

WeSuite Integration Project Management Process - SedonaOffice

12/28/2023 6:03 pm EST

Contents

[Purpose](#)
[WeSuite Resources](#)
[Project Flow](#)
[Sample WeSuite Schedule](#)
[Revision History](#)

Purpose

The purpose of this document is to outline the process for delivering the SedonaOffice 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.

[Top of Document](#)

WeSuite Resources

Contact info for WeSuite resources:

- PM - Michael Magnani
 - michael.magnani@wesuite.com
 - 914-920-3400 x715
- Tech - Richard Johnson
 - richard.johnson@wesuite.com
 - 914-920-3400 x704

- Account Executive - Samantha Perry
 - samantha.perry@wesuite.com
 - 914-920-3400 x702
 - 914-400-8321

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

[Top of Document](#)

Project Flow

The following outlines the project flow:

1. Use the project template "[WeSuite Project Template](#)" to create new WeSuite installation projects
2. The customer will need to be on API 2.0 version. See [API Information and Installation Process](#) for help determining the version of the API the customer is using.
3. If the quote/SOW includes installation of API - follow the process of confirming and scheduling API installation first
 - a. If No API Install or Upgrade is required - delete API tasks
4. Kickoff - Use the template to notify the customer that you are the PM and will be working with WeSuite resources to coordinate the installation:
 - a. If No API install is required - "WeSuite Integration" template
 - b. IF API install required - "WeSuite Integration with API Install" template
 - i. make sure to attach the preinstall checklists noted in the template
5. Schedule the following tasks for Bold Group Technician to do the Preinstall setup, keeping WeSuite PM in the loop
 - a. WeSuite Preinstall Setup
 - i. Estimated time: 1 Hour
 - ii. Setup up Outlook appointment for tech and WeSuite resource for the last 30 minutes to validate setup is complete. This will avoid rescheduling delays

iii. Add the following Chatter notes for tech to provide info below to be shared with WeSuite after installation:

i. Setup WeSuite user in API with the following information

i. Username: WeSuite

ii. FirstName: WeSuite

iii. LastName: Docs

iv. Email: wesuite@wesuite.com

v. Password: WeSuite1!

ii. ClientID: should always be SedonaCloud Client

iii. Client Secret Key: to be provided by Bold Group Tech

i. Can be found in API information under Variables

iv. SedonaAPI Security Certificate file location

i. If hosted - Bold Group tech will need to provide

i. usually in the c: temp folder

ii. If not hosted - the customer will have to provide information

v. if the customer is hosted and using SedonaDocs, Tech will need to provide a certification path

iv. Bold Group Tech will reboot the server at end of day

b. Review WeSuite Preinstall with WeSuite

i. Estimated time: 1 Hour

ii. Timeline: next morning after Preinstall Setup task

iii. Setup Outlook appointment for tech and WeSuite resources for the full hour to review any open install issues

6. WeSuite Tech will install WeSuite and communicate to both PM's it is complete

7. Confirm with WeSuite that the installation is complete
 - a. Schedule any follow-up tasks with techs as necessary
8. Reach out to WeSuite PM for the balance of the WeSuite project schedule
9. WeSuite PM will confirm training and go-live dates with Bold Group PM
10. Bold Group PM will schedule Bold Group tech for Go live installation based upon WeSuite go live schedule
 - a. Time - 1 hour
 - b. Tech to publish the app
 - c. Tech to turn off Quotewerks (if applicable)
11. WeSuite will conduct go-live training and final meetings post go live.
 - a. Their PM will provide the full schedule
 - b. May be done in advance of the task for Bold Group to publish the live database
12. After the go-live meetings with WeSuite, confirm with the customer project is complete
13. Close Project

[Top of Document](#)

Sample WeSuite Schedule

Below is an example of WeSuite's internal project plan schedule post installation. The WeSuite PM should provide this information to the Bold Group PM to update our project plan. Note the week with an asterisk is the Bold Group tasks for Go Live. All other activity is done by WeSuite, and they will communicate the schedule to the customer.

Week 1 – Tuesday 8/30 1 PM EST

- Configuration and Workflow for WeOpportunity Meeting

Week 2 - Tuesday 9/6 1 PM EST

- Configuration and Workflow for WeEstimate Meeting
- WeEstimate Proposal Review

Week 3-4 – Tuesday 9/13 & 9/20 1 PM EST

- Contract Review
- Sedona Import Process and testing in Sandbox
- Sedona testing in Sandbox

Week 5 – 7 - Tuesday 9/27 – 10/11 1 PM EST

- Begin WeEstimate Power User Training
 - Testing Workflow – Estimate, Proposal, and contracts to provide edits
- Quote Anywhere Review and Testing
- Finalize Configuration of WeSuite –
 - Final edits for Proposal & Contracts
 - Finalize workflow process
 - Finalize Sedona import before Go Live Set up

****Week 8 Tuesday 10/17 ** (This is Bold Group Activity)**

- Soft GO Live – Publish the WeSuite Live
 - Connect to Live WeSuite/Sedona Office Integration
 - Publish Live Application set up for the Sales team
 - Turn off Quote work Connect in Sedona Office live

Week 9 – Wednesday 10/25

- WeEstimate Go Live Training

Week 10 -12 11/1 – 11/10

- Post GO Live Meeting with both System admin and Sale Reps

Project Close Out/ Move to WeSuite Support

[Top of Document](#)

Revision History

Revision History

6/30/23 - JMK - Added step 2 in Process flow for WeSuite compatibility to API version

5/12/23 - JMK - Updated WeSuite install task in project flow to include additional information WeSuite requires for access

1/4/2023 - JMK per WeSuite, added step to tech install for customers using SedonaDocs and are hosted, the tech will need to provide the certification path to WeSuite

[Top of Document](#)