts in SedonaOffice that you wish to make Available for Sales.

art Vista 1	00		☐ <u>I</u> nactive
BP <u>a</u> rt Det		📸 Alt. Parts 🚍 Warehouses 📃Cu	stom Fields Documents (0)
Description	1 <u> </u>		
	Description	Vista 100	Part <u>K</u> it
	Detail	Vista 100	Special Order
	Bud data		Customer Equipment
	Product Line	Control Panels	<u> </u>
	Manufacturer Manuf Part Code	Ademco	<u> </u>
	U.P.C	VT100	
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	Hotes	Alarm Control Panel	
	Labor Units	6	
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AR Setup			
	Invoice Item	Equipment TX	×
Sales			
	Invoice Description	Vista 100	
	Price	0.0000	Available for Sales
Service			
	Invoice Description	Vista 100	
	Price	250.0000	Available to FSU

Showing SedonaOffice Part Edit with Manufacture's Part Number filled in and "Available for Sales" checked.

The "Available for Sales" box must be checked for a part to be made available through QuoteWerks. Remember, the Manuf Part Code should be filled in for all parts to be used in QuoteWerks.

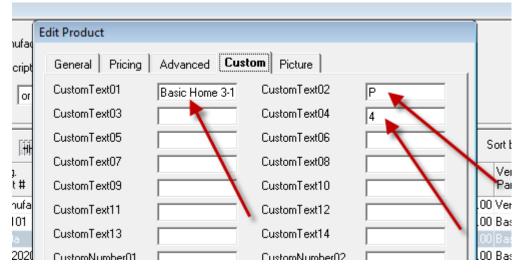
Editing Items in QuoteWerks

Items in the QuoteWerks database can be edited. The various data fields in QuoteWerks can be used for creating data that will allow you to calculate quotes in your specific manner. When editing product information there are a few fields that can not be edited.

× Z-	Edit View Products Tool		Window	v Help	8 9g	0		
~//	Product Lookup							
QUICK L	Sedonaltems Sedonaltems Sedonaltents Sedonaltents Sedonaltents Sedonaltents Sedonaltents Canteras Canteras Category Contacts Control Panels Keypad Kits Misc Folder Misc Folder Sirens Sirens Sedonaltents Misc Folder Misc Folder Misc Folder Misc Folder Misc Folder Misc Folder Misc Folder	Manufac Descript or Mig. 144 Mfg. 144 Manufa VV101 2405 BM2020 VV100-9 BCS105 D1256 D1257	Edit Product	Advanced Custom 240a Taxable Basic Home 3·1·1 Ø Basic Home 3·1·1 Packages	Picture	E *	Sort by Vendor Part # 00 Vendor_Part_Num 00 Basic Contact 00 Basic Motion 00 Basic Panel 00 Basic Panel 00 D1256 00 D21256 00 D2212b 00 D273 00 D405 00 LTC141220 00 Motion Sensor 00 TEst Part 00 VCR84/16	Victronix
Product/		<			1]k <u>C</u> ancel	00 Viets Panal Kit	Rosch , *

View of Part Edit screen in QuoteWerks

Product Fields Reserved for SedonaOffice



Product Fields Reserved for SedonaOffice – DO NOT EDIT!

When editing Product information, under the "Custom" tab, the fields CustomText01, CustomTexto2 and CustomText04 are reserved for SedonaOffice use. If you overwrite or change this information SedonaOffice Jobs may not work properly. Do not change theses fields.

Creating the body of a quote

Sedonaltems SedonaParts SedonaParts Batteries Cameras Cameras Category Contacts	Manufacturer	Con	Vendor Part # tains Mfg. Part # Folder	1	Begins with		Eind <u>R</u> eset Show All More >>
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Kits Misc Folder	Mfg. Part #	Description	Cost	Price		Vendor Part #	Manufacturer 🔺
Motion Detectors	Manufacturer_Part_I	Description	\$0.00	\$0.00	\$0.00	Vendor_Part_Numbe	Manufacturer
🚞 Packages	VV101	Basic Contact	\$29.00	\$60.00	\$60.00	Basic Contact	Victronix
Sirens	240a	Basic Home 3-1-1	\$0.00	\$0.00	\$0.00	Basic Home 3-1-1	DMP
Smoke Detectors	BM2020	Basic Motion	\$57.00	\$120.00	\$120.00	Basic Motion	DMP
C VCR	VP100-WL	Basic Panel	\$96.00	\$250.00	\$250.00	Basic Panel	Victronix
SedonaRecurringItems	BCS10-WL	Basic Smoke	\$55.00	\$120.00	\$120.00	BS440-WL	Bosch
Misc Folder	C4405	Color Dome Camera	\$175.00	\$450.00	\$575.00	C4405	Ademco
	D1256	Fire Keypad w Easy	\$88.00	\$0.00	\$169.00	D1256	Bosch
	D126	Battery 12v 6.5a	\$12.00	\$0.00	\$35.00	D126	Bosch
	D2212bart	Cont/comm 8 to 48	\$90.00	\$0.00	\$175.00	D2212b	Bosch
	D273	Smoke Detector	\$29.50	\$0.00	\$69.00	D273	Bosch
		Dead End	\$69.00	\$0.00	\$996.00	Dead End	Victronix
	LTC141220	Color Surface	\$188.00	\$569.00	\$599.00	LTC141220	Bosch
	1234567	Motion Sensor	\$35.00	\$0.00	\$75.00	Motion Sensor	Bosch
	PMV TE p123	TE p123	\$0.00	\$0.00	\$0.00	TEst Part	Victronix
	PMV VCR 48/16	VCR48/16	\$4,400.00	\$0.00	\$9,500.00	VCR48/16	Victronix
	•	Vieta Panal Kit	¢150.00	¢0 00	\$250.00	Vieta Panal Kit	Bosch
					1	lew <u>E</u> dit	Delete

From the Product Lookup function items are highlighted and added to a quote

Ne Ne	/	Open Save	Revision Print Products	Bundles Co	onfigurator	0 000 Latest				
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	Qty	S475.50 S5,1 Manufacturer Part #	32.95 \$689.00 \$4,657.45 Description	90.74 % Unit Cost			Ext. Price	Vendor Part #	Vendor	Manufa
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	1 5 1	Manufacturer Part # Install D273 D1256	Description Installation Smoke Detector 12-24v 4 wireD273 Fire Keypad w Easy to Read	Unit Cost \$0.00 \$29.50 \$88.00	Unit Price \$4,998.00 \$0.00 \$0.00	Code Y Y Y Y Y	Price \$4,998.00 \$0.00 \$0.00 \$0.00	Part # Install D273 D1256	Sedonaltems Bosch Bosch	Sedona Bosch Bosch
	1 5 1 1	Manufacturer Part # Install D273 D1256 D2212bart	Description Installation Smoke Detector 12-24v 4 wireD273 Fire Keypad w Easy to Read Cont/comm 8 to 48 Zn	Unit Cost \$0.00 \$29.50 \$88.00 \$90.00	Unit Price \$4,998.00 \$0.00 \$0.00 \$0.00	Code Y Y Y Y Y Y	Price \$4,998.00 \$0.00 \$0.00 \$0.00 \$0.00	Part # Install D273 D1256 D2212b	Sedonaltems Bosch Bosch Bosch	Sedona Bosch Bosch Bosch Ademc

The bill of materials as shown in the "Document Items" tab

Rules for a successful Job creation from a QuoteWerks quote

Document Items must not contain blank lines – The Job creation interface will process the document items into a job setup. It will create the Job Sales Summary form the document items.

Sedonaltems in the quote will become line items in the Installs Section.

SedonaParts in the quote will become line items in the Parts section.

SedonaRecurringItems in the quote will become line items in the Recurring section.

Before a quote can be turned into a Job, it must be saved in QuoteWerks.

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	1	Part # Install	Installation	Cost \$0.00	Price \$4,998.00	Code Y Y	Price \$4,998.00 \$0.00	Part # Install	Sedonaltems	Sedona
	1 5 1	Part # Install D273	Installation Smoke Detector 12-24v 4 wireD273	Cost \$0.00 \$29.50	Price \$4,998.00 \$0.00	Code Y Y Y	Price \$4,998.00 \$0.00 \$0.00	Part # Install D273	Sedonaltems Bosch	Sedona Bosch
	1 5 1	Part # Install D273 D1256	Installation Smoke Detector 12-24v 4 wireD273 Fire Keypad w Easy to Read	Cost \$0.00 \$29.50 \$88.00	Price \$4,998.00 \$0.00 \$0.00	Code Y Y Y Y	Price \$4,998.00 \$0.00 \$0.00 \$0.00	Part # Install D273 D1256	Sedonaltems Bosch Bosch	Bosch
	1 5 1 1	Part # Install D273 D1256 D2212bart	Installation Smoke Detector 12-24v 4 wireD273 Fire Keypad w Easy to Read Cont/comm 8 to 48 Zn Vista100	Cost \$0.00 \$29.50 \$88.00 \$90.00	Price \$4,998.00 \$0.00 \$0.00 \$0.00	Code Y Y Y Y Y Y	Price \$4,998.00 \$0.00 \$0.00 \$0.00 \$0.00	Part # Install D273 D1256 D2212b	Sedonaltems Bosch Bosch Bosch Bosch ADI	Sedona Bosch Bosch Bosch Ademc
	1 5 1 1 1	Part # Install D273 D1256 D2212bart VT100	Installation Smoke Detector 12-24v 4 wireD273 Fire Keypad w Easy to Read Cont/comm 8 to 48 Zn	Cost \$0.00 \$29.50 \$88.00 \$90.00 \$150.00	Price \$4,998.00 \$0.00 \$0.00 \$0.00 \$0.00	Code Y Y Y Y Y Y Y	Price \$4,998.00 \$0.00 \$0.00 \$0.00 \$0.00 \$29.95	Part # Install D273 D1256 D2212b Vista100	Sedonaltems Bosch Bosch Bosch	Sedona Bosch Bosch Bosch Ademc Sedona

Press the Save button to save a quote in QuoteWerks

ipen Sa	ve Revisio	n Print	Products	Bundles	Configurator	Latest		
Manufacturer Pa	rt # 💌		from Sedonalte	ems	- Add			
ms 🗵 Sold to	/Ship to 🛛 🤯 S	Sale Info 🛛 🛅 N	lotes 🛛 😵 Custor	n				
Extd. Price	Extd. Li	st F S689.00 Save Quote As	¹ rofit Pro \$4,857.45	fit Marqin Cor 90.74 %	nmission \$0.00)
ufacturer #	Descriptio	Details:	Test Quotewerks	Interface			<u>0</u> k	Vendor Part #
 	Installatior Smoke De	Doc No:	{Next Available}	. Intellace			<u>C</u> ancel	Install D273
6	Fire Keypa	Status:	Open					D1256
2bart 10	Cont/comr Vista100	Project No:	{Next Available}					D2212b Vista100
toring Services	6 Monitoring	L		1	1			Monitoring
ection	Inspection			\$0.0	\$105.00) Y 💌	\$105.00	Inspection

Save the quote file in QuoteWerks

Once the file has been saved it can be turned into an Order. An Order in QuoteWerks becomes a Job in SedonaOffice.

A quote is turned into an order by going to the drop down File menu and selecting the "Convert to Order" option.

💷 File	Edit View Products Tools Contacts	Reports	Utilities	Wir
	New	Ctrl+N	1	20
٩	Open	Ctrl+O		00
	Close		P	roduc
QU	Save	Ctrl+S	from	Sed
2	Save As		otes	94
	Save As Template		otes	4-0
T	Save As Next Revision			
E	Insert Document		rofit	
1	Duplicate		-\$4	475.50
г				-
	Delete	/		C
-	Rename			\$
	Properties			\$2
-	Convert to Order			\$8
	Convert to Invoice			\$9
	Convert to Lost Sale			\$
	Print	Ctrl+P		\$15
-	FHIRm	Curr		\$
	Import Document			
	Export to Document Transport File			
	Test QW Interface < AAAQ1080>			
	Test Quotewerks Interface <aaao1078></aaao1078>			
	GCC Demo <aaao1076></aaao1076>			
	test MM <aaao1067></aaao1067>			
	bundle greg <aaao1061></aaao1061>			
	test ryan <aaao1056></aaao1056>			
	test Cheryl < AAAO1049>		-	
	test MMD <aaao1068></aaao1068>			
	Exit			

Selecting this option will bring up the following dialog box:

	Convert this Quote to an	Order	
o	Conversion Option(s)		
	Doc Status for new Or	der:	
t	Open		
lifi	Allocate Inventory	for this Order.	
	Superseded Revisions		
	The following is a list o	f all the superseded revision:	s for this document.
-	Please select the revis	ions that you would like to d	elete:
	DocNo	Date Created	Amount
		~	

Selecting "Ok" will convert the quote to an Order

Once a quote has been turned into an Order it can be found in SedonaOffice, Job Management, Job Queue under the "QuoteWerks" icon

Select Job Numb	ber							Total Job	is in Process 58
WuoteWerks Orders to Process									
Doc No	Doc Name	Status	Date	Order Date	Salesperson	Sold To	Contact	Total Quote	Bill To
AAAO 1064	SW24 Job 1	Needs	12/10/2	12/10/2	Bill Patsiga	SecureWatch24	Nate Smith	5562.00	SecureWatch24
AAAO 1068	test MMD	Open	12/22/2	12/22/2	Administrator	Kalamazoo Coll	James Dean	5994.00	Kalamazoo Coll
AAAO 1070	Test Grouped	Open	12/24/2	12/24/2	Bill Patsiga	Interstate Alarm	Shawn Harmon	772.20	Interstate Alarm
AAAO 1075	Test Quotewerks Interface	Open	1/14/2009	1/14/2009	Bill Patsiga	Vancouver Bic	Sam Spoke	5543.59	Vancouver Bic

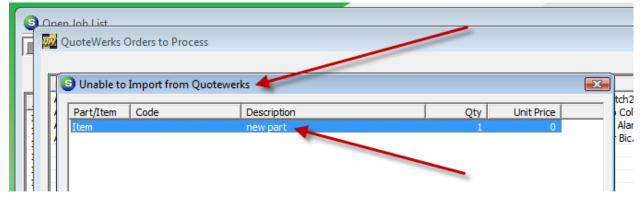
QuoteWerks Icon on Open Jobs List opens the "QuoteWerks Orders to Process" list

Once the Quote has been turned into an Order within QuoteWerks, The SedonaOffice QuoteWerks Interface moves the order to the QuoteWerks Orders to Process list. From here an Order is selected and the Job creation process is begun.

Doc No	Doc Name	Status	Date	Order Date	Salesperson	Sold To	Contact	Total Quote	Bill To
AAAO 1064	SW24 Job 1	Needs	12/10/2	12/10/2	Bill Patsiga	SecureWatch24	Nate Smith	5562.00	SecureWatch2
AAAO 1068	test MMD	Open	12/22/2	12/22/2	Administrator	Kalamazoo Coll	James Dean	5994.00	Kalamazoo Col
AAAO 1070	Test Grouped	Open	12/24/2	12/24/2	Bill Patsiga	Interstate Alarm	Shawn Harmon	772.20	Interstate Alar
AAAO 1075	Test Quotewerks Interface	Open	1/14/2009	1/14/2000	Dill Datata		Sam Spoke	5543.59	Vancouver Bic.
					Open QuoteV	Verks Order			
					Create Sedon	a lob			

Highlight the appropriate Order and Select "Create Sedona Job"

This will initiate the Job creation process.



Unable to Import from QuoteWerks

Unable to import from QuoteWerks will occur when any item is on the quote that is not already existing in the SedonaOffice data base. Every part, item code, and recurring item code must be set up in SedonaOffice in order for a quote to import. Any blank lines, comments, or additional lines in the body of a quote will cause the job creation to fail. To correct this situation, go into SedonaOffice and add the missing part, item or recurring item or clean up the quote in order to have the import function work correctly

In the example above, an item with the name "new part" was found in the quote and did not exist in the SedonaOffice database and therefore caused the job creation to stop at this point.

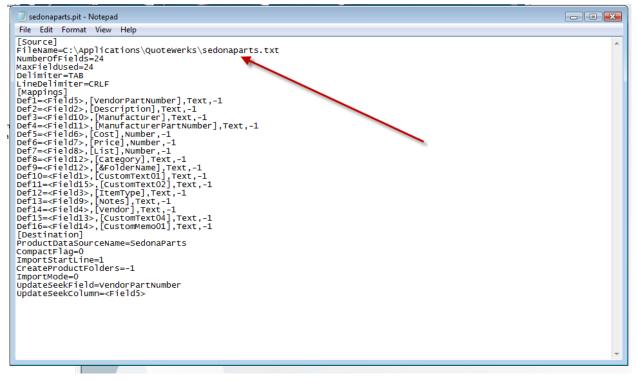
Customizing Your QuoteWerks

There are several areas that users may choose to customize the interfacing of information between the SedonaOffice and QuoteWerks. The reasons typically include the desire to use additional factors in developing quotes. This has included the use of the SedonaOffice Parts custom fields and other information.

Importing Parts Data into QuoteWerks

The parts, items and recurring items are imported into QuoteWerks via a QuoteWerks file called the ".pit" file, a copy of which is shown below. This file controls what information is taken from SedonaOffice and where it is placed into the QuoteWerks files as it builds the QuoteWerks products database. If you wish to change the data mapping this file is where it is controlled. It is showing where the SedonaOffice field is being placed in the QuoteWerks part records.

For example below, "Field5" from the SedonaOffice Part record is being placed into "VendorPartNumber" in QuoteWerks.



Sedonaparts.pit File

The mapping of the SedonaOffice Parts fields is defined in the SedonaParts.txt file. All available data elements from the part that could be brought into QuoteWerks are defined and mapped. The fields refer to the following listing of SedonaOffice part fields:

Field1 = Part Code Field2 = Description Field3 = Product Line Field4 = Vendor Field5 = Vendor_Part_Number Field6 = Purchase_Cost Field7 = Sales Price Field8 = List Price Field9 = Notes Field10 = Manufacturer Field11 = Manufacturer_Part_Number Field12 = Category Field13 = Labor Units Field14 = Part Detail Field15 = SedonaType Field16 = UserTable1 Field17 = UserTable2 Field18 = UserTable3 Field19 = UserText1 Field20 = UserText2 Field21 = UserText3 Field22 = UserText4 Field23 = UserText5 Field24 = UserMoney1 Field25 = UserMoney2

SedonaOffice SedonaParts.txt File Layout

These fields can be mapped into the QuoteWerks product files by editing the .pit file. Definition lines in the pit file can be added for additional data element or edited to change the use.

Remember, in the pit file and use of QuoteWerks, DO NOT CHANGE the mapping into QuoteWerks field CustomText01, CustomText02, or CustomText04

Controlling QuoteWerks Database Update

The basic SedonaOffice to QuoteWerks interface is setup to completely overlay the QuoteWerks database when the export function is run. If you choose to change this you will lose some control over the closed loop information cycle but you can preserve changes and added relationships that you may create in QuoteWerks.

This process is controlled by the ImportMode value which is shown below set to 0. This default setting will delete the old and create a new QuoteWerks Database from the SedonaOffice inventory and item code files.

If the user sets the value for ImportMode = 2, then QuoteWerks will update the database, add new product information and well as update information. It will not delete products that are no longer in the SedonaOffice files. This is why the import mode is set to keep integrity of the information flow. Changing to update mode means that obsolete products will remain in QuoteWerks and possibly be selected by sales, thereby causing the Job Creation process to fail.

```
sedonaparts.pit - Notepad
 File Edit Format View Help
[Source]
FileName=C:\Applications\QuoteWerks\sedonaparts.txt
NumberOfFields=24
MaxFieldUsed=24
Delimiter=TAB
LineDelimiter=CRLF
[Mappings]
Def1=<Field5>,[VendorPartNumber],Text,-1
Def2=<Field2>, [Description], Text, -1
Def2=<Field2>,[Description],Text,-1
Def3=<Field10>,[Manufacturer],Text,-1
Def4=<Field11>,[ManufacturerPartNumber],Text,-1
Def5=<Field6>,[Cost],Number,-1
Def6=<Field7>,[Price],Number,-1
Def7=<Field8>,[List],Number,-1
Def8=<Field12>,[Category],Text,-1
Def9=<Field12>,[&FolderName],Text,-1
Def10=<Field1>,[CustomText01],Text,-1
Def11=<Field15>,[CustomText02],Text,-1
Def12=<Field3>,[ItemType],Text,-1
Def13=<Field9>,[Notes],Text,-1
Def14=<Field4>,[Vendor],Text,-1
Def15=<Field13>,[CustomText04],Text,-1
Def16=<Field14>,[CustomMemo01],Text,-1
[Destination]
ProductDataSourceName=SedonaParts
CompactFlag=0
ImportStartLine=1
CreateProductFolders=-1
ImportMode=0 <
UpdateSeekField=VendorPartNumber
UpdateSeekColumn=<Field5>
```

Exporting Data into SedonaOffice Jobs

The data that can be transferred from QuoteWerks into SedonaOffice Jobs can be customized. The mechanism used to define the transfer of data into the Job is the QuoteWerks Integration utility, Mapping Fields tab.

	QuoteWerks Job Mapping Fields	
Sedona Field Name	QuoteWerks Field Name	
Contract_Form		
Date1	CustomDate01	
Date2	CustomDate02	
Description		
Est_Labor		
Est_Material		
Est_Other		
EstCommission		
EstOverhead		
Install_Company		
Job_Code		
Job_Type		
Memo		
Money1	CustomNumber01	
Money2	CustomNumber01	
Panel_Location		
Panel_Type		
Part_Labor_Units	CustomText04	
Part_Location	CustomText03	
Permit_1		
Permit_2		
		Apply

The example below will show how to map a QuoteWerks field into the "Est_Labor" field in a SedonaOffice Job.

Q	uoteWerks Job Mapping Fields	1
Sedona Field Name	QuoteWerks Field Name	
Contract_Form		1.1
Date 1	CustomDate01	
Date2	CustomDate02	
Description		
Est_Labor		
Est_Material	× 1	
Est_Other	AlternateGrandTotal	
EstCommission	AlternateSubTotal	
EstOverhead	AlternateTotalTax	
Install_Company	DocDate	
Job_Code	DocDueDate	
Job_Type	DocName	
Memo	GrandTotal 👻	
Money1	CustomNumber01	
Money2	CustomNumber01	
Panel_Location		
Panel_Type		
Part_Labor_Units	CustomText04	
Part_Location	CustomText03	
Permit_1		
Permit_2		•
		Apply

First select the QuoteWerks field to pull the data from. Here it is shown highlighted in Yellow. Putting your cursor on the field will give you the drop down list of available fields

QuoteWerks	and	SedonaOffice	User	Guide
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Quote Sedona Field Name Contract_Form Date 1 Date 2	Werks Job Mapping Fields QuoteWerks Field Name	_
Contract_Form Date1	QuoteWerks Field Name	
Date1		
)ate?	CustomDate01	
0002	CustomDate02	
Description		
st_Labor	CustomText03	
st_Material		
st_Other		
stCommission		
stOverhead		
nstall_Company		 I
ob_Code		-
ob_Type		
1emo		
Noney1	CustomNumber01	
loney2	CustomNumber01	
Panel_Location		
Panel_Type		
Part_Labor_Units	CustomText04	
Part_Location	CustomText03	
Permit_1		
Permit_2		•
		Apply

Here, "CustomText03" is selected to be mapped into the SedonaOffice Job field Est_Labor.

14	V File Edit ete Data	View Open	Products	V e	Contacts	Reports	3	s Window	Help GOO Bundles	(
STATE OF STREET	QUICK LOOKUP		ufacturer Pa		• [23	from		252.062/12200	•
	📒 Document Ite	:ms	Sold to) / Ship to	🛛 🔯 Sale	e Info	📒 Notes	Security Custon	n	
	CustomText01	Г						- 1		
	CustomText02	Í								
l	CustomText03	- Î								
	CustomText04	- Î							+	
	22 22 227								-	
	CustomText05									
	CustomText05 CustomText06	[
	CustomText06 CustomText07 CustomText08 CustomText10 CustomText11 CustomText12 CustomText12 CustomText13				Custon Custon Custon Custon Custon Custon	nDate01 nDate02 nNumber0 nText14 nText15 nText16	19			
	CustomText06 CustomText07 CustomText08 CustomText09 CustomText10 CustomText11 CustomText12				Custon Custon Custon Custon Custon Custon Custon	n Date02 n Number0 n Number0 n Text14 n Text15	19			

Remember, the Custom fields in QuoteWerks are available to be mapped as well as all Product fields and other quote information. Shown above is the "Custom" tab within QuoteWerks and the Custom fields available.

NOTE: CustomNumber01 and CustomNumber02 are used by SedonaOffice and should not be written into in your use of QuoteWerks.