



Presented by

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Relevant Automation



RELEVANT AUTOMATION

Digital Quote Manager Connector to MSCRM

- Task bar buttons are added to CRM so a quote can be created or re-opened directly from the customer/prospect record.
- Contact information in the CRM system is automatically populated into new quotes in DQM. You will never have to re-type your customer information.
- Quotes are linked to the CRM customer record automatically. Managers can now run reports to see the status and details of all quotes produced. Use quote data in your filtered searches to create follow up or marketing lists.



Digital Quote Manager Connector to MSCRM

- Follow up activities can be automatically scheduled for each quote on the rep's calendar. Now you can easily have visibility into all of the forecast and no quotes are able to fall through the cracks.
- When saving a quote, a link to the quote is automatically created in the CRM system. You can quickly see all of the quotes and launch them directly from within Microsoft CRM.



Digital Quote Manager Connector to MSCRM

- Updating quote information in DQM will automatically update the corresponding quote in CRM.
- In addition to Quotes being generated in CRM to match the quotes in DQM, the DQM Connector also creates a corresponding Opportunity with a rolled up value of the quotes related to the Opportunity. The quotes and opportunities are linked together using built-in CRM relationship functionality



Screenshots

- Many details from the Quote are copied from DQM into CRM as shown in the following screenshots.



Quote: Office Move First Floor

Information

General **Lease Options** Equipment/Service Printer/Service Billing/Shipping Administration Notes

Quote ID * Revision ID *

Name *

Potential Customer * Currency *

Price List * Status *

DQM Details

Description SO Number

PO Number DQM Status

Quote Date DQMLastUpdate

Due By Expires Date

Required Date

Configured Items	Description	Standard Cost	Suggested Price	Price	Qty	Amount
Host Item: HP 4650n Color LaserJet						
4650	HP 4650n Color LaserJet	\$480.00	\$622.70	\$1,205.85	1.00	\$1,205.85
HP-C9720A	HP LJ 4600 Series Black Toner Cartridge	\$114.67	\$127.80	\$247.48	1.00	\$247.48
HP-C9721A	HP LJ 4600 Series Cyan Toner Cartridge	\$155.13	\$172.90	\$334.82	2.00	\$669.64
HP-C9722A	HP LJ 4600 Series Yellow Toner Cartridge	\$151.94	\$172.90	\$334.82	1.00	\$334.82
HP-C9723A	HP LJ 4600 Series Magenta Toner Cartridge	\$89.71	\$99.99	\$193.63	2.00	\$387.26
Totals for Host Item:		\$991.45				\$2,845.05
Host Item: imageRUNNER c5180						



Quote: Office Move First Floor

 Information

General | Lease Options | Equipment/Service | Printer/Service | Billing/Shipping | Administration | Notes

Host Item: imageRUNNER c5180

Other Items	Description	Standard Cost	Suggested Price	Price	Qty	Amount
XR-4150S	Xerox WorkCentre 4150/S Multifunction Printer	\$1,506.19	\$3,412.50	\$2,153.15	1.00	\$2,153.15
AR-M162	Sharp AR-M162	\$934.96	\$2,295.00	\$2,343.41	1.00	\$2,343.41

Totals for Other Items: \$4,496.56 \$4,496.56

Price & Out Cost Summary

Price Configured Items Total	\$ 5,367.13	Out Cost Configured Items Total	\$ 3,102.29
Price Other Items Total	\$ 30,632.87	Out Cost Other Items Total	\$ 0.00
Total Price	\$ 36,000.00	Total Out Cost	\$ 3,102.29
Quote Margin	\$ 32,897.71	Quote Margin %	91.38

Totals

Detail Amount	\$ 36,000.00
Quote Discount (%)	
Quote Discount	\$
Pre-Freight Amount	\$ 36,000.00
Freight Amount	\$
Total Tax	\$ 0.00
Total Amount	\$ 36,000.00

Remarks



Quote: Office Move First Floor

 Information

General Lease Options **Equipment/Service** Printer/Service Billing/Shipping Administration Notes

Lease Details

Term / Lease Name	<input type="text"/>	Lease Months	<input type="text" value="24"/>
Purchase Option	<input type="text" value="\$1BuyOut"/>	Lease Factor	<input type="text" value="0.05110"/>
Lease Company	<input type="text" value="Lease Company"/>	Lease Buyout	<input type="text" value="\$ 0.00"/>

Payment Summary

Lease Items Total	<input type="text" value="\$ 33,597.52"/>
Lease Payment	<input type="text" value="\$ 1,839.60"/>
Total Payment	<input type="text" value="\$ 2,399.60"/>

Configured Items on Lease

Selected	Item	Citem	Amount
X	4650 / HP 4650n Color LaserJet	3219	\$1,205.85
X	HP-C9720A / HP LJ 4600 Series Black Toner Cartridge		\$247.48
X	HP-C9721A / HP LJ 4600 Series Cyan Toner Cartridge		\$669.64
X	HP-C9722A / HP LJ 4600 Series Yellow Toner Cartridge		\$334.82
X	HP-C9723A / HP LJ 4600 Series Magenta Toner Cartridge		\$387.26
	c5180 / imageRUNNER c5180	3224	\$13,462.18
	7628A001AA / Cyan Toner Cartridge imageRUNNER c5180		\$189.59
	7626A001AA / Yellow Toner Cartridge for imageRUNNER c5180		\$123.96



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- General
- Lease Options
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- Printer/Service
- Billing/Shipping
- Administration
- Notes

Details

Black Volume	<input type="text" value="10,000"/>	Color Volume	<input type="text" value="0"/>
Black Rate	<input type="text" value="0.05600"/>	Color Rate	<input type="text" value="0.00000"/>
Black Overage	<input type="text" value="0.06700"/>	Color Overage	<input type="text" value="0.00000"/>

Service Summary

Black CPP	\$ <input type="text"/>	Total CPP	\$ <input type="text" value="0.18"/>
Color CPP	\$ <input type="text"/>	Total Service	\$ <input type="text" value="560.00"/>

Items on Service

Selected	Item	Citem				
X	4650 / HP 4650n Color LaserJet	3219				
	Meter	Category	Min Volume	Volume	Rate	Overage
	BW	BW	\$1,000.00	\$2,000.00	\$0.02	\$0.02
	Color	Color	\$1,000.00	\$1,000.00	\$0.02	\$0.03
X	c5180 / imageRUNNER c5180	3224				
	Meter	Category	Min Volume	Volume	Rate	Overage
	BW	BW	\$1,000.00	\$2,000.00	\$0.02	\$0.02
	Color	Color	\$1,000.00	\$1,000.00	\$0.02	\$0.03
X	c5180 / imageRUNNER c5180	3504				
	Meter	Category	Min Volume	Volume	Rate	Overage



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Total Summary

Total Average CPP	\$	<input type="text"/>	Profit Margin	\$	<input type="text"/>
Total Printer Price	\$	<input type="text"/>	Total Printer Cost	\$	<input type="text"/>

Proposal Summary

Average Black CPP	\$	<input type="text"/>	Average Color CPP	\$	<input type="text"/>
Monthly Black Volume		<input type="text"/>	Monthly Color Volume		<input type="text"/>
Monthly Black Cost	\$	<input type="text"/>	Monthly Color Cost	\$	<input type="text"/>
Printer Coverage		<input type="text"/>	Printer Terms		<input type="text"/>
			Printer Margin Percent		<input type="text"/>

Service Summary

Monthly Average CPP	\$	<input type="text"/>	Monthly Payment	\$	<input type="text"/>
Total Volume		<input type="text"/>	Total Profit	\$	<input type="text"/>

Printers on Service

Make	Model	Device Type	Serial Number	Supplier	Source	Black Cost	Color Volume
HP	Laserjet 4100 Series	Compatible	CNMXB03406	LMI		\$63.50	\$895.00
HP	Laserjet 4100 Series	Compatible	CNMXB03406	LMI		\$63.50	\$895.00
HP	Laserjet 4100 Series	Compatible	CNMXB03406	LMI		\$63.50	\$895.00



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Information

General

Lease Options

Equipment/Service

Printer/Service

Billing/Shipping

Administration

Notes

Bill To Address

Name	<input type="text"/>	State/Province	<input type="text"/>
Street 1	<input type="text"/>	ZIP/Postal Code	<input type="text"/>
Street 2	<input type="text"/>	Country/Region	<input type="text"/>
Street 3	<input type="text"/>	Phone	<input type="text"/>
City	<input type="text"/>	Fax	<input type="text"/>
Address Contact	<input type="text"/>		

Ship To Address

Ship To Address Will Call

Name	<input type="text"/>	State/Province	<input type="text"/>
Street 1	<input type="text"/>	ZIP/Postal Code	<input type="text"/>
Street 2	<input type="text"/>	Country/Region	<input type="text"/>
Street 3	<input type="text"/>	Phone	<input type="text"/>
City	<input type="text"/>	Fax	<input type="text"/>
Address Contact	<input type="text"/>		

Shipment and Delivery Options

Dates


Effective From	<input type="text"/>		Effective To	<input type="text"/>	
Requested Delivery Date	<input type="text"/>		Due By (Out of Box)	<input type="text"/>	









Shipping Information



The DQM Connector will also bring in the associated Quote Products as related items

Quote: Office Move First Floor

 Write-In Products

<input type="checkbox"/>	Product Description ▲	Price Per Unit	Quantity	Extended Amount
▶ 	2 X 250-Sheet Paper Feed Unit	\$516.37	1.00000	\$516.37
▶ 	Deluxe Low Cabinet	\$104.87	1.00000	\$104.87
▶ 	imageRUNNER c5180	\$15,316.43	1.00000	\$15,316.43
▶ 	imageRUNNER c5180	\$15,316.43	1.00000	\$15,316.43
▶ 	Sharp AR-M162	\$2,343.41	1.00000	\$2,343.41
▶ 	Xerox Black Toner Cartridge	\$95.14	1.00000	\$95.14
▶ 	Xerox Stand for WorkCentre 4150	\$154.20	1.00000	\$154.20
▶ 	Xerox WorkCentre 4150/S Multifunction Printer	\$2,153.15	1.00000	\$2,153.15





Thank You

Please contact us for a live demo:
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