

WeSuite ADI Integration

WeSuite integration with ADI is utilized within WeEstimate and available in WeSuite release 6.7 and higher. ADI integration is being introduced in QuoteAnywhere and the Site Survey 3.0 in Q3 of 2022.

ADI integration allows WeSuite users to confirm ADI part cost pricing in real-time via use of the ADI API connection with WeEstimate.

****ADI part pricing confirmation relies on use of the specific ADI catalog part numbers.****

In summary the integration with WeSuite enables:

1. Price confirmation of ADI parts per your ADI Customer ID.
2. Retrieval of ADI part pricing from within Estimates in WeSuite after adding parts to Estimates via the “Get Latest Pricing” tools in WeSuite.
3. Adding the same part to different Estimate Folders in same estimating session will fetch the ADI cost price on record for the current session.
4. Confirmation of the source for the part cost. A column on the Bill of Materials grid indicates the source for the part cost (i.e. ADI, Accounting, WeSuite, etc.)
5. Manual control of addition of ADI items that are on sale “discounted”. Sales price versus regular cost.

Please note: There is an option to turn this feature on at the system level and the ability to control at the Estimate/Folder/item levels when retrieving ADI pricing manually. (See ADI Configuration)

6. Search and present only the “Lower cost items” from ADI versus other database part cost sources.

The ADI part pricing features can be used within Estimates at the part level, Folder level, or the Job level.

Adding Parts to Estimates:

After users add parts to an Estimate Folder, the system will allow retrieval of ADI part cost pricing for the parts with matching ADI part numbers, and present the material “Unit Cost” for update/inclusion on the Bill of Materials. A new column on the BOM grid “Vendor”: i.e. Accounting, WeSuite, ADI, PSA, etc. will show the origin of the part cost after adding to the Estimate.

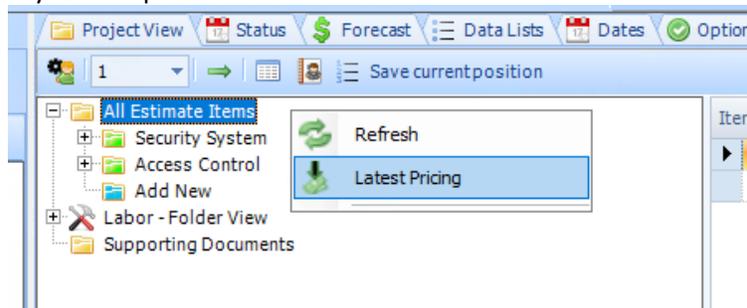
Configuration options include:

1. **Auto Assign** - assign ADI pricing automatically when parts are added to Estimate Folder(s).
2. **Part Item Level** - select a specific item and trigger the ADI integration to retrieve cost. “Get latest pricing” feature in WeSuite.
3. **Folder Level** - select a specific Folder and trigger ADI integration to retrieve ADI pricing for all part item with ADI pricing included in the Folder.
4. **Job Level** – select “All Estimate Items” at the Project View to retrieve ADI cost pricing for any part from ADI included on the Estimate.

WeEstimate Get Latest Pricing Features:

- 1) At the Estimate Bill of Materials use the “get latest pricing” feature to get ADI cost pricing.
 - a. **Part Line-Item:** Users may right click on the part line item and select from the “get latest pricing” popup.
 - b. **“Latest Pricing” icon:** click the icon on the left tool panel of the Bill of Materials and select from the popup.
 - c. **Project View – All Estimate Items** (see below)
 - d. **Project View – Folder Level** (see below)

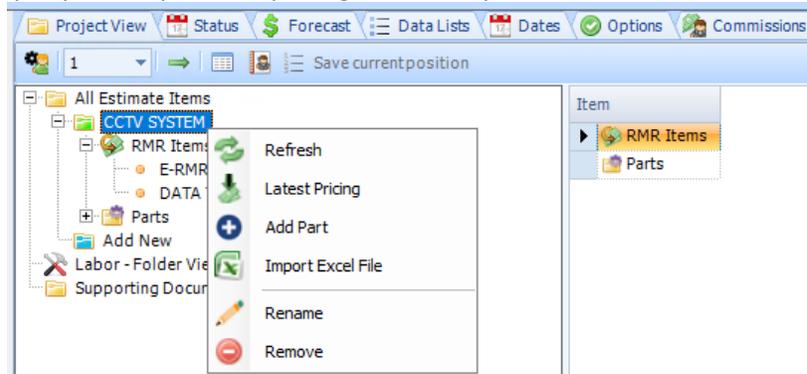
1. Project View: "All Estimate Items" – right click and select “Latest Pricing” will enable Latest Pricing popup box. Initial option are “Latest Pricing” for all parts in the job or, “ADI Items – Latest Pricing” which will retrieve pricing only for ADI parts on the Estimate.



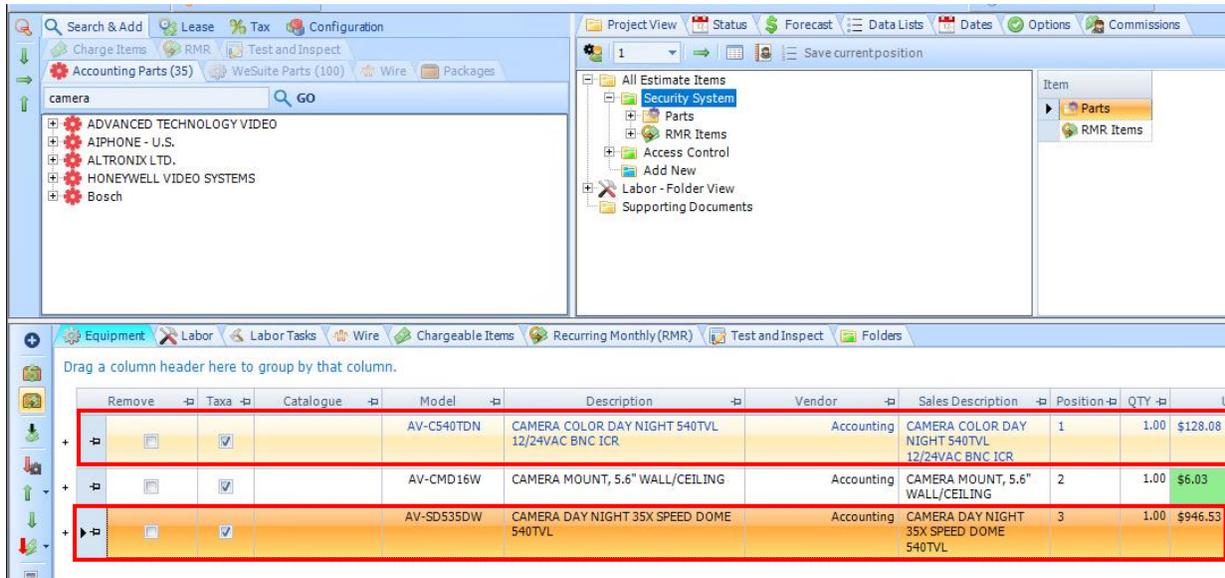
The API call will send in bulk all items assigned to the Estimate to get ADI pricing. As this method includes all items on the Bill of Materials, the process will analyze and find the total quantity of same items that may exist across all Folders and submit the total quantity to the ADI API call, thus retrieving the cost pricing for all ADI items on the Estimate.

Further, the concept of “Lot” or volume pricing is accounted for: i.e. ADI prices 1 unit at \$10, however if order is 5 units pricing is at \$8 per unit. The integration accounts for the “lot” pricing and updates all respective line items based on the total quantity of parts within the estimate.

2. Folder Level – right click and select “Latest Pricing” will present Latest Pricing popup box. Select ADI as “Vendor” to enable query of ADI part cost pricing for all ADI part items within the selected Folder.

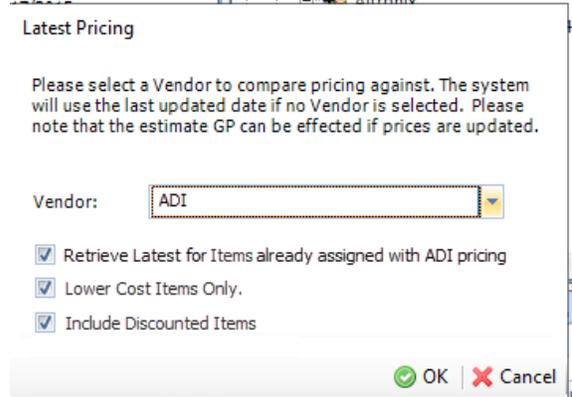
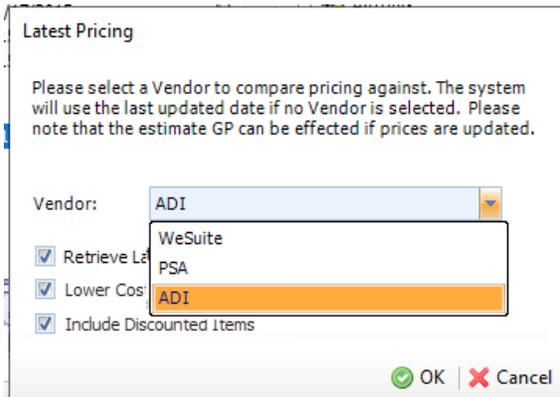


3. Line Item – highlight one or multiple line items on the Bill of Materials. Right click and select from the “Latest pricing” pop up. Select ADI as the Vendor. The integration will query for the ADI part cost of the specific item and return ADI pricing in the Unit Cost column.



Above: Multiple line items selected at Estimate BOM

Latest Pricing:



“Vendor:” The Latest Pricing box enables selection of the part source “Vendor” from the drop down. The drop down will show available pricing databases configured for your system. Select ADI for pricing query for ADI parts.

When retrieving ADI pricing for a specific item the user can indicate that the query should be done for all exact matching items included on other Estimate Folders. (“lot pricing”)

“Lower cost items only” check box will show only same items that are available at lower cost than those already included on the Estimate. (Configurable selection – see ADI Configuration below)

“Include items on sale” is made live for selection after ADI is selected as “Vendor”. The query will include and show items available from ADI that are on sale with sale start and end dates. End dates are highlighted red if less than the number of days set as the “Discount Threshold Days” as

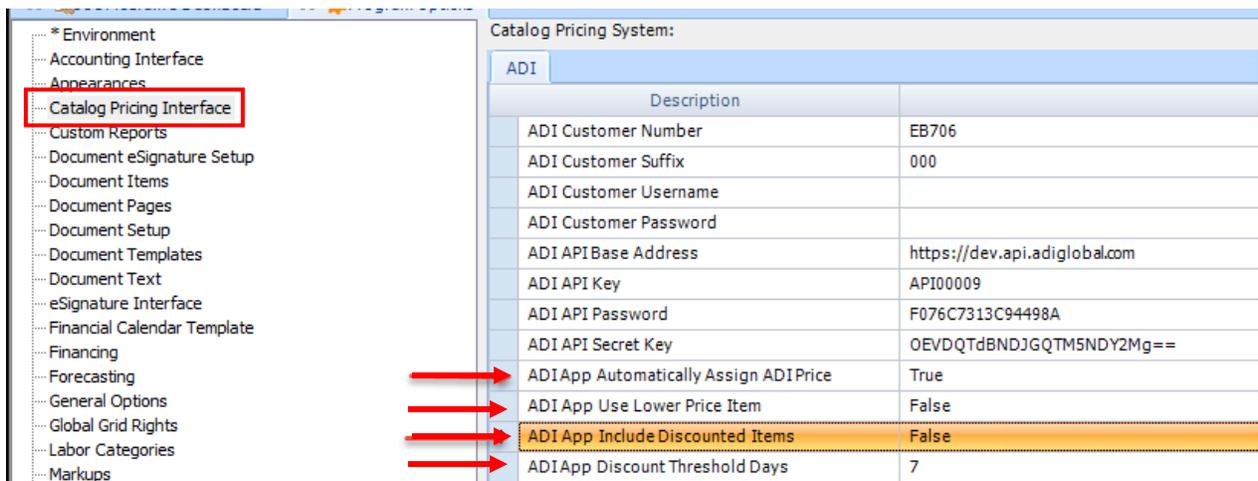
configured). (See ADI Configuration section below.)

ADI Sale Items:

If ADI has items available on sale, that are included on Estimates, users may check the “Include items on sale” box to get pricing for items on sale from ADI. The discounted sale price is shown per item and indicates sale start and end dates. These values will be presented to the User while initiating the price check integration. The sales end date is shown in red color to indicate immediate expiration of the sale price. Use of this feature is configurable to be on or not. (See ADI Configuration below).

ADI Configuration in WeSuite:

WeEstimate: Tools: Program Options



Catalog Pricing System:	
ADI	
Description	
ADI Customer Number	EB706
ADI Customer Suffix	000
ADI Customer Username	
ADI Customer Password	
ADI API Base Address	https://dev.api.adiglobal.com
ADI API Key	API00009
ADI API Password	F076C7313C94498A
ADI API Secret Key	OEVDQTdBNdJGQTM5NDY2Mg==
ADI App Automatically Assign ADI Price	True
ADI App Use Lower Price Item	False
ADI App Include Discounted Items	False
ADI App Discount Threshold Days	7

WeSuite Clients utilizing the ADI integration will include their ADI Customer Number, Customer Suffix, etc. to identify their customer information to ADI and allow for integration pricing verification.

ADI App Automatically Assign ADI Price as “true” activates automatic query for ADI price as parts added to the Estimate.

ADI App Use Lower Price Item as “true” enables the checkbox selection on the Latest Price popup “Lower Cost Items Only”.

ADI App Include Discounted Items as “true” enables show of “sale” items via integration query.

ADI App Discount Threshold Days as “true” enables setting of a threshold “number of days” for sale items to be shown in sales results query. Sales items that fall within the “Discount Threshold Days” will be shown.

System Configuration: User Configuration

Requires licensing per User by checking the “ADI Pricing Catalog” Application Name option at the User level within System Configuration.

User Information			People Manager	Thresholds	Grid Rights	Labor Rights	Commissions
First Name	Last Name	Title					
Jack	Shepard	Vice President					
Region	Office Location	User Mapping					
New York	White Plains	Jack Shepard					
Phone - Ext.	Cell	Fax					
(914)-555-4562	(914)-555-5642	(914)-555-5623					
Logon							
General		Approvals		Quotas		Connections	
Regional Profile		Licensing					
Modules							
Uses	Application Name	Date User Added					
<input checked="" type="checkbox"/>	ADI Pricing Catalog	04/27/2022					
<input checked="" type="checkbox"/>	Business Forms	04/27/2022					
<input checked="" type="checkbox"/>	Dealer Ally	03/23/2022					
<input checked="" type="checkbox"/>	QuoteAnywhere	07/23/2018					
<input checked="" type="checkbox"/>	SiteSurvey	07/23/2018					
<input checked="" type="checkbox"/>	WeEstimate	07/23/2018					
<input checked="" type="checkbox"/>	WeOpportunity	07/23/2018					
<input checked="" type="checkbox"/>	WeSuite Go!	07/23/2018					