

WeSuite Integration Project Management Process for Managely Integration

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Purpose

The purpose of this document is to outline the process for delivering the Managely WeSuite Integration project for our customers.

The integration is collaboratively deployed by Bold Group and third-party vendor WeSuite and supported by both parties. The integration automates many aspects of recording lead information, estimating and quoting, as well as jobs in WeEstimate and the transfer of won or booked sales opportunity information to SedonaOffice for job or work order creation.

Bold Group will manage the preinstallation work required on hosted servers (and API install if necessary) and the go-live publishing of the applications. WeSuite manages the product installation on the hosted server as well as all training for the product. WeSuite will develop a plan and timeline for their portion that is incorporated into the Bold Groups project.

If the customer is currently using QuoteWerks, that application must be turned off at the go-live step. WeSuite replaces the QuoteWerks application. Still true?

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WeSuite Resources

Contact info for WeSuite resources:

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For problems with the WeSuite relationship, contact the Bold Group Strategic Partnership Product Manager for assistance.

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Project Flow

The following outlines the project flow for WeSuite with Managely:

1. Provide the customer with the following information to share with WeSuite:
 - a. Managely URL: (Example: <https://customerX.managelyapp.com/>)
 - b. Managely username for WeSuite: wesuite_Interface
 - c. Password: Customer will create the WeSuite user password within Managely
 - d. API URL: managelyapp.com/graphql/
 - i. The link takes user to Banana Cake Pop site, a feature-rich GraphQL IDE for developers that works with any GraphQL API. GraphQL is a query language for APIs and a runtime for fulfilling queries
 - e. Customer will need to apply for an access token at: <https://managelyapp.com/connect/token>

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