



# Pre-Installation Checklist

Thank you for taking the time to complete the ConnectIt-Avalara pre-installation checklist. By completing this form, you will help us to get your new software installed and configured quickly and efficiently, plus provide you with best-practice advice on how ConnectIt-Avalara may be best utilised in your business.

## About You & Your Business

Contact Name:

Company Name:

Contact Phone:

Contact Email:

## About QuoteWerks

- Are you currently running QuoteWerks in your business? If yes, then approximately how long have you been a QuoteWerks User?
- Who is the QuoteWerks Technical Lead / Administrator in your company?
- Which edition of QuoteWerks are you using? (Or planning to use if not a current User. Standard, Professional or Corporate)
- If you are running (or planning to run) QuoteWerks Corporate edition, then where will the SQL Server database be hosted?

**Note: we will require the QuoteWerks SQL Server database login username and password in order to set up the ConnectIt-Avalara configuration and so please have these available ready for when we do the installation.**

- Which version of QuoteWerks are you running? (We'll assume the latest if you are not a current QuoteWerks User.)
- How many licenses of QuoteWerks do you have? (Or planning to have if not a current User.)
- Do you (or will you) use any of the QuoteWerks add-ons, such as QuoteValet, QuoteWerks Web, Etilize, Real-Time Module, QuickBooks integration, etc.? If yes, then please specify.
- Do you (or will you) use any of the QuoteWerks third party add-ons, such as contact manager integrations, ERP integrations or QuoteWerks scripts, etc.? If yes, then please specify.
- Do you use a Contact Manager, such as Act!, SalesForce, Dynamics CRM, ConnectWise, AutoTask, etc. in your business? If so, then which Contact Manager(s) do you run? And is it (are they) integrated with QuoteWerks?
- Do you create Quotes, Orders and/or Invoices in QuoteWerks? (Or planning to have if not a current User.)
- When you get to the final stage of a document's use in QuoteWerks, where is the information transferred to progress it through your overall business workflow?

**Note: typically, businesses either perform just the quoting function in QuoteWerks and when the Quote becomes an Order, it is then transferred to an ERP solution for order fulfilment. Or the document will go through Quote, Order and Invoicing stages in QuoteWerks and only at the end be transferred to another system to perform the accounting function within the business. The more information you can provide us with in terms of how your business' workflow runs will give us an insight into how ConnectIt-Avalara should be set up to compliment this process.**

- Who is your QuoteWerks partner? (Where did you buy the licenses and who provides you with support?)

## About Avalara

- Are you currently using Avalara in your business? If yes, then which system(s) does it currently integrate with?
  
- Who is the Avalara AvaTax Technical Lead / Administrator in your company?

**Note: we will require the Avalara AvaTax web portal login username and password in order to set up the ConnectIt-Avalara configuration and so please have these available ready for when we do the installation.**

- How do you assign Avalara Tax Codes to the products and/or services that you sell?

**Note: typically, this might be by individual Product SKU, by Product Category or Item Type, or other such methodology. The more information you can provide us with in terms of how your business' Tax Codes get associated to the things that you sell will give us an insight into how ConnectIt-Avalara should be set up to compliment this process.**

Product SKU / Item Type / Category / Order (please specify)

- Do you charge for shipping? If so, then which Tax Code do you use?
  
- Do you have a "catch all" Tax Code that you use for non-assigned miscellaneous items?
  
- Do you save Transactions in Avalara? If so, then at which stage? (Typically, this would be at Order or Invoice stage.)
  
- Who is your Avalara Account Manager?

## About ConnectIt

- How many people are likely to be using the ConnectIt-Avalara QuoteWerks & Avalara AvaTax integration?
- How many of these Users are likely to be using it for address validation?
- How many of these Users are likely to be using it for tax calculations which are **not** saved into Avalara as a Transaction?
- How many of these Users are likely to be using it for tax calculations which **are** saved into Avalara as a Transaction?
- Do you have any other comments or observations which might assist us in best setting up the ConnectIt-Avalara QuoteWerks and Avalara AvaTax in your business? If yes, please specify.