

Base Camp Quote Export Integration

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Overview

You can now set up and use 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

Install Base Camp

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

After Base Camp is installed, you will need to supply Paradigm with your Base Camp identifier. This will allow Paradigm to register your install with our integration module. Your Base Camp identifier is accessed by right-clicking on the Base Camp icon in your Windows Startup Tray and select "About...". This will open an informational screen about your Base Camp install. Copy and paste the Base Camp Identification Number, the system you will be integrating quotes to, and the number of users you will be exporting quotes for into an email to integrations@myparadigm.com.

After you are registered with the integration module, Base Camp will download 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.

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. (See the end of this document for a list of companies available for integration.) The 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 or if nothing was 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, you will want to 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. Browse to and select a directory to store your exported quotes. For example, C:\mydocuments\Quotes\

6. Under Filename 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 checkbox, and add the username and password to the environment for any user that you want to export quotes for. You will need to request as many user names as you need when you request the integration. Click Done to accept the changes here.
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 Paradigm at integrations@myparadigm.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: as a scheduled batch, or on demand while a user has the quote open in CenterPoint.

On Demand Export

When you have a quote open in CenterPoint, an "Export" button is available (only after you have checked the "Enable on Demand Integration" in the integration settings screen). At any time you can click this button to generate the quote export on demand.

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.

Scheduled Batch Export

The frequency settings in the Base Camp integration settings screen control how often ordered quotes will be exported to your desired folder. Any quote that has been ordered since the last batch run will be exported at that time.

The batch export can also be triggered by a manual process. 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.

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 check box.

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 will find all ordered quotes for the users identified in the settings, and will put 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.

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



Important: 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 want 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 want to add fields, contact your Paradigm representative. The <Data> setting is required for every field and must be obtained from 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 Lineltems Extra Data field:
 - ROHeight
 - ROWidth
 - LongDescription
 - ShortConfigDescription

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

```

System-Specific Integrations

The systems listed below all have specific output file formats that have already been optimized to make the importing process more accurate. If you do not use one of these systems, your integration will be identified as Paradigm Integration in your Base Camp right-click options.

- QuickBooks

- Spruceware
- DMSi