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## Version 4.0 Build 1 - New Features

1. New SQL backend offered in the new Corporate Edition. This edition will have a Utilities|Rehost backend to SQL menu. This will create a QuoteWerks database and tables on a Microsoft SQL server. When the rehost is complete, simply restart QuoteWerks and you will be running QuoteWerks on a MS SQL backend.
2. In Corporate Edition, added new Utilities|Sync menu. This feature is used to copy data from a master network installation to a remote laptop installation. The feature requires a network connection and copies all data except for the documents from a QuoteWerks master install to a remote install.
3. In Corporate Edition, added feature to copy all security information from a SQL Server master installation to an access backend security.mdb file.
4. The PC industry edition is now called the Professional Edition, and includes the Peachtree link, QuickBooks link, and Open Export module.
5. For Standard Edition and Professional Edition, the Access 97 database backend has been upgraded to Access 2002 database backend which has improved record locking performance.
6. In Professional and Corporate Editions only, you can link to any product database source such as Microsoft SQL tables and views, Microsoft Access, Microsoft Excel, or any ODBC or OLEDB compliant data sources.
7. A new real-time live link to the QuickBooks product database enables you to search the QuickBooks product database real-time for products and services to use in your quote. Current availability for inventory items is displayed too (Professional/Corporate Editions only).
8. A new real-time live link to the salesforce.com price book enables you to search the salesforce.com product databases real-time for products and services to use in your quote (Professional/Corporate Editions only).
9. There no longer is a limit of 200 maximum product databases, you can have as many product databases as you need.
10. You can now insert JPEG formatted pictures (in addition to BMP formatted pictures) into the print layouts and report layouts.
11. Increased maximum number of line items in any single quote/order/invoice to 600. Previously the limit was 300.
12. New QuoteWerks Launcher app makes it easier to choose on-the-fly which QuoteWerks installation you want to use to open a quote when double-clicking on the df file or launching from a contact manager. This is most useful when QuoteWerks is installed on both a laptop and the network. Prior to this Launcher support, the last installed copy of QuoteWerks was the installation that would be used to open the document.
13. Multi-language spell checker supporting 14 languages including custom dictionary/word support. Also now, if no text is selected, the entire text will be spell checked, and if some text is selected, then only that text will be spell checked.
14. There are now separate city, state, and postal code fields in addition to the address3 field for quotes, contacts, and vendors.
15. The QuoteWerks contact records now store more information with the contact record such as terms, tax rate, mobile #, AccountingCustomerID and website.
16. Products/Services in the product databases can now be associated with more than one folder. Also, when editing the product, on the Advanced tab, the full path of all the folders that the product is in will be displayed.
17. Added new File|Save As Next Revision menu. This feature will auto-number (either alpha or numeric) your revisions, and will automatically update your contact manager links to redirect them to your latest revision. Previous revisions can be kept. They can be searched for, however they are not reflected in reports as previous revisions will have been superceded by the current revision. A history of all previous and newer can be viewed with the new View|Document Revisions menu.
18. When converting a quote to an order, or quote/order to invoice, the details of the conversion such as the date/time of the conversion, the source document number, and the logged in user that performed the conversion are now logged and stored with the document. If you have chosen the option to preserve the quote, this quote is also updated with the converted date, and document number of the order.
19. When converting a quote to order, or quote/order to invoice, and you have chosen the option to preserve the existing quote/order, the doc status of the existing quote/order will be updated with a docs status such as "Closed" that you can specify.
20. Support for 15 volume costing levels, so you can setup your cost to be different based on the quantity of the item that you are selling.
21. Increased volume pricing levels from 10 levels to 15 levels.
22. Added new cost modifier column on the document items tab. This enables you to base your cost column as a discount from the list column.



23. The cost of products can now be based on the list price of the product such as a discount from list price.
24. Items that use the Pricing based on Volume or customer price levels now support the ability to use price modifiers for each of the price levels in addition to a static or fixed numeric price. This enables the price levels to be based on cost the list price of the product.
25. In the product lookup window, there are now sub folders for Tech Data that include a unique list of manufacturers, and a 3 level deep category folders that when clicked on will display the products from the manufacturer or category selected.
26. In the product lookup window, there are now sub folders for Ingram Micro that include a unique list of manufacturers, and a 3 level deep category folders that when clicked on will display the products from the manufacturer or category selected.
27. In the product lookup window, for QuoteWerks native product databases, there is now a (Manufacturers) folder that automatically lists all the unique manufacturers contained in the product database, and when a manufacturer folder is clicked on, only the products made by that manufacturer will be displayed.
28. There is now a Spec Sheets tab on the File|Print window that contains a list of all the spec sheets available for the products in the quote. On this tab, you can choose which spec sheets you want to print with the quote. You can also double-click on a spec sheet in the list to view/modify it. There is also a new setting under the Tools|My Preferences menu to set per user if by default you want to print all or print no spec sheets.
29. The Literature tab on the File|Print window now supports multi-level folders to organize your literature.
30. The literature and spec sheets that you choose to include in the quote are now saved with the quote so that the next time you open the quote, those literature and spec sheets will be remembered and pre-selected for you.
31. When selecting the option to print multiple purchase orders, you will now be prompted with a window that lets you choose which vendors you want to print the purchase orders for. Additionally, if you have selected to preview the purchase orders, they will be previewed one after the other. As each po is previewed, you will now have the ability to look through all the pages in the po whereas before, you could only see the first page.
32. When printing documents, if any spec sheets or literature files included with the document are in pdf format, a dialog is now displayed that enables you to choose to print those pdf spec sheets and/or literature files by sending them to Adobe Acrobat to be printed.
33. 30% speed increase when importing product data from a text file source.
34. Purchase Order macros now include a macro for your vendors account number (&POVendorAccountNumber), your accounting software's id for the vendor (&POVendorAccountingID), Terms (&POVendorTerms) and SalesRep (&POVendorSalesRep). So, when printing purchase orders, the terms that you have established with your vendor will automatically print along with your vendor's account number and salesrep.
35. Added DocumentHeader macro fields &SoldToAddress and &SoldToFullAddress that will combine the 3 address fields and the city,state, and postal code and remove any blank lines. Also added Address and FullAddress components to the &ShipTo, and &POVendor counterparts.
36. The node installation now has the option to install shortcuts for all users on the machine, or only the logged in user.
37. A feature to delete a native product database file.
38. More fields on the File|Open window and others now have lookup lists and date selection windows.
39. Added new API method Application.GetUserINIFileName() to return the ini file name for the specified user.
40. Added new API method Application.SetStatusBarMessage() to allow api developers to display status messages in the QuoteWerks status bar.
41. Added new API method Application.GetMacro() to return a QuoteWerks macro like cover page macros, report macros, etc.
42. Added a new site.ini option, under the [System] section, the DocDueDate ini key={Empty} will cause the DocDueDate on the Sale Info tab for new documents to stay empty instead of defaulting to a date or calculated date. This new option is useful in the example when it is left blank, and exporting the document to QuickBooks, the terms field can be used to have QuickBooks automatically calculate this due date date.
43. The importing/synchronizing of ddf files received by QuoteWerks by double-clicking on a contact manager linked document, or double-clicking on a ddf file is no longer affected by the "Look for Synchronized data" option. QuoteWerks will now always attempt to import/synchronize ddf files provided to it in this manner.
44. On Product|Lookup window, added new right click menu "Insert item into quote" for inserting instead of adding.



45. Added Memo text field DocumentHeaders.IntegrationData to be used by 3rd party integrated applications to store their data in a QuoteWerks quote.
46. Added filter operator of "Ends with" for creating management report filters.
47. Added new column auto-size to fit icon on the product lookup window.
48. The Medic Utility now has a Utilities | System Database Setup when using the SQL backend for QuoteWerks. This menu enables you to modify SQL server connection settings such as server name, database, name, user id, etc.
49. Added new File | Save As Template menu to simplify creating document templates.
50. You can now set per product data source if you want to show all records in the database when first selecting the product database.
51. Added &ProfitPercent macro to DocumentHeaders table.
52. Added new API event BeforePreviewAction. This enables developers to intercept when a user is on the preview window, and chooses to print, email, save to a file, etc.
53. When creating a new GoldMine opportunity from within QuoteWerks, the owner of the opportunity will now be based on the user selected for the forecast instead of always being the user that is logged into GoldMine.
54. The product price history columns can now be sorted on the fly by clicking on the column heading.
55. When adding bundle items, required items, and configuration items, the sort order field is now automatically set to the next highest increment of 10.
56. Custom menus will now obey the security settings for hiding these menus.
57. After updating the exchange rate list, you no longer have to restart QuoteWerks for the changes to take effect.
58. Added UnitOfPricing key under the System section of the site.ini to specify an alternative default unit of pricing and unit of measure other than "ea".
59. DocumentHeaders->SoldToPONumber field length increased from 20 to 30.
60. Added new access right "CannotDeleteDocuments". When a user has this right, they cannot delete any documents, including their own.
61. Added "Close" toolbar button on the Print Preview window.
62. Added the computer machine name to the event.log and error.log log file entries.
63. The AfterSaveDocument API event now returns more return codes that indicate if a salesforce.com create/update opportunity window was canceled during the save.
64. System information is now displayed on a new System tab of the Help | About menu.
65. The QuickBooks export list is now sorted by DocDate.
66. When import xml files from the File | Import Document menu, you can now archive the .xml file.
67. Added a Vendor column to the results of the Find Quoted Item window.
68. On the QuickBooks link "Select sales tax item name" window, the tax rate from the quote is now displayed.
69. SQL command error window now displays sql command in a scrollable text box. This enables user to copy and paste the error data in order to email to support staff.

## Misc Features

1. With the introduction of QuoteWerks 4.0, ACT! 3.0 is no longer supported by QuoteWerks.



2. More icon changes.
3. When adding or removing license keys, the menus on all open quote workbooks are now updated to reflect the new licensing changes.
4. The auto-generated 4 letter/number location prefix for remote users is now screened for offensive 4 letter words, and filtered out.
5. Alternate currency last updated date/time in the product database is now stored in ISO format.
6. When exporting to QuickBooks, we now check to see if the terms field (15) and the ShipVia field (31) data is larger than what QuickBooks supports, and if so user is notified.
7. Renamed the "Don't Print" item attribute to "Print Line" - removing the double negative.
8. DocumentHeader Macros are now listed under the DocumentHeaders table with an ampersand symbol preceding the macro name. The DocumentHeadersMacro table has been superceeded.
9. When more than one Standard Edition or Professional Edition license is entered, the C or J letter no longer gets changed to a "B" to indicate a bump license when displayed in the License Manager window.
10. Whenever a file selection dialog was displayed, the main quote workbook window would be brought to focus hiding the window that was displayed prior to the file selection. This no longer happens.
11. If a group member line item does not have the Hide Price attribute set, the unit price will be printed.
12. When linking configuration selection containers together, you now need to select from the list of options, you cannot type it in.
13. After deleting, editing or cloning a user account, the selected item position in the list is preserved.
14. You can no longer move a product folder to a subordinate folder. You will now receive a message to that effect.