

Quote to Cloud

Connecting QuoteWerks[®] and Xero[®]

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Setup Guide

Pre-requisite:

- Quote to Cloud installer

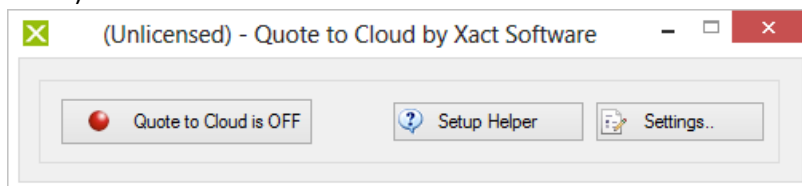
Download link: www.xactsoftware.co.nz/downloads/QuoteCloud.zip

Quote to Cloud Installation and Configuration

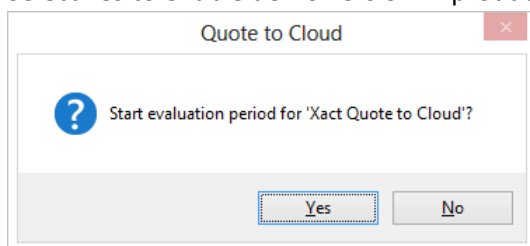
1. Run the Setup application to install *Quote to Cloud* and follow through the setup process



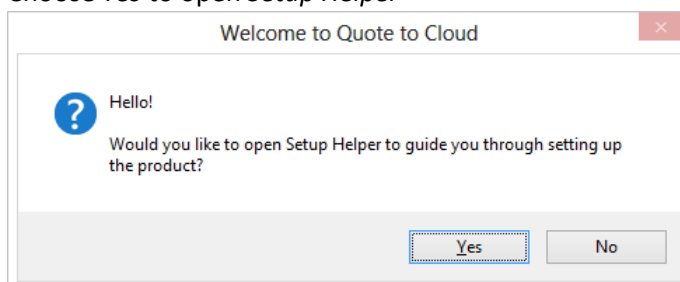
2. Open *Quote to Cloud* on the Desktop. Alternatively, go to *Start – All Programs – Xact Software – Quote to Cloud*)



Select Yes to enable demo version. If product was already purchased you may skip this step.



3. Choose *Yes* to open *Setup Helper*



4. Follow the steps outlined on the Setup Helper.

Quote to Cloud - Setup Helper

Step 1 - User Manual

- Open [Setup Manual](#) document

Step 2 - Create Private Application in Xero

- I have the SSL certificate files ready ☐
- Open [api.xero.com](#)
- Create new Private Application ☐

Step 3 - Configure Connection to Xero

- I have "Consumer Key" and "Consumer Secret" ☐
- Open Settings
 - Enter "Consumer key" ☐
 - Enter "Consumer secret" ☐
 - Specify the location for "Certificate file" ☐
- Do Test Connect to Xero

Step 4 - Turn it On

- Enable Integration to QuoteWerks
- Enable Auto-Run (optional)

☒ Prompt to open Setup Helper on start up Close

What to next:

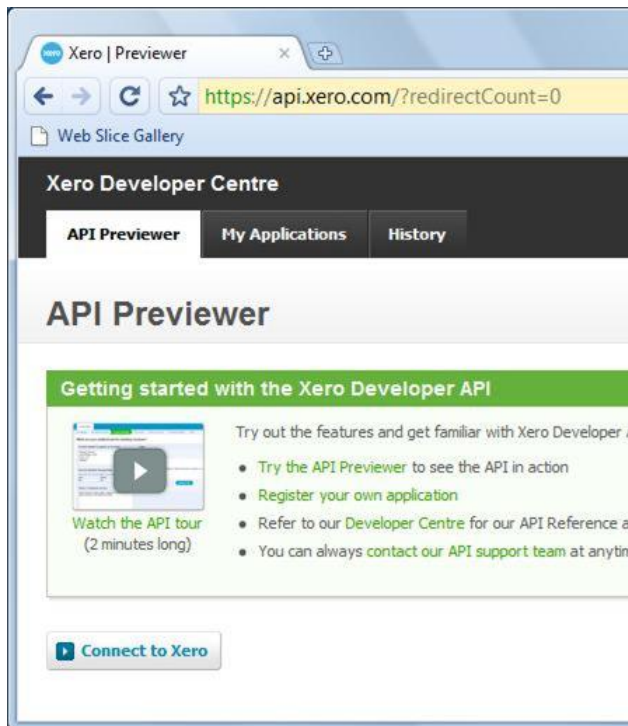
- For each step click the [blue link](#) (or the green arrow) to open/perform the applicable action.
- Click the icon to get more information on a particular item.
- Tick the checkbox on the right when you have completed an item.

Xero Application Setup

To allow any third-party application to your Xero account an authentication procedure must be performed.

Follow these steps to set this up:

1. Log in to <https://api.xero.com> using an internet browser



2. Open on *My Applications*

If this is not your first application you have to click *Add Application*



3. Choose *Private* – just for use with my own organisation

Xero | Add an Application

https://api.xero.com/Application/Add

Web Slice Gallery

Try out the features and get familiar with Xero Developer API using the API Previewer then register

- Try the API Previewer to see the API in action
- Register your own application
- Refer to our Developer Centre for our API Reference and code samples
- You can always contact our API support team at anytime to ask us a question.

Watch the API tour (2 minutes long)

What type of application are you developing?

☐ Public - for use with any organisation that authorises you

☒ Private - just for use with my own organisation

Application Name

Quote to Cloud

Please select which organisation your application can access:

Demo Company (NZ)

X509 Public Key Certificate

Either, paste in the base-64 encoded X509 certificate file in here

Or, select a X509 certificate (.cer) file to upload

Choose File No file chosen

Save Cancel

4. Enter Application Name: **Quote to Cloud**

5. Choose which company database to use if you have more than one.

6. Click *Choose File* and browse for public key certificate file (e.g. **publickey.cer**)

7. Click *Save*

My Applications >

Edit Application

Application Name

Quote to Cloud

Selected Organisation:

Demo Company (NZ)

X509 Public Key Certificate

Subject

E=sales@xactsoftware.co.nz, CN=Xact Software, O=Xact Software Solutions Ltd,

Valid From

8/12/2010 2:33:46 AM UTC

Valid To

8/12/2011 2:33:46 AM UTC

Thumbprint

FC20BA9E6A4D82615ED11EB93FC7C6B76A92A33B

[Upload a new Public Key Certificate](#)

Save Cancel

OAuth Credentials

Consumer Key

YJU3NJDJMTIYNGMSGFIMDHIMJK3YJ

Consumer Secret

AFNQPEPNHPZEGNCFDL4KUGASVLACP6

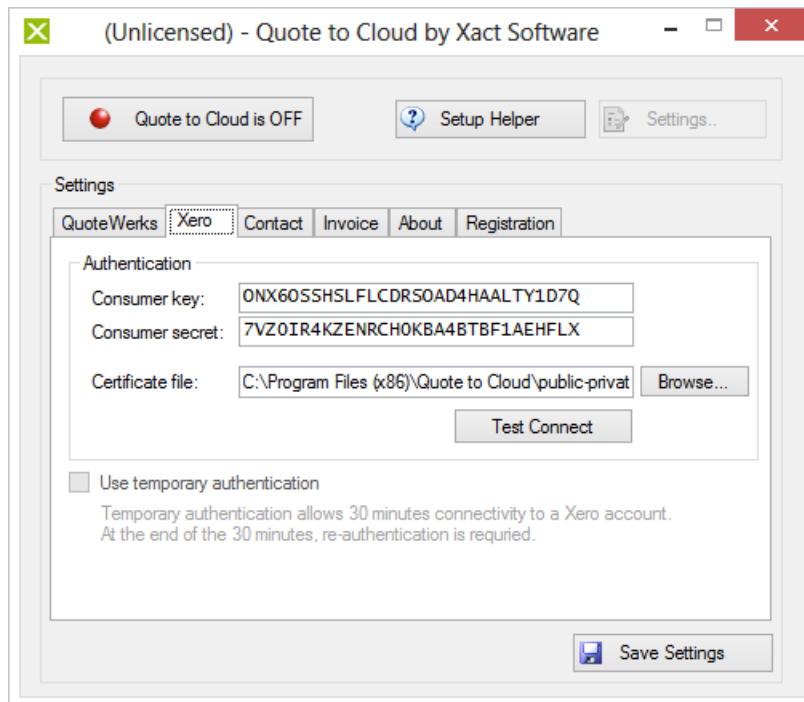
[Regenerate Key and Secret](#)

Note, For Private applications, the consumer token and secret are also used as the access token and secret.

API Endpoint URL:

https://api.xero.com/api.xro/2.0/

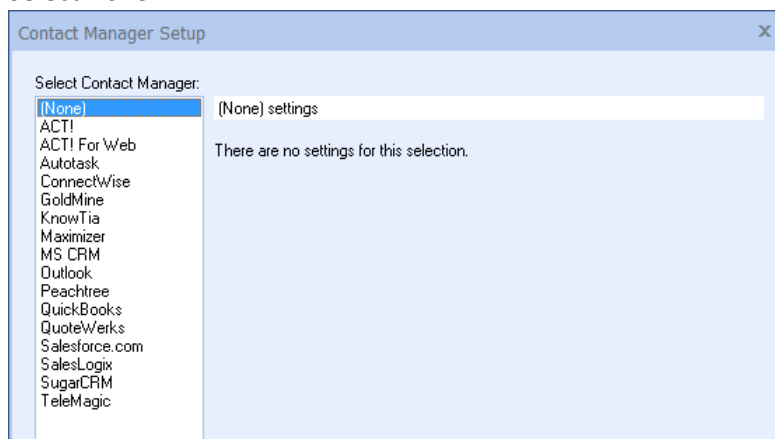
- Keep this page open, and switch back to *Quote to Cloud*.
- Copy and paste both *Consumer key* and *Consumer Secret* back into the Xero Authentication settings in Quote to Cloud.



QuoteWerks Configuration

To use Xero as the contacts lookup in QuoteWerks:

- Make sure *Use Xero for contact lookup* option is enabled in *Settings – Contact* tab
- In QuoteWerks, go to *Contacts – Setup Contacts Manager...*
- Select *None*



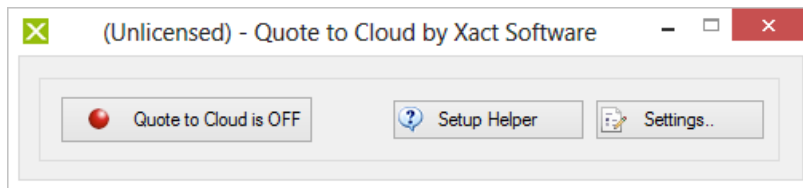
- Click *Ok* to save

Getting Started

Once *Quote to Cloud* is installed, a new shortcut is created on the desktop and also in the Start menu (*All Programs – Xact Software – Quote to Cloud*).

Make sure configuration is done before turning on integration.

If you need help setting up Quote to Cloud, click *Setup Helper* to guide you through the setup process.



Click *Quote to Cloud is OFF* button to turn on the integration, QuoteWerks must already running.

What to do next:

- See *How to – Perform Xero Contact lookup* to retrieve and populate invoice contact details from Xero.
- See *How to – Create Xero Invoice from QuoteWerks*

How to

Perform Xero Contact lookup

To perform a contact lookup from Xero contacts simply click the 'search contact' button (magnifying glass)

(Alternatively for a quicker search, enter a company name into the company field and click "Retrieve Current Contact" button.)

The image shows the QuoteWerks software interface. The title bar reads "QuoteWerks - [Untitled Quote <UNSAVED>]". The menu bar includes File, Edit, View, Products, Tools, Contacts, Reports, Utilities, Window, and Help. The toolbar contains icons for New, Open, Save, Revision, Print, Products, Bundles, Configurator, Best, Latest, Compare, Contacts, Contact, and Purchasing. Below the toolbar is a "QUICK LOOKUP" section with a dropdown menu set to "Etilize", a "Manufacturer Part #" dropdown, and a "Search For" text field with a magnifying glass icon. The main workspace is divided into three columns: "Sold to:", "Ship to:", and "Bill to:". Each column has fields for Company, Contact, Title, and Address. To the right of the main workspace is a "Getting Started" sidebar with a "Getting Started Video" button, an "Interactive Quick Start Guide" button, and a "More Resources" section with a "Training Videos" link.

Type in to the search the company name, contact name, or email and hit enter.

You may enter partial name for company name, search is not case sensitive.

The image shows the "Xero Contact List" window. It has a search bar at the top with the text "abc" and a "Search" button. Below the search bar is a table with the following columns: Name, Contact Person, Email, and Groups. The table contains one row with the following data: Name: ABC Furniture, Contact Person: Trish Rawlings, Email: (empty), Groups: (empty). At the bottom of the window, there are three buttons: "View Contact", "New Contact" (with a checkbox), and "Select Contact".

To see contact record details click *View Contact*.

The image shows the "Xero Contact Details - ABC Furniture" window. It displays the following information: Name: ABC Furniture, Customer: ☐, Group: (empty), Supplier: ☒, Currency: (empty). Below this is a section for "Contact Person" with fields for First Name: Trish and Last Name: Rawlings, and an empty Email Address field. Below that is a section for "Address" with two columns: "Postal / PO Box" and "Physical". Both columns contain the same address: 144 Sandringham Rd, Mt Eden. Below the address section are fields for Town / City: Auckland, State / Region: (empty), Postal Code: 1041, and Country: New Zealand.

Click *Select Contact* to proceed back to QuoteWerks.

Create Xero Invoice from QuoteWerks

Once integration is enabled (see *Getting Started*) an invoice preview is generated and displayed on the screen after a QuoteWerks document is successfully saved.

At this point the invoice is NOT yet saved/created in Xero.

This screen allows user to confirm and possibly modify the invoice content before sending it to Xero.

To create the Invoice in Xero click *Save Draft* or *Submit for Approval*.

Note: To have item code appears on the “Item” column, the item code in Xero must match exactly the “Manufacturer Part #” in QuoteWerks.

Updating Xero Invoice from QuoteWerks

To update an existing Xero Invoice from a QuoteWerks document simply save the document in QuoteWerks. *Quote to Cloud* will then try to find the corresponding Invoice in Xero.

To enable this feature, make sure a field in QuoteWerks is configured to save Xero Invoice number (see *Settings – Invoice*).

Create Xero contact from QuoteWerks

Quote to Cloud will automatically create a new Xero contact when a QuoteWerks document is saved as a Xero invoice. This will be done if there is no matching company / contact name in Xero already.

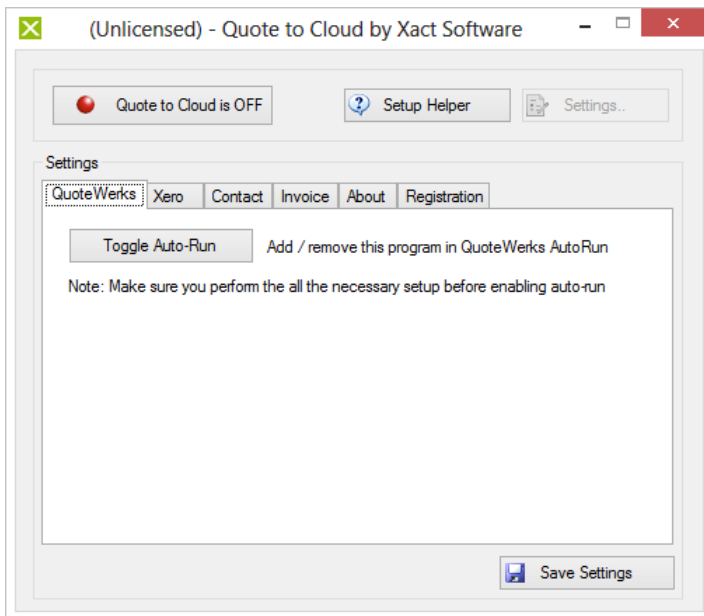
You can turn this feature off and allow you to select an existing Xero contact.

See *Quote to Cloud Settings – Contact tab* section below for more info.

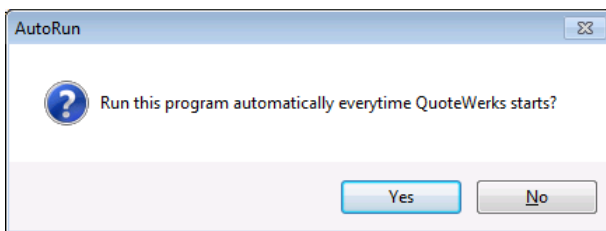
Run Quote to Cloud Automatically

After setting up Quote to Cloud and making sure all everything is working, you can setup *Quote to Cloud* to be called and enabled automatically when QuoteWerks is opened.

To set this up, open *Settings* and select *QuoteWerks* tab.



Click *Toggle Auto-Run*



Click *Yes* to proceed.

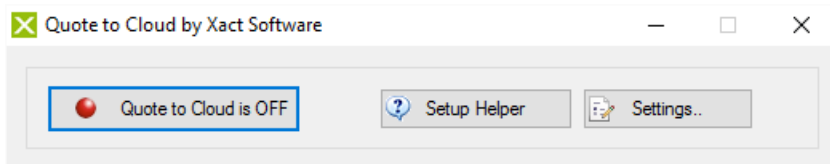
A dialog box will confirm if setup was successful.

Purchase Product Subscription

See *Settings – My Xact Account* bellow.

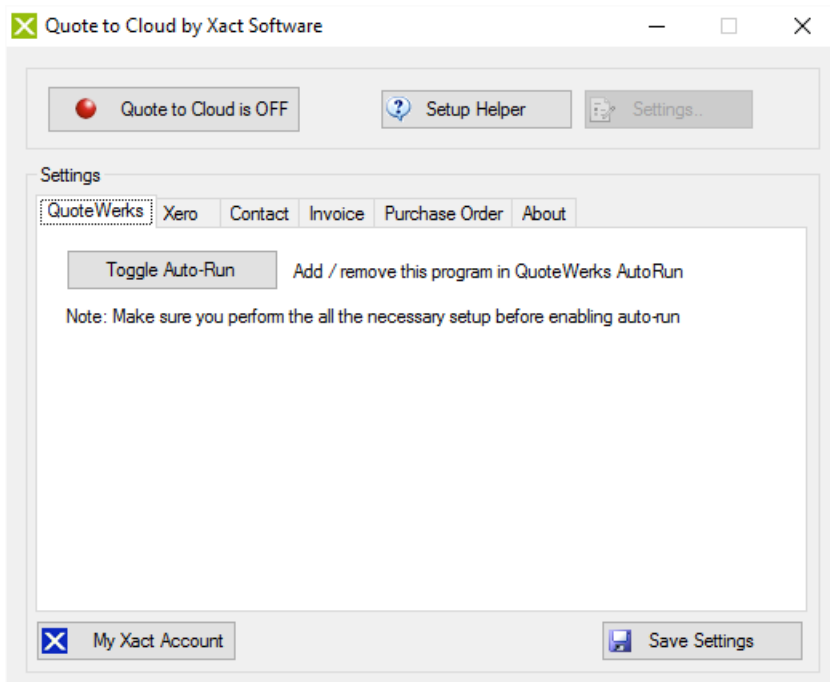
Quote to Cloud Settings

Click *Settings* button to open Quote to Cloud settings.



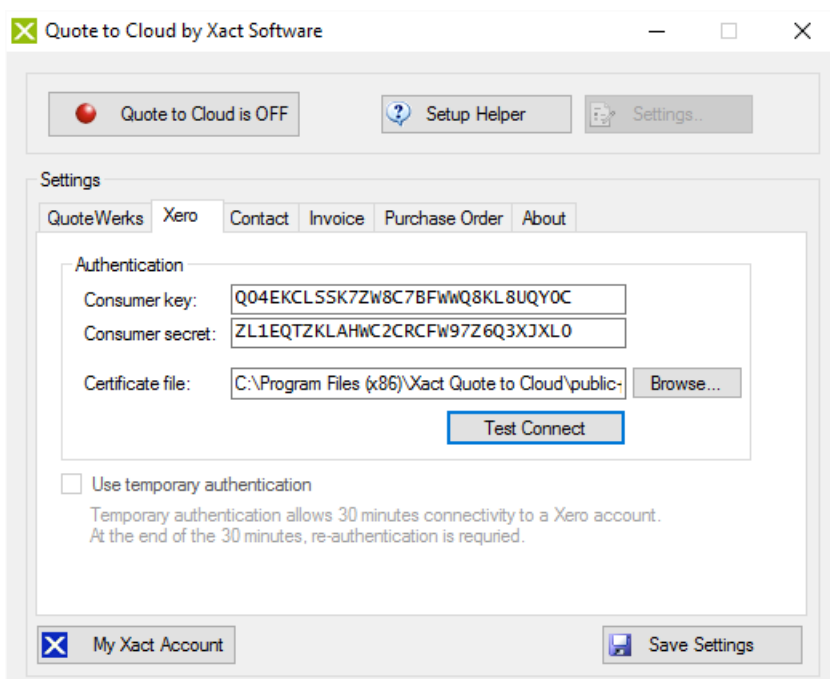
Note: some settings will be disabled while Quote to Cloud integration is active.

QuoteWerks tab



- *Toggle Auto-Run*
Use this to have *Quote to Cloud* application automatically run when QuoteWerks is opened.
Make sure QuoteWerks is running before turning this feature on/off.

Xero tab



- *Authentication (Consumer key and Consumer secret)*

These pair of keys are generated after creating a *Private Application* in Xero API website. See *Setup Guide – Xero Application Setup* for more info.

- *Authentication Certificate file*

This is the location of the SSL certificate file use to secure and authenticate communication between *Quote to Cloud* and Xero API server.

Note: These files are provided free of charge by Xact Software; alternatively you can use your own certificate files if you have one already.

- *Test Connect*

Test connection to Xero using the keys and certificate specified above.

- *Use temporary authentication*

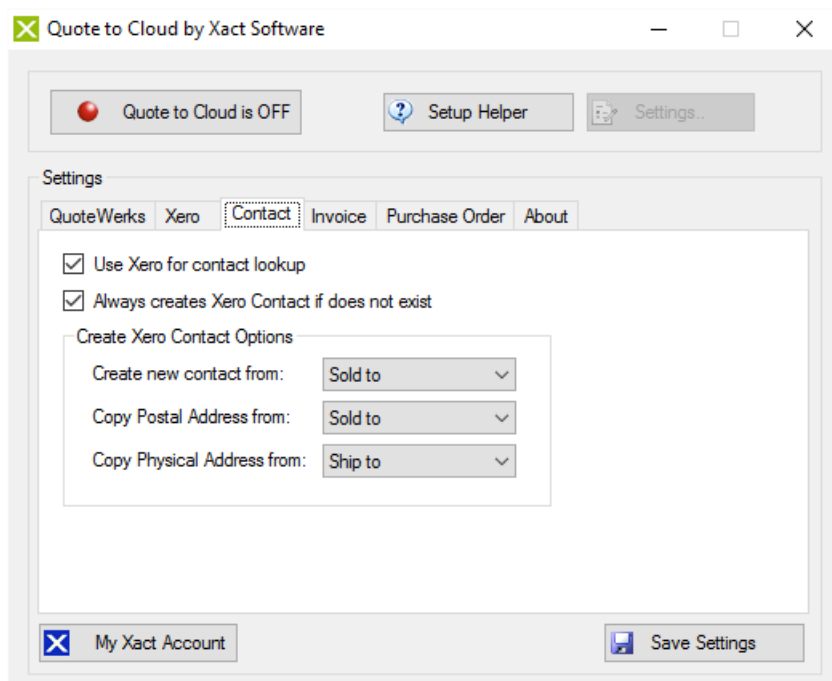
This method of authentication is mainly provided for evaluation purposes only.

This allows Quote to Cloud to connect to your Xero account for up to 30 minutes without setting up Private Application above.

- *Save Settings*

Saves the settings.

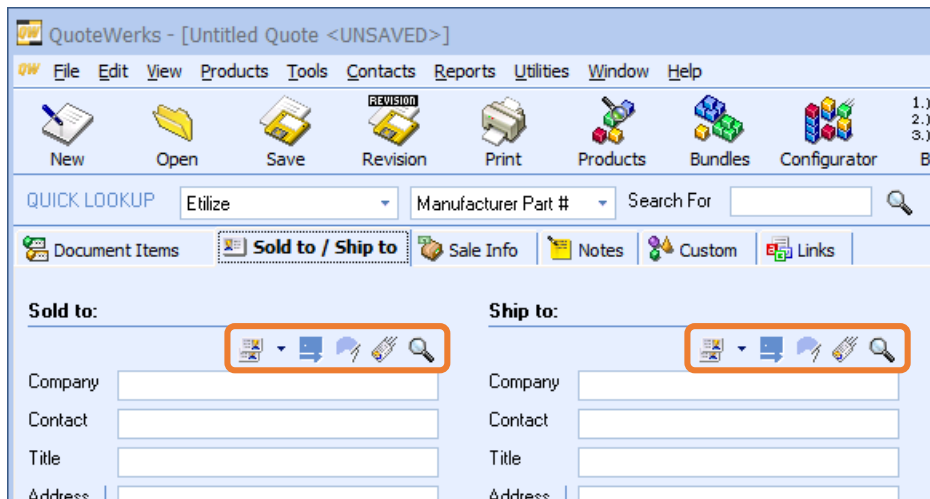
Contact tab



- *Use Xero for contact lookup*

Turning this on allows performing Xero contact lookup from inside QuoteWerks.

See *Setup Guide – QuoteWerks Configuration* for additional configuration.



- *Always creates Xero Contact if does not exist*

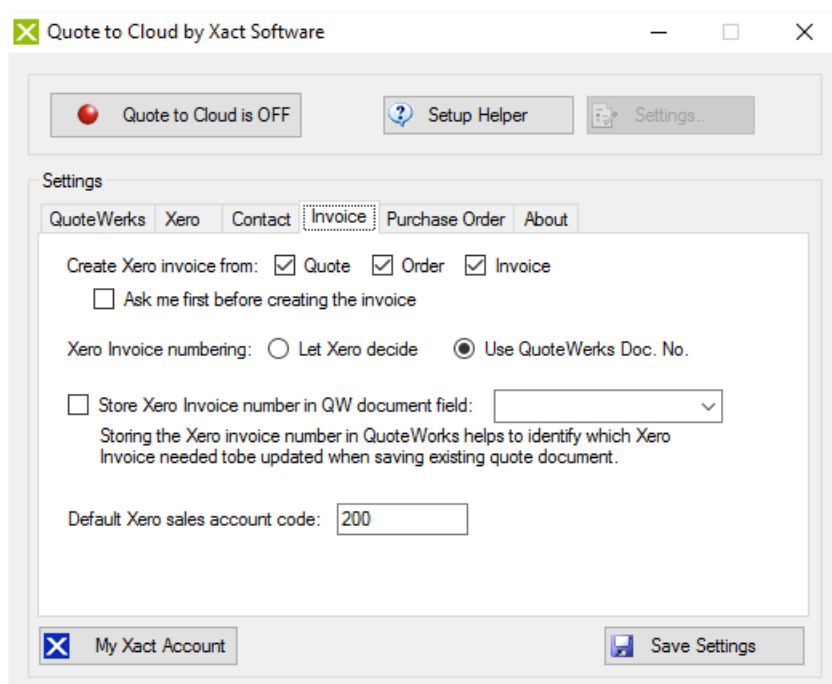
Tick this box to automatically create a new Xero contact when creating Xero Invoice from QuoteWerks if the contact does not exist in Xero.

Quote for Cloud will try find match by company name, contact name or email before creating a new contact record in Xero.

- *Create Xero Contact Options*

You can specify how contact record is copied from QuoteWerks to Xero, when creating a new Xero contact from a QuoteWerks invoice.

Invoice tab



- *Create Xero invoice from*

Select which type(s) of QuoteWerks document you like to create a Xero invoice from.

- *Ask me first before creating the invoice*

Check this box if you like to be prompted before invoice form is displayed giving user a chance not to create or update a Xero invoice.

- *Xero Invoice numbering*

Specify how Xero Invoice number is generated.

By default *Use QuoteWerks Doc. No.* is selected. When this option is checked, Xero invoice number will be the same as QuoteWerks document number.

If *Let Xero decide* is selected, Xero will automatically assigns the next available number.

- *Store Xero Invoice number in QW document field*

This feature allows Quote for Cloud to update existing Xero invoice when saving a QuoteWerks document previously created by Quote to Cloud.

If you never modify QuoteWerks document or does not need to update the Xero invoice when modifying QuoteWerks document then you can leave this feature off.

To enable this feature, simply nominate a QW field from the drop down.

Make sure this field is not used for anything else.

- *Default Xero sales account code*

Choose an account code used for sales. See Xero manual for more information.

Purchase Order

- *Create Xero purchase order from*

Select which type(s) of QuoteWerks document to create Xero purchase-order from.

An option can be checked for both Invoice and Purchase Order at the same time.

- *Ask me first before creating the purchase order*

Check this box if you like to be prompted before purchase-order form is displayed.

- *Purchase order numbering*

Specify how Xero Purchase Order number is generated.

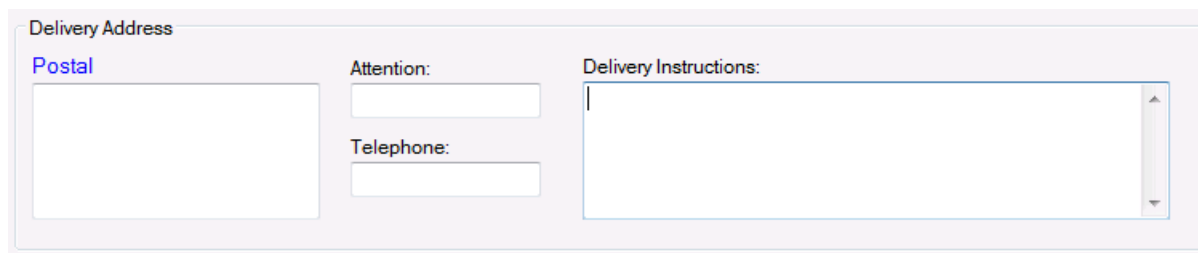
By default *Use QuoteWerks Doc. No.* is selected. When this option is checked, Xero purchase-order number will be the same as QuoteWerks document number.

If *Let Xero decide* is selected, Xero will automatically assigns the next available number

- *Default Xero purchase account code*

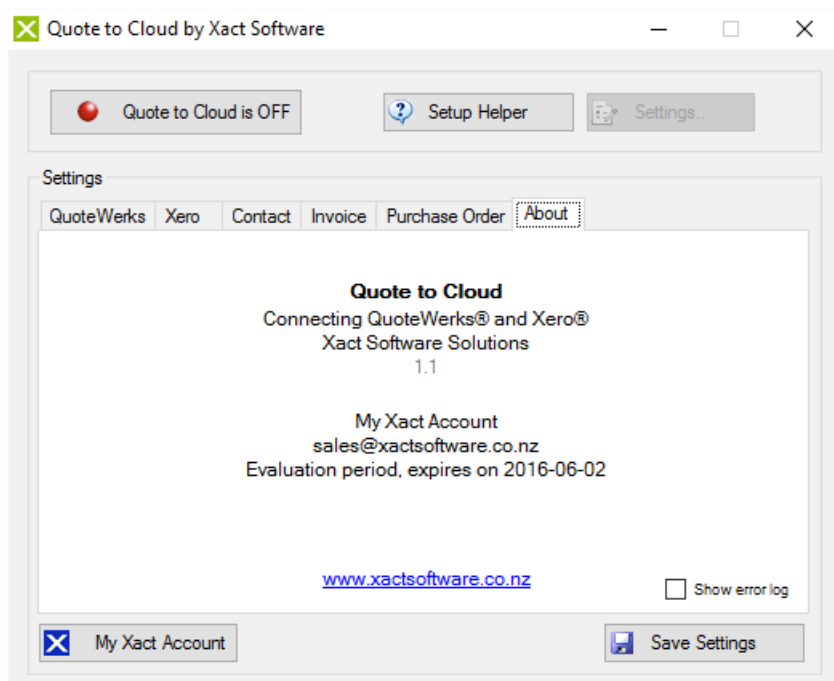
Choose an account code used for purchasing. See Xero manual for more information.

- *Default Ship-To* fields
Specify default delivery details if they are not entered in QuoteWerks “Ship to”.



The image shows a 'Delivery Address' form with three main sections. On the left, under the heading 'Postal', is a large empty text box. In the middle, there are two smaller text boxes: 'Attention:' and 'Telephone:'. On the right, under the heading 'Delivery Instructions:', is a large text area with a vertical scrollbar.

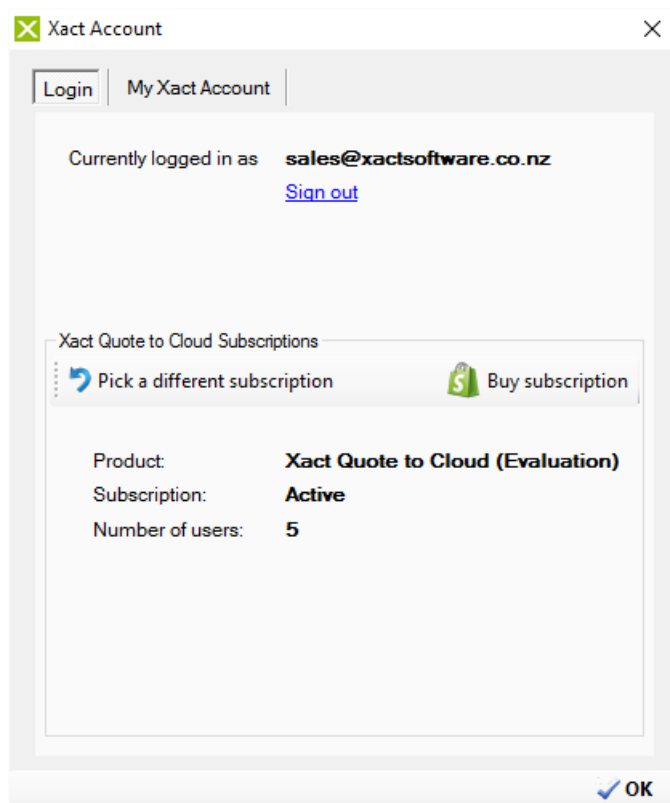
About tab



- This page shows subscription info and application version.

My Xact Account

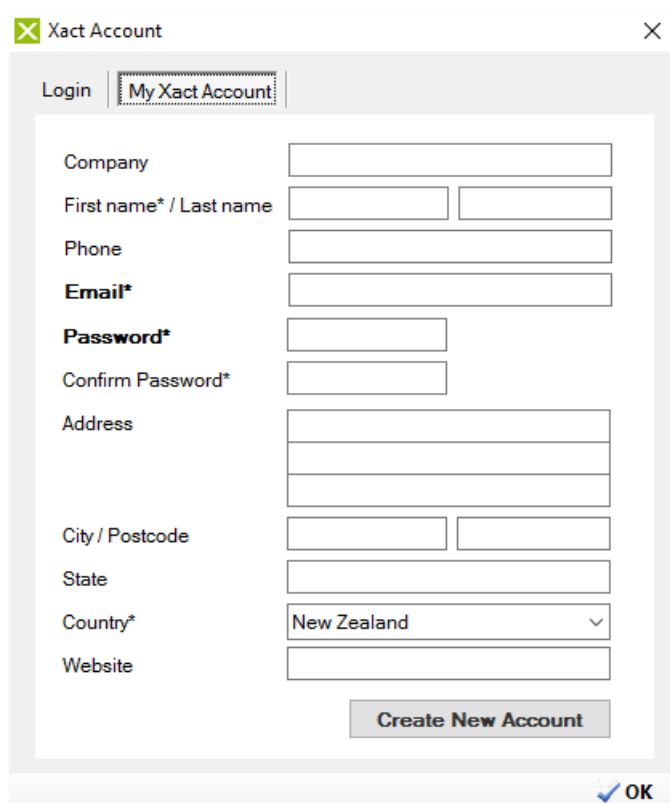
Manage your account details and purchase product subscription from “My Xact Account”



The screenshot shows a window titled "Xact Account" with a close button. It has two tabs: "Login" and "My Xact Account". The "My Xact Account" tab is active. It displays the text "Currently logged in as **sales@xactsoftware.co.nz**" with a blue "Sign out" link below it. Below this is a section titled "Xact Quote to Cloud Subscriptions" containing two buttons: "Pick a different subscription" (with a circular arrow icon) and "Buy subscription" (with a green dollar sign icon). Below these buttons, the following details are listed: Product: **Xact Quote to Cloud (Evaluation)**, Subscription: **Active**, and Number of users: **5**. At the bottom right of the window is a blue checkmark icon and the text "OK".

In order to use the product, you must login to an Xact Account.

New account can be created by accessing *My Xact Account* tab.



The screenshot shows the same "Xact Account" window, but the "Login" tab is active. It displays a form for creating a new account with the following fields: Company, First name* / Last name (split into two input boxes), Phone, Email*, Password*, Confirm Password*, Address (split into three input boxes), City / Postcode (split into two input boxes), State, Country* (a dropdown menu currently showing "New Zealand"), and Website. A "Create New Account" button is located at the bottom right of the form area. At the bottom right of the window is a blue checkmark icon and the text "OK".

When logged in for the first time, a 14 days evaluation subscription will be created.

Purchasing Subscription

To purchase the product subscription, click *Buy Subscription*. You must be logged in before the button is available.

Upon check out, select the number of users that will use the product. Subscription is activated against the Windows user(s).