



WTS PARADIGM®

Setting up Accounting Integrations for Base Camp

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Using Base Camp

WTS Paradigm Base Camp lets you identify, optimize, and update WTS Paradigm quote entry systems. It can also create integration files of orders placed in the WTS Paradigm quote entry systems.

Installing Base Camp on a Local Machine

See the Base Camp documentation on how to install and set up Base Camp on a local machine.

Accounting Integrations for Base Camp

If your organization uses accounting software that is compatible with your WTS Paradigm applications, such as Intuit QuickBooks®, you can use Base Camp to import the ordered quotes automatically. This feature allows faster and easier integration of quotes and orders from CenterPoint into your accounting software and eliminates manual entry or synchronization.

Request Accounting Integrations Setup

To request integration information for Base Camp to work with an accounting integration, send email to integrations@wtsparadigm.com. Provide the following information:

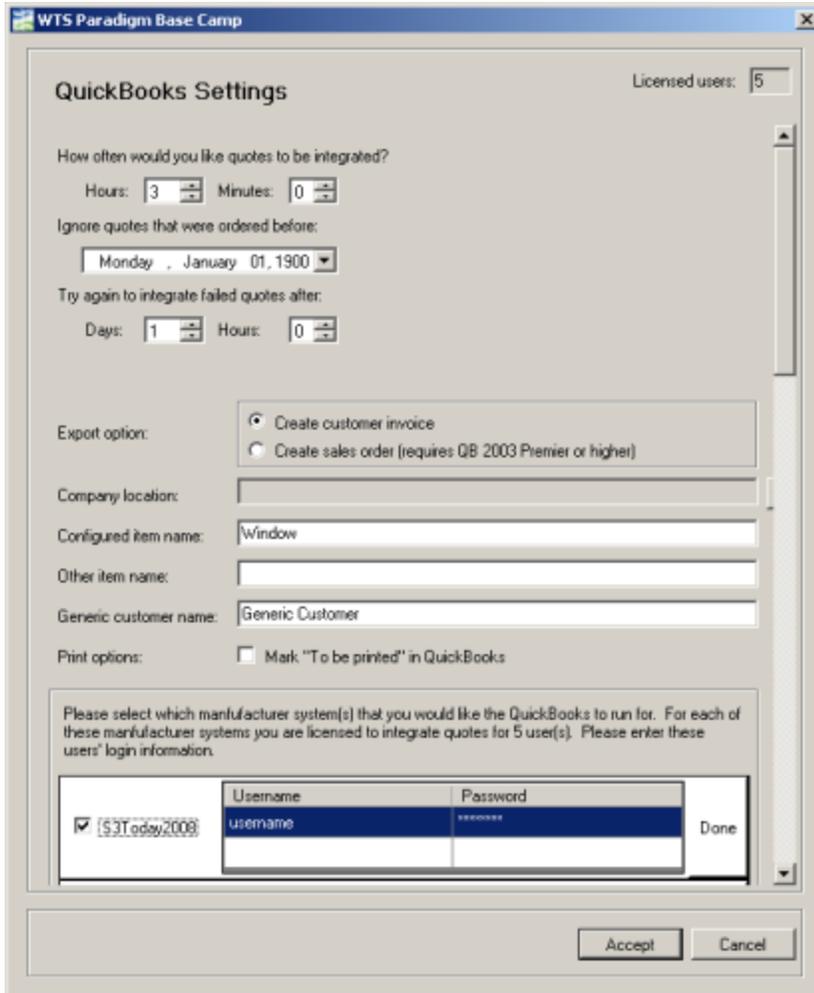
- Billing information for the integration licenses
- The Base Camp Install GUID. To find this number, select **About** from the Base Camp pop-up menu. Copy and paste the Identification Number into the email message.
- The number of licensed users whose quotes need to be integrated via Base Camp. The number you provide will be the number of licenses you will be charged for. **Note:** This number is not dependent on the number of machines that are using Base Camp; this number indicates how many users need to integrate their CenterPoint quotes with the accounting software via Base Camp.

When you are registered for an accounting integration, Base Camp will automatically download the integration files and keep them up to date.

Using QuickBooks in Base Camp

After QuickBooks is installed, the **QuickBooks** menu choice appears in the system tray menu for Base Camp.

1. Select **QuickBooks > Settings** to open the Integration Settings form where you can configure the integration settings.



2. In the **Hours** and **Minutes** fields, determine how often the integration should run. When the integration performs a run on an interval, a message appears informing the user about the number of orders that were processed or not processed.
3. To ensure that quotes created before a certain date are not processed by the integration, enter a date in the **Ignore quotes that were ordered before** field.
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. Under **Export option**, select how you wish the ordered quote to be exported.
6. Select the file **Company location** to export orders automatically. If you do not select a file location, QuickBooks must be open when the integration runs.
7. Provide a **Configured item name**. This is the name of the QuickBooks “Item” for any standard configured window/door line items.
8. Provide an **Other item name**. This is the name of the QuickBooks “Item” for non-configured line items.

9. Provide a **Generic customer name**. This is the name of the customer in QuickBooks who will be attached to the invoice/sales order if the name from the bill address on the Sold-To tab is not found. A customer is required on all Sales Orders or Invoices in QuickBooks, so if you do not enter a name here, a customer named “Generic” will be created and used.
10. Select the **Print option** check box to determine whether or not the QuickBooks invoice or sales order should be marked “To be printed”.
11. 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.
12. Click **Edit** to enter a username and password for the system. Specify a username and password for each manufacturer system for which the integration needs to run.

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 for assistance on configuring these settings.

Allowing QuickBooks Access

To allow WTS Paradigm software access to the QuickBooks company file, you must have administrative rights to complete this one-time setup procedure.

1. Open QuickBooks to the company file.
2. From the Base Camp system tray menu, select **QuickBooks > Run**.

The “Application with No Certificate” form opens, indicating WTS Paradigm QuickBooks Integration is requesting access.

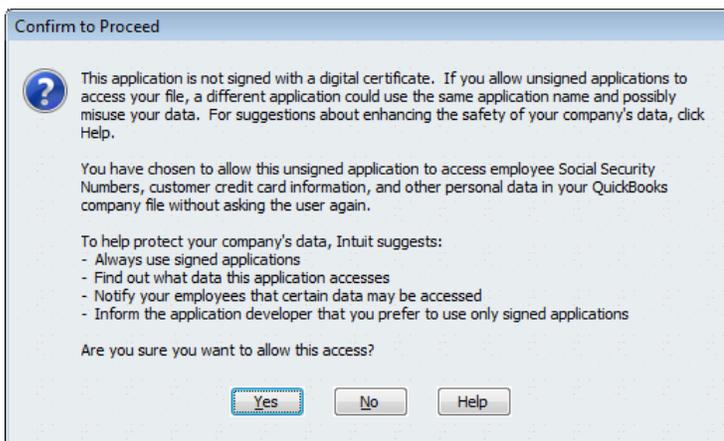


3. Select **Yes, always allow access**.

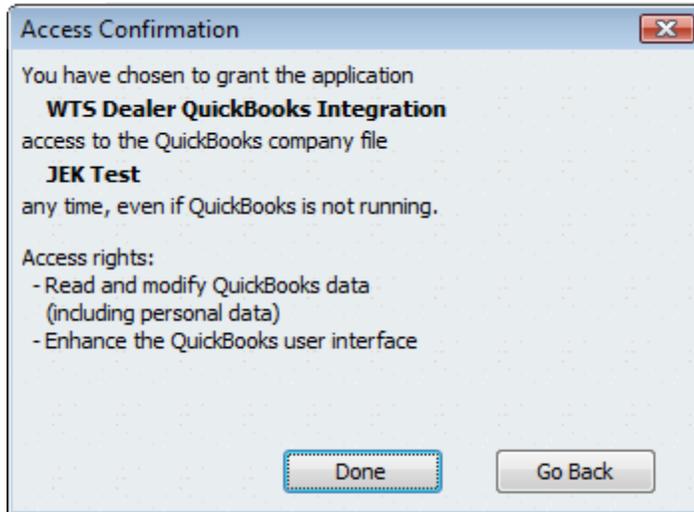
The **Allow this access** checkbox can be checked or unchecked. WTS Paradigm does not access personal information on your machine.

4. Click **Continue**. The Confirm to Proceed box opens.

5. Click **Yes** to allow access.



The Access Confirmation box appears.



6. Click **Done**.

Running QuickBooks Integration

From the Base Camp system tray menu, select **QuickBooks > Run** to perform an immediate run of the integration. The integration runs for environments and users that are set up in the Settings form. A status message shows the success or failure of the integration or if there were no quotes to integrate.

Select **QuickBooks > History** to view the history and status of the integration runs performed by Base Camps.

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