



What's New in Quosal 1.8

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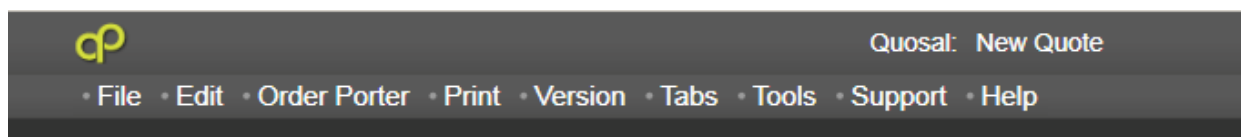
About this Document

Quosal 1.8 contains many new features, enhancements and adjustments to the Quosal product. In many respects, this release is much more than a simple “point 7 to point 8” uptick in versioning. With 1.8, Quosal is making good on its commitment to be constantly innovating and pushing its technological base forward.

This document is intended to supplement the current User’s Guide -- this document goes over the highlights of the features designed to sharpen your experience with Quosal and your process of creating quotes and proposals. We also recommend that users take advantage of the video training available at www.quosal.com, especially the “Quosal 101” series, as well as the extensive Knowledge Base entries.

Quosal is embarking on a top-to-bottom rewrite of its User’s Guide, which will fully include the changes introduced in this 1.8 version. Expect to see that updated User’s Guide in the next few weeks.

What’s New in Quosal 1.8



Reorganized Menu Structure & Interface Updates

Quosal 1.8 shifts a few things around on the applications menu. We recommend existing customers take some time to familiarize themselves with the new layout.

The updated look and feel offers a common title bar and menu bar layout, allowing for expansion of the menu structure for future releases.

There is a new Order Porter entry on the Main Menu, allowing the common Order Porter tasks to be triggered here.

Support moves out from underneath Help, and has additional specific options, discussed below.

New Default Quote Form

Quosal 1.8 introduces a new default quote form, offering several new features. What's more, all of Quosal's standard quote forms have been updated to adhere to the same set of quote form rules, discussed below.

(The previous default quote form is still available, but has been renamed to Default Original).

Features of the new default quote form include:

Special Tab Names and Formatting

The default form automatically recognizes certain tab names and provides a special format for them.

- Cover Letter
- Executive Summary
- Statement of Work
- References

For example, when a Cover Letter tab exists, the default quote form adjusts its formatting to allow for text space.

Similarly, the Tab Group "Plan" is now designated for special formatting. If you have 2, 3 or 4 tabs in the "Plan" group, the default quote form will create a new pivoted view of those tabs before it goes into the tab details.

Tab Groups now also feature a Pivot Item, which is similar to a Quote Item, but has 10 horizontal bucket columns that allow you to easily create MSP-style quotes (e.g. quotes featuring Silver, Gold and Platinum service tiers, for example).

Plan Comparison		Silver	Gold	
Spare Backup Backup Service 3 Month - 24x7 Same Day - Installation and Startup - Electronic Service		\$1,000.00	\$2,000.00	
Totals		\$1,000.00	\$2,000.00	

Silver		Price	Qty	Extended
SRVC3	Spare Backup Backup Service 3 Month - 24x7 Same Day - Installation and Startup - Electronic Service	\$1,000.00	1	\$1,000.00
Silver Subtotal		\$1,000.00		

Gold		Price	Qty	Extended
SRVC3	Spare Backup Backup Service 3 Month - 24x7 Same Day - Installation and Startup - Electronic Service	\$2,000.00	1	\$2,000.00
Gold Subtotal		\$2,000.00		

ConnectWise service tickets in Quote Forms

ConnectWise service tickets are now available to use in Quote Forms. They can be found under the new CRM Data section in the field list.

Order Porter Enhancements

Quosal 1.8 offers several significant updates for OrderPorter, especially for ConnectWise users.

New features include:

Standardized Order Porter Default Template

Similar to the standardization of the default quote form template, the default Order Porter template now adheres to the same set of rules.

Personal Videos

The default Order Porter template now includes a standard layout that easily allows for the inclusion of a personal video with your Order Porter presentations.

Assistance for Calculating Totals

A JavaScript adjustment helps with the automatic recalculation of options, allowing users to see their price changes without having to hit the Update Options button. Update Options has now become Save My Selection.

Enhancements for ConnectWise users

The three most notable updates speed the process of creating and managing Service Tickets directly from Order Porter.

- Service Tickets can now be displayed from Order Porter for the account that is attached to the quote. Tickets can be filtered on their properties such as status.
- When an order is approved, you can now add a service ticket to ConnectWise directly from Order Porter.
- It is now possible to perform customer searches against ConnectWise in Order Porter. This can be used on Quote Requests, especially the iPad, to reduce entry.

The Setup Wizard

The first time a user launches Quosal, a Setup Wizard steps them through activating their account and setting up the application's most commonly used features, including Real-Time Pricing, Electronic Ordering, QuickBooks integration and more.

At the conclusion of the Wizard, you will be ready to make your first quote or proposal, complete with your Company Info, your User Info, and additional subscribed components, such as Etilize.



You may change these settings at any time, and even re-run portions of the Wizard as needed.

Existing Customers and the Wizard

Besides the set-up, the Wizard's functionality appears in other portions of the application, too. Existing customers will encounter sections of the Wizard when modifying settings such as Real-Time Pricing sources.

Microsoft Word Integration Enhancements

Pivot Items are available as well in Word, and Tab Groups are now properly exposed in Word -- you can get the Tab Group level information, such as Subtotals, without having to use it at the Quote level and always have to have your Tab Groups in a specific order.

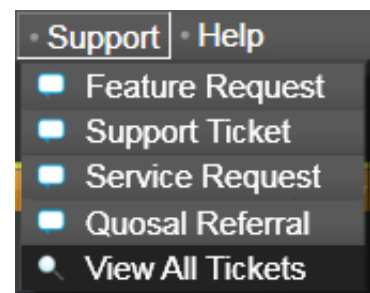
Users can now embed a Quote Form inside of Word, too – the Quote Form is exported as an RTF document, which is then placed it inside of Word.

Peachtree Support

Quosal now allows you to create Sales Orders through Peachtree. It will automatically create products and customers in Peachtree if they do not already exist. Tax Codes can be imported from Peachtree into Quosal.

Submitting Feedback to Quosal

Under the Support menu button, on the task bar, there are now five options.



In all cases, you do not need to enter your contact information – the submission process automatically includes your account information and details to Quosal.

Feature Request

Use this form for submitting Feature Requests to Quosal engineers. Note that Feature Requests are always free, and will be evaluated and prioritized according to demand and development impact.

Support Ticket

Enter details to create a Support Ticket for an issue you have encountered. Please enter as much detail as possible about the issue, including steps to reproduce, what you were doing prior to encountering the issue, etc.

Quosal Support will follow up on Support Tickets on a first-come, first-served basis. Some issues may require follow-up communications from Quosal -- remember, your prompt response helps us help you!

Note that a Support Ticket is not an appropriate means to request product training or a review of your business processes. Please check the Knowledge Base, product documentation and the Quosal Web site (www.quosal.com) for training materials and a wealth of "How to" videos. If you'd like formal training or custom services from Quosal, please make a Service Request, under the Help menu.

Service Request

Quosal can offer your business a wealth of additional services to sharpen your business practices -- performing advanced implementation and deployment, creating custom documents or training your staff on best practices in quote and proposal management and automation. We have decades of collective experience with businesses of all sizes.

Drop us a line below and tell us about the solution you're looking for. Please enter as much detail as possible, so we can tailor a proposal for you that best meets your needs and gives your business some added energy.

Quosal Referral

If you enjoy working with Quosal and know someone that can also benefit from an innovative quote-and-proposal solution, refer to them us! Enter their contact information below, as well as any details that might be helpful, such as their choice of CRM, distributors used, etc.

View All Tickets

This option allows you to view all open Support Tickets associated with your account.

Quosal Standards for Quote Forms and Order Porter Templates

As we mention above, Quosal has made several changes to its default quote forms and Order Porter templates, ensuring that they adhere to a set of standards established by Quosal. These standards are:

The following standards are established for Quosal default quote forms and Order Porter templates.

- 1) Blank tab sections should be ignored, not print and should not be included in summary section.
- 2) All tab sections should print the plain text notes at the top of the section, in italics.
- 3) If a section called "Cover Letter" is included on the quote, a cover letter should print on its own page.
- 4) If a section called "Executive Summary" is included on the quote, it should print on its own page.
- 5) Alternative to Nos. 3 and 4 is RTF fields 1 and 2.
- 6) If a Shipping section is included AS a Shipping tab:
 - "Is Printed" should be obeyed for printing as a section.
 - The Shipping total should print after Subtotal in the summary section, and before Total.
- 7) Package rules should be obeyed.
- 8) "Is Printed" tab section rules should be obeyed, including for a summary section.
- 9) Line item rules for "Is Printed" should be obeyed.
- 10) Line item rules for "Is Show Price" should be obeyed.
- 11) Tab Optional flag should be obeyed, printing "optional" in the tab header.
- 12) "Printed" fields should always be used.
- 13) Ensure RTF Notes coming from Etilize don't print extraordinarily large page quotes.
- 14) "Arial" is the standard default font.
- 15) Margins should be set to 50,50,50,50 to maximize viewing area and still remain printable at default printer settings.
- 16) A Recap section should be included before the signature. Terms and Conditions should be placed on the quote, near the signature.
- 17) Tax, PST, and GST should be included in the Recap section. GST and PST should be set to not be visible if they are set to \$0.
- 18) Keep Together should be set for item details. Group Union should be set to "With First Detail" for the Tab Group Header.
- 19) Group Union should be set to "With Last Detail" for the Tab Group Footer.
- 20) The Tab Group Header should be set to "Repeat Every Page."
- 21) Images should have as small of a file size as possible. All images should be .JPG or .PNG format. Any image over 300K should be analyzed to see if it can either be compressed or presented at a reduced resolution. Screen resolution should be set at 96 DPI and print resolution at 300 DPI.
- 22) If a form has item pictures on it, it should be tested against a quote that has both pictures and no pictures. In the no-picture scenario, it should not use blank space or creating a white space between lines.

- 23) 23) In the Properties section, Report (select by clicking a non-dotted grey area in the middle) -> Export Options -> PDF Export Options -> Image Quality should be set to HIGHEST 13. Report -> Export Options -> PDF Export Options -> Compressed should be set to "Yes."

Quosal 1.8 General Release Notes

Installation and Activation

- Added a new activation Wizard to Quosal for the first time a user signs into the system.
- On the very first user activation in a database, the user will be presented with a walkthrough of setup options for Real Time Pricing, Electronic Ordering, QuickBooks, Etilize and Order Porter.
- Streamlined Order Porter and Etilize activations by pre-filling those keys by having a cross reference to the main Quosal key.
- Real Time Pricing setup has been standardized.
- Created Help and videos on all installation steps.
- Added the ability to force users to always log in as an existing user and remove the ability to create a new user during the Activation process. This can be configured under Options -> Administrative.

Quote Forms

- Added a Pivot Item to Tab Groups. A pivot item is similar to a Quote Item, but it has 10 bucket columns horizontally that allow you to create MSP style quotes easier (Silver, Gold, Platinum for example). Basically, each tab in the group is assigned a column, and it does a match by Manufacturer Part Number on each one.
- Added new Totaling fields to Tab Groups to support Pivot Items and make totaling easier.
- Created a new Default form for Quosal. The old default Quote form will be placed in the Content library.
- ConnectWise service tickets are now available to use in Quote Forms. They can be found under the new CRM Data section in the field list.
- Added alternative names for Location Address2 and Address3. The Quote Form parser errantly puts Address1 into those fields.

New Default Quote Form

- The existing default quote form has been renamed to Old Default
- It supports special tab names and provides a special format for them, which are:
 - Cover Letter
 - Executive Summary
 - SoW
 - References

- The Tab Group “Plan” is now designated for special formatting. If you have 2, 3 or 4 tabs in the “Plan” group, the Default Quote Form will create a new pivoted view of those tabs before it goes into the tab details. If you do not wish to print the details of a “Plan”, set the Is Printed section to off.
- If a tab is empty, it will not print in the details. Empty constitutes 1 or 0 line items, and that line item must be a blank.
- If a line item is empty, it will also not print.
- Margins have been increased to support .
- The Shipping tab is supported by default. A shipping tab is set up using the Is Shipping checkbox under Tab Information.
- Plain Tab Notes will print after a tab section.
- Rich Tab Notes will print immediately before the list of items.
- Overview Rich Text 2 can be used to provide notes at the end of the quote form.
- Overview Rich Text 1 can be used immediately after the prepared for / prepared by section.

Word

- Pivot Items are available as well in Word.
- Tab groups are now properly exposed in Word, and you can get the Tab Group level information, such as Subtotals without having to use it at the Quote level and always have to have your tab groups in a specific order.
- Added the ability to embed a quote form inside of word. This is accomplished by exporting the Quote Form as an RTF document, and placing it inside of Word. It is recommended that your quote form have no overlapping controls (which it notifies you by red marks) when using this to get good results. This can be accessed with the Embed Quote Form submenu in the Quosal add-in menu.

Publish and Deliver

- If you tried to view a Stored Document on a different system than on which it was created, it would not work. It was trying to use the app directory of the original user for recreating the document before viewing.

ConnectWise

- Fixed a problem where packages were doubling the opportunity totals if the package was not also set up as a bundle inside of ConnectWise.
- Comment Lines were causing update issues on opportunities if the description type was set to Quosal Long Description instead of ConnectWise Customer Description.
- Managed Services with Recurring revenue were causing problems on the second update of an opportunity where only the last tab on the opportunity would update.

- The last quote on attach documents was using the last quote if the current one had not yet been published.
- The checkbox to update documents from the opportunity is only visible on new opportunities. Existing opportunities must use the attach document button.
- The Opportunity Name will truncate at 50 characters if you make it longer than 50 characters rather than return an error message from ConnectWise.
- Removed the option of creating a single product on a service ticket for Phase 3, as this is no longer possible to do.
- On Opportunities, we are now totally ignoring Empty Tabs and Empty Line items.
- Fixed a problem with Vendor Mapping if it maps to a vendor but it doesn't exist as an account in ConnectWise.
- If you try to update an opportunity from Quosal that has sales order line items, Quosal is now catch that this happened and warn you that the update is not going to work. Basically, once you move an item to sales order, it's rightly impossible to update it from the opportunity. What was going on before is Quosal wasn't reading the error correctly and creating a new opportunity.

QuickBooks

- When setting up QuickBooks from Quosal, we now do a better job of trying to find the company file automatically for you.
- You can now specify a template for QuickBooks Purchase Orders in Options -> Invoice Setup.

Peachtree

- Quosal now allows you to create Sales Orders through Peachtree. It will automatically create products and customers in Peachtree if they do not already exist.
- Tax Codes can be imported from Peachtree into Quosal.

Configuration Options

- Fixed a condition where it was possible to erase settings in Quosal when doing a new activation.
- Added a new Configuration Backup system. Quosal will automatically log a backup of user / global settings every 24 hours.
- Administrators can restore previous backups of configuration options. If an admin accidentally makes some changes they shouldn't, this gives a quick way of getting back to recently good settings. This can be found under Options -> Administrative -> Configuration and Backup History. Historical options are encrypted as regular configuration options are.

Miscellaneous

- Fixed a problem where Price Scripts were not always correctly caching to the hard drive on launching. This was causing longer load times in some situations.
- Added about 30 indexes for folks with larger databases that will improve access time.

- If DBInfo.ini was found, but suddenly can no longer be found or accessed, Quosal will use the previously read version of that dbinfo file.

Order Porter

- ConnectWise service tickets can now be displayed from Order Porter for the account that is attached to the quote. Tickets can be filtered on their properties such as status.
- It is now possible to add a service ticket to ConnectWise from order porter. This can be done when an order is approved.
- It is now possible to do customer searches against ConnectWise in Order Porter. This can be used on Quote Requests, especially the iPad, to reduce entry.
- For Order Porter Requests, you can assign a custom Quote Preface under Options -> Order Porter. You can also allow Order Porter to use its own internal numbering system vs. assigning the Quote Number from Quosal when you fetch it.
- Added a fallback email system in Order Porter. If your custom SMTP settings fail, Order Porter will then use an additional email we've setup to send out approvals and visits.
- Added the ability to duplicate an Order Porter group in the template editor. This can be done with a right click on the group you want to copy.
- Added the ability to export multiple template groups at once, which is useful when more than one template works together, such as Quote Request and Quote Approval templates.
- Added a new search feature in Order Porter. This allows us to find any text in the current template, and will highlight all other templates on the left in which that text occurs.
- Order Porter now gives additional feedback as it's uploading about which step it is on.
- There is a new Order Porter main menu option.
- Fixed a two person updating race condition that would make Quosal think an order was not approved when it was. If a customer shares the order porter link within an organization, and both decided to update the same order porter at the same time, and one approves while another updates options, it was possible to confuse Quosal into knowing that the order was approved under File -> Check for Approved Order Porters. The email was still properly sent out to the customer and the sales rep.
- Added the ability to route the order porter server location by Quosal key.
- Added a #SSLOrderPorterURL tag to directly go to the SSL version of the page rather than regular http. We were manually building the link before for SSL.
- Added #ApprovedBegin and #ApprovedEnd (along with #UnapprovedBegin and end) to make it easier to handle sections of content depending on the state of the OrderPorter page, especially when parenthesis were involved.
- Added detail lines for visits on top of the standard visit counter to better track how and when an order porter is being viewed.
- Added the ability to use Pivot Items from groups in Order Porter.

- All of the default order porter templates have been updated.
 - Quosal Standard now uses a simplified email.
 - We implemented some JavaScript to help with automatic recalc of options on all the templates to allow users to see their price changes without having to hit the Update Options button. Update Options has now become Save My Selection.
 - Available Options has become Declined Options Amount
 - Added an optional Video section to all the templates. Video will only be displayed if you add one under Overview -> Media.
- Added the ability to support custom navigation pages within a template section. Custom Pages can be reached with the #NavigationPage(“”) tag.
- Duplicated the Is Template and Order Porter Request Template to the Publish Settings on Overview (as this is where you assign order porter templates and other information for OP).

Load Quote

- Fixed a problem where CW_Only for a post status was not being correctly searched.
- You can now search on Archived quotes (old versions).

Peer Review / Approvals

- If you had similarly named Quote Forms for Peer Review or Approvals, it was possible to generate more than 1 email with each of those forms. An example of similarly name quote forms would be PeerReview.xrpt and PeerReviewRev2.xrpt.

Copy Quotes / Templates

- Quote Status and Post Status no longer inherit from the original quote. This means if you copy a “Won” quote, it will be set to “Active” on the copied quote.

Knowledge Base

- Enhanced the video support for knowledge base entries.
- Videos no longer keep playing in the background once you leave the knowledge base entry that has the video on it.

Workspace

- Changed the rendering on ComboBoxes, Menus, and the SplashScreen to not use the Allows Transparency option. This was causing a problem on a couple of systems out there where Quosal would stop showing updates and appear frozen, and return a NotifyPartitionIsZomie error in the log.
- If you moved a tab all the way to the left using Ctrl-L, and tried to move it beyond the first position, totals were not updating correctly until another action was performed, such as a Quantity update.

- Updated the look and feel of the workspace to have a more common title bar and menu bar underneath it, rather than all on one line. This allows for expansion of the menu structure.
- There is now an “Is Group Quantity Source” checkbox under Tab Information. If this is set, all tabs in the same group are scanned for items that have a matching manufacturer part number. If a match is found, it will copy the quantity from the item in the source tab to the other tab(s). It is possible to set this checkbox on all tabs in a group.
- Gross Margin and Markup (percentages) are now populated on the line item instead of being empty fields.
- The Delete Warning Message for removing tabs can be toggled off with a checkbox.
- You can now right click a line item and add it to the Quosal Product source. It will look up by manufacturer part number and warn you about updating if it already exists.

Support

- Removed Help -> Submit Feedback.
- Added a new Support Menu item with multiple options about the kind of information you want presented, which includes Feature Requests, Support Ticket, and Service Request.
- Before submitting a new ticket in Quosal, you will be prompted with a knowledge base keyword search. This will allow you to see if your problem has already been solved before, and help us understand what kind of keywords we should use when creating knowledge base entries after solving your problem.
- You can now view your tickets under support.
- You can add comments to existing tickets when viewing your tickets.
- Added the ability to submit Referrals to Quosal. Referrals can come with rewards, and you will be presented with what our current referral program is when you use it. You can also choose whether or not we can use your name when we talk to a referral.
- All tickets require that you do a keyword search against our knowledge base first. This both helps you double check for a solution and helps us put in solutions with your suggested keywords when issues are hit.
- If the opportunity for a quote was created after you had uploaded to Order Porter, you would lose the opportunity association when getting the approved Order Porter. Quosal will now keep this association.

Sql Compact

- Fixed a problem with SqlCompact databases where the video field was smaller than the actual 4mb that we support.
- Occasionally, SqlCompact would time out. Quosal now handles the reconnection situation faster.

Autotask

- Fixed spellings of AutoTask to Autotask.
- Improved error handling when connecting to different servers.
- Product searches could crash if you were switching between CRM systems and Autotask was a source.

Salesforce

- Customer Search now does a partial match on beginning rather than a partial match anywhere by default to better use indices in large databases.
- Opportunities will no longer try to automatically update when closing Quosal. This was causing a permanent hang if the Salesforce connection was lost.
- When the automatic create opportunity button was checked, Quosal was being overly aggressive and creating opportunities even before a customer existed on the Quote. Opportunities will now only automatically get created after a customer is attached.

CDW

- CDW was causing a crash problem on certain manufacturer part numbers. The crash will no longer happen and CDW just won't return results when it runs into that problem.