

QuoteWerks Licensing Process

01/09/2024 11:12 am EST

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Purpose

The purpose of this document is to provide the user with instructions on delivering new QuoteWerks licenses to a customer.

QuoteWerks is a third-party product that provides quoting functionality that integrates with Bold Group products.

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Process Overview

The following is an overview of the project steps:

- The project will be created using the template: [QuoteWerks Add On Licensing Implementation](#)
- Review the sales order and project notes
- Send kickoff email to customer
- Request Billing Analyst order licenses from QuoteWerks
- Provide license keys to customer
- Close Project

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Review Sales Order and Project Notes

Follow the process [Review Sales Order](#) for reviewing a sales order and project notes.

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Kickoff Email

The kickoff email will inform the customer their request for licenses is in process and they will receive an update once the licenses are available.

From the Kick Off Email task within the project:

1. Prepare the kickoff email using the template: 'QuoteWerks License Kickoff'
 - a. Update the 'To' = customer contact listed in the 'Primary Implementation Contact' fields on the task
 - i. If the task is blank, view the field on the Project page
 - b. Update the '{number of Licenses}' section of the email with the number of licenses purchased
2. Send the email
3. Update the Kickoff task to 'Completed'

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Request Licenses

The Billing Analyst will order the QuoteWerks licenses and provide the license key information to the PM for delivery to the customer. Follow the steps below to complete the task:

From the Request Licenses from Billing Analyst task in the project:

1. Prepare the email to the Billing Analyst using the template: 'QuoteWerks License Request'
 - a. Update the X for the number of licenses and the X for the Customer Name
2. Send the email
3. Update the Request Licenses from the Billing Analyst task to 'Completed'

The Billing Analyst will forward an email from QuoteWerks with the license keys

From: Koree Combs <kcombs@quotewerks.com>
Sent: Thursday, April 8, 2021 12:01 PM
To: Luke Taylor <ltaylor@evercommerce.com>
Subject: [Email 1 of 2] Thank you for your QuoteWerks order!

Hi Luke,

Thank you for your order of QuoteWerks.

As you requested, here is your License Key information to get you started right away:

License Key(s) Purchased
<i>4 User Corporate License Key</i>
F-0004-40146993-JPV57G

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Provide License Key to Customer

Once the license keys have been received from the Billing Analyst:

1. Forward the email to the customer
2. Upload the email to the Provide License Keys to Customer task
3. Mark the task 'Completed'

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Close Project

Follow the process of [Project Closure - Complete](#) Project for closing a project

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