



## Step-by-Step Guide to Configuration

The **Connectit-Workflow Configuration** utility enables you to check or change the various settings that the **Connectit-Workflow** software uses. To open the **Connectit-Workflow Configuration** utility, browse to the **Start | All Programs | Connectit-Workflow** menu and click the **Connectit-Workflow Configuration** option.

**General Note:** The field names in the drop down lists in the **Connectit-Workflow Configuration** utility are the original QuoteWerks field names and not the customised field names. To find the original QuoteWerks field name label, (the Default Label Name), go into QuoteWerks and double left click on the field name in question whilst holding down the Ctrl key.

Please also note that if QuoteWerks and Connectit-Workflow are already running, then any changes to the settings will not take effect until they are restarted.



## QuoteWerks Settings tab

The **QuoteWerks** tab enables the connection to **QuoteWerks** to be set up and tested.

**Note:** This connection is necessary for the **ConnectIt-Workflow Document Open, Document Split and ConnectIt-Workflow RFQ** modules but it does not need to be configured for the **ConnectIt-Workflow Validation** module.

ConnectIt Configuration utility v7.1.0

QuoteWerks | Document Open | Document Split | RFQ | Validation | Find & Replace | Updates | Line Item Sort

QuoteWerks Logon Settings

Edition: Corporate (dropdown) | Is Re-hosted to SQL Server (or MSDE or other variant)

Server Name: MyServer\MyInstance

Logon: ConnectIt

Password: \*\*\*\*\*

Database Name: QuoteWerks

Database Owner: dbo

Database Timeout: 30

Test Connection

Save | Close

1. Select the **Edition** of **QuoteWerks** that you are running.
2. If you select the **Corporate Edition** of **QuoteWerks**, the **Is Re-hosted to SQL Server (or MSDE or other variant)** option box becomes enabled. If you are running the **Corporate Edition** of **QuoteWerks** and it has been re-hosted, tick this option to allow the rest of the information to be populated.
3. If you are running the **Corporate Edition** of **QuoteWerks** and it has been re-hosted, enter the Server Name, Logon, Password, Database Name and Database Owner information. This can be found by looking in the **backend.ini** file in the **QuoteWerks** installation directory.

**Note:** The Password value is encrypted in the backend.ini file. You may need to ask your IT systems administrator or the person who originally re-hosted QuoteWerks for this information.

4. Click the **Test Connection** button to check that the settings are correct.

**Note:** On successful configuration, you will receive the message "Logon Information Tested OK!" If you do not receive this message, please check the details and try again.

5. Click the **Save** button to retain the settings on the **General** tab.



## Document Open Settings | Search tab

The **Document Open | Search** tab enables you to configure the fields that will be used as part of the QuoteWerks database search selection fields.

**Note:** the fields are all pipe (“|”) separated. Up to 10 fields may be set up as part of the ConnectIt-Workflow Document Open configuration. The individual pipe separated values of each of the settings here are linked to each other, i.e. the first Search Label Caption is linked to the first Database Field Name is linked to the first Field Data Type, etc. In the screenshot below: Document Name -> DH.DocName -> Text -> True -> Contains; Customer -> DH.SoldToCompany -> Text -> True -> Begins With; etc.

The screenshot shows the 'ConnectIt Configuration utility v7.1.0' window with the 'Document Open' tab selected. The 'Search' sub-tab is active, displaying 'Search Criteria Settings'. The settings are as follows:

Search Label Captions	Database Field Names	Field Data Types	Use Filter Option	Filter Types
Document Name Customer Contact Document No Status Product Code Product Description Pr	DH.DocName DH.SoldToCompany DH.SoldToContact DH.DocNo DH.DocStatus DI.Manufac	Text Text Text Text Text Text Text Text	True True True True True True True True	Contains Begins With Begins With Contains Contains Begins With Contains Contains

Buttons: Test Separators, Save, Close

1. The **Search Label Captions** are the labels that will appear next to the text boxes on the **ConnectIt-Workflow Document Open** utility screen.
2. The **Database Field Names** are the actual field names from the database that should be used.

**Note:** To ensure that the Document Open utility is filtering on exactly the expected field, field names should be prefixed “DH.” if they are DocumentHeader table fields and “DI.” if they are DocumentItem tables fields.

3. The **Field Data Types** denote the type of information that is stored in the **Database Field**.

**Note:** Only “Text” fields are supported at this time. Entering a value other than “Text” may have unexpected results.

4. The **Use Filter Option** denotes whether the filter type dropdown should be displayed for this field.
5. The **Filter Types** option allow the default **Filter Option** to be set – “Contains”, “Begins With”, “Ends With” or “Equal To”.



## Document Open Settings | Results tab

The **Document Open | Results** tab enables you to configure the fields that are displayed listing the documents that have been found in the QuoteWerks database from the specified **Search Criteria**.

**Note: the fields are all pipe (“|”) separated. The individual pipe separated values of each of the settings here are linked to each other, i.e. the first Results Grid Caption is linked to the first Database Field Name is linked to the first Grid Column alignment, etc. In the screenshot below: Document Name -> DH.DocName -> [blank] -> [blank] -> Text -> True ->True -> [blank]; Customer -> DH.SoldToCompany -> [blank] -> [blank] -> Text -> True ->True -> [blank]; etc.**

ConnectIt Configuration utility v7.1.0

QuoteWerks Document Open Document Split RFQ Validation Find & Replace Updates Line Item Sort

Search Results

Search Results Settings

Results Grid Captions: Document Name|Customer|Sales Person|Doc No|Status|Date|Net Amount|Locked

Database Field Names: DH.DocName|DH.SoldToCompany|DH.SalesRep|DH.DocNo|DH.DocStatus|DH.DocDate|DH

Grid Column Alignment: ||||Centre|Right|Centre

Grid Column Format: |||dd/MM/yyyy|£#,##0.00|

Column Content Data Type: Text|Text|Text|Text|Text|Date|Single|Boolean

Column Content Editable: True|True|False|False|False|True|False|True

Column Content Mandatory: True|True|True||||

Column Content Macro: ||&QWUS:|&QWF2: TB\_DOCSTATUS\_QUOTE||

Get Lookup Names Get Lookup Values Test Separators

Save Close

1. The **Results Grid Captions** are the labels that will appear on the top row of the grid when the results are displayed.
2. The **Database Field Names** are the actual field names from the database that should be used.

**Note: Field names should be prefixed “DH.”; only DocumentHeader table fields should be listed here.**

3. The **Grid Column Alignment** allows the grid column information to be aligned “Left”, “Right” or “Centre”. Where no alignment value has been set, then the default will be used for the field data type.
4. The **Grid Column Format** allows the grid column information to be formatted for numeric or date values, etc. Where no format value has been set, then the default will be used for the field data type.

### Examples:

“#,##0” for numbers with a thousand separator

“#,##0.00” for numbers with a thousand separator and two decimal places

“\$#,##0.00” for currency values with a thousand separator and two decimal places

dd/MM/yyyy dates formatted day/month/year

MM/dd/yyyy dates formatted month/day/year



5. The **Column Content Data Type** is used alongside the Edit Mode features to specify how the data in the grid will be treated when it is saved. Expected values are “Text”, “Date”, “Single”, “Numeric”, etc.
6. The **Column Content Editable** is used alongside the Edit Mode features to specify whether the User should be allowed to edit the column data.
7. The **Column Content Mandatory** is used alongside the Edit Mode features to specify whether a value is required. If the row has been edited and a value has not been entered for a mandatory column when the User clicks “Save” on the Document Open screen, then the User will be prompted to enter a value and the updates will not be saved.
8. The **Column Content Macro** is used alongside the Edit Mode features to specify if the value should come from a F2 Lookup or User list. To specify an F2 Lookup value: enter the macro “&QWF2:” followed by the name of the F2 Lookup. To specify the Quotewerks User list for the Lookup value: enter the macro “&QWUS:” for the pipe-separated value.

**Note: a list of available F2 Lookup Names can be viewed by clicking the “Get Lookup Names” button; to check that the Lookup has the expected values, then click the “Get Lookup Values” button and enter the Lookup Name into the dialog that appears.**

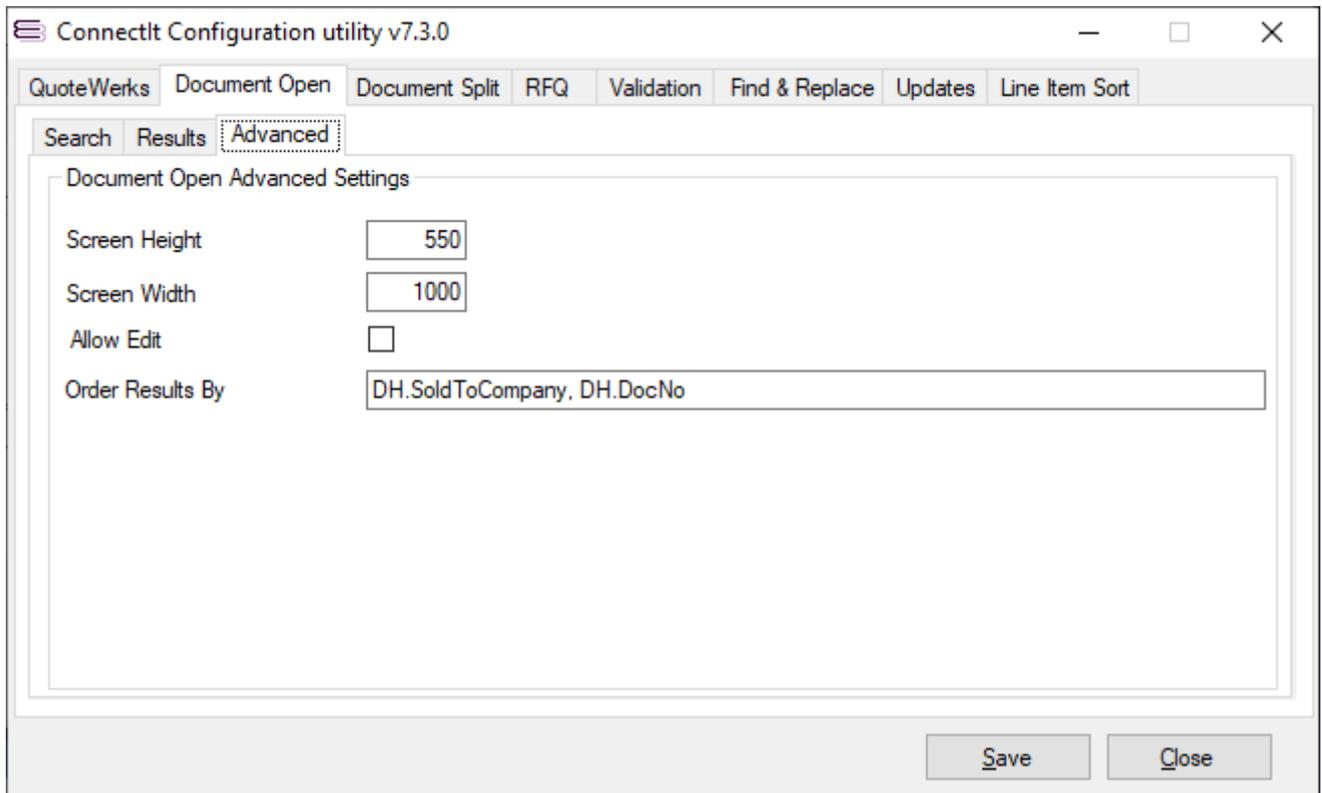
**Notes:**

- \* By entering Editable = False and a Macro will mean that the User is forced to select a value from the F2 Lookup or User list and not able to free type a value.
- \* By entering Editable = True and a Macro will mean that the User can select a value from the F2 Lookup or User list or enter a free typed value.



## Document Open Settings | Advanced tab

The **Document Open | Advanced** tab enables you to configure miscellaneous other details with how the **Document Open** screen appears and functions.



The screenshot shows a window titled "ConnectIt Configuration utility v7.3.0" with a menu bar containing "QuoteWerks", "Document Open", "Document Split", "RFQ", "Validation", "Find & Replace", "Updates", and "Line Item Sort". Below the menu bar are three tabs: "Search", "Results", and "Advanced". The "Advanced" tab is selected and contains the following settings:

Document Open Advanced Settings	
Screen Height	550
Screen Width	1000
Allow Edit	<input type="checkbox"/>
Order Results By	DH.SoldToCompany, DH.DocNo

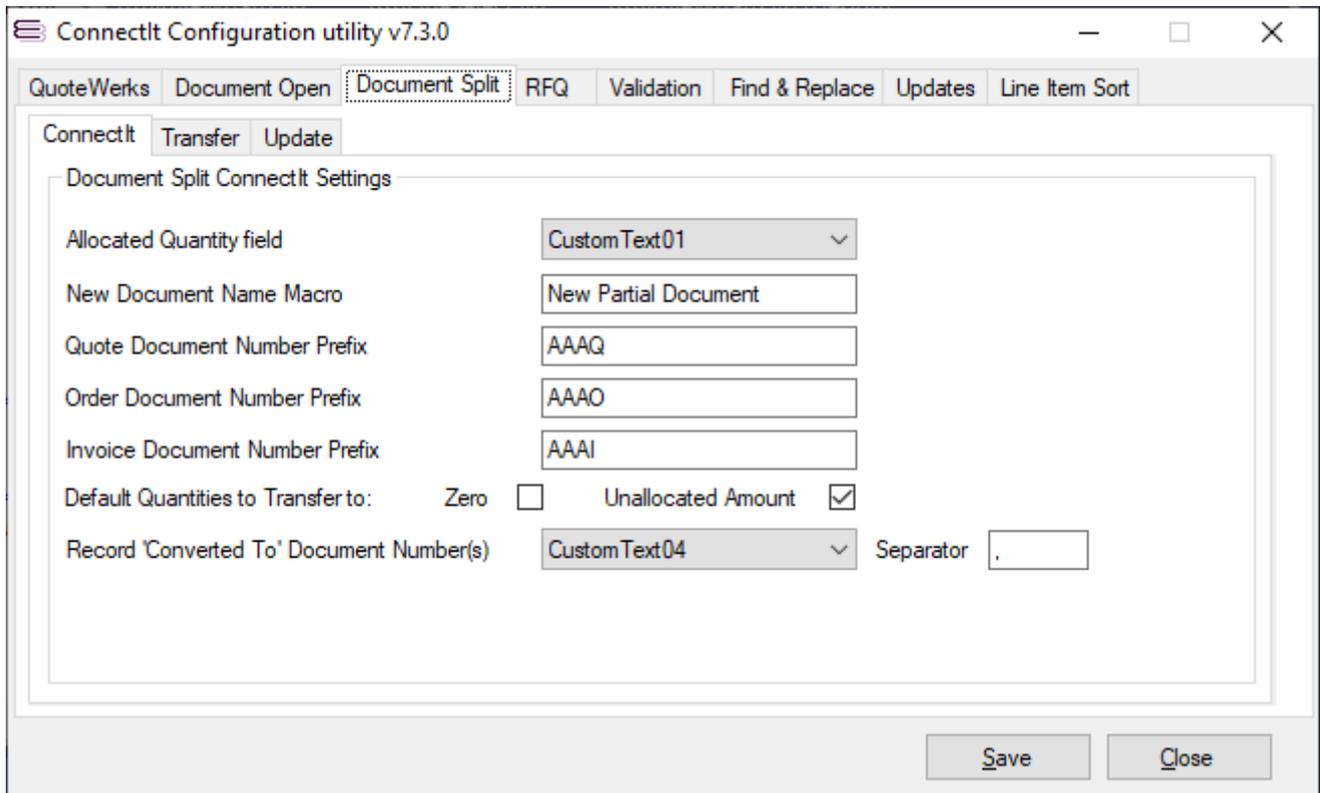
At the bottom right of the window are two buttons: "Save" and "Close".

1. The **Screen Height** and **Screen Width** settings define how big the screen appears by default when it is first opened. (The screen may then be resized as required using standard Windows functionality.)
2. The **Allow Edit** setting defines whether the **Enter Edit Mode** checkbox appears on the Document Open screen. This is useful if you do not want Users to know about the Edit Mode features which should be used by advanced Administrator Users only.
3. The **Order Results By** setting defines how the results grid list of documents is ordered. If this setting is left blank, then the grid results are ordered by the fields on the grid itself.



## Document Split Settings | ConnectIt tab

The **Document Split | ConnectIt** tab enables you to enter your required settings for split documents within QuoteWerks.



The screenshot shows the 'ConnectIt Configuration utility v7.3.0' window. The 'Document Split' tab is selected, and the 'ConnectIt' sub-tab is active. The settings are as follows:

Field	Value
Allocated Quantity field	CustomText01
New Document Name Macro	New Partial Document
Quote Document Number Prefix	AAAQ
Order Document Number Prefix	AAAO
Invoice Document Number Prefix	AAAI
Default Quantities to Transfer to:	Zero <input type="checkbox"/> Unallocated Amount <input checked="" type="checkbox"/>
Record 'Converted To' Document Number(s)	CustomText04
Separator	.

Buttons for 'Save' and 'Close' are visible at the bottom right.

1. Select a field from the **Allocated Quantity Field** drop down menu. This field is used to store in the original document the quantity that has already been transferred to a new **QuoteWerks** document(s) using the **ConnectIt-Workflow Document Split** module.

**Note:** If the option to **Reduce Quantities of Original Document by Amount on the New Document** is ticked on the **Document Split | Transfer** tab, the **Allocated Quantity** field changes to **Original Quantity** field.

2. The **New Document Name Macro** field is used to generate the name of the new **QuoteWerks** document(s) created by the **ConnectIt-Workflow Document Split** module. **ConnectIt-Workflow Document Split** supports a number of macros which allow you to configure the name of the new **QuoteWerks** document(s). The default value for **New Document Name Macro** is "&QWDH\_DocName Split". Using this macro will mean the new **QuoteWerks** document created by **ConnectIt-Workflow Document Split** will have the name of the original document followed by "Split". If you would prefer the new document name to have something else other than "Split" at the end, replace "Split" with your required name.
3. The **Default Quantities to Transfer to** option controls the default value for the Quantity to Transfer field in the **ConnectIt-Workflow Document Split** form. Selecting **Zero** will result in the Quantity to Transfer field in the **ConnectIt-Workflow Document Split** form defaulting to Zero. Selecting **Unallocated Amount** will result in the Quantity to Transfer field in the **ConnectIt-Workflow Document Split** form defaulting to the unallocated amount i.e. the remaining amount that is yet to be ordered / invoiced.
4. If the **Record 'Converted To' Document Number(s)** option has been set, then the "Converted To" Document Number is appended to the "Converted From" Document Line Item(s). Note that any existing "Converted From" Document Numbers on a Line Item get appended to with the "Separator" value between them. The "Converted From" Document Number(s) on the "Converted To" Document are cleared – they are not retained from the "Converted From" Document.
5. Click the **Save** button to retain the settings on the **Document Split | ConnectIt** tab.



## Document Split Settings | Transfer tab

The **Document Split | Transfer** tab enables you to configure the settings to be used when splitting QuoteWerks documents.

ConnectIt Configuration utility v7.1.0

QuoteWerks Document Open Document Split RFQ Validation Find & Replace Updates Line Item Sort

ConnectIt Transfer

Transfer Settings

Reduce Quantities of original Document by amount on the new Document

Quote Destination Document Type QUOTE

Order Destination Document Type ORDER

Invoice Destination Document Type INVOICE

Transfer Allocated Quantities to new Document

New Document Allocated Quantity field CustomText02

Transfer remaining Quantities to new Document

New Document remaining Quantity field CustomText03

Transfer Items with a zero Quantity to Transfer

Save Close

1. Selecting Reduce Quantities of Original Document by Amount on the New Document will change how ConnectIt-Workflow Document Split behaves. ConnectIt-Workflow Document Split will reduce the quantity of items on the original document by the quantity on the newly created document. This option disables the selection of a Destination Document Type as this is only suitable if the Destination Document Type matches the original's document type.

**Note: If the option to Reduce Quantities of Original Document by Amount on the New Document is ticked, the Allocated Quantity field on the Document Split | ConnectIt tab changes to Original Quantity field.**

2. Select a **QuoteWerks Document Type** from the three **Destination Document Type** drop down menus. For each **QuoteWerks Document Type** you wish to split, you must select the **QuoteWerks Document Type** of the document that is created i.e. selecting ORDER from the **Quote Destination Document Type** drop down menu will mean when you run **ConnectIt-Workflow Document Split** on a Quote, the document created will be an Order.
3. Selecting **Transfer Allocated Quantities to new Document** will populate the field selected from the **New Document Allocated Quantity field** drop down menu with the allocated quantity for that line item.
4. Selecting **Transfer Remaining Quantities to new Document** will populate the field selected from the **New Document Remaining Quantity field** drop down menu with the remaining quantity to be transferred for that line item.
5. Selecting **Transfer Items with a Zero Quantity** will mean that if you have entered zero as the quantity to transfer, this item will be added to the document with a quantity of zero. If this option is not selected, the Quantity must be 1 or higher for the line to be included in the new document.
6. Click the **Save** button to retain the settings on the **Document Split | Transfer** tab.



## Document Split Settings | Update tab | Original Document tab

The **Document Split | Update | Original Document** tab enables you to configure the settings to modify field values on the originating Document while the Split is in progress and once it has been completed.

The screenshot shows the 'ConnectIt Configuration utility v7.3.0' window. The 'Update' tab is selected, and the 'Original Document' sub-tab is active. The 'Document Split Update Settings' section contains four fields:

Setting	Value
Original Document Update Fields	CustomText01   DocStatus
Original Document Update Values	&QWDH_DocName   Document Split in Progress
Original Document Update Fields on Complete	DocStatus
Original Document Update Values on Complete	Document Split Complete

Buttons for 'Save' and 'Close' are located at the bottom right of the window.

1. The **Original Document Update Fields** setting is a pipe-separated list of **QuoteWerks Document Header** field names that should be updated when the **Document Split** is in progress.
2. The **Original Document Update Values** setting is a pipe-separated list of macro or fixed values that you would like the respective field in the **Update Fields** list to be changed to.
3. The **Original Document Update Fields on Complete** setting is a pipe-separated list of **QuoteWerks Document Header** field names that should be updated when the **Document Split** process has been completed, i.e. all **Line Item Quantities** have been allocated to a new Document.
4. The **Original Document Update Values on Complete** setting is a pipe-separated list of macro or fixed values that you would like the respective field in the **Update Fields on Complete** list to be changed to.

**Note:** "&QWDH\_..." macros are supported for the Update Fields and so is "&Today" which gets modified to the current system date in the local "short date" format.

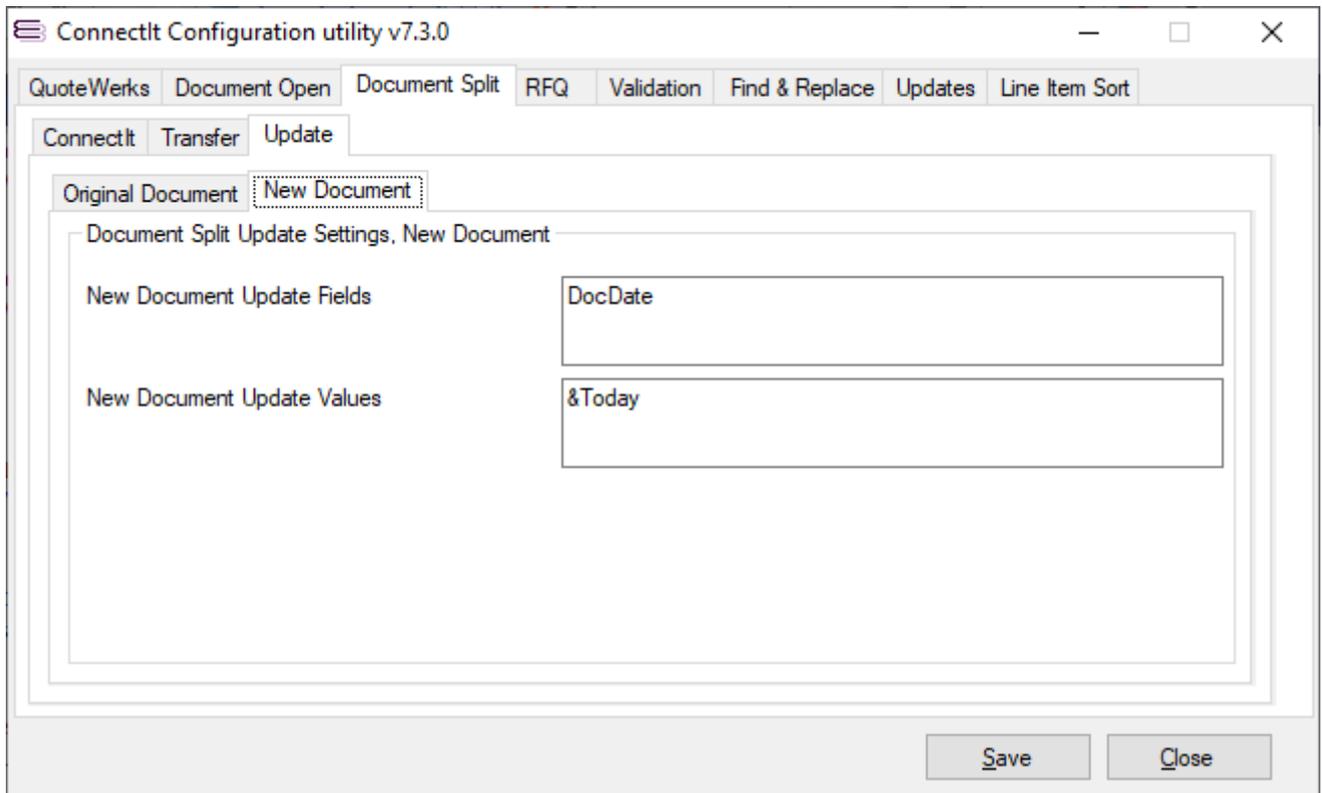
**Note:** the number of elements in the pipe-separated Fields and Values lists should match.

5. Click the **Save** button to retain the settings on the **Document Split | Update** tab.



## Document Split Settings | Update tab | New Document tab

The **Document Split | Update | New Document** tab enables you to configure the settings to modify field values on the new Document(s) created from the originating Document.



1. The **New Document Update Fields** setting is a pipe-separated list of **QuoteWerks Document Header** field names that should be updated when the **Document Split** is in progress.
2. The **New Document Update Values** setting is a pipe-separated list of macro or fixed values that you would like the respective field in the **Update Fields** list to be changed to.

**Note: "&QWDH\_..." macros are supported for the Update Fields and so is "&Today" which gets modified to the current system date in the local "short date" format.**

**Note: the number of elements in the pipe-separated Fields and Values lists should match.**

3. Click the **Save** button to retain the settings on the **Document Split | Update** tab.



## RFQ Settings | ConnectIt tab

The screenshot shows the 'ConnectIt Configuration utility v7.1.0' window with the 'RFQ' tab selected. The 'ConnectIt' section is active, displaying the following settings:

Field	Value
Document Type	QUOTE
Document Status Start	Open
Document Status in Progress	Requesting Quotes
Document Status Complete	RFQ Complete
Vendor Name field	Vendor
RFQ Marker field	CustomText10
Product/Service RFQ Marker	RFQLine
RFQ Source Line Marker	RFQSource

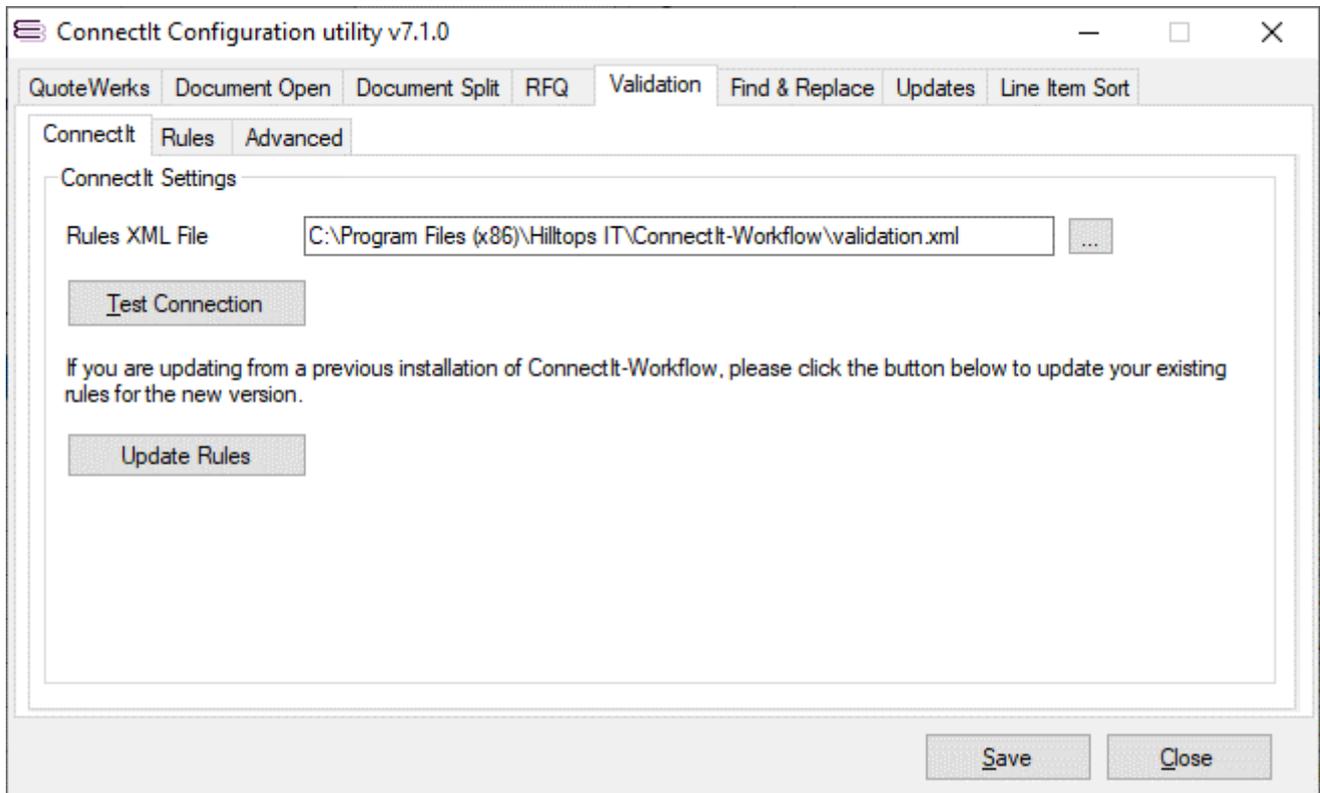
Buttons for 'Save' and 'Close' are visible at the bottom right of the window.

1. Select the **QuoteWerks Document Type** that you would like to create the **RFQ** from.
2. If you would prefer a starting status other than the default “Open” for the **QuoteWerks Document Status**, enter your required starting status in the **Document Status Start** field.
3. If you would prefer an in progress status other than “Requesting Quotes” for the **QuoteWerks Document Status**, enter your required in progress status in the **Document Status In Progress** field.
4. If you would prefer a completed status other than “RFQ Complete” for the **QuoteWerks Document Status**, enter your required in progress status in the **Document Status Complete** field.
5. If you are using a **QuoteWerks** field other than **Vendor** to hold your Supplier company names, select the appropriate field from the Vendor Name field drop down list box.
6. If you would prefer to use a different **Document Items Custom field** to the default **CustomText10**, to hold the **RFQ Marker** information, select the appropriate field from the **RFQ Marker** field drop down list box. The **RFQ Marker** indicates whether the **Line Item** is an original source line or an additional line item added by the **RFQ module** so that prices can be entered per Quantity by Supplier.
7. If you would prefer a **Product/Service RFQ Marker** other than the default “RFQLine” for the value that the **RFQ module** automatically enters in the selected **RFQ Marker** field above for the requested RFQ line(s), enter your required Marker text in the **Product/Service RFQ Marker** field.
8. If you would prefer a **RFQ Source Line Marker** other than the default “RFQSource” for the value that the **RFQ module** automatically enters in the selected **RFQ Marker** field above for the original source line(s), enter your required Marker text in the **Product/Service RFQ Marker** field.
9. Click the **Save** button to retain the settings on the **RFQ | ConnectIt** tab.



## Validation Settings | ConnectIt tab

The **Validation | ConnectIt** tab enables you to set where **ConnectIt-Workflow** should read its **Rules** from. The screenshot below shows the default path.



1. If you would like to change the XML file where **ConnectIt-Workflow** gets its **Rules** from, click the ellipses (“...”) button to select the appropriate file. This can be particularly useful in a multi-user networked environment where you want all **QuoteWerks Users** to have the same **Rule** set.
2. To double-check that the file exists, click the **Test Connection** button. A message will appear to confirm whether the file exists.
3. Click the **Save** button to retain the settings on the **ConnectIt** tab.

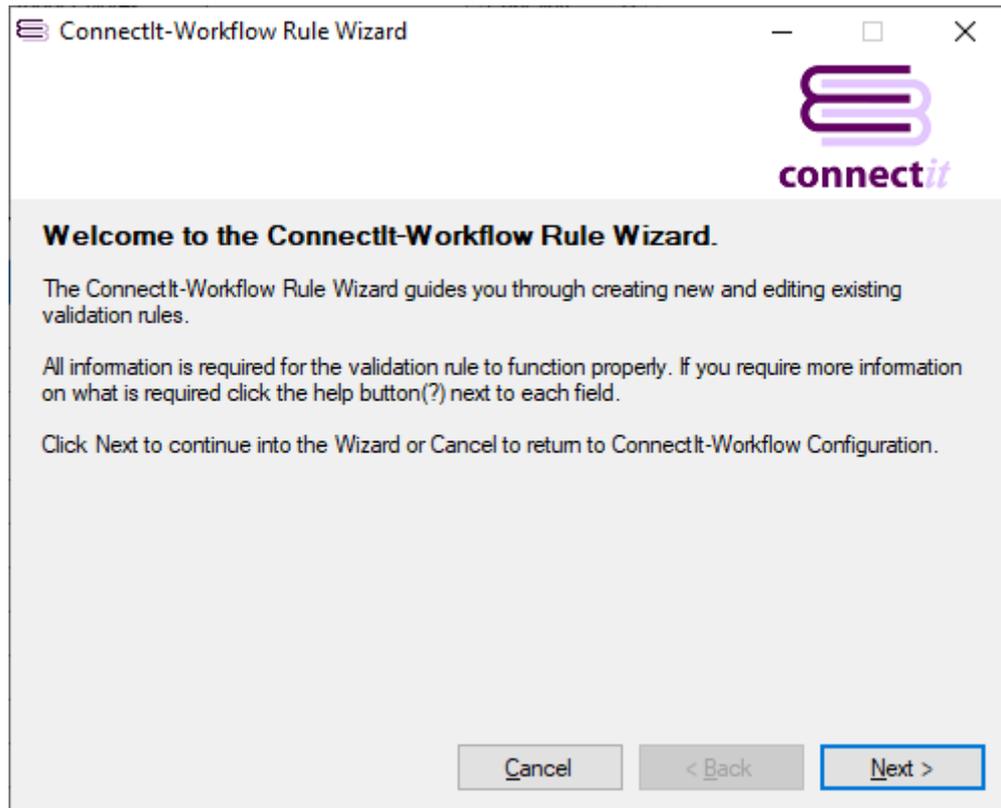
## Validation Settings | Rules tab

The **Validation | Rules** tab enables you to create, edit and remove the **Rules** used by the **ConnectIt-Workflow Validation** module.

Name	Document Type	Document Status	Validation Lev
Sales Rep must match specified values	All	All	DocHeader
Sold To Company Name must not be blank	Quote	All	DocHeader
Sold To Contact Name must not be blank	Quote	All	DocHeader
Sold To Address Line 1 must not be blank	Quote	All	DocHeader
Unit Price must not be blank on Quotes	Quote	All	DocItem
Vendor Name must not be blank on Orders	Order	All	DocItem
Ship Via must be listed values	Order	All	DocHeader
Document Due Date must not be blank for Orders and Invoices	Order Invoice	All All	DocHeader
Bill To Company Name must not be blank on Orders and Invoices	Order Invoice	All All	DocHeader

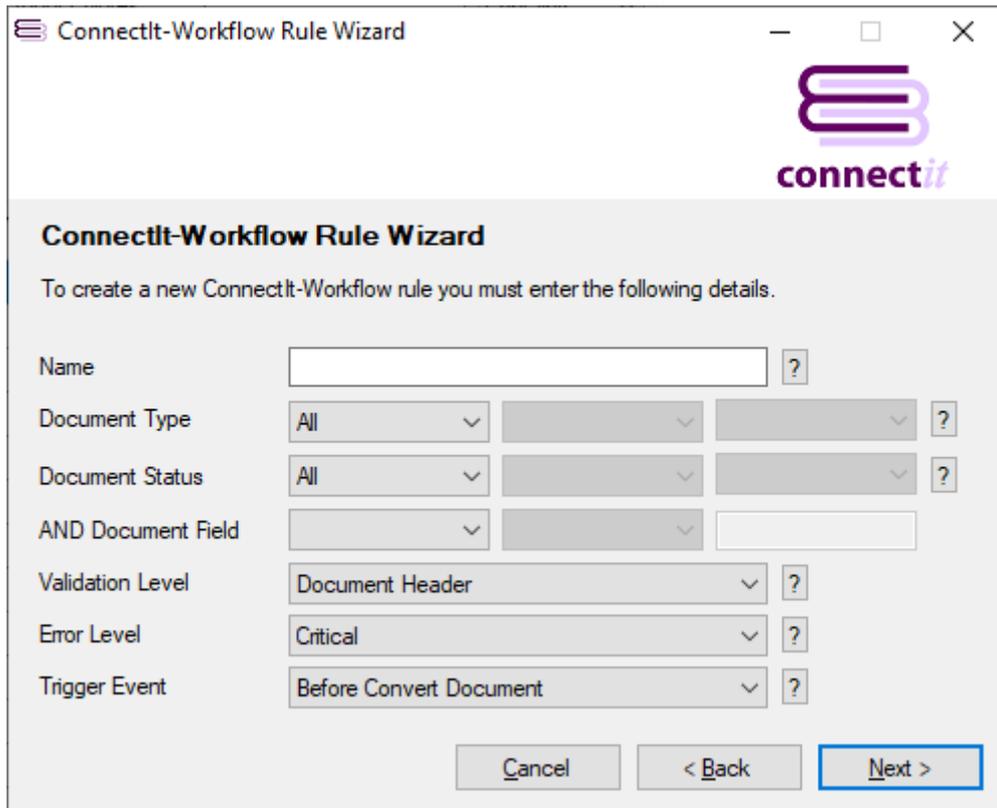
1. **ConnectIt-Workflow Validation** module comes pre-configured with several example **Rules**. From this screen, you can use the **New Rule**, **Edit Rule** and **Delete Rule** buttons to create, modify or remove the **Rules** as appropriate for your business.
2. Once you have finished editing the list of **Rules**, click the **Save** button to retain the settings on the **Validation | Rules** tab.

## ConnectIt-Workflow Validation module Rule Wizard step 1



1. After clicking **New Rule** or **Edit Rule** on the **ConnectIt-Workflow Validation | Rules** tab, click **Next** to begin the **ConnectIt-Workflow Validation module Rule Wizard**.

## ConnectIt-Workflow Validation module Rule Wizard step 2



**ConnectIt-Workflow Rule Wizard**

To create a new ConnectIt-Workflow rule you must enter the following details.

Name  ?

Document Type All ?

Document Status All ?

AND Document Field  ?

Validation Level Document Header ?

Error Level Critical ?

Trigger Event Before Convert Document ?

1. Enter a Name for the **Rule** that you are going to create.
2. Select from the **Document Type** drop down menu which **QuoteWerks Document Type(s)** you would like to create the **ConnectIt-Workflow Validation Rule** for.
3. Select from the **Document Status** drop down menu which **QuoteWerks Document Status** you would like to create the **ConnectIt-Workflow Validation Rule** for.
4. If, in addition to **Document Type** and **Document Status**, you would also like to validate on a specific **QuoteWerks** field, select the required field from the '**AND Document Field**' dropdown list. Once you have selected a Document field, the operator field dropdown list will be activated enabling you to select the required option. Finally enter the required value for the selected Document field to validate on. If these fields are set, then as well as checking that the Rule should be run for the specific **Document Type** and **Status**, the **ConnectIt-Workflow Validation Rule** also checks that the specified Document Header AND field has the appropriate Value. Note that this works for Rules based on both **Document Header** and **Document Item** Validation Levels.
5. Select from the **Validation Level** drop down menu which document level you would like to create the **ConnectIt-Workflow Validation Rule** for. This will either be **Document Header** or **Document Items**.
6. Select from the **Error Level** drop down menu which type of error message you would like to appear if the appropriate **Validation Rule** is not completed. A **Critical** error message does not allow the user to continue until all the validation rules have been met. A **Warning** error message informs the user that a validation **Rule** has not been met but allows the user to ignore the error and carry on.
7. Select from the **Trigger Event** drop down menu which **QuoteWerks** event you would like to trigger the **ConnectIt-Workflow Validation** module to run this rule.
8. Click **Next** to continue.



## ConnectIt-Workflow Validation module Rule Wizard step 3

ConnectIt-Workflow Rule Wizard

QuoteWerks Field and Field Type are required, User QuoteWerks Field is optional.

Quotewerks Field: AcceptanceNotes

Field Type: Text

Customer Error Messages:

User QuoteWerks Field:

Buttons: Cancel, < Back, Next >

1. Select from the **QuoteWerks Field** drop down menu which **QuoteWerks** field you would like to create the **ConnectIt-Workflow Validation** rule for.
2. Select from the **Field Type** drop down menu which **QuoteWerks** field type you have selected above: Text, Numeric or Date.
3. If the rule you are creating or editing is at the **Document Items** rather than **Document Headers** level, you will need to select the **Document Items Line Type** that the rule is to validate on.
4. If you would prefer to use your own error messages, tick the **Customer Error Messages** check box and then enter your required error message in the **Custom Error Message** field which replaces the **User QuoteWerks Field** when **Customer Error Messages** is ticked.
5. If you do not wish to use your own error message and have not ticked the **Customer Error Message** check box, enter your **QuoteWerks** custom label name in the **User QuoteWerks Field** if you require your custom label to be displayed in error messages, rather than **QuoteWerks'** default field name.
6. Click **Next** to continue.

## ConnectIt-Workflow Validation module Rule Wizard step 4

ConnectIt-Workflow Rule Wizard

**ConnectIt-Workflow Rule Wizard**

Select a Macro (the type of validation you require this rule to run).

For more information, select a Macro from the drop down list and a brief decription will appear below.

Macro  ?

Macro Description:  
Ensures the specified field contains data.

1. Select from the **Macro** drop down menu which type of validation you require this rule to run.
2. Click **Next** to continue.

## ConnectIt-Workflow Validation module

**ConnectIt-Workflow Rule Wizard**

This is where you enter any extra information the macro requires, below is a description of what is required.

The value(s) that the specified field must equal should be entered here. e.g. if the field should equal 1 simply enter 1, if the field should enter Bob or Dave then Bob|Dave should be entered any number of values can be entered separated by | with NO spaces around it.

Arguments  ?

Case Sensitive  ?

Arguments Macro  ?

Append  ?

1. Enter the required value in the **Arguments** field. For this rule, “Unit Price must not be blank on Quotes”, where the macro is “Field must be greater than or equal to specified value”, the appropriate value to enter is “0”.

For a Rule where there are perhaps multiple values that the field could be (such as “Field Must Equal Specified Value”) then the values must be entered with a pipe character separating each value, i.e. “Option 1|Option 2|Option 3”, etc. Alternatively, the list of field values may be taken from an F2 Lookup field using the “&QWF2:” prefix to the Argument. For example: “&QWF2: TB\_CustomText01” would read the values from the Custom tab | CustomText01 field values; “&QWF2: TB\_DocumentItemsColumn\_CustomText02” would read the values from the QuoteWerks Items tab | CustomText02 column field values.

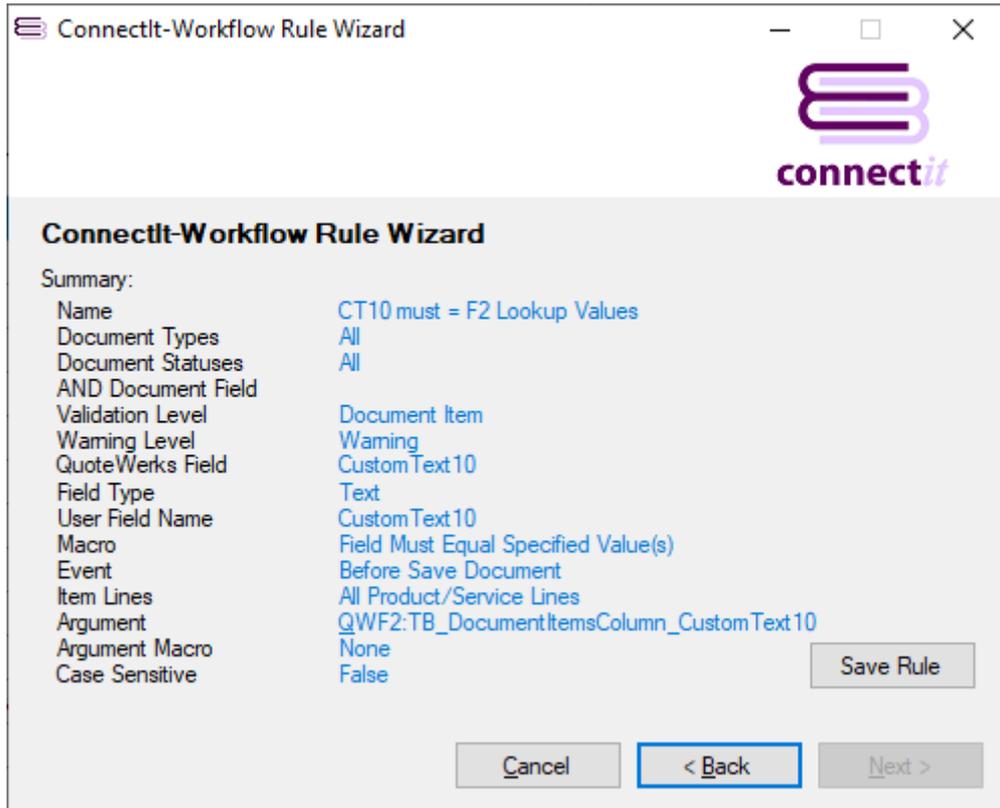
**Note: the F2 Lookup Names are not case-sensitive.**

**Note: while many of the QuoteWerks Document Header and Document Item level F2 Lookup Names follow the naming convention illustrated above, some do not. For example: the Notes tab | Introduction field F2 Lookup Name is “MB\_INTRO” and QuoteWerks Items tab | ItemType column field F2 Lookup Name is “TB\_EP\_PRODTYPE”. If, when testing the Rule, you receive an ‘XML Rule error, Argument required for equal macro’ error, then it may be because ConnectIt-Workflow has not been able to translate the “&QWF2:” macro correctly due to an invalid F2 Lookup Name being specified. Please interrogate the QuoteWerks Lookups database | LookupItems table or contact your QuoteWerks Reseller for assistance in finding out the Name of the required F2 Lookup.**

2. If relevant for your rule, select the appropriate **Arguments Macro** from the drop-down menu. For this example rule, no **Arguments Macro** is needed.
3. In the **Append** field, use either “True” if you would like the required argument to be entered if a rule fails or “False” if you just require the user to be warned that the rule has failed.
4. Click **Next** to continue.



## ConnectIt-Workflow Validation module Rule Wizard step 6



The screenshot shows the 'ConnectIt-Workflow Rule Wizard' window. The title bar reads 'ConnectIt-Workflow Rule Wizard'. In the top right corner, there is a logo for 'connectit' consisting of a stylized purple 'S' shape above the text 'connectit'. Below the logo, the text 'ConnectIt-Workflow Rule Wizard' is displayed. Underneath, a 'Summary:' section lists various configuration options and their values. At the bottom, there are three buttons: 'Cancel', '< Back', and 'Next >'. A 'Save Rule' button is also present on the right side of the summary table.

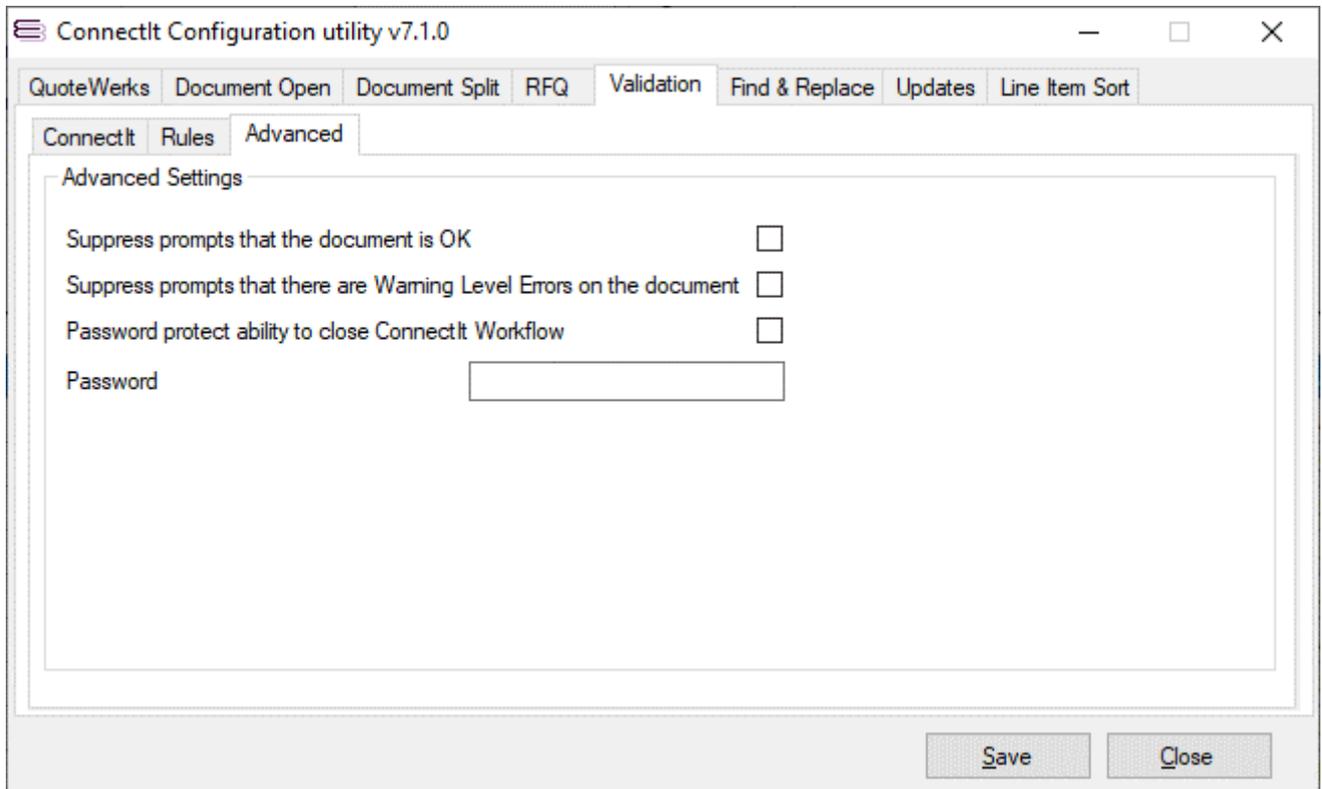
Summary:	
Name	CT10 must = F2 Lookup Values
Document Types	All
Document Statuses	All
AND Document Field	
Validation Level	Document Item
Warning Level	Warning
QuoteWerks Field	CustomText10
Field Type	Text
User Field Name	CustomText10
Macro	Field Must Equal Specified Value(s)
Event	Before Save Document
Item Lines	All Product/Service Lines
Argument	QWF2:TB_DocumentItemsColumn_CustomText10
Argument Macro	None
Case Sensitive	False

1. The final screen, above, is a summary of the **ConnectIt-Workflow Validation module Rule Wizard**. If you are happy with the Summary, click the **Save Rule** button. If you would like to change any of the values shown in the Summary, click the **Back** button to change any part of the rule you have created.

## Validation Settings | Advanced tab

The **Validation | Advanced** tab enables you to suppress the warning messages that the **ConnectIt-Workflow Validation** module generates when processing information from the **QuoteWerks** document.

**Note: Please note that suppressing these warning messages is not recommended and may lead to the user missing important feedback when creating documents in QuoteWerks.**



1. When an event in **QuoteWerks** triggers **ConnectIt-Workflow Validation** module to validate the document, you will be prompted by **ConnectIt-Workflow Validation** if the current document has validated ok. If you would prefer not to be prompted, tick the “Suppress prompts that the document is OK” tick box.
2. When an event in **QuoteWerks** triggers **ConnectIt-Workflow Validation** module to validate the document, you will be prompted by **ConnectIt-Workflow Validation** if the current document has any **Warning Error Level** problems to be highlighted. If you would prefer not to be prompted, tick the “Suppress prompts that the document contains Warning level errors” tick box.
3. By default any user can close **ConnectIt-Workflow Validation** at anytime. Selecting “Password protect ability to close ConnectIt Workflow” and entering a password in the “Password” field can prevent users closing **ConnectIt-Workflow Validation**. This option is primarily to stop users from exiting **ConnectIt-Workflow Validation** and therefore not validate a document(s). Selecting this option will not affect **ConnectIt-Workflow Validation** automatically closing with **QuoteWerks**.

**Note: Critical Error Level messages cannot be suppressed.**

4. Click the **Save** button to retain the settings on the **Advanced** tab.



## Find & Replace | Document Header tab

The **Find & Replace | Document Header** tab enables you to configure the fields that will be used in the Find and Replace process.

The screenshot shows the 'ConnectIt Configuration utility v7.3.0' window with the 'Find & Replace' tab selected. Under the 'Document Header' sub-tab, the 'Document Header Search Settings' section contains three main fields:

- Search Dropdown Captions:** A text box containing a pipe-separated list: "All | Introduction Notes | Closing Notes | Purchasing Notes | Internal Notes | CustomMemo01 | CustomMemo02 | CustomMemo03 | CustomMemo04 | CustomText01 | CustomText02 | CustomText03 | CustomText04 | CustomText05 | CustomText06 | CustomText07 | CustomText08 | CustomText09 | CustomText10 | CustomText11 | CustomText12 | CustomText13 | CustomText14 | CustomText15 | CustomText16 | CustomText17 |".
- Search Dropdown Fields:** A text box containing a pipe-separated list: "All | IntroductionNotes | ClosingNotes | PurchasingNotes | InternalNotes | CustomMemo01 | CustomMemo02 | CustomMemo03 | CustomMemo04 | CustomText01 | CustomText02 | CustomText03 | CustomText04 | CustomText05 | CustomText06 | CustomText07 | CustomText08 | CustomText09 | CustomText10 | CustomText11 | CustomText12 | CustomText13 | CustomText14 | CustomText15 | CustomText16 | CustomText17 |".
- Default Selection:** A dropdown menu currently set to "All".

Below these fields is a **Test Separators** button. At the bottom of the window are **Save** and **Close** buttons. A 'Notes' section at the bottom provides instructions: "\* Values should be entered separated by pipe (\"|\") characters." and "\* Spaces are allowed between values - any leading or trailing spaces will be trimmed."

1. The **Search Dropdown Captions** are a pipe-separated list of the captions for the related **Search Dropdown Fields**. The **Caption** is the value that the User will see in the front end; the **Field** is the underlying database field name that the process uses.

**Note: the number of elements in the pipe-separated Fields and Values lists should match.**

2. The **Default Selection** is the option that will appear selected when the **Find & Replace** utility **Search Dropdown** is first displayed.
3. The **Test Separators** button will check that there are the same number of pipe-separated elements in the **Captions** and **Fields** lists.
4. Click the **Save** button to retain the settings on the **Find & Replace** tab.



## Find & Replace | Document Items tab

The **Find & Replace | Document Items** tab enables you to configure the fields that will be used in the Find and Replace process.

The screenshot shows the 'ConnectIt Configuration utility v7.3.0' window. The 'Find & Replace' tab is selected, and the 'Document Items' sub-tab is active. The 'Document Item Search Settings' section contains three main areas:

- Search Dropdown Captions:** A text box containing a pipe-separated list of field names: "All | Description | Notes | Manufacturer Part # | Vendor Part # | Internal Part # | CustomMemo01 | CustomMemo02 | CustomMemo03 | CustomMemo04 | CustomMemo05 | CustomText01 | CustomText02 | CustomText03 | CustomText04 | CustomText05 | CustomText06 | CustomText07 | CustomText08 | CustomText09 | CustomText10 | CustomText11 | CustomText12 | CustomText13 | CustomText14 | CustomText15 | CustomText16 |".
- Search Dropdown Fields:** A text box containing a pipe-separated list of field names: "All | Description | Notes | ManufacturerPartNumber | VendorPartNumber | InternalPartNumber | CustomMemo01 | CustomMemo02 | CustomMemo03 | CustomMemo04 | CustomMemo05 | CustomText01 | CustomText02 | CustomText03 | CustomText04 | CustomText05 | CustomText06 | CustomText07 | CustomText08 | CustomText09 | CustomText10 | CustomText11 | CustomText12 | CustomText13 | CustomText14 | CustomText15 |".
- Default Selection:** A dropdown menu currently set to "All".

At the bottom right of the settings area is a button labeled "Test Separators". Below the settings area, there are two notes:

- \* Values should be entered separated by pipe ("|") characters.
- \* Spaces are allowed between values - any leading or trailing spaces will be trimmed.

At the bottom of the window are two buttons: "Save" and "Close".

1. The **Search Dropdown Captions** are a pipe-separated list of the captions for the related **Search Dropdown Fields**. The **Caption** is the value that the User will see in the front end; the **Field** is the underlying database field name that the process uses.

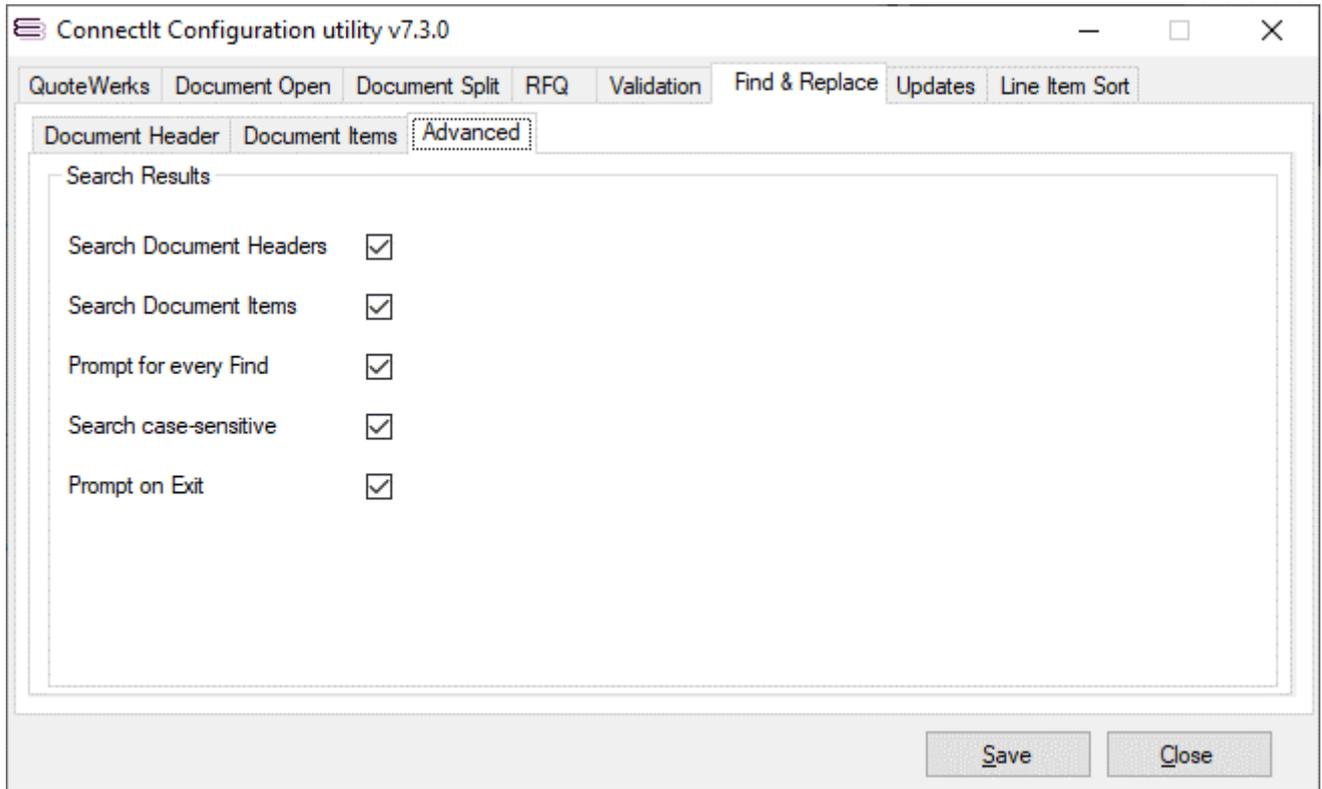
**Note: the number of elements in the pipe-separated Fields and Values lists should match.**

2. The **Default Selection** is the option that will appear selected when the **Find & Replace** utility **Search Dropdown** is first displayed.
3. The **Test Separators** button will check that there are the same number of pipe-separated elements in the **Captions** and **Fields** lists.
4. Click the **Save** button to retain the settings on the **Find & Replace** tab.



## Find & Replace | Advanced tab

The **Find & Replace | Advanced** tab enables you to configure options used in the **Find & Replace** process.



1. The **Search Document Headers**, **Search Document Items**, **Prompt for every Find** and **Search case-sensitive** options define whether these options are selected or not when the **Find & Replace** utility **Search Dropdown** is first displayed.
2. The **Prompt on Exit** option defines whether a 'are you sure you want to exit' prompt appears before closing the **Find & Replace** utility.
3. Click the **Save** button to retain the settings on the **Find & Replace** tab.

## Updates | Document Revisions | Quotes (old) tab

The **Updates | Document Revisions | Quotes (old)** tab enables you to configure the fields that will be updated when a QUOTE Document is superseded as part of the **QuoteWerks File menu | Save As Next Revision** option process. These are the values which get applied to the Document being revised as opposed to the new revised Document.

**Note: the values should be entered as pipe (“|”) separated. Any number of values may be set up as part of the ConnectIt-Workflow Save Updates configuration. The individual pipe separated values of each of the settings here are linked to each other, i.e. the first Field is linked to the first Value is linked to the first Data Type, etc. Spaces are allowed between values and any leading or trailing spaces are trimmed when the Updates take place.**

ConnectIt Configuration utility v6.0.0

QuoteWerks Document Open Document Split RFQ Validation Find & Replace Updates Line Item Sort

Document Revisions Post Lock

Quotes (old) Orders (old) Invoices (old) Quotes (new) Orders (new) Invoices (new)

Save Update Quote Revision Settings (for the Document being revised)

Fields

Values

Data Types

Notes:

- \* Values should be entered separated by pipe (“|”) characters.
- \* Spaces are allowed between values - any leading or trailing spaces will be trimmed.

Test Separators

Save Close

1. Enter the pipe-separated list of **QuoteWerks Document Header Fields** to update. For example DocStatus | CustomText01 | CustomNumber01 | CustomDate01.

**Note: this should be the underlying database field name and not the label caption.**

2. Enter the pipe-separated list of **Values** that you would like to update the respective **QuoteWerks Document Header Field** with. For example: &Conc\_Superseded | &Conc\_My Username | &QWDH\_SubTotal | &Date\_Today;.

**Note: these values may be hard-coded or QuoteWerks Document Header field macros.**

3. Enter the **Data Types** for the respective **QuoteWerks Document Header Field** names that have been entered. For example: Text | Text | Number | Date.
4. Click the **Test Separators** button to ensure that you have entered the same number of pipe-separated values into each of the **Fields**, **Values** and **Data Types** textboxes. You will be prompted with a success message or details of any mismatches if they are present.
5. Click the **Save** button to retain the settings on the **Updates | Document Revisions | Quotes (old)** tab.



## Updates | Document Revisions | Orders (old) tab

See **Updates | Document Revisions | Quotes (old)** tab section for details, but please note that these settings are used when an **ORDER** type Document is revised.

ConnectIt Configuration utility v6.0.0

QuoteWerks Document Open Document Split RFQ Validation Find & Replace Updates Line Item Sort

Document Revisions Post Lock

Quotes (old) Orders (old) Invoices (old) Quotes (new) Orders (new) Invoices (new)

Save Update Order Revision Settings (for the Document being revised)

Fields

Values

Data Types

Notes:

- \* Values should be entered separated by pipe ("|") characters.
- \* Spaces are allowed between values - any leading or trailing spaces will be trimmed.

Test Separators

Save Close

## Updates | Document Revisions | Invoices (old) tab

See **Updates | Document Revisions | Quotes (old)** tab section for details, but please note that these settings are used when an **INVOICE** type Document is revised.

ConnectIt Configuration utility v6.0.0

QuoteWerks Document Open Document Split RFQ Validation Find & Replace Updates Line Item Sort

Document Revisions Post Lock

Quotes (old) Orders (old) Invoices (old) Quotes (new) Orders (new) Invoices (new)

Save Update Invoice Revision Settings (for the Document being revised)

Fields

Values

Data Types

Notes:

- \* Values should be entered separated by pipe ("|") characters.
- \* Spaces are allowed between values - any leading or trailing spaces will be trimmed.

Test Separators

Save Close

## Updates | Document Revisions | Quotes (new) tab

The **Updates | Document Revisions | Quotes (new)** tab enables you to configure the fields that will be updated when a **QUOTE** Document is superseded as part of the **QuoteWerks File menu | Save As Next Revision** option process. For more information on how these settings may be applied please see the **Updates | Document Revisions | Quotes (old)** tab section for details, but please note that these are the values which get applied to the new Document being created as opposed to the Document which has been revised.

The screenshot shows the 'ConnectIt Configuration utility v6.0.0' window. The 'Updates' tab is selected, and within it, the 'Document Revisions' sub-tab is active. The 'Quotes (new)' sub-tab is highlighted. The main area is titled 'Save Update Quote Revision Settings (for the new Document)'. It contains three input fields: 'Fields', 'Values', and 'Data Types'. Below these fields are 'Notes' and a 'Test Separators' button. The 'Save' and 'Close' buttons are at the bottom right.

ConnectIt Configuration utility v6.0.0

QuoteWerks Document Open Document Split RFQ Validation Find & Replace Updates Line Item Sort

Document Revisions Post Lock

Quotes (old) Orders (old) Invoices (old) Quotes (new) Orders (new) Invoices (new)

Save Update Quote Revision Settings (for the new Document)

Fields

Values

Data Types

Notes:

- \* Values should be entered separated by pipe ("|") characters.
- \* Spaces are allowed between values - any leading or trailing spaces will be trimmed.

Test Separators

Save Close



## Updates | Document Revisions | Orders (new) tab

See **Updates | Document Revisions | Quotes (old)** tab section for details, but please note that these settings are used when an **ORDER** type Document is revised and to the new document that is created not the old one that has been revised.

ConnectIt Configuration utility v6.0.0

QuoteWerks Document Open Document Split RFQ Validation Find & Replace Updates Line Item Sort

Document Revisions Post Lock

Quotes (old) Orders (old) Invoices (old) Quotes (new) Orders (new) Invoices (new)

Save Update Order Revision Settings (for the new Document)

Fields

Values

Data Types

Notes:

- \* Values should be entered separated by pipe ("|") characters.
- \* Spaces are allowed between values - any leading or trailing spaces will be trimmed.

Test Separators

Save Close

## Updates | Document Revisions | Invoices (new) tab

See **Updates | Document Revisions | Quotes (old)** tab section for details, but please note that these settings are used when an **INVOICE** type Document is revised and to the new document that is created not the old one that has been revised.

The screenshot shows a window titled "ConnectIt Configuration utility v6.0.0". The main menu bar includes "QuoteWerks", "Document Open", "Document Split", "RFQ", "Validation", "Find & Replace", "Updates", and "Line Item Sort". The "Updates" menu is open, showing sub-tabs for "Document Revisions" and "Post Lock". Under "Document Revisions", there are sub-tabs for "Quotes (old)", "Orders (old)", "Invoices (old)", "Quotes (new)", "Orders (new)", and "Invoices (new)". The "Invoices (new)" sub-tab is active, displaying a form titled "Save Update Invoice Revision Settings (for the new Document)".

The form contains three input fields:

- Fields
- Values
- Data Types

Below the fields, there are "Notes":

- \* Values should be entered separated by pipe ("|") characters.
- \* Spaces are allowed between values - any leading or trailing spaces will be trimmed.

A "Test Separators" button is located to the right of the notes. At the bottom of the window, there are "Save" and "Close" buttons.



## Updates | Post Lock | Quotes tab

The **Updates | Post Lock | Quotes** tab enables you to configure the fields that may be optionally updated when the User opens the Post Lock Updates utility with a QUOTE Document open.

**Note:** the values should be entered as pipe (“|”) separated. Any number of values may be set up as part of the ConnectIt-Workflow Post Lock Updates configuration. The individual pipe separated values of each of the settings here are linked to each other, i.e. the first Field is linked to the first Caption is linked to the first Value, etc. Spaces are allowed between values and any leading or trailing spaces are trimmed when the Updates take place.

ConnectIt Configuration utility v6.0.0

QuoteWerks Document Open Document Split RFQ Validation Find & Replace Updates Line Item Sort

Document Revisions Post Lock

Quotes Orders Invoices Advanced

Save Update Post Lock Settings (for Quote Document Types)

Fields

Captions

Values

Data Types

Notes:

- \* Values should be entered separated by pipe (“|”) characters.
- \* Spaces are allowed between values - any leading or trailing spaces will be trimmed.

Test Separators

Save Close

1. Enter the pipe-separated list of **QuoteWerks Document Header Fields** to update. For example DocStatus | CustomText01 | CustomNumber01 | CustomDate01.

**Note:** this should be the underlying database field name and not the label caption.

2. Enter the pipe-separated list of **Captions** that you would like the User to view against the above field names, i.e. these would reflect the label changes which have been made within the **QuoteWerks** User interface such as Document Status | Assigned To | Net Profit | Event Date.
3. Where you would like the User to select an **Update Value** from a list (i.e. similar to the **QuoteWerks F2 Lookup** feature) then these should be entered into the **Values** textbox. For example: Ready For Despatch, Despatched, Ready For Invoicing | Joanne Bloggs, Joseph Bloggs, Stephen Siggs ||.

**Note:** the optional values are separated by commas within the pipe-separated parameter of each field.

4. Enter the **Data Types** for the respective **QuoteWerks Document Header Field** names that have been entered. For example: Text | Text | Number | Date.



5. Click the **Test Separators** button to ensure that you have entered the same number of pipe-separated values into each of the **Fields**, **Caption**, **Values** and **Data Types** textboxes. You will be prompted with a success message or details of any mismatches if they are present.
6. Click the **Save** button to retain the settings on the **Updates | Post Lock | Quotes** tab.



## Updates | Post Lock | Orders tab

See **Updates | Post Lock | Quotes tab** section for details; settings are applied to **ORDER** type Documents.

ConnectIt Configuration utility v6.0.0

QuoteWerks Document Open Document Split RFQ Validation Find & Replace Updates Line Item Sort

Document Revisions Post Lock

Quotes Orders Invoices Advanced

Save Update Post Lock Settings (for Order Document Types)

Fields

Captions

Values

Data Types

Notes:

- \* Values should be entered separated by pipe ("|") characters.
- \* Spaces are allowed between values - any leading or trailing spaces will be trimmed.

Test Separators

Save Close

## Updates | Post Lock | Invoices tab

See **Updates | Post Lock | Quotes tab** section for details; settings are applied to **INVOICE** type Documents.

ConnectIt Configuration utility v6.0.0

QuoteWerks Document Open Document Split RFQ Validation Find & Replace Updates Line Item Sort

Document Revisions Post Lock

Quotes Orders **Invoices** Advanced

Save Update Post Lock Settings (for Invoice Document Types)

Fields

Captions

Values

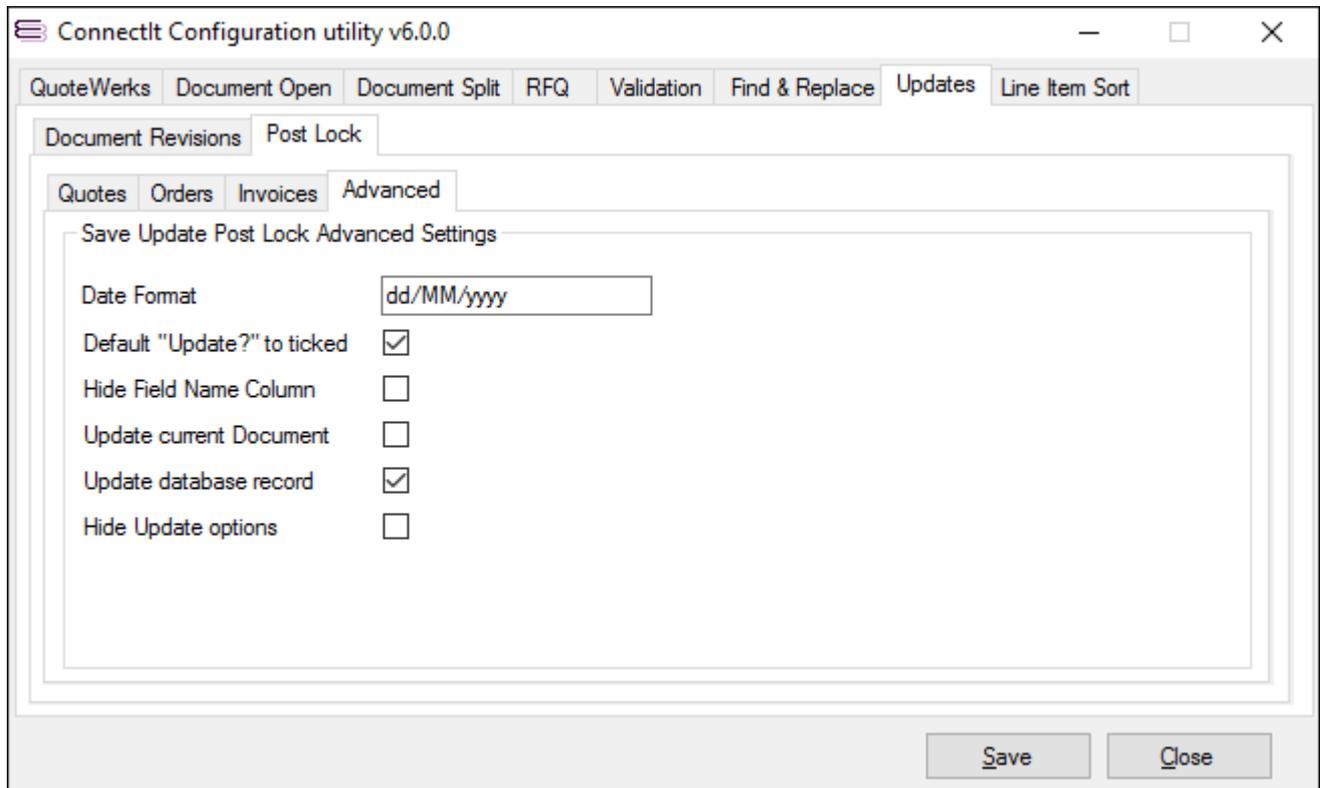
Data Types

Notes:

- \* Values should be entered separated by pipe ("|") characters.
- \* Spaces are allowed between values - any leading or trailing spaces will be trimmed.

## Updates | Post Lock | Advanced tab

The **Updates | Post Lock | Advanced tab** enables you to configure how the **Post Lock Updates** screen appears when it is opened by the User.

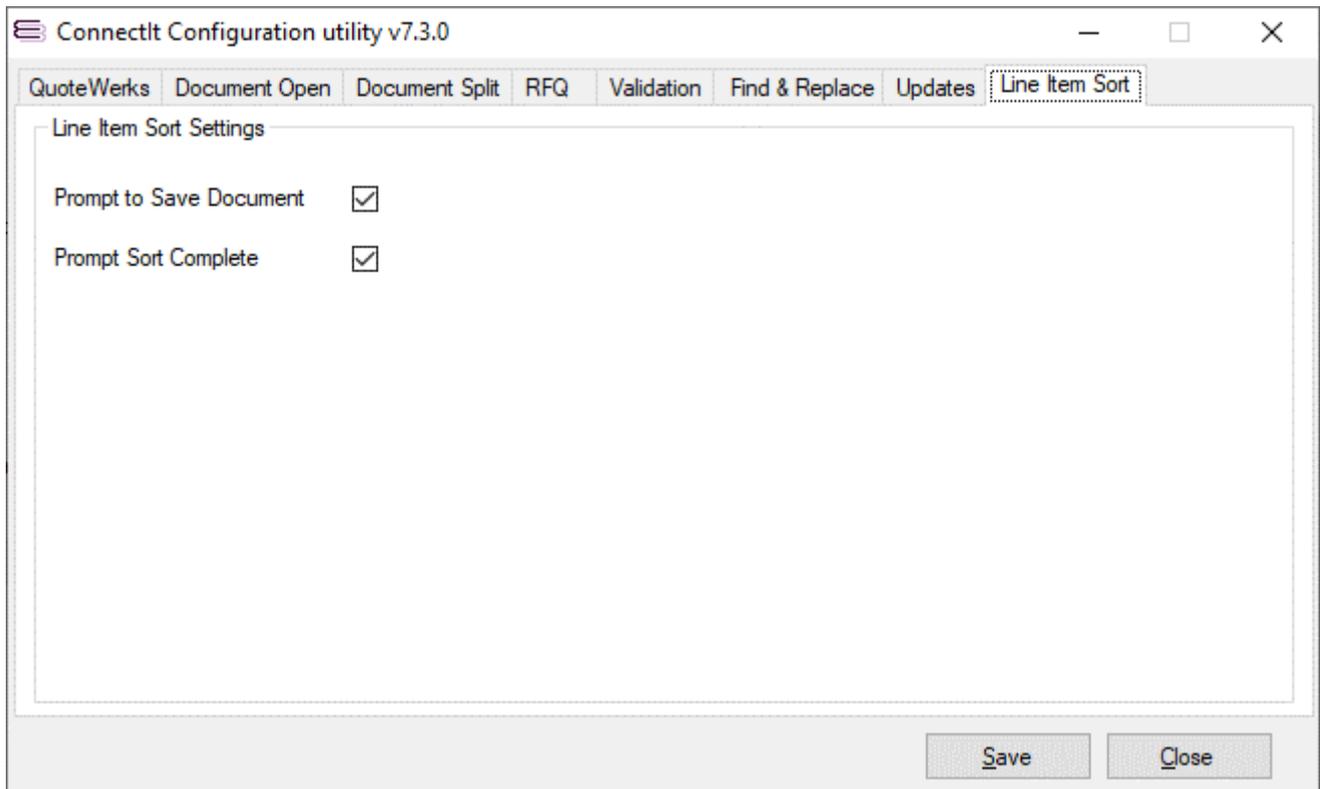


1. Enter the **Date Format** (usually dd/MM/yyyy or MM/dd/yyyy) for the Country or Region that your workstation is set to.
2. If you would like to have the **“Update?”** column on the **Post Lock Updates** screen ticked by default, then select the **Default “Update?” to ticked** option. This can be useful if you want to always update all fields or perhaps only update certain field by exception.
3. If you would like to hide the **Field Name** column on the **Post Lock Updates** screen to avoid any confusion between the underlying field name and what the label caption may have been changed to, then select the **Hide Field Name Column** option.
4. On the **Post Lock Updates** screen, there are the options to update the Document itself or to update the record in the QuoteWerks database. If you would like these to be ticked (or not) by default when you open the **Post Lock Updates** screen, then select (or deselect) the **Update current Document** and **Update database record** respectively.
5. To make the **Update current Document** and **Update database record** options on the **Post Lock Updates** screen invisible because you know that, due to the processes that you follow, you will always want to update one or the other (or both), then select the **Hide Update options** option.
6. Click the **Save** button to retain the settings on the **Updates | Post Lock | Quotes tab**.



## Line Item Sort tab

The **Line Item Sort** tab enables you to configure options used in the **Sort** process.



1. The **Prompt to Save Document** option defines whether the User is prompted before the **Sort** process takes place if the Document requires saving.
2. The **Prompt Sort Complete** option defines whether 'sort complete' prompt appears once the utility has run.
3. Click the **Save** button to retain the settings on the **Find & Replace** tab.