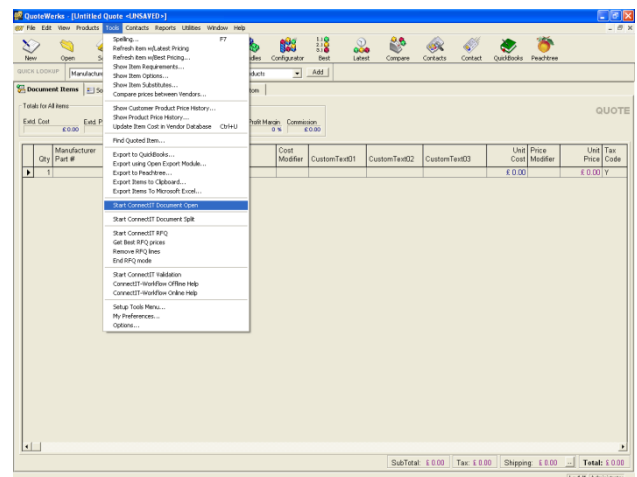


# Step-by-Step Guide to ConnectIt-Workflow

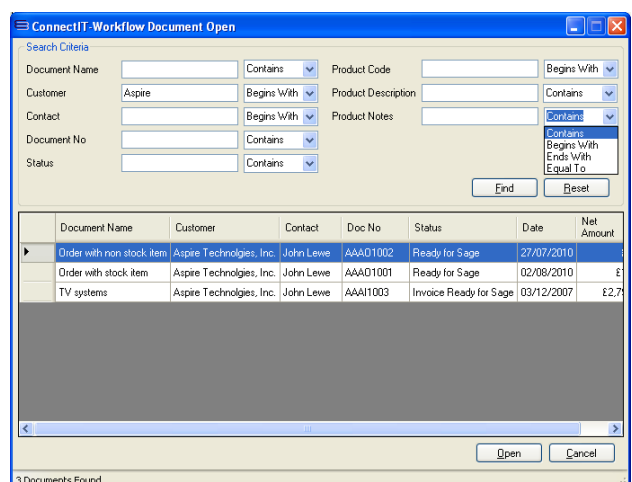
## Document Open Utility

The **ConnectIt-Workflow Document Open** utility helps **QuoteWerks** users find documents that have been saved in the database quickly and easily.

1. Click the **QuoteWerks Start ConnectIt Document Open** menu option.



2. Enter the relevant **Search Criteria** for the documents that you would like to Open; click the **Find** button.
3. The **ConnectIt-Workflow Document Open** grid lists all of the relevant documents from the **QuoteWerks** database that meet the **Search Criteria** entered.
4. Double-click or highlight the row(s) on the grid of documents that you would like to open; click **Open**.

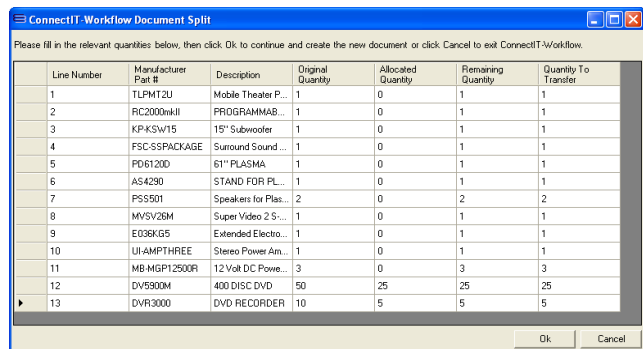
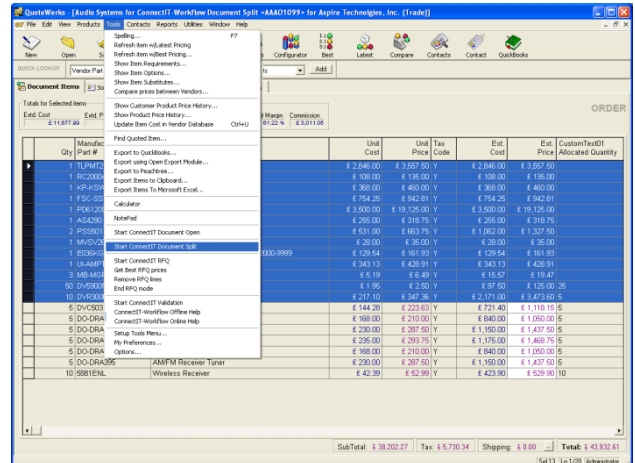


# Document Split Module

**ConnectIt-Workflow Document Split** module manages part-ordering or part-invoicing from **QuoteWerks** and removes manual duplication of documents.

**Note:** before running the Document Split module, please ensure no more than four documents are open in QuoteWerks. ConnectIt-Workflow Document Split needs to open the new document it creates and QuoteWerks does not allow more than five documents to be open simultaneously (you will be prompted if you have more than four open).

1. Save the document in **QuoteWerks** and then select the **Line Items** on the **QuoteWerks** document that you would like to transfer into the new document. Alternatively, select all lines on the document to transfer them all to the new document.
2. Click the **“Start ConnectIt Document Split”** option from the **QuoteWerks | Tools** menu.
3. The **ConnectIt-Workflow Document Split** window will appear. The grid contains information about each line item (**Line Number**, **Manufacturer Part #** and **Description**) and also four additional columns (**Original Quantity**, **Allocated Quantity**, **Remaining Quantity** and **Quantity To Transfer**).
4. Enter, or edit, the quantities of each item that you would like included in the new document in the **Quantity To Transfer** field. It is not necessary to enter a quantity for all lines, some can be left blank but at least one valid quantity must be entered (one or above unless you have selected the **“Transfer Items with a Zero Quantity”** option in the **Document Split | Transfer** tab in the **ConnectIt-Workflow Configuration** utility). The **Quantity To Transfer** entered must also be less than or equal to the **Remaining Quantity**.



- **Original Quantity** is the Quantity from the original document for each item.
- **Allocated Quantity** is the amount that has already been transferred to other documents using ConnectIt-Workflow Document Split.
- **Remaining Quantity** is the amount that is yet to be transferred.
- **Quantity To Transfer** is the quantity you wish to transfer to the new document. This field will be automatically populated by the appropriate amount as specified on the ConnectIt tab of the ConnectIt-Workflow Configuration utility, i.e. zero or the unallocated amount if Default to Zero or Default Quantities to Unallocated Amount have been ticked.



- Click OK once you have entered all the quantities you require. The values for **Allocated Quantity** will be updated on the original document and the new document will be created.

QuoteWerks - Audio Systems for ConnectIT Workflow Document Split -44401077- for Aspire Technologies, Inc. [Trade]

Document Items

Qty	Manufacturer Part #	Description	Unit Cost	Unit Price	Tax Code	Est. Cost	Est. CustomText01	Allocated Quantity
1	TLPM72U	Mobile Theater Projector	£ 2,846.00	£ 3,557.50	Y	£ 2,846.00	£ 3,557.50	1
1	RC200RH8	PROGRAMMABLE REMOTE	£ 108.00	£ 135.00	Y	£ 108.00	£ 135.00	1
1	1P4KSW15	15" Subwoofer	£ 388.00	£ 480.00	Y	£ 388.00	£ 480.00	1
1	FSC-SSPACKAGE	Surround Sound Package	£ 754.25	£ 942.81	Y	£ 754.25	£ 942.81	1
1	PO6120D	61" PLASMA	£ 19,126.00	£ 3,900.00	Y	£ 3,900.00	£ 19,126.00	1
1	AS4290	STAND FOR PLASMA	£ 255.00	£ 318.75	Y	£ 255.00	£ 318.75	1
2	PSS901	Speakers for Plasma	£ 663.75	£ 1,062.00	Y	£ 1,062.00	£ 1,327.50	2
1	MVQV8M	Super Video 2 S-VID cable	£ 35.00	£ 38.00	Y	£ 35.00	£ 38.00	1
1	ED89G5	Extended Electronic Warranty	£ 181.50	£ 191.50	Y	£ 181.50	£ 191.50	1
1	LAAMPHREE	Stereo Power Amp 150w	£ 343.13	£ 428.91	Y	£ 343.13	£ 428.91	1
3	MBMGF125DR	12 Vdc DC Power Supply	£ 5.19	£ 6.49	Y	£ 15.57	£ 19.47	3
50	DV900M	400 DISC DVD	£ 1.95	£ 2.60	Y	£ 97.50	£ 125.00	50
10	DV9300	DVD RECORDER	£ 217.10	£ 347.36	Y	£ 2,171.00	£ 3,473.60	10
5	DV9C93	5 DISC DVD/CD/RW	£ 144.28	£ 223.63	Y	£ 721.40	£ 1,118.15	5
5	DO-DRA95	AMFM Stereo Receiver 60Wx2	£ 168.00	£ 210.00	Y	£ 840.00	£ 1,050.00	5
5	DO-DRA95	AMFM Receiver Tuner	£ 230.00	£ 307.50	Y	£ 1,150.00	£ 1,437.50	5
5	DO-DRA85	AMFM Receiver 100Wx2	£ 235.00	£ 293.75	Y	£ 1,175.00	£ 1,468.75	5
5	DO-DRA95	AMFM Stereo Receiver 60Wx2	£ 168.00	£ 210.00	Y	£ 840.00	£ 1,050.00	5
5	DO-DRA95	AMFM Receiver Tuner	£ 230.00	£ 307.50	Y	£ 1,150.00	£ 1,437.50	5
10	5881ENL	Wireless Receiver	£ 42.39	£ 82.99	Y	£ 423.90	£ 829.90	10

SubTotal: £ 38,202.27 Tax: £ 5,730.34 Shipping: £ 0.00 Total: £ 43,932.61

- The new document will then be opened in **QuoteWerks** and you are prompted to save both the new document and the original document. The original document is still open but behind the newly created document. You must save the documents to ensure that the fields are recalculated and saved back to the database

QuoteWerks - Audio Systems for ConnectIT Workflow Document Split -44401077- for Aspire Technologies, Inc. [Trade]

Document Items

Qty	Manufacturer Part #	Description	Unit Cost	Unit Price	Tax Code	Est. Cost	Est. CustomText01	Allocated Quantity
1	TLPM72U	Mobile Theater Projector	£ 2,846.00	£ 3,557.50	Y	£ 2,846.00	£ 3,557.50	1
1	RC200RH8	PROGRAMMABLE REMOTE	£ 108.00	£ 135.00	Y	£ 108.00	£ 135.00	1
1	1P4KSW15	15" Subwoofer	£ 388.00	£ 480.00	Y	£ 388.00	£ 480.00	1
1	FSC-SSPACKAGE	Surround Sound Package	£ 754.25	£ 942.81	Y	£ 754.25	£ 942.81	1
1	PO6120D	61" PLASMA	£ 19,126.00	£ 3,900.00	Y	£ 3,900.00	£ 19,126.00	1
1	AS4290	STAND FOR PLASMA	£ 255.00	£ 318.75	Y	£ 255.00	£ 318.75	1
2	PSS901	Speakers for Plasma	£ 663.75	£ 1,062.00	Y	£ 1,062.00	£ 1,327.50	2
1	MVQV8M	Super Video 2 S-VID cable	£ 35.00	£ 38.00	Y	£ 35.00	£ 38.00	1
1	ED89G5	Extended Electronic Warranty	£ 181.50	£ 191.50	Y	£ 181.50	£ 191.50	1
1	LAAMPHREE	Stereo Power Amp 150w	£ 343.13	£ 428.91	Y	£ 343.13	£ 428.91	1
3	MBMGF125DR	12 Vdc DC Power Supply	£ 5.19	£ 6.49	Y	£ 15.57	£ 19.47	3
50	DV900M	400 DISC DVD	£ 1.95	£ 2.60	Y	£ 97.50	£ 125.00	50
10	DV9300	DVD RECORDER	£ 217.10	£ 347.36	Y	£ 2,171.00	£ 3,473.60	10
5	DV9C93	5 DISC DVD/CD/RW	£ 144.28	£ 223.63	Y	£ 721.40	£ 1,118.15	5
5	DO-DRA95	AMFM Stereo Receiver 60Wx2	£ 168.00	£ 210.00	Y	£ 840.00	£ 1,050.00	5
5	DO-DRA95	AMFM Receiver Tuner	£ 230.00	£ 307.50	Y	£ 1,150.00	£ 1,437.50	5
5	DO-DRA85	AMFM Receiver 100Wx2	£ 235.00	£ 293.75	Y	£ 1,175.00	£ 1,468.75	5
5	DO-DRA95	AMFM Stereo Receiver 60Wx2	£ 168.00	£ 210.00	Y	£ 840.00	£ 1,050.00	5
5	DO-DRA95	AMFM Receiver Tuner	£ 230.00	£ 307.50	Y	£ 1,150.00	£ 1,437.50	5
10	5881ENL	Wireless Receiver	£ 42.39	£ 82.99	Y	£ 423.90	£ 829.90	10

SubTotal: £ 28,311.17 Tax: £ 4,426.68 Shipping: £ 0.00 Total: £ 32,737.85



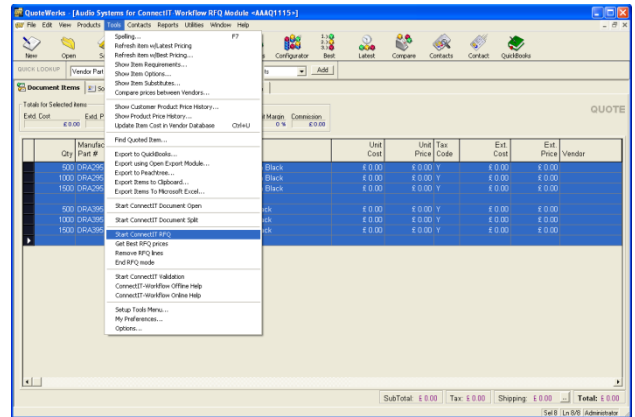
# RFQ Module

**ConnectIt-Workflow RFQ** module provides additional screens and functionality to make requesting up-to-date vendor pricing very easy from the **QuoteWerks** user interface.

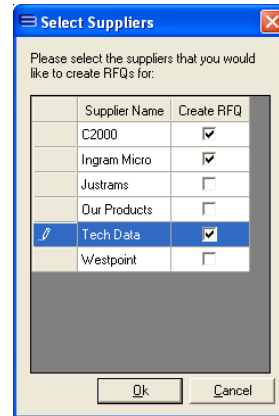
1. Select and highlight the **Line Items** on the **QuoteWerks** document you want to request prices for. Click the **Start ConnectIt-RFQ** option from the **QuoteWerks | Tools** menu.

This starts the **ConnectIt-RFQ** application.

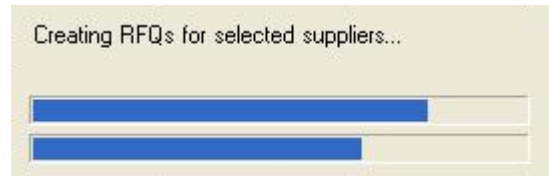
**Note:** The QuoteWerks Document Status must match the status entered for Document Status Start on the RFQ tab of the ConnectIt-Workflow Configuration utility. After ConnectIt-RFQ has been started, the QuoteWerks Document Status will be changed to be that of the Document Status in Progress on the RFQ tab of the ConnectIt-Workflow Configuration utility.



2. Select the Suppliers you want to request prices from by ticking the appropriate **“Create RFQ”** box(es).

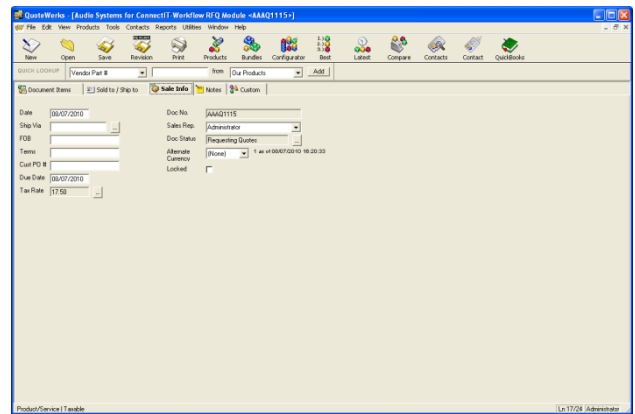


3. **ConnectIt-RFQ** then creates **RFQ Lines** for each of the selected **Line Items** for each of the selected suppliers. **ConnectIt-RFQ** will enter the **RFQ Marker** text in the **RFQ Marker** field (**CustomText01** by default) that was selected on the **RFQ** tab of the **ConnectIt-Workflow Configuration** utility.



- The **QuoteWerks Doc Status** is now updated to the **Document Status in Progress** as entered on the **RFQ** tab in the **ConnectIt-Workflow Configuration** utility.

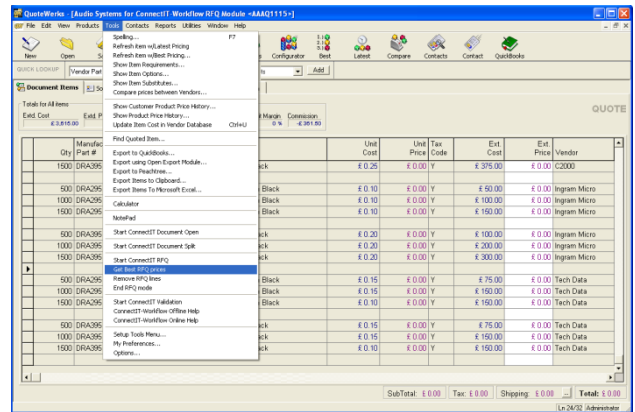
The selected suppliers can now be emailed from **QuoteWerks** requesting their most up-to-date prices using a **Purchase Order** type **Layout** that you have edited, as required, for the purpose of requesting prices from Vendors.



**Note: A Purchase Order type Layout is required as it allows for multiple suppliers to be requested for prices via the Vendor name field. Once it has been created, the RFQ Layout can be accessed by clicking Print, after ensuring that Display All Layout Types and Create PO for each Vendor are both ticked. Click Close after each RFQ so that the next one is generated.**

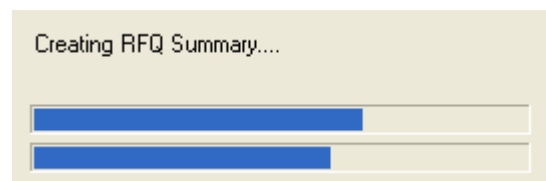
- When cost prices are received back from suppliers, they should be typed into the appropriate **QuoteWerks RFQ** document against the appropriate Quantity for each supplier. Once prices have been received back and have been entered in the **QuoteWerks RFQ** document, click **Get Best RFQ Prices** from the **QuoteWerks | Tools** menu option.

**Note: Ensure the cost prices are entered into the RFQ Lines and not into the RFQ Source lines.**

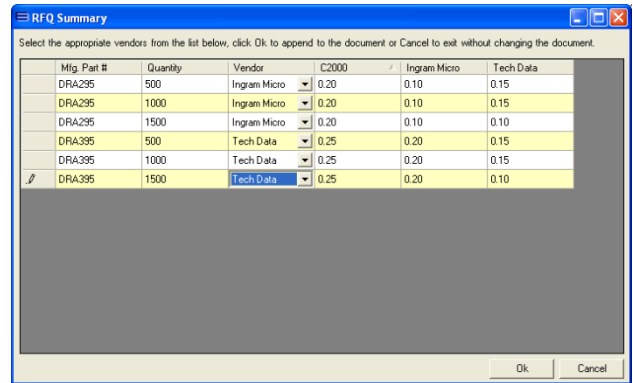


**Note: You may wish to save the QuoteWerks document as a Revision, or under a different Document Number, so that you have separate documents for the RFQ document containing all the prices requested from suppliers, and for the quotation that you subsequently send to your customer.**

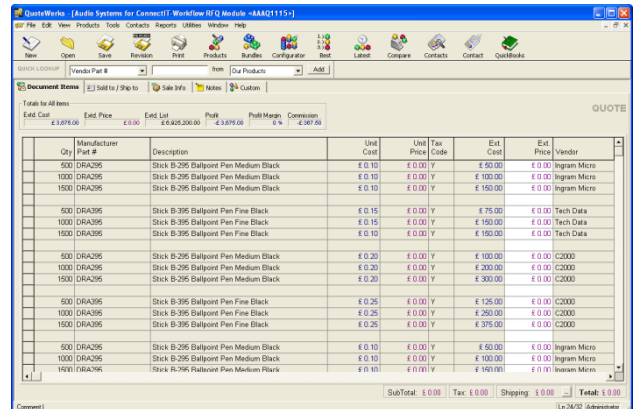
- After **“Get Best RFQ Prices”** has been clicked, **ConnectIt-RFQ** will create a summary of the requested prices by supplier by quantity.



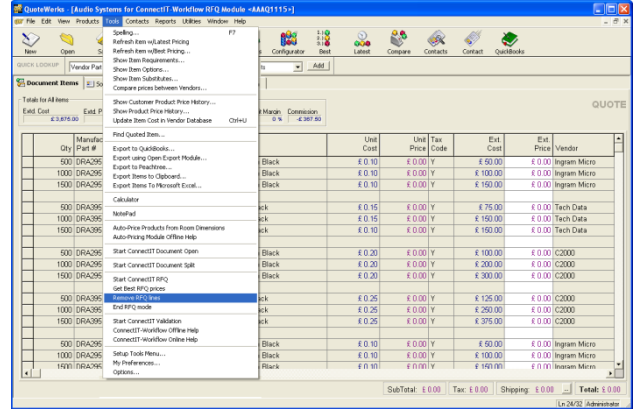
- Cost prices from suppliers can now be compared and the supplier you wish to use can be selected for each product/quantity from the drop down **Vendor** list box. Click **OK** to select your chosen suppliers.



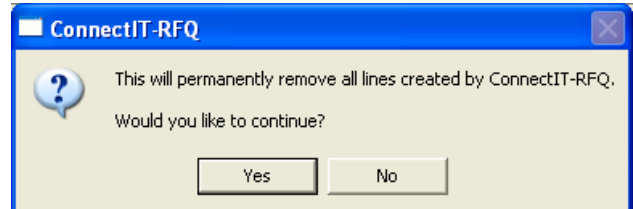
- The selected suppliers are now automatically entered in the **QuoteWerks Vendor** field.



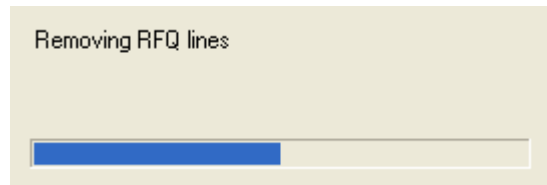
- If you have chosen to use a **QuoteWerks Document Revision**, or a different **QuoteWerks Document Number**, ensure you are in that document before you click **Tools | Remove RFQ Lines**.



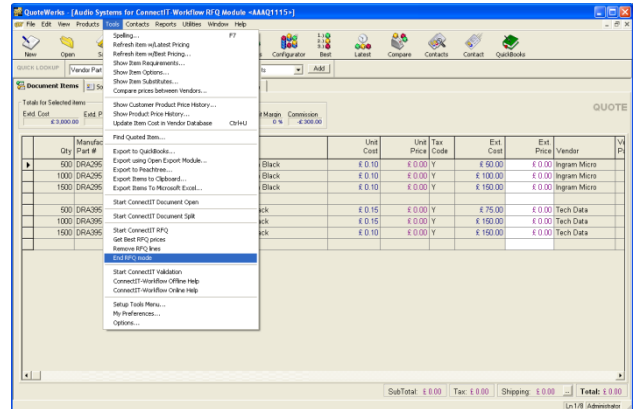
- Click **Yes** to confirm that you would like to permanently remove all lines created by the RFQ Module (assuming you wish to do so). If you are using a **QuoteWerks Document Revision**, or a different **QuoteWerks Document Number**, you will have a record of all the prices received from suppliers that you entered in the original document before it was revised or saved under a different **Document Number**. Once the **RFQ Lines** have been removed, the **Quotation Document** can be processed and sent to your customer in the normal manner.



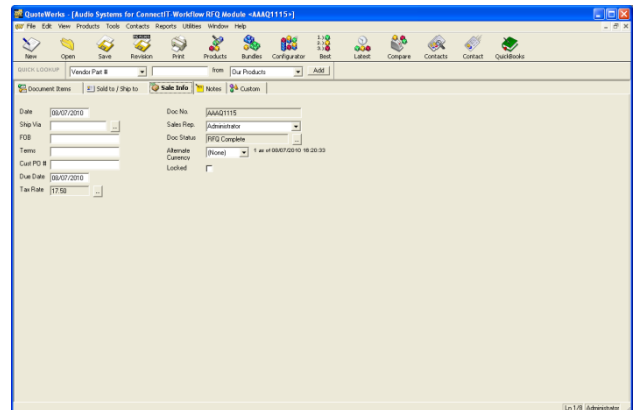
11. **RFQ Lines** are now removed from the **QuoteWerks Document**.



12. Click **Tools | End RFQ mode**.



13. The **QuoteWerks Document Status** will be changed to the value entered on the **RFQ** tab of the **ConnectIt-Workflow Configuration** utility.



# Validation Module

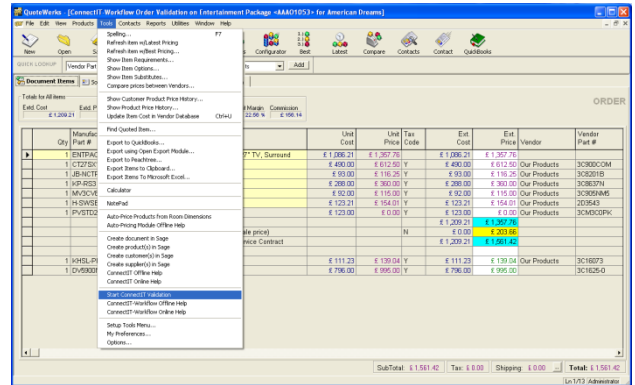
**ConnectIt-Workflow Validation** module manages entries on a **QuoteWerks** document to ensure that the **QuoteWerks** user has entered all the required information at each step of document creation (**Quote, Order and Invoice**).

**ConnectIt-Workflow Validation** module validates that the **QuoteWerks** user has entered required values into particular fields before the user is allowed to print, save, convert or email etc a document.

**Note: ConnectIt-Workflow Validation module rules are set up in the ConnectIt-Workflow Configuration utility. Please see the ConnectIt-Workflow Step-by-Step Guide to Configuration for information on how to set up your required rules before trying to validate documents.**

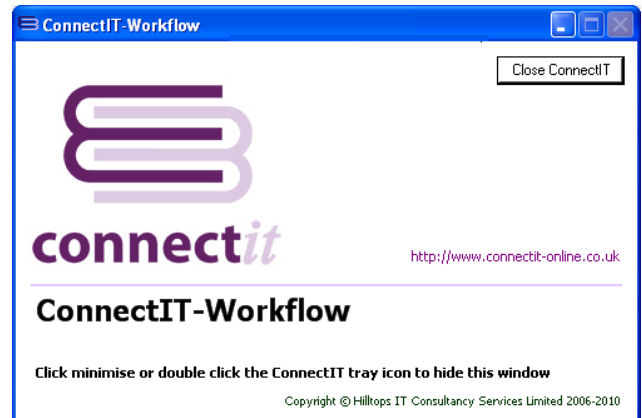
1. Click the **Start ConnectIt-Workflow** option from the **QuoteWerks | Tools** menu.

This starts the **ConnectIt-Workflow** application.



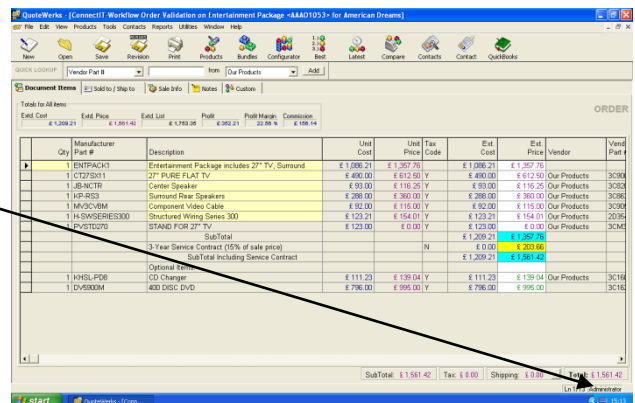
2. Once started, **ConnectIt-Workflow** runs in the background.

You can either click the minimise button or double-click the **ConnectIt-Workflow** tray icon to hide the **ConnectIt-Workflow** Window.



3. Once started, **ConnectIt-Workflow** runs in the background.

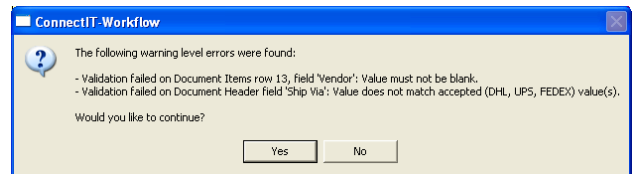
The **ConnectIt-Workflow** tray icon can be found in the bottom right hand corner of your screen.





#### 4. Warning level error message...

Provided that at least one **Warning level rule** has been set up in the **ConnectIt-Workflow Configuration** utility, the **Trigger Event** (i.e. Save, Print etc) will start validation on the **QuoteWerks** document. If **Warning level errors** are found in the **QuoteWerks** document, **ConnectIt-Workflow** will warn the user about the **Validation** rules that have not been met. In the case of **Warning level errors**, the user has the choice to go back and correct the errors or to continue without correcting them.



#### 5. Critical level error message...

Provided that at least one **Critical level rule** has been set up in the **ConnectIt-Workflow Configuration** utility, the **Trigger Event** (i.e. Save, Print etc) will start validation on the **QuoteWerks** document. If **Critical level errors** are found in the **QuoteWerks** document, **ConnectIt-Workflow** will warn the user about the **Validation** rules that have not been met. In the case of **Critical level errors**, the user has no choice and must go back and correct the errors before being able to save, print etc the document.

