



WTS PARADIGM®

# Setting up and Using Accounting Integrations with Base Camp

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Setting up Base Camp to Export Quotes .....	3
System Specific Integrations .....	4
Configure Quote Export Integration.....	4
Using Quote Export: Creating XML files for Quotes.....	6
Exporting On Demand .....	6
Exporting as a Scheduled Batch Export.....	6
Exporting All Quotes to One Location.....	7
How Quotes Are Identified for the Scheduled Batch .....	7
Viewing Integration History .....	8
Understanding the Format of the Exported XML Files.....	8
Sample Quote XML File .....	9
Customizing the XML template.....	10
Testing the Integration .....	11
Additional Information for Dealer Integration .....	11

# Base Camp Quote Export Integration

You can now set up and use WTS Paradigm® Base Camp to automatically create XML files for quotes ordered on your system. When you run the Quote Export, Base Camp checks CenterPoint for quotes that have been ordered, and creates an XML file for each quote.

## Setting up Base Camp to Export Quotes

You must have Base Camp installed. For information on installing Base Camp on your company's computers, see the WTS Paradigm white paper, *Setting up Base Camp*.

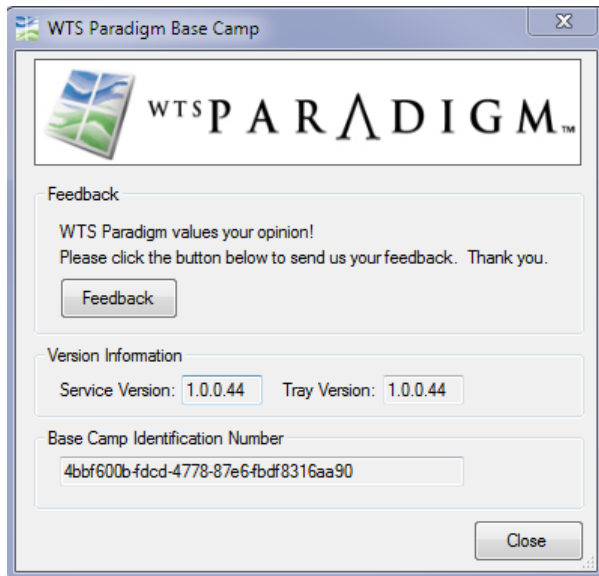
Once Base Camp is installed, you need to supply WTS Paradigm with your Base Camp identification number. This allows WTS Paradigm to register your installation with our integration module.

To access your Base Camp identification number:

1. Right-click the Base Camp icon Windows task bar Notification area and select **About**.



The WTS Paradigm Base Camp form opens, showing the Base Camp Identification Number.



2. Email the following information to [integrations@wtsparadigm.com](mailto:integrations@wtsparadigm.com):
  - The Base Camp Identification Number
  - The system to which you will be integrating quotes; for example, QuickBooks.
  - The number of users you will be exporting quotes for

After you register via email with this information, Base Camp downloads the necessary files during the next nightly update, making it possible for you to create and export XML files for quotes. A menu option for the integration company you are using appears in the Base Camp menu.

### System Specific Integrations

The systems listed below all have specific output file formats that have already been optimized to make the quote export and import process more accurate. If you do not use one of these systems, your integration is identified generically as **WTS Paradigm Integration** in your Base Camp right-click menu options.

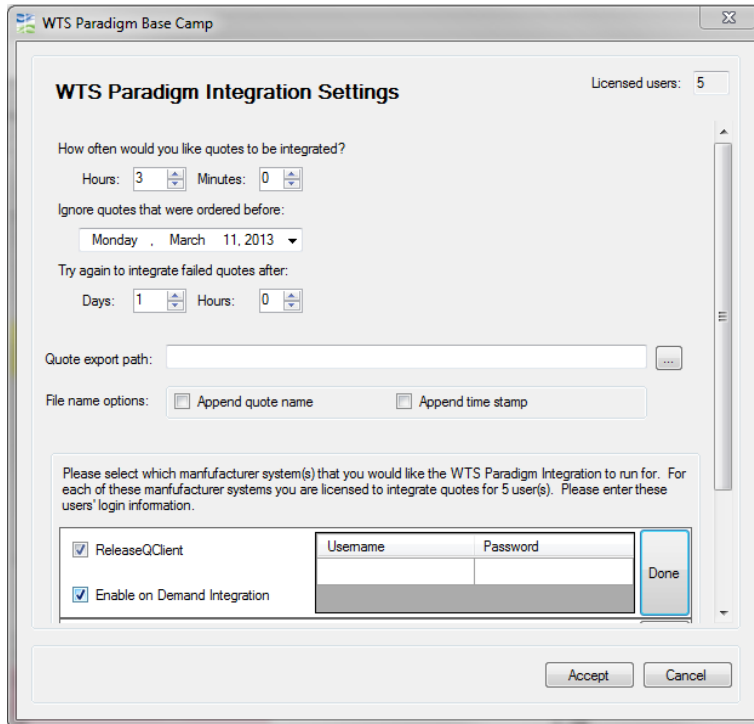
- Intuit QuickBooks
- SpruceWare
- DMSi Software

For specific information on Base Camp QuickBooks integration, see the *Setting up QuickBooks Accounting Integration for Base Camp* whitepaper, available from your WTS Paradigm Representative.

### Configure Quote Export Integration

1. Right-click the Base Camp icon in the Windows task bar Notification area and select ***Integration Company*** > **Settings** from the Base Camp pop-up menu.

The Integration Settings window opens.



2. In the **Hours** and **Minutes** fields, determine how often the integration should run. When the integration runs, a message appears informing you about the number of orders that were processed.
3. To ensure that quotes before a certain date are not processed by the integration, enter a date in the **Ignore quotes that were ordered before** field. If you only want to export quotes that have been ordered as of the date that you installed the integration, change the date to today's date.
4. To allow Base Camp to integrate quotes that failed the integration the first time after a certain amount of time has passed, enter a number of days or hours in the **Days** and **Hours** fields.
5. In the **Quote export path** field, select a directory to store your exported quotes. For example, C:\mydocuments\Quotes\  
See [Exporting as a Scheduled Batch Export](#) for more information.
6. Under File name options, select **Append quote name** and **Append time stamp** to add this information the XML filename for each quote. The default file name is the Quote name in CenterPoint.  
For example: 1732\_ Quote\_04-07-2010-115040.XML
7. In the list of the manufacturer systems that have been configured to work with Base Camp, select the checkbox next to the environments for which you need to run the integration.

8. Click **Edit** to access the settings for a specific manufacturer. Check the **Enable On Demand Integration** option. Add the **Username** and **Password** to the environment for any user whose quotes you want to export. Add as many usernames as you need when you request the integration.

Click **Done** to accept the changes here. See [Exporting On Demand](#) and [Exporting All Quotes to One Location](#) for more information.

9. Click **Accept** in the Settings form. Your settings are saved.

**Note:** The options available in the middle section of this form vary depending on the type of accounting system you are integrating with Base Camp. Contact WTS at [integrations@wtsparadigm.com](mailto:integrations@wtsparadigm.com) for assistance on configuring these settings.

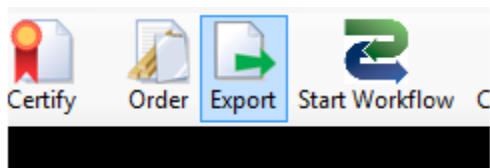
## Using Quote Export: Creating XML files for Quotes

There are two ways to export quotes for your CenterPoint quoting systems:

- On demand while a user has the quote open in CenterPoint.
- As a scheduled batch

### Exporting On Demand

If you have checked the **Enable on Demand Integration** option in the integration settings screen, an **Export** button is available to the user when they open a quote in CenterPoint. Users can click the **Export** button at any time to generate the quote export.



This export can then be brought into your downstream system to generate a purchase order number that may be required for completing your order in CenterPoint. On-demand exporting may not be necessary for all users of the Base Camp integration.

### Exporting as a Scheduled Batch Export

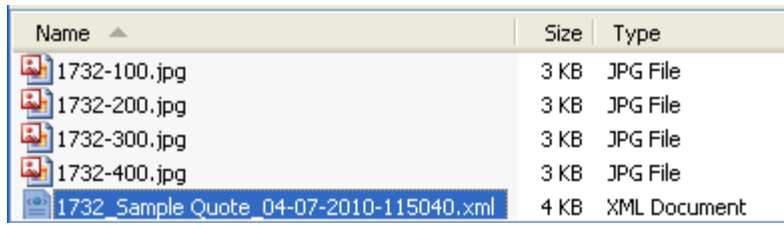
The frequency settings in the Base Camp Integration Settings window control how often ordered quotes are exported to the directory specified in the **Quote export path** field. Any quote that has been ordered since the last batch run is exported at that time.

You can also trigger the batch export manually. Right-click the Base Camp icon and select **Integration Company > Run**.

The XML files for the CenterPoint quotes are saved in the directory specified in the Settings form. A message appears when the quotes export is complete or if there were no quote integrations to run.

The XML files for ordered quotes in your CenterPoint system are created and exported to a manufacturer-specific subfolder in the directory you specified in your Base Camp integration settings.

Any .jpg files for associated line item images with the quote number filename are also in the directory, as shown in the following example.



Name	Size	Type
1732-100.jpg	3 KB	JPG File
1732-200.jpg	3 KB	JPG File
1732-300.jpg	3 KB	JPG File
1732-400.jpg	3 KB	JPG File
1732_Sample Quote_04-07-2010-115040.xml	4 KB	XML Document

## Exporting All Quotes to One Location

If you have a single employee that manages the data entry into the downstream system, you can set up all of your employees as users in that person's Base Camp install. The integration finds all ordered quotes for the usernames identified in the Integration Settings form, and puts all the quotes in the same location for easier management.

## How Quotes Are Identified for the Scheduled Batch

All quotes that are ordered and were created by the user entered in your Base Camp Integration settings are possible candidates for the batch export. Once a quote has been exported in a scheduled batch, it has a flag set on it, indicating it should not be exported again.

If an ordered quote that has already been exported has been changed and re-ordered, it will be exported again during the next run of the batch.

This means that the first Base Camp Integration to export a quote in a batch run will be the only Base Camp Integration to export that quote in a batch run. If you have multiple computers with the Base Camp Integration installed, be aware that each quote will only be exported by one of them.

Quotes exported on demand using the Export button within CenterPoint will not cause the flag to be set. Quotes can be exported on demand from within CenterPoint whenever desired.






## Viewing Integration History

Select *Integration Company* > *History* from the pop-up menu to see when the integration. This is particularly useful when looking for the processes that ran when you were logged out of the application.

The following is a list of the color and icon indications for history messages:

- Messages highlighted in green with an “I” icon indicate that the integration was successful.
- Messages highlighted in yellow with an exclamation point icon indicate that there is a warning.
- Messages highlighted in red with an “X” icon indicated that Base Camp encountered an error while attempting to run the service.

When no updates were applied, the row is not highlighted and the “I” icon appears. To filter out rows where no updates were applied, clear the **Show Inactive Messages** checkbox.

Name	Size	Type
 1732-100.jpg	3 KB	JPG File
 1732-200.jpg	3 KB	JPG File
 1732-300.jpg	3 KB	JPG File
 1732-400.jpg	3 KB	JPG File
 1732_Sample Quote_04-07-2010-115040.xml	4 KB	XML Document

## Understanding the Format of the Exported XML Files

Each XML file created for your CenterPoint quotes includes the following information:

### Quote

- Project Name
- Quote Name
- Quote Number

### Line Item Master

- Dealer Extended Price
- Description
- Number
- Quantity
- Image File Location

### Line Item

- Dealer Extended Price
- Description



- Number
- Product Code
- Quantity

### Sample Quote XML File

The xml code here shows a sample quote based on the standard XML template:

```
<Quote>
  <ProjectName>Sample Project</ProjectName>
  <QuotationName>Sample Quote</QuotationName>
  <UserQuoteNumber>188</UserQuoteNumber>
  <LineItemMasters>
    <LineItemMaster>
      <DealerExtendedPrice>334.95</DealerExtendedPrice>
      <Description></Description>
      <Number>100</Number>
      <Quantity>1</Quantity>
      <ImageFile>c:\exportedorders\188_5-14-2009_100.jpeg</ImageFile>
    <LineItems>
      <LineItem>
        <DealerExtendedPrice>334.95</DealerExtendedPrice>
        <Description>*** PRODUCT ***
          Cream White Series 300 315 SH - V 17.75 W X 24.75 H
          *** SIZES ***
          17.75W x 24.75H X Equal Lite Sash
          *** GLASS ***
          Clear Int 1/8" / Unanswered Ext 1/8"
          *** SCREEN ***
          Unanswered Cream White Unanswered
          *** WRAPPING ***
          Flange</Description>
        <Number>1</Number>
        <ProductCode></ProductCode>
        <Quantity>3</Quantity>
      </LineItem>
    </LineItems>
  </LineItemMaster>
</LineItemMasters>
```

</Quote>

### Customizing the XML template

The XML template, DealerXMLFormat.xml, is located in the Base Camp integration directory. For example:

```
C:\Program Files\WTS Paradigm\BaseCamp\Integration\DealerXMLFormat.xml
```

**Caution:** This filename and this file location are required for the integration to run. Do not rename or delete this file. If you modify the template XML file, ensure you keep a backup copy.

The DealerXMLFormat.xml file indicates the display and data fields that exported to the quote XML file.

- The <Field> setting designates CenterPoint fields to export to XML.
- The <Name> setting indicates the XML tag in the exported XML file.
- The <Data> setting indicates the CenterPoint data name.

For example, the following field setting indicates that the CenterPoint Line Number within a quote will be exported to a XML tag titled Number.

DealerXMLFormat.xml:

```
<Field>
    <Name>Number</Name>
    <Data>LineNumber</Data>
</Field>
```

Resulting field in exported XML file:

```
<Number>1</Number>
```

To change the XML tags in the exported XML files, you can edit the value in the <Name> setting.

If you do not wish to export some fields, you can delete settings from the Template XML file. For example, you can delete the whole setting for <ProductCode> if that is information your company does not use.

```
<Field>
    <Name>ProductCode</Name>
    <Data>ProductCode</Data>
</Field>
```

If you wish to add fields, please contact WTS Paradigm representatives. The <Data> setting is required for every field and must be obtained from WTS Paradigm.

## Testing the Integration

To test Quote Integration, run the module from the Base Camp icon's pop-up menu. Use the exported XML files to verify against your back-end system.

### Additional Information for Dealer Integration

In addition to the standard quote information, the XML file can include the following information:

- Values from the LineItems Extra Data field:
  - ROHeight
  - ROWidth
  - LongDescription
  - ShortConfigDescription

**Important Note:** LI.ProductCode and extradata LongDescription and ShortConfigDesc is set by your PK.

Contact your WTS paradigm representative if you would like to use additional dealer integration information.

The DealerXMLFormat.xml file for additional Dealer Integration includes the following fields:

```
<QuoteExport>
  <QuoteFields>
    <Field>
      <Name>QuoteName</Name>
      <Data>QuoteName</Data>
    </Field>
    <Field>
      <Name>UserQuoteNumber</Name>
      <Data>QuoteNumber</Data>
    </Field>
  </QuoteFields>
  <QuoteHeaderFields />
  <LineItemMasterFields>
    <Field>
      <Name>Quantity</Name>
      <Data>Quantity</Data>
    </Field>
  </LineItemMasterFields>
  <LineItemFields>
```

```

<Field>
  <Name>CustomerListPrice</Name>
<Data>CustomerListPrice</Data>
</Field>
<Field>
  <Name>ProductCode</Name>
  <Data>ProductCode</Data>
</Field>
<Field>
  <Name>Quantity</Name>
  <Data>Quantity</Data>
</Field>
<Field>
  <Name>Description</Name>
  <Data>Description</Data>
  <CDATAOutput>true</CDATAOutput>
</Field>
<Field>
  <Name>ROHeight</Name>
  <Data>roheight</Data>
  <FromExtraData>true</FromExtraData>
</Field>
<Field>
  <Name>ROWidth</Name>
  <Data>rowidth</Data>
  <FromExtraData>true</FromExtraData>
</Field>
<Field>
  <Name>LongDescription</Name>
  <Data>longdescription</Data>
  <FromExtraData>true</FromExtraData>
  <CDATAOutput>true</CDATAOutput>
</Field>
<Field>
  <Name>ShortConfigDesc</Name>
  <Data>shortconfigdesc</Data>
  <FromExtraData>true</FromExtraData>

```

```
        <CDATAOutput>true</CDATAOutput>
    </Field>
</LineItemFields>
</QuoteExport>
```

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