

Quoting4Act

How do i set up Quoting4Act?

In order to use Quoting4Act, certain fields and custom tables must be created. This will be referred to as the "Schema Import" in this article. This operation can only be performed on the machine hosting the database and by an Administrator or Manager of the database.

If you are hosting the Act! database on your own machine, please proceed to the schema import section. If your Act! database is hosted on a different computer such as a server, or shared PC, then you will need to perform the initial schema import on that machine instead. If your database is hosted by a third party hosting company, please contact your hosting provider so they can assist you with the import.

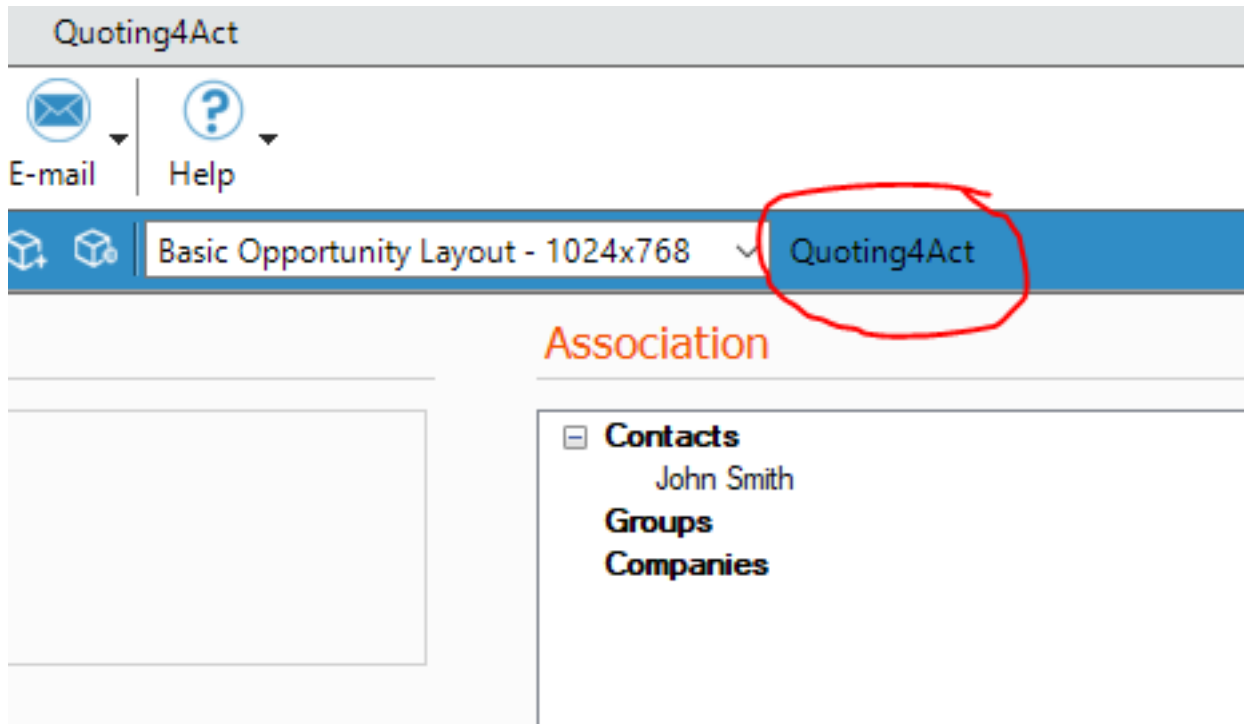
Schema Import

1. After installing Quoting4Act and Tables4Act using the installers provided, please start up Act.
2. Enter your Quoting4Act and Tables4Act license keys to activate the products.
3. Click on the menu **Quoting4Act > Setup Quoting4Act**
4. Once the import wizard is launched, ensure both Products and Quote tables are selected. Proceed through the wizard with default settings to begin the import. This will temporarily lock the database and begin the import process.
Note: This process can take some time and other Act users will be unable to use the database until it is completed. Please ensure this process is not interrupted as that may leave the database in a locked state.
5. Once the schema is imported, you will be presented with a confirmation message. Click Finish to continue, and then close the wizard and finally, restart Act.
Once Act! is restarted, you will see the new custom tabs on the Opportunity screen and navbar.
6. Once you have verified that the schema import is completed successfully on the master database, you may install Quoting4Act on other machines and begin using the product.
Note: If you are installing Quoting4Act on a remote database, please perform a sync and then restart Act in order to see the new tables.

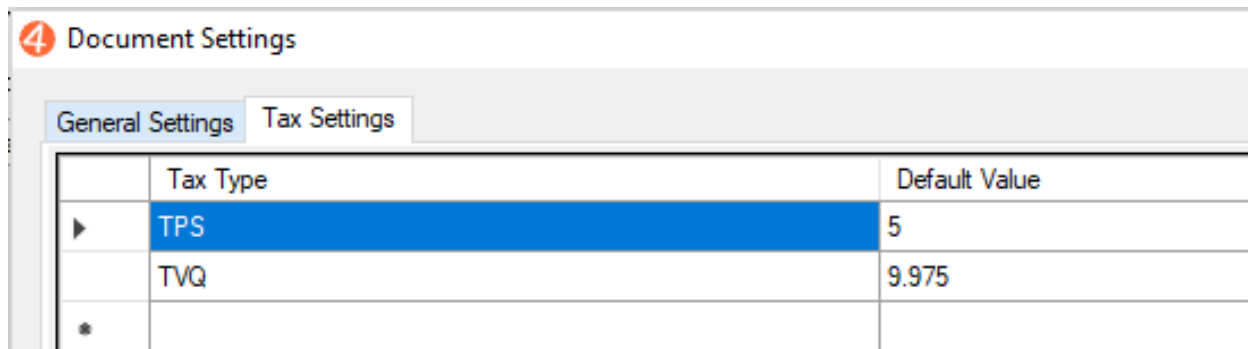
Setting Quote Preferences

1. Navigate to any existing or new Opportunity, and click on the **Quoting4Act** button on the toolbar.

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2. Click on **Document Settings** from the top left corner of the Quoting4Act form.
3. In this Window, you can set a number of preferences such as font size and color, your company logo, disclaimer text
4. Click the **Tax Settings** tab to define all applicable taxes that must be included. These taxes will be automatically calculated and included when a quote PDF is generated.



5. Click **Save** to save your settings.

Generating Quotes

1. Navigate to any existing or new Opportunity, and click on the **Quoting4Act** button on the toolbar.
2. The products list from the Opportunity will be loaded in Quoting4Act and most customer information and pricing information should be automatically generated.
3. If taxes or foreign exchange rates must be applied or excluded from

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products, enable or disable the appropriate checkboxes in the Products list.

| Item | Discount | Total Price | Tax Included | Apply foreign exchange |
|------|----------|-------------|-------------------------------------|--------------------------|
| 00 | 0.00 | 2000 | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

4. To change the Quote expiry date, set the **Valid To** date in the Quote Information section.

Quote Information

Opportunity Name:

Contact Name:

Email:

Phone Number:

Record Manager:

Valid to:

5. To preview the Quote, click the **Print To PDF** button.
6. To send the Quote to the client, click the **Email PDF** button.

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Document Settings About **Email PDF**

Currency: Quote #:

Products

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