ITARIAN

Quote Manager
Administrator Guide

Guide Version 3.26.052720

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1   Introduction to Quote Manager

- Quote Manager (QM) is an easy-to-use utility which allows you to quickly generate, send and manage customer quotes for services rendered.

- After adding customers, billable items and price rates, QM lets you track submitted quotes, issue reminders, respond to customer feedback, view sales funnels, create templates and more.

- Quote Manager is also integrated with Service Desk, so you can create quotes direct from a service desk ticket.
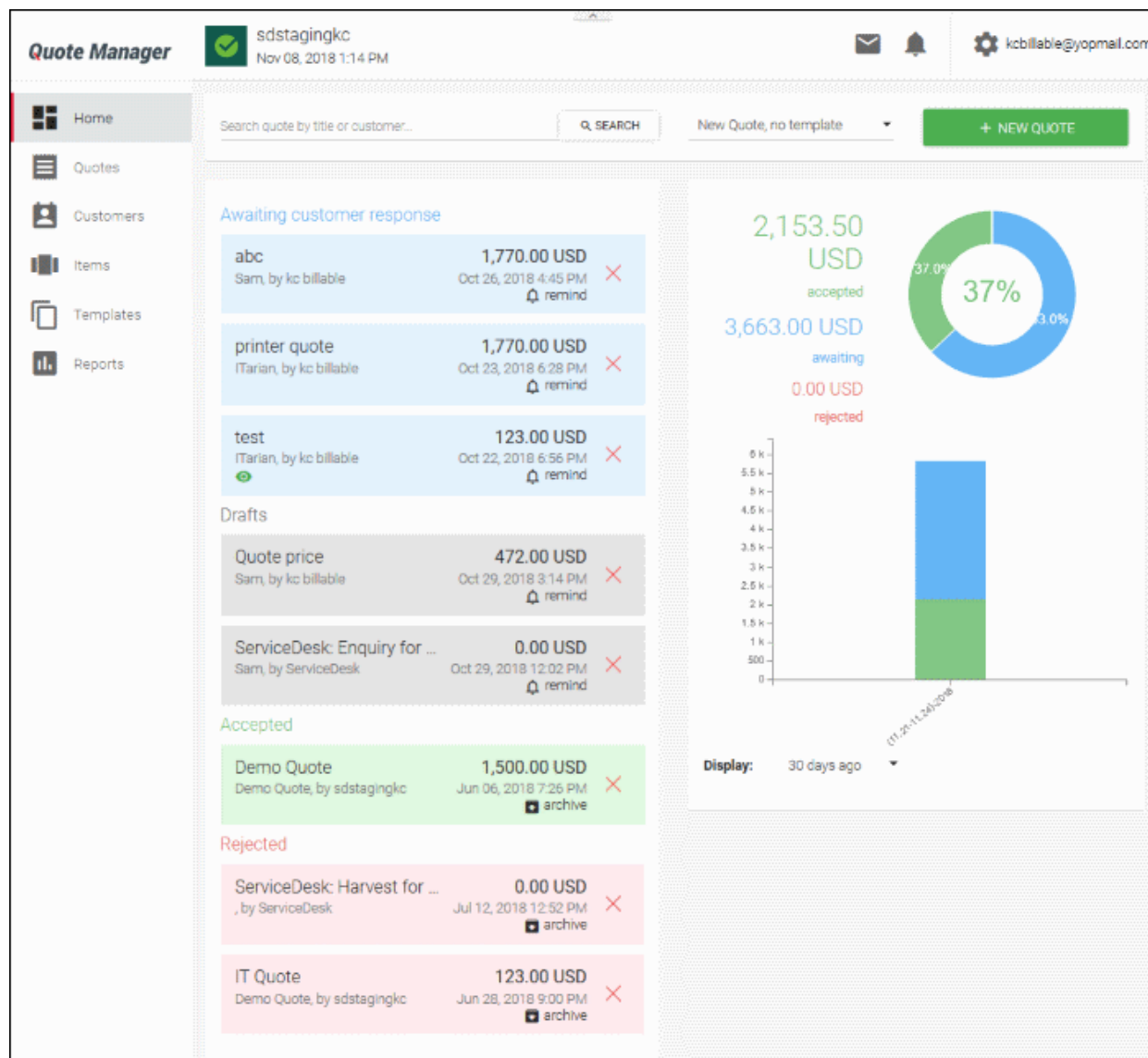
This guide takes you through the set up and ongoing use of Quote Manager:

- **Introduction to Quote Manager**
    - **Quick Start Guide**
    - **Login to the Quote Manager Module**
    - **Quote Manager Admin Console**
- **The Home Screen**
- **Manage Items**

1.1   Quick Start Guide

This step-by-step guide explains how to start using Quote Manager.

- **Step 1 - Login to Quote Manager Module**
- **Step 2 - Add Customer**
- **Step 3 - Add Billable Items**
- **Step 4 - Generate and Send a Quote**
- **Step 5 - Answer Feedback and Finalize a Quote**
- **Step 6 - Create a Quote Template**
- **Step 7 - View Reports**

Step 1 - Login to the Quote Manager module

Quote Manager is a module of the ITarian management platform. To access the module, first login to ITarian at **https://one.comodo.com/**
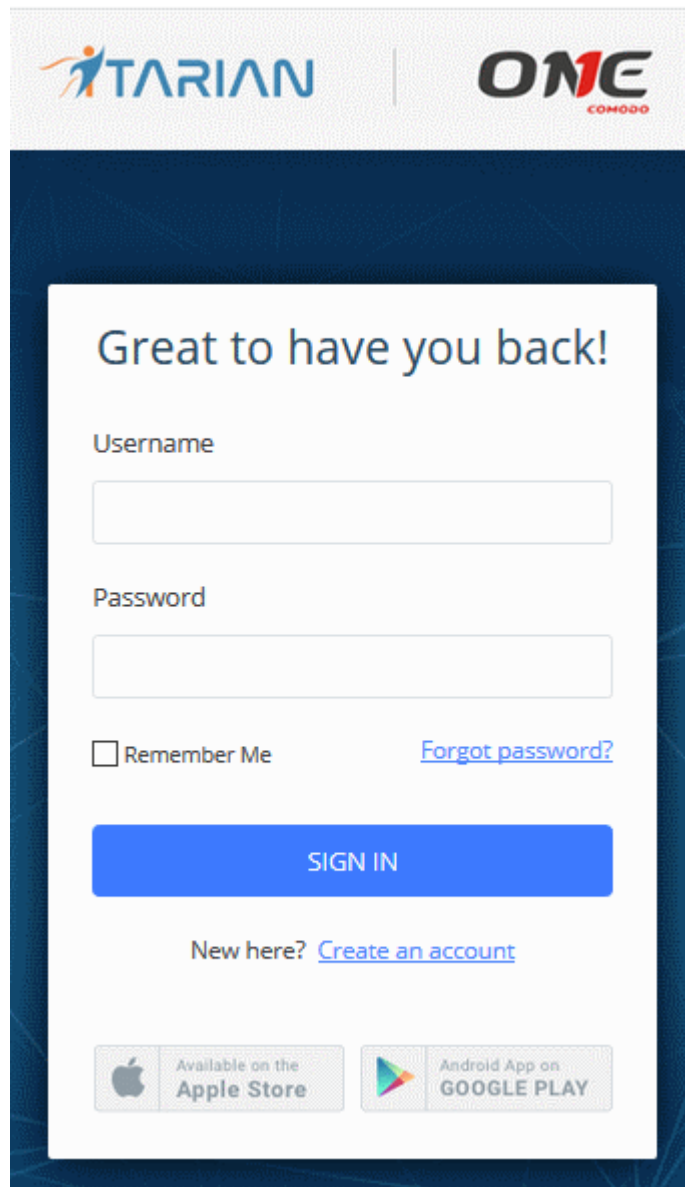
- Enter your login credentials and click 'Login'.
- Click 'Forgot Password' to reset your password
- Click 'Create an account' if you do not have an ITarian account

ITarian will open at the dashboard.

- Click 'Applications' > 'Quote Manager' to open the application.
- Click 'Store' if you haven't yet activated Quote Manager. You can install it from the Quote Manager tile.

Step 2 - Add Customers

The next step is to add contacts/companies to whom you want to send quotes.

- Click 'Customer' on the left and then click '+ New Customer'

The screen to add a new contact or company will open:

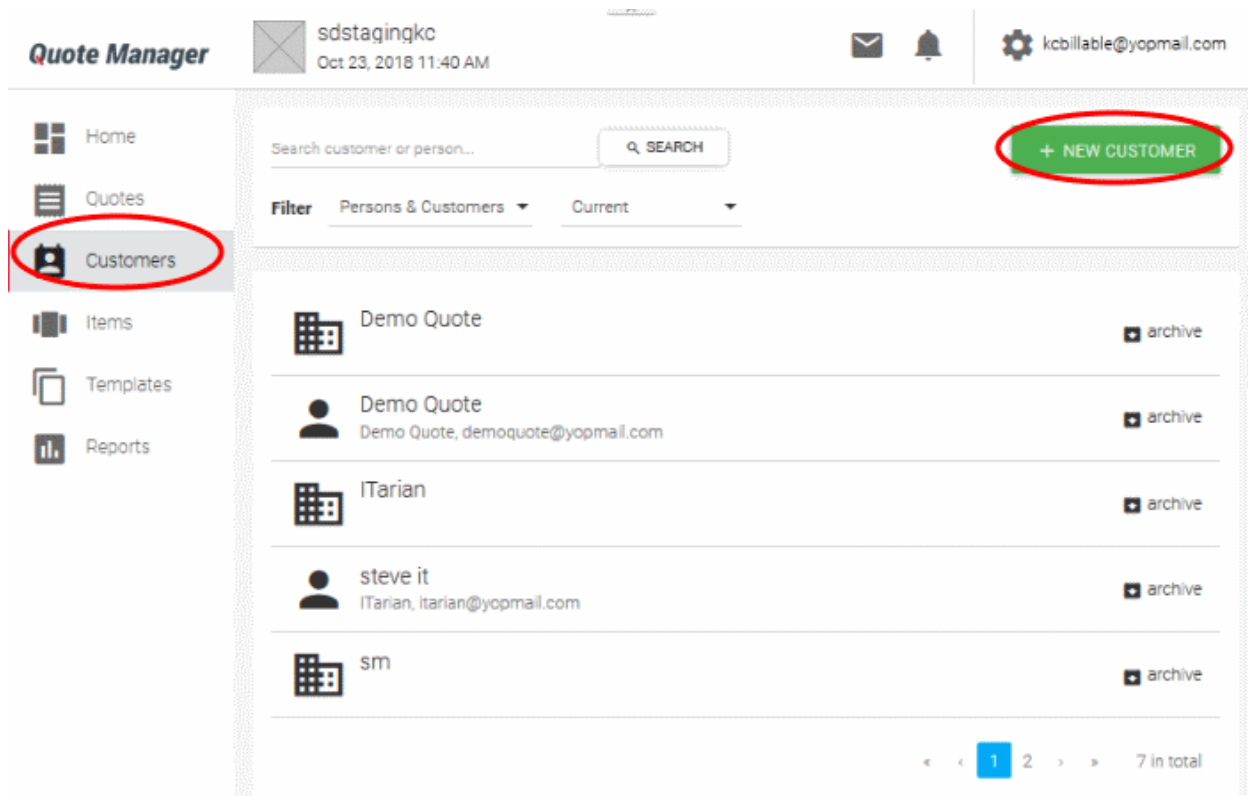You can create customers as a 'New Person' or a 'New Company' depending on your requirements. To switch between the two types, click the '...OR ADD NEW COMPANY/PERSON' link.

Add Customer/Company - Form Fields	
First Name	Forename of your customer ('New Person' only).
Last Name	Surname of your customer ('New Person' only).
Company Name	The company to which you want to send a quote.
Email	The email address to which the quote will be sent.
Contact Info	Click the 'Add' button to add phone number, Skype, website and fax details. You can add more fields by clicking the '+ Add' button again.
Addresses	Click the 'Add' button to add shipping and billing addresses. You can add more fields by clicking the '+ Add' button again.

- Click the 'Save' button above the form when you are finished. The customer will be saved and listed in the 'Customer' screen. Repeat the process to add more contacts/companies.

Tip: For testing purposes, you may want to create a dummy company with your own email address as the customer email.

Step 3 - Add billable 'Items'

In QM, the goods and services for which you want to generate quotes are called 'Items'. In order to send quotes, you first have to add at least one 'Item' to QM. Once created, items can be used in multiple quotes.

- Click 'Items' on the left then click the '+ New Item' button
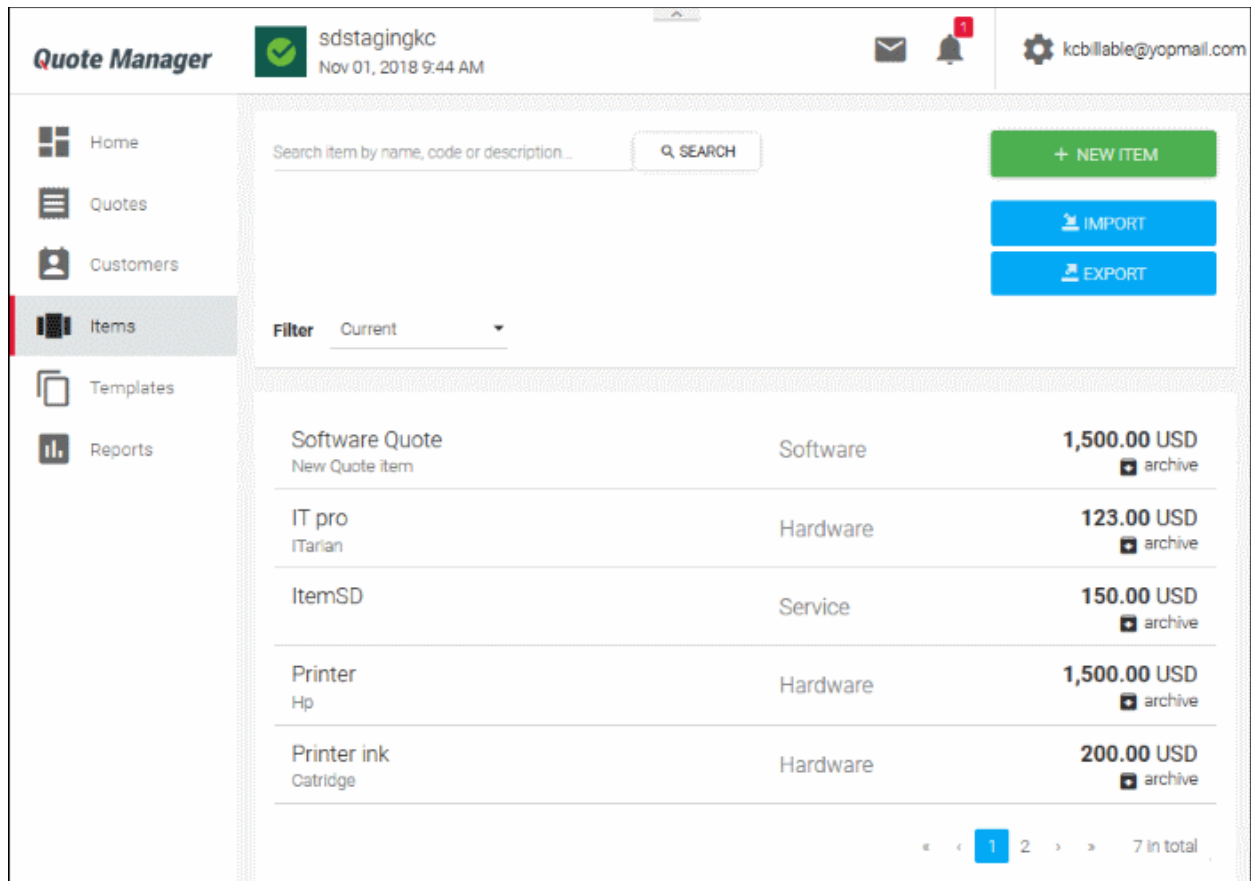
The item details screen will be displayed. Please complete as many fields as you can as the information recorded here will be visible to your customer in the quote.

Add Item - Form Fields	
Item Code	The unique key identifier of the product. This can be an internal product ID, product code, version number, serial number or part number.
Product or Service Name	The official label of the item
Item description	Brief summary of the product or service.

Item Cost	Price for the product or service. The default currency is USD.
Tax	Set the tax you wish to add. You can change or add new tax rates by clicking your user-name then 'Settings' > 'Tax Rates' • Click 'Tax Rates' under 'My Company Settings'. • Edit the currently listed tax rates or click the 'Add' button to add new rates • Click 'Save' to apply your changes. The new or edited tax rate will be available from the drop-down when creating a new item.
Type to search Unit of Measurement	The unit of measurement you would like to assign to the item. For example, • If your item is 'Bottle of Black Ink Jet Printer Fluid', you could enter 'ml' as the measurement unit. • If your item is '16 GB Corsair RAM', you could enter 'GB' as the unit.
Category	Placing an item into a category allows you to create a more organized product catalog. It helps you identify the type of product/service you purchase. Categories are also shown in the quotes themselves, allowing you to provide your customers with a professional-looking break-down of the charges you are making. The available categories are: • Hardware • Software • Service

• Click the 'SAVE' button above the form to add your new item. The new product or service will be listed in the 'Items' screen. Repeat the process to add more items.

Step 4 - Generate and Send a Quote

Now that you have created your products ('Items') and your customers, you can create and send a quote.

Note - this step explains how to create a basic quote from scratch. You can also create time-saving **templates** which can be selected in the 'New Quote' screen.

The new quote can be configured and executed in four steps:

• **Quote setup**

• **Add items**

• **Additional information**

- **Summary**

Step 1 - Quote setup

The setup stage has two areas:

- Quote setup
- Private note

Quote Setup - Description Form Fields	
Quote setup - Specify the quote recipient and configure basic quote details.	
*To	Select a recipient that you added in **Step 2 - Add Customers**. Enter a customer or company name in part or full. Matching contacts will be displayed for you to select.

	The quote will be sent to the email address you have on record for the customer.
*Subject	The subject line of the quote email.
Expires on	The date up to which the quote is valid. • This is set at 30 days in the future by default. Click the calendar icon to change the expiry date • To change the default date, click your user-name then 'Settings' > 'Quote Default Settings'
Style	Select the appearance of the quote. • 'My Style' is selected by default • To change the default quote style or add new styles, click your user-name then 'Settings' > 'Quote Appearance'. You can upload your company logo, change font/header/link styles and more. You can save multiple quote styles • Once saved, new styles will be available for selection in the 'Style' drop-down of the 'New Quote' form
Private notes - Add comments for your reference and internal communication. These notes will not be shown in the quote sent to the customer.	
Note heading	Title related to your note.
Note text	Brief information of the internal note. To add additional notes for the quote, click the 'ADD ONE MORE NOTE' button:

Fields marked as * are mandatory.

• Click 'Next' to proceed into the next step

Step 2 - Add items

The 'Add items' stage allows you to add fields which is available in the customer quote page.

- Specify the currency which you want to use in the quote. All items added to the quote will be charged in the selected currency. You can specify the billed items parity directly affect a cost and whether the currency symbol or the currency name will be shown in the quote. See **Quote Currencies Settings** and **Quote Parity Settings** for more details.

- To add products to the quote, choose the category into which your item fits then start searching the item in the text box as follow in **search item explanation** in the **Creating a New Quote Template** section.

- If you wish to add a brand new item instead (one that does not exist in Quote manager), click the 'ADD NEW ITEM' button and follow the guidance in **Step 3 - Add Items.**

- • Repeat the process to add more items

- • To remove an item click 'X' at the right of the Item name

- • To re-order the items in the list use the 'Up' and 'Down' arrows at the right end of the item details

- • After creating the item, QM will return you to the 'Add items' interface with the new item added.

- • Enter the discount that can be applied to the item price in the 'Quote discount' field.

Once the item has been added, basic details will be auto-completed from database records:

- • Code, name and description will auto-complete with the defaults on record for the item.

- • You can modify 'Price', 'Quantity', 'Unit Of Measurement', 'Tax' and 'Quote discount' on the quote.

- • Set a client discount (optional). Allows you to encourage further purchases by entering a % discount on the total price.

- • Click '+ Add New Item' to add more products and services to the quote.

- • The total value for all items, including tax, is displayed on the lower-right of the form.

« QUOTES

Add items

Currency USD $ ▼

Hardware	Service	Software

Search item in Service	Type code, name or description of a	+ ADD NEW ITEM

CODE	NAME	DESCRIPTION	PRICE	QUANTITY	UNIT OF MEASUREMENT	RATE, %	ITEM TOTAL		
Office furniture	Office furniture, table ligth-gray (40) chair blue (40)	Office furniture transportation	⬍	80 ⬍	Piece	V ▼	2,320.00	▼ ▲	✕
	Board	White plastic board	⬍	2 ⬍	Unit	V ▼	30.00	▼ ▲	✕

Quote discount, % 0.02 ⬍

Sub-total	$ 2,350.00
Discount	$ 0.47
Pre Tax Total	$ 2,349.53
Tax	$ 46.99
Grand Total including tax	**$ 2396.52**

Previous	Next

- Click 'Next'

Step 3 - Additional Information

The 'Additional Information' step allows you to define whether your image signature and contact details such as phone, email, website and heading and / or footer will be displayed in the quote page.

- Click 'Next' to continue

Step 4 - Summary

The summary step allows you to review the quote and take the following actions:

- **Save quote as draft** - Store the quote for later. The quote will be shown in the quote list with a status of 'Draft' until you send it.

- **Send** - Immediately forward the quote to the customer. The quote status will change to 'Published'. See below for more information on what happens next.

- **Previous** - Click if you want to update any of the information you have entered so far.

- To send the quote from QM, click the 'Send' button. The quote 'Status' will change to 'Published'
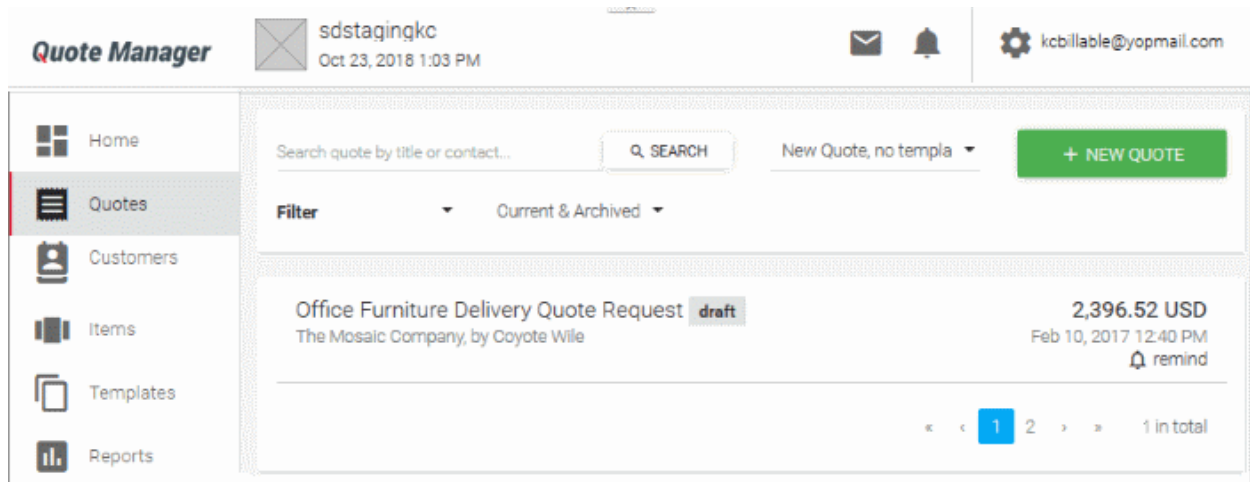
- Customers will receive a notification email which contains a link to a web-page containing your quote. Customers can provide feedback or accept/reject your quote on this page. Your quote is securely hosted on **https://quote.comodo.com**. See **Step 5** for more details on quote finalization.

- You can set reminders per quote from main 'Quotes' interface.

- Click 'Quote Manager', then click any quote in the list.

  - Click 'Download PDF' on the details screen if you want to print/archive the quote, or if you wish to send it to the contact manually.

  - Click 'Show Quote Activity' to show an itemized history of events pertaining to the quote

- The menu (top right) contains additional actions which allow you to edit the quote, preview it as a customer, convert the quote to a template or to withdraw the quote:
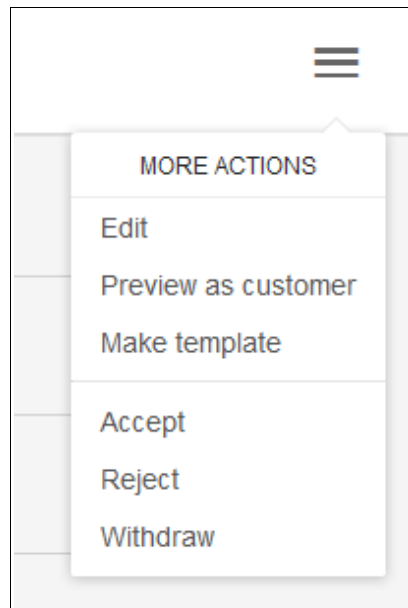
- All feedback from your customer regarding the quote will also be stored on the quote detail screen. Please see **step 5** for more details on this.

Step 5 - Answer Feedback and Finalize a Quote

Each quote email contains a link to your quote:
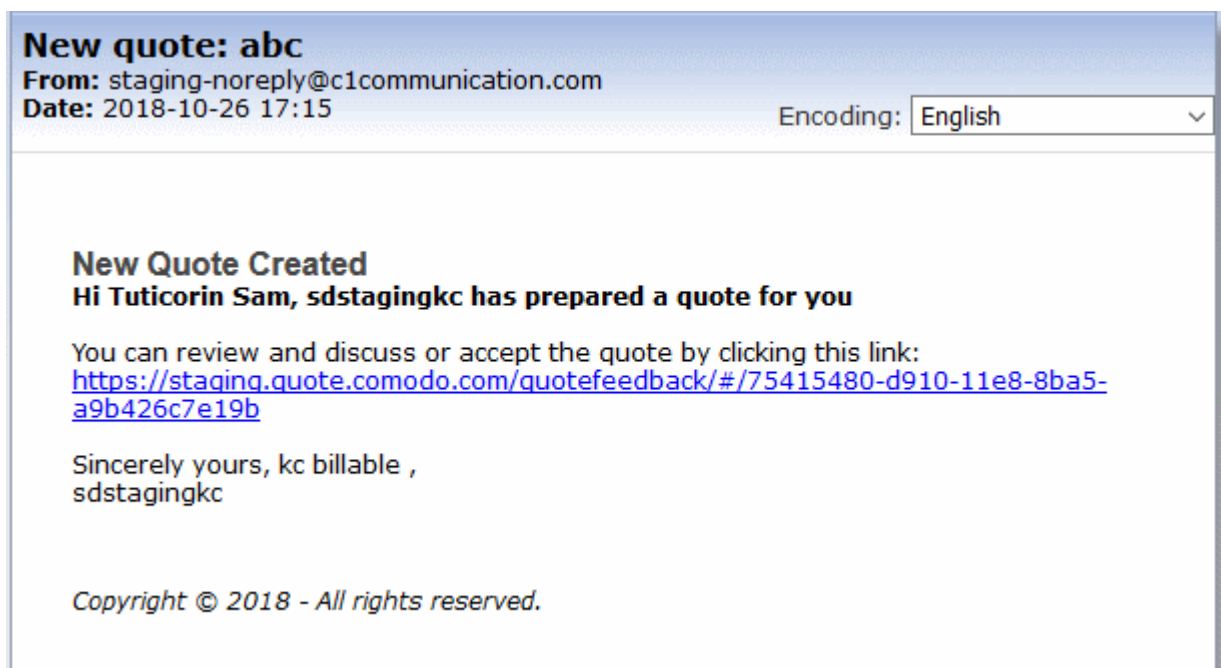
After clicking the link, your quote will open in a web browser and allow your client to post queries and/or accept/reject the quote.

Quote for Printers

Quotes for Tuti

HARDWARE	
Printer	USD 1,500.00
	x1 GHZ
Hp	**USD 1,500.00**

SERVICE	
Services	USD 125.00
	x1 Hours
IT services	**USD 125.00**

Sub-total	USD 1,625.00
Tax	USD 292.50
Grand Total including tax	**USD 1,917.50**

Quote Number 581

For Sam

To Tuticorin Sam

Created Oct 26, 2019 11:39 AM

Expires Jan 24, 2019 12:27 PM

From kc billable

Email sdstagingkc@yopmail.com

Tuticorin

Tuticorin Pvt Ltd

DOWNLOAD PDF

Feedback

POST   CANCEL

Yes, I agree to accept this quote

✓ ACCEPT QUOTE   REJECT

The quote details screen will be updated with all feedback and responses from your customer. To view:

• Open the 'Quotes' section of QM

• Select your quote from the list

Red numbers above the mail icon also indicate that there are responses pending your review. All feedback is displayed inline in the quote itself, along with controls which allow you to answer or dismiss the feedback:

- Click 'Answer' to post your reply to the contact/company.

Quote status will change to 'Accepted' or 'Rejected' according to your customers response. This status will be displayed in the 'Quotes' screen and the 'Home' screen:


Once a quote has been accepted, you may begin the process of executing the order in coordination with your vendors.

Step 6 - Create a Quote Template

You can save time when producing quotes by creating re-usable templates which address single or multiple items. This makes it easy to generate quotes for your most popular items or item sets. Once you have chosen a quote template, you can customize it for specific customers by modifying quantities, prices, taxes and item composition.

- Click 'Templates' then click the '+ New Template' button:
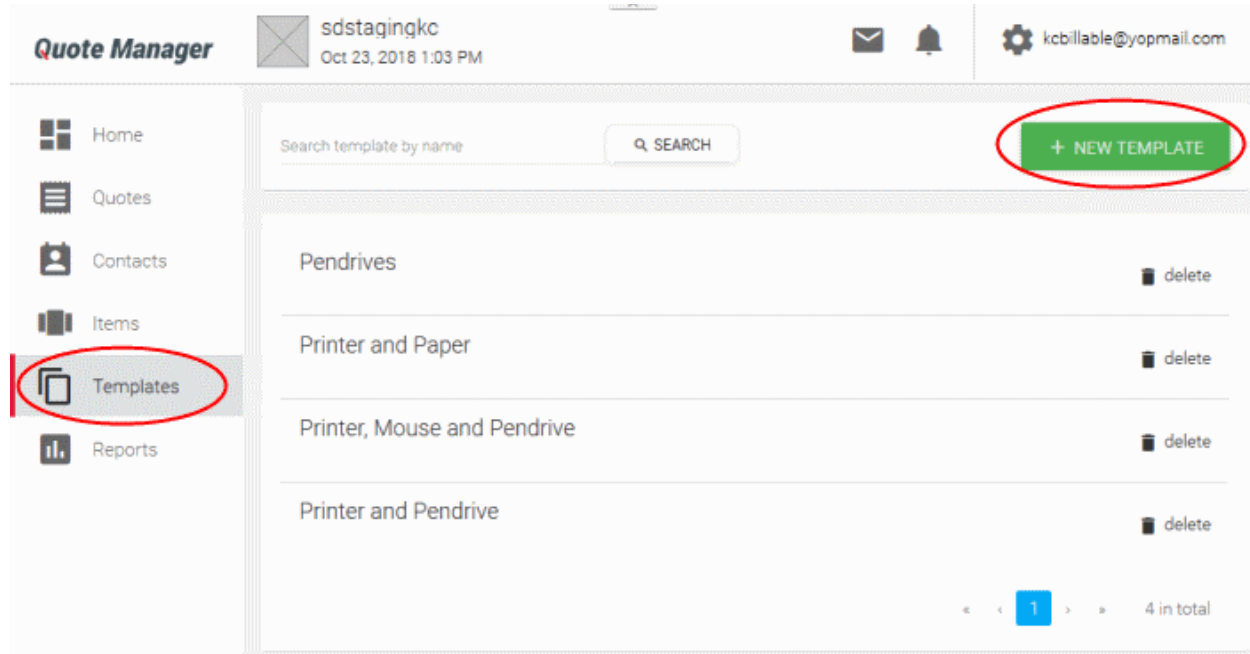
The add new template screen will be displayed:

« TEMPLATES   SAVE

Title   Title of the template...

Style   Deer Company ▼

Header

Footer

Hardware   Service   Software

Search item in Hardware   Type code, name or description of a

CODE	NAME	DESCRIPTION	PRICE	QUANTITY	UNIT OF MEASUREMENT	RATE, %	ITEM TOTAL

To add item use search box above

- **Title -** Create a name for the template

- **Style** -The appearance of the quote. By default, 'MyStyle' will be selected. All styles that you create will be available from the 'Style' drop-down.
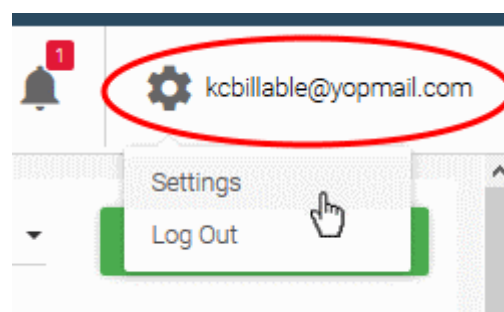
- To change the default style or to add new styles, click your user-name then 'Settings' > 'Quote Appearance'

- You can upload your logo, change fonts, background colors, heading style and more. Click 'Set as default' if you want this to be your go-to style when generating a new quote. Click 'Save' to apply your changes.

- **Header** - Enter the page header to be displayed in the quote page

- **Footer** - Enter the page footer to be displayed in the quote

- **Add Item from category** - To add an items to the template, choose the product category then start typing an item code, name or description in the 'Search item in' field then select the item from the auto-generated suggestions.

- The total value of all items in the template will be displayed at bottom-right.

- Click the 'SAVE' button to save your template.

To use your template:

- Click 'Quotes' in the left-hand menu of the QM interface.

- First select your template from the templates drop-down at the top-center of the interface.

- Then click the '+ NEW QUOTE' button.

Your template can now be tailored to generate customer-specific quotes as explained in **Step 4 - Generate and Send a Quote**.

Tip: You can also create a template from an existing quote. To do this, click on a quote in the main 'Quotes' interface to open its detail page, click the menu icon at top-right then select 'Make template':
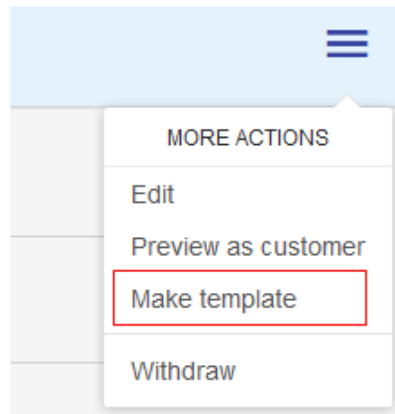


Step 7 - View Reports

- The 'Reports' screen contains statistics and charts about quote statuses, sales and revenue.
- All revenue and sales data in the dashboard is derived from the value and acceptance status of your QM generated quotes.
- Click 'Reports' on the left, to open the dashboard
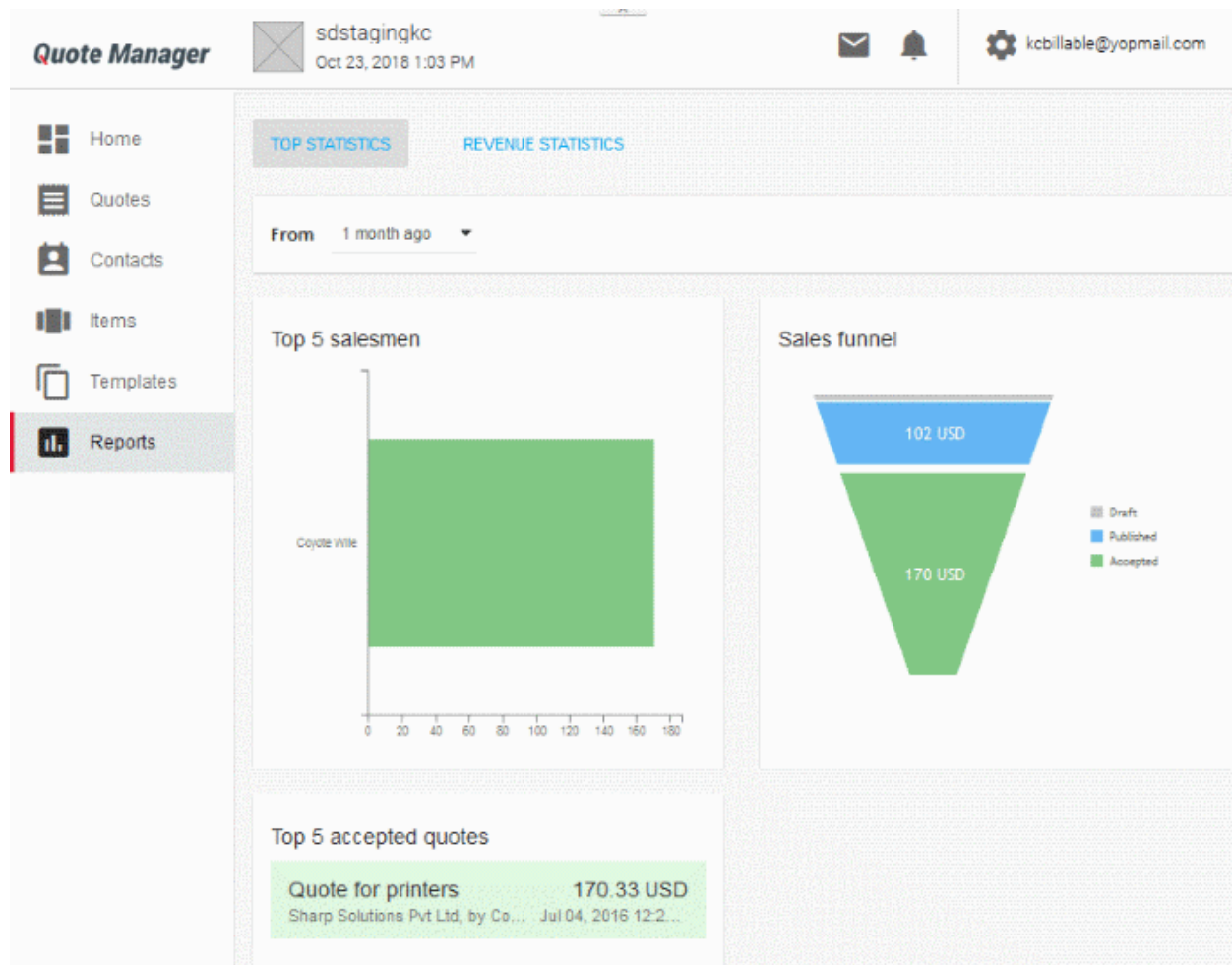
- **Top Statistics** - Displays total revenue generated by top 5 accepted quotes, lists the top 5 quotes by value and shows a funnel of the value of all generated quotes according to their life-cycle status.
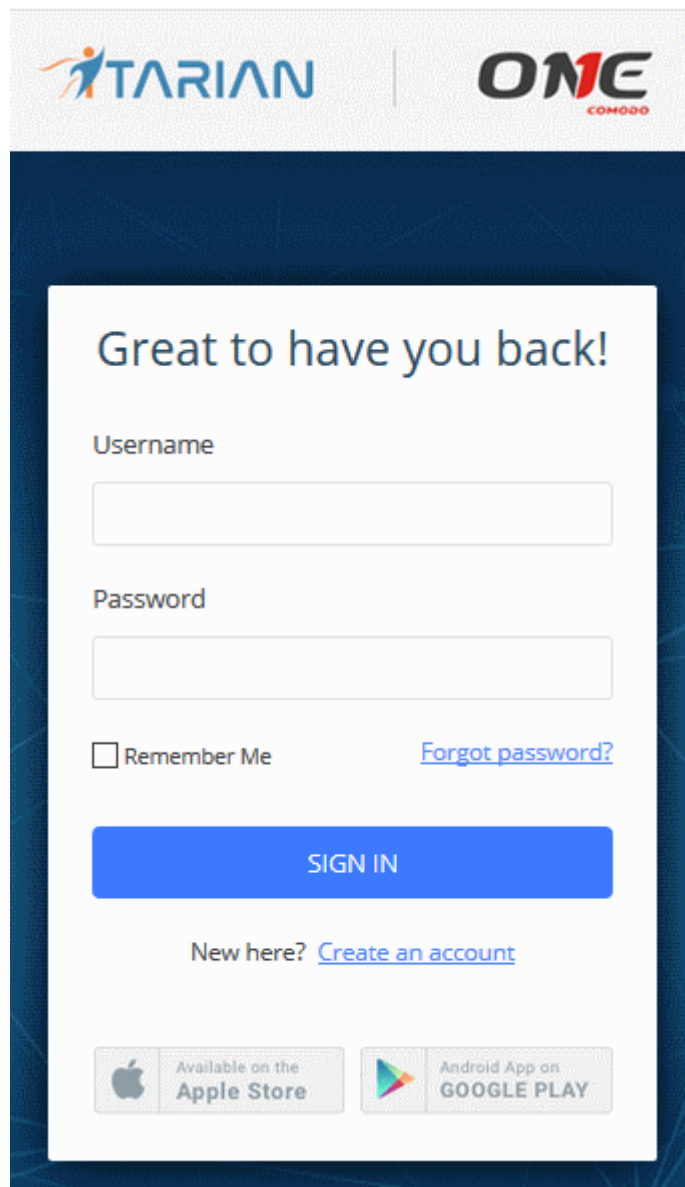
- **Revenue Statistics** - Displays monthly, cumulative monthly and average monthly revenues. This section also shows the average time to close a quote.

Tip: To make the sales funnel more accurate, you may want to 'Withdraw' any test or otherwise unwanted quotes that have 'Draft' or 'Published' status. To do this, click on a quote in the main 'Quotes' interface to open its detail page, click menu at top-right then select 'Withdraw':

-

1.2   Login to Quote Manager

Login to Quote Manager with your user name and password at **https://one.comodo.com/app/login**

The ITarian dashboard will open.

- Click 'Applications' > 'Quote Manager' to open the application.
- Click 'Store' if you haven't yet activated Quote Manager. You can install it from the Quote Manager tile:
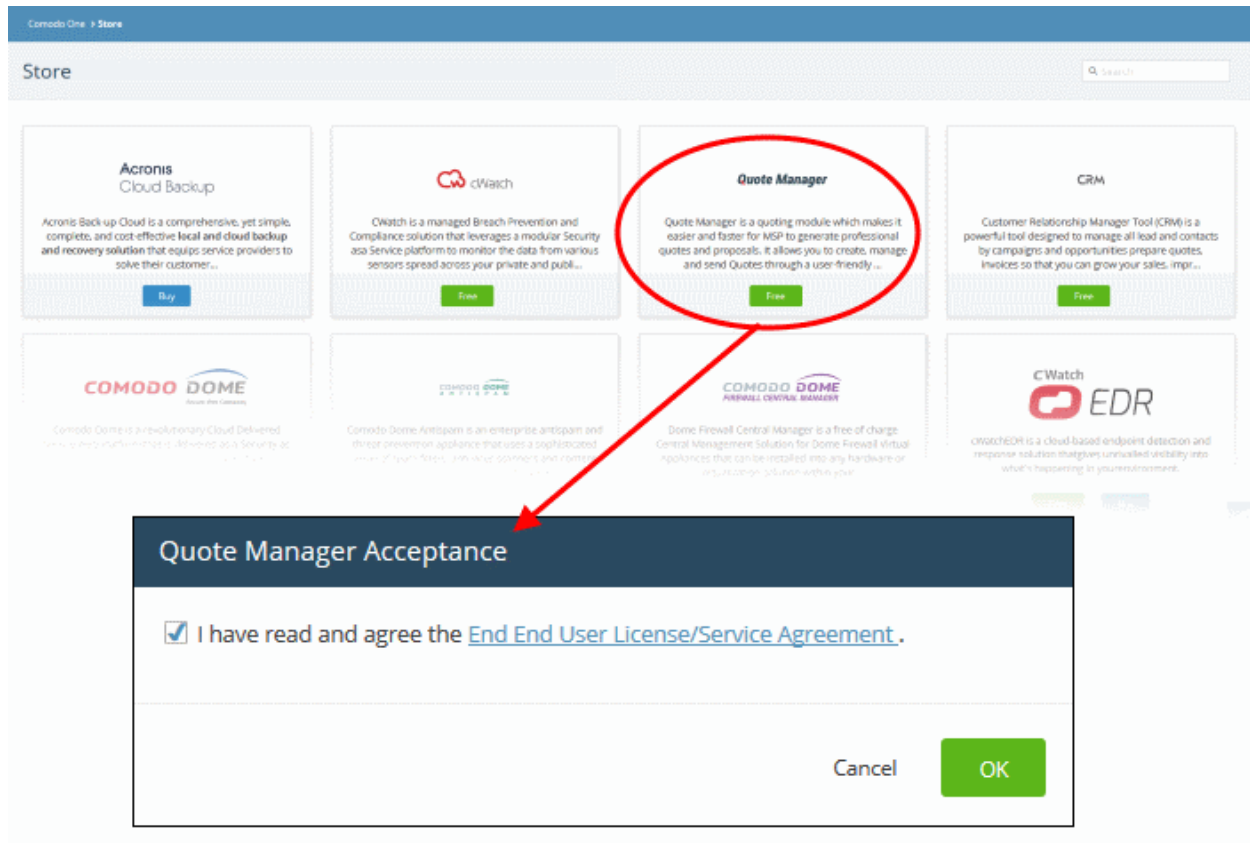
- Click 'OK' after agreeing to the end user license agreement
- The application will be activated and you will see the following notification:
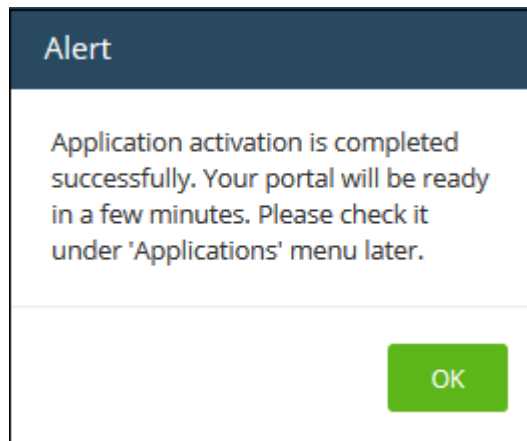
- Click 'OK' to close the alert

After activation, you can find 'Quote Manager' under 'Applications' on the menu bar.

1.3 The Quote Manager Admin Console

The admin console is an easy to use interface which lets you:

- Add billable items and customers
- Create and send quotes
- View and respond to customer feedback

- Track the overall progress of your quotes
- Archive quotes and more.

Navigation

The drop down menu allows you to navigate to each major area of the interface:

- **Home** - Contains a graphical summary of quote activity and status. See **The Home Screen** for more details.

- **Quotes** - Allows you to create, edit and manage customer quotes. See **Manage Quotes** for more details.

- **Customers** - Allows you to add contacts for whom you wish to create quotes. See **Manage Customers** for more details.

- **Items** - Allows you to add and manage billable items and item pricing. Billable items can be re-used in multiple quotes. See **Manage Items** for more details.

- **Templates** - Allows you to add and manage quote templates per customer. See **Manage Quote Templates** for more details.

- **Reports** - Allows you to generate reports on quotes generated, forwarded to customers, accepted, rejected and so on. See **Reports** for more details.
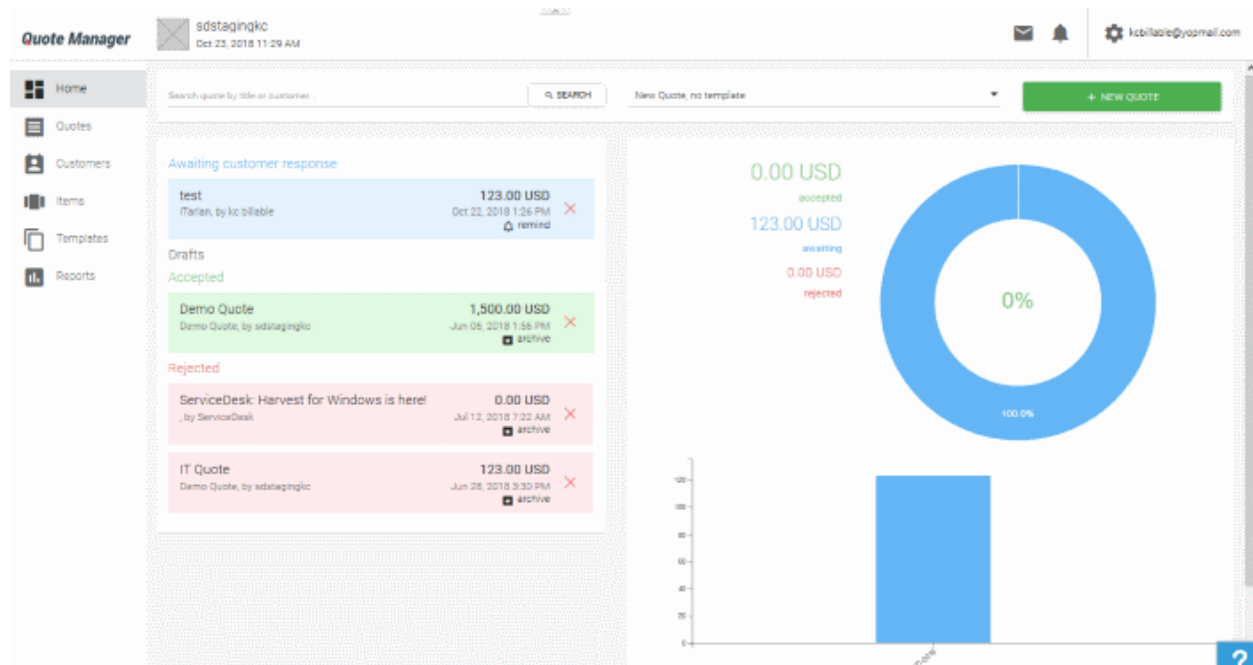
Configuration Options

- Click the gear icon at top-right:
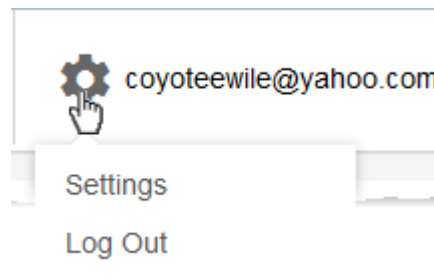
- **Settings** - Configure profile settings, company settings and integrations. See **Configure Quote Settings** for more details.

- **Log Out** - Logout of Quote Manager.

2   The Home Screen

The 'Home' screen is displayed by default whenever you open the Quote Manager module.

The left pane of the 'Home' screen displays the list generated quotes as tiles, under the following categories:

- **Awaiting Customer Response** -The quotes that are forwarded to the customer and yet to be replied by the customer

- **Drafts** -The quotes that are prepared but yet to be forwarded to the customer. Quotes that are created from the service desk tickets are also displayed under Drafts. The administrator can review the draft quotes, edit

them and forward to the customer, once it is completed.

- **Accepted** -The quotes that are accepted by the customer. The administrator can archive the accepted quotes, after completing the delivery processing with the vendor.

- **Rejected** -The quotes that were rejected by the customer.

An example is shown below:
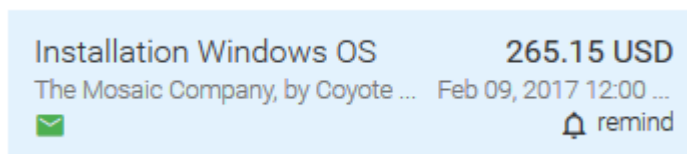
- Clicking on a quote allows you to view the details of the quote and process it. See **Manage Quotes** for more details.

- The shortcut at bottom right allows you to set reminders for draft quotes and quotes that are awaiting customer response and to archive accepted and rejected quotes.

    You can set reminders for you to attend to the quote at a specified time. On the specified time, the number beside the notification icon will be incremented and on clicking the icon, it displays the reminder message.

To set a reminder

- Click the bell icon at the bottom right of the tile
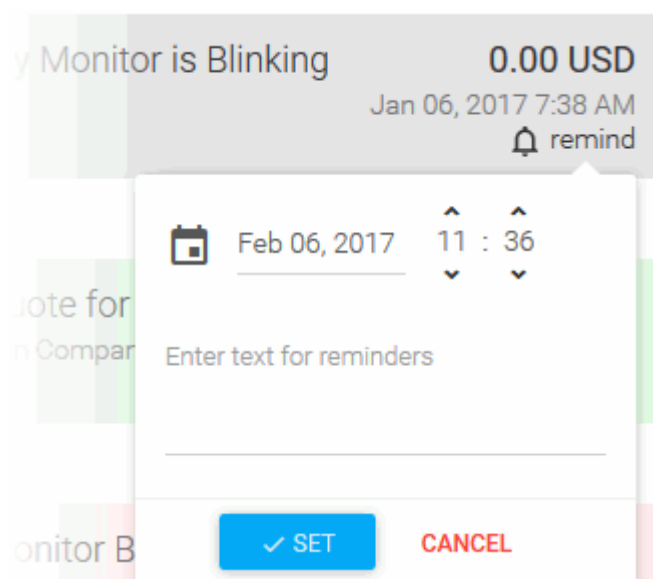
- Set the date and time for the reminder to be shown by clicking the calendar icon and selecting the date and entering the time in HH:MM fields.
- Enter the text to be displayed as reminder
- Click 'SET'.

The reminder will be added and an alert will be displayed on the set time.

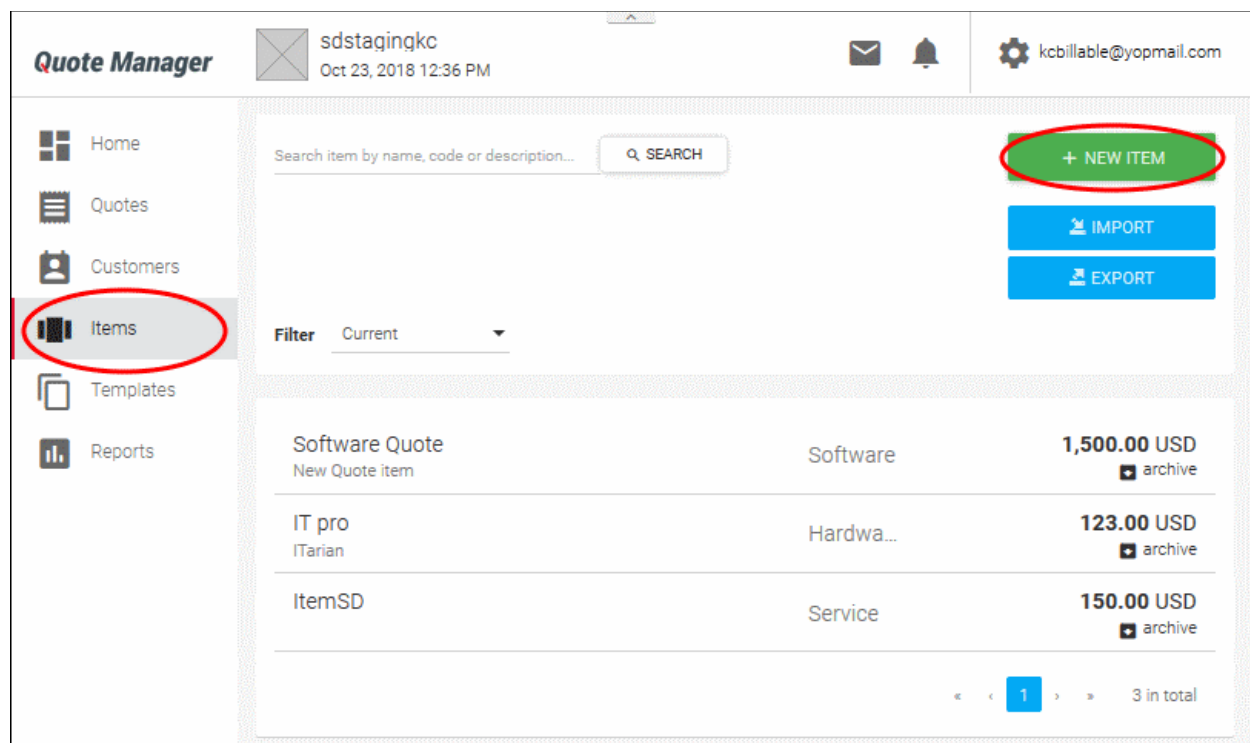- The mail icon indicates you have a response from the customer. See **Manage Quotes** for more details.

The right of the home screen shows a summary of processed quotes with their monetary values.

- The 'Display' drop-down lets you filter how much data is shown in the graphs:

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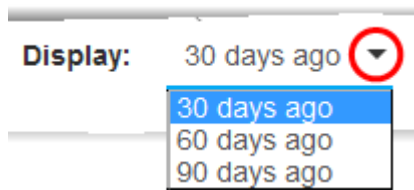
3   Manage Items

- Click 'Items' in the left-hand navigation to open this interface

- 'Items' are the products and services for which you will quote prices to your customers

- The items interface lets you add products to the inventory and manage them

- Each item is identified by an 'Item Code' number, name and description

- You can specify a tax rate for each item in the quote

- Items that are outdated can be archived. Archived items can be reinstated to the current list at anytime

Searching and Filtering options:

- To search for a specific item, enter the code, name or description in part or full, as search criteria in the Search field and click the magnifier icon. To remove the filter, click 'X' at the right of the search field.

- To filter the items based on their availability, choose the option from the 'Filter' drop-down. The available options are:

  - Current - Displays only those items that are currently available

  - Archived - Displays out-dated items, that are added to archive

  - Current and Archived - Displays both currently available and archived items
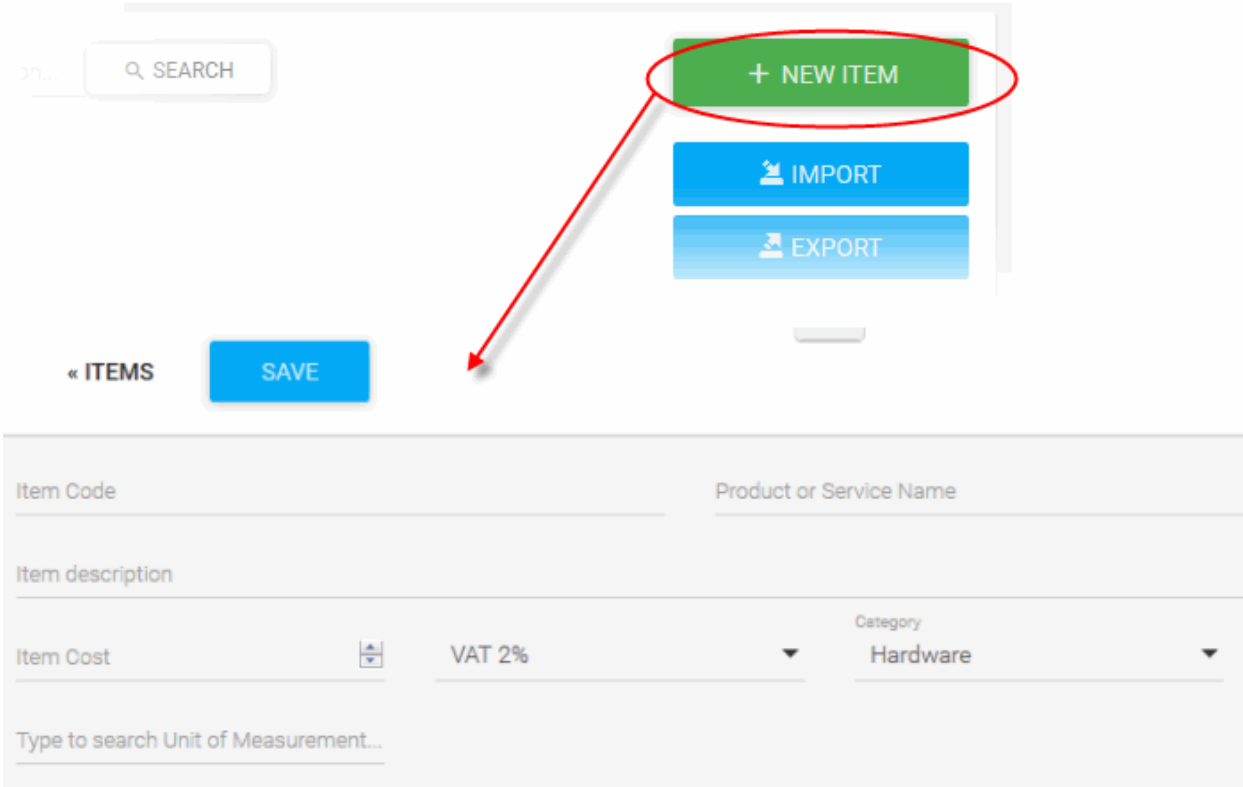
Following sections explain more about:

- **Add a New Item**
- **Add Bulk Items**
- **Edit an Item**
- **Archive Out-Dated Items**

3.1 Add a New Item

- You can add billable products or services to Quote Manager along with their price, item code, a short description and associated tax rate.
- Once created, you can add items to a quote by entering the product name or code.

To add a new item

- Click 'Items' in the left menu
- Click ' + NEW ITEM'

On the new item form, please enter:

- Item Code - Enter your product's unique identifier. This can be a universal product code, serial number, RFID code or any other string your company wants to use to identify individual products. The field accepts alpha-numeric characters.
- Product or Service Name - Enter a label for the product or service
- Item description - Create a short overview of the item
- Item Cost - Enter the pre-tax price of the item
- Default rate - Choose the tax rate which applies to the item. Tax rates can be specified in the settings interface. See 'Configuring Tax Rates' for more details.
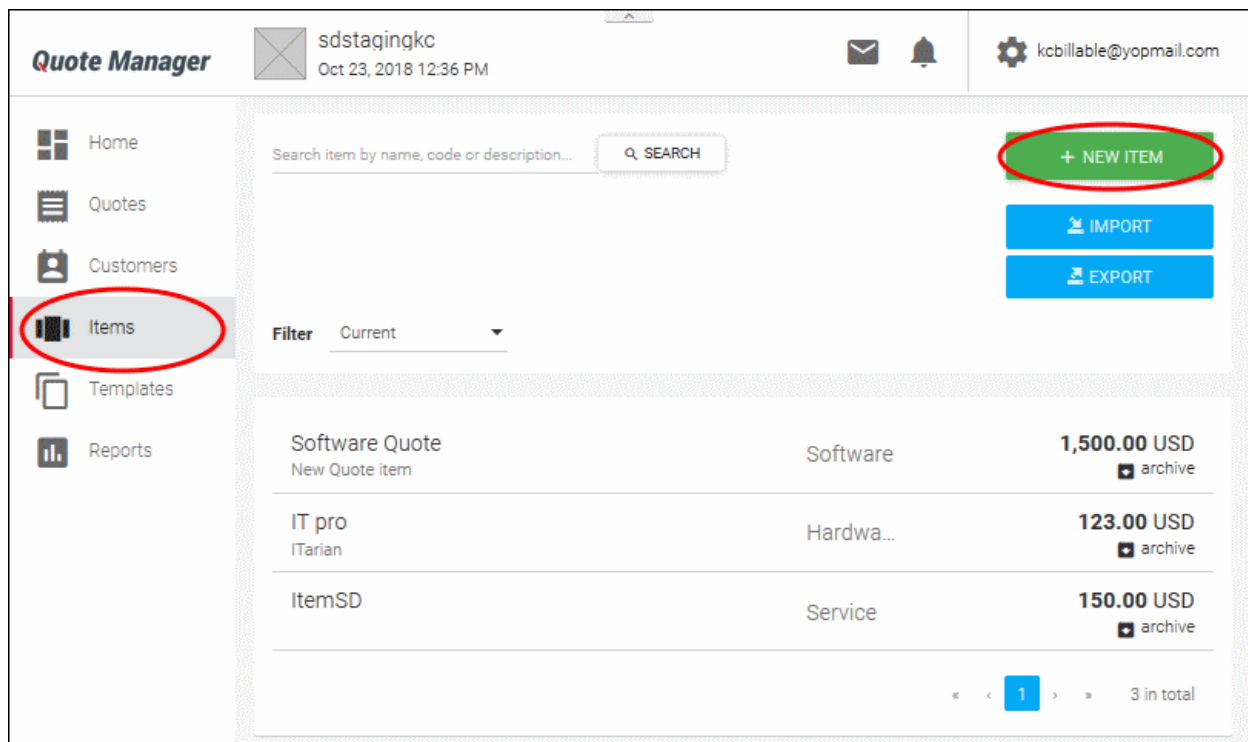
- Category - Choose the product area into which your item fits. Billed items are organized according to category on your quotes. Available categories are: Software, Hardware, Service

- Type to search Unit Measurement - For example, mm, gb, ml, inches, hours, unit. This unit of measurement will be added to the database and will be available for selection when you create future items.

- Click 'Save'.

The item will be added to QM and can be included in any future quotes.

- Repeat the process to add more items.

3.2   Add Bulk Items

- The bulk item feature lets you import multiple product items into QM from a .csv file.

- You can also export all existing items to a .csv file.

Import Items

- Click the [IMPORT] button, at the top right of the interface.

- Imported .csv files must have the following headers:

    - Code

    - Name

    - Description

    - Cost

    - Rate

    - Category

    - Unit Of Measurement

- If your organization already has a spreadsheet which contains this product information, then you may be

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able to work with it to create a document suitable for import.

- Save a copy of your original document
- Delete the columns that you don't need for the import
- Rename column headers to match those listed above
- Rearrange the columns to match the order listed above
- Save the file in .csv format

• The image below shows an example .csv file:

• Click 'IMPORT'. The products in the .csv will be added to the 'Items' interface.

Export Items

This feature exports a .csv list of all items added to QM. The exported file includes the item code, product name, description, cost, and tax rate.

To export items:

• Click the [EXPORT] button, at the top right of the interface.

• The number of items present in the 'Items' interface will be downloaded.
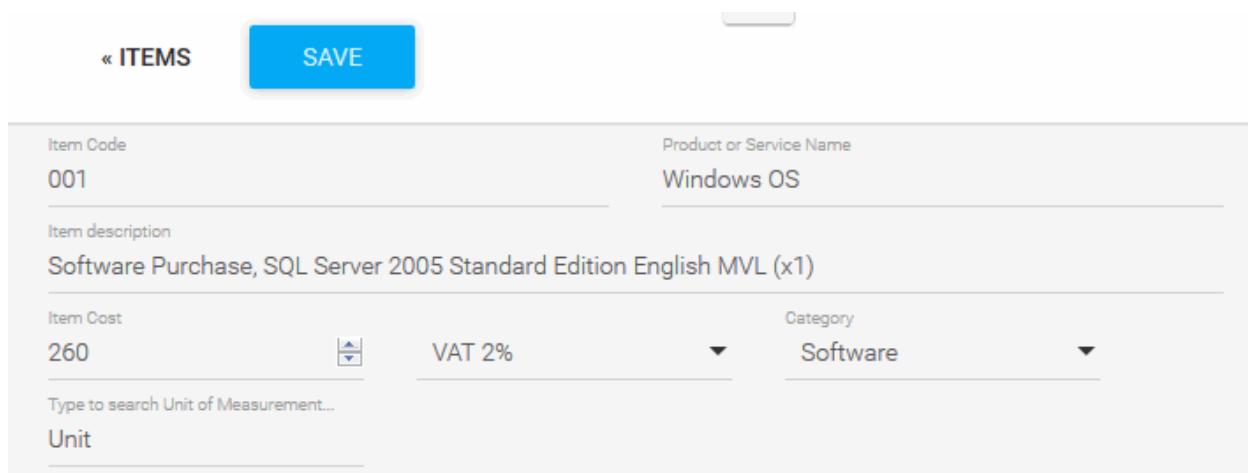
3.3   Edit an Item

You can view and edit any item in the 'Items' interface.

- Click 'Items' in the left-hand menu
- Click the name of the item you want to edit

Tip: Use the search options to find specific items

The item's detail screen will open:

The edit interface is the same as the add new item interface. See **adding an item** if you need help with this.

- Change the details as required and click 'Save'

If the item is outdated, you can archive the details from the options at the top right

- To archive the item, click the menu button at the top right and choose Archive from the options.

3.4 Archive Out-Dated Items

- Items which are no longer required can be archived.
- Archived items are hidden by default and are not available to add to a quote.
- You can reintroduce archived items to the live list if required.

To archive an item

- Click 'Items' on the left to view your list of items
- Locate the item you wish to archive. Use the search feature if required.
- Click the 'Archive' icon at the end of the item row:

To view archived items

- Click 'Items' on the left to view your list of items
- Click the 'Filter' drop-down and select 'Archived':

- Click the 'unarchive' icon if you want to re-instate the item

4   Manage Customers
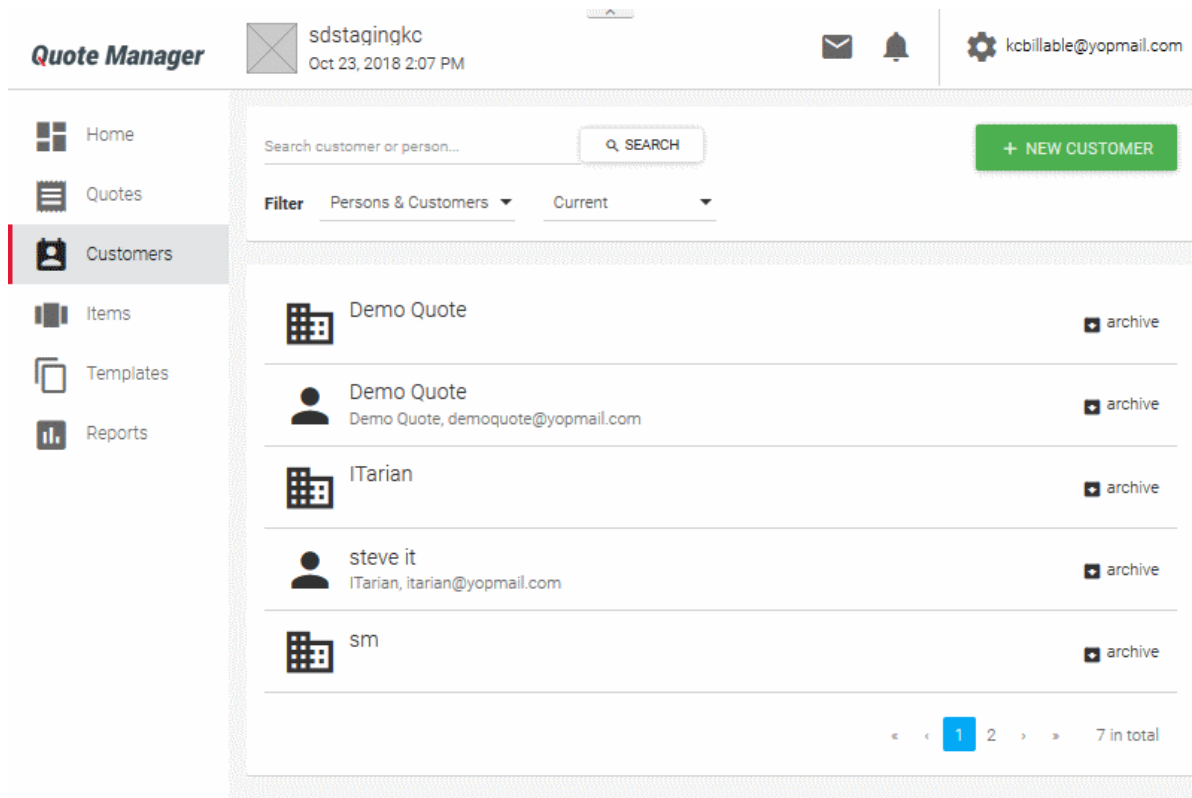
- Click 'Customers' on the left to open this interface

You can create two types of customers in Quote Manager:

- **Companies** - Organizations with whom you do business.
  - Customers you have to added to ITarian are automatically added to Quote Manager as companies.
  - Company contact details are also imported. You can add new details or edit existing details of these companies. See **Edit a Customer** for help with this.
  - You also have the option to add new companies specifically in QM.
- **Persons** - Private individuals, or employees who work for a client company. You can generate quotes for a person in the same way as you would for a company.

After generating a quote for a customer, they will receive an email which contains a link to a hosted version of the quote.

- You can archive individuals and client companies with whom you no longer do business.
- Archived customers are not available for selection when creating a quote. Customers can be brought out of archive and back into the list of active customer at any time.

The customer list shows all existing customers you have added to QM. Click ' + New Customer ' to add a new company or person to the list.

- Use the search box to find a specific person or company. To remove the filter, click 'X' at the right of the search field.

- Use the filter drop-down to sort customers by type ('Persons', 'Companies' or 'Persons and Companies')

- You can further filter by contact availability:

    - Current - Individuals and companies which are enabled and to whom you can send quotes

    - Archived - Individuals and companies which are disabled and to whom you cannot send quotes

    - Current and Archived - Shows all individuals and companies.

See the following sections for more help:

- **Add a New Customer**

- **Edit a Customer**

- **Archive a Customer**

4.1 Add a New Customer
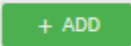
You can specify name, company, phone, email, billing and shipping addresses in the contact details form for a new customer.

To add a new customer

- Click 'Customers' > 'New Customer'

- This will open the 'Add new private customer' interface.

    - Click '...or add a new customer' to add a company instead.

- Enter the details of the company/person you want to add:
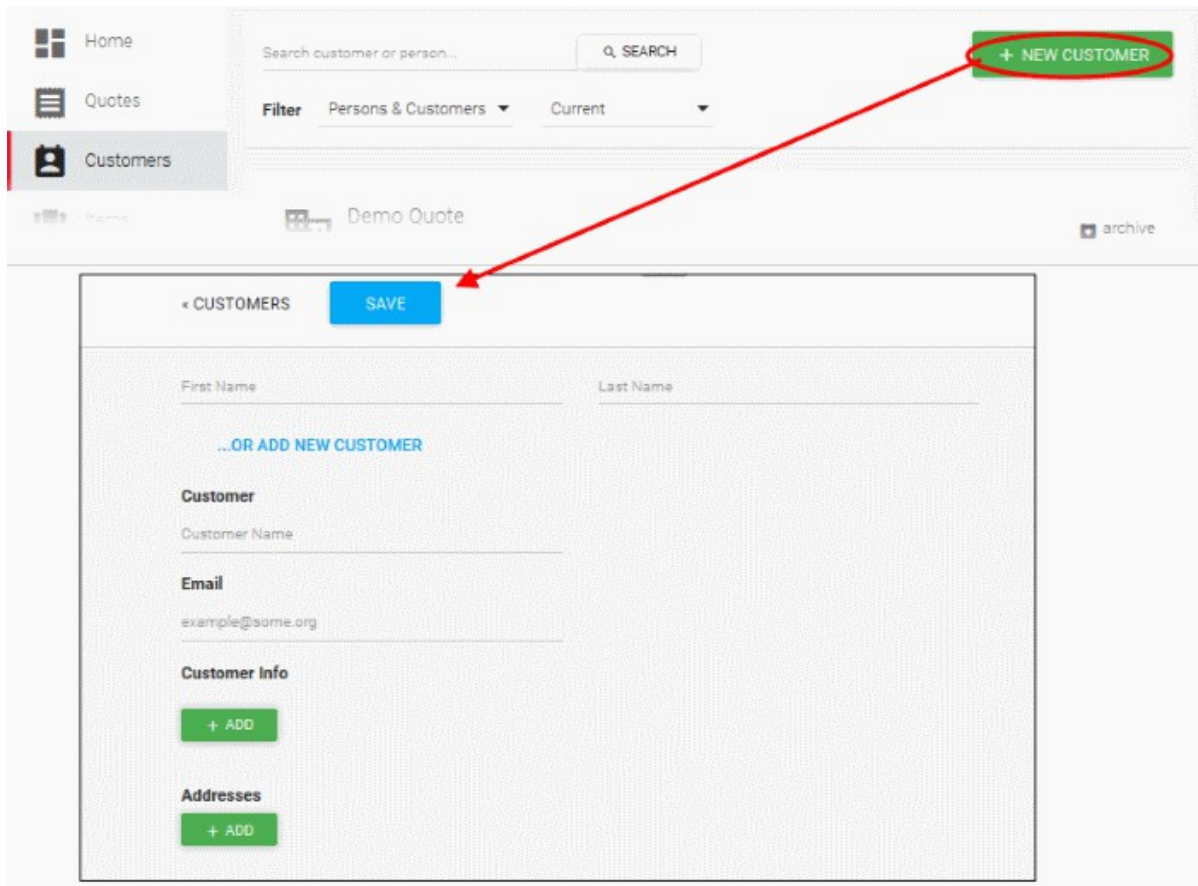
Add a Customer - Form Parameter	
Form element	**Description**
First Name and Last Name	These fields are available only for person. Enter the first name and last name of the private customer.
Company	• Person - Name of the company to which the person belongs. • Company - Name of the company
Email	• Person - Email address of the individual contact. • Company - Email address of the contact person in the company
Customer Info	Add fields to store additional data above the customer. For example, phone number, FAX number, website, Skype ID etc. **To add a field** • Click 'ADD' • Choose the field from the drop-down.

- Enter the detail

- Click 'ADD' and repeat the process to add more fields
- To remove a field click 'X' at the right of it

| Addresses | Enter the billing and shipment address of the customer. |

To add an address

- Click 'ADD'
- Choose the address type from the drop-down.

- Enter the address for the chosen address type

	• To add more address types and addresses, click 'ADD' and repeat the process • To remove an address click 'X' at the top right of the address

- Click 'SAVE' at the top to add the contact to the list.

The contact will be now available as a potential quote recipient.

- Repeat the process to add more customers.

4.2   Edit a Customer

- You can edit the details of an individual or company at anytime.
- Customers added via ITarian can also be edited in Quote Manager.
- You can also add more fields and addresses for the customer.

To edit contact details

- Click 'Customers' in the left menu
- Click on a customer name to view and edit their details
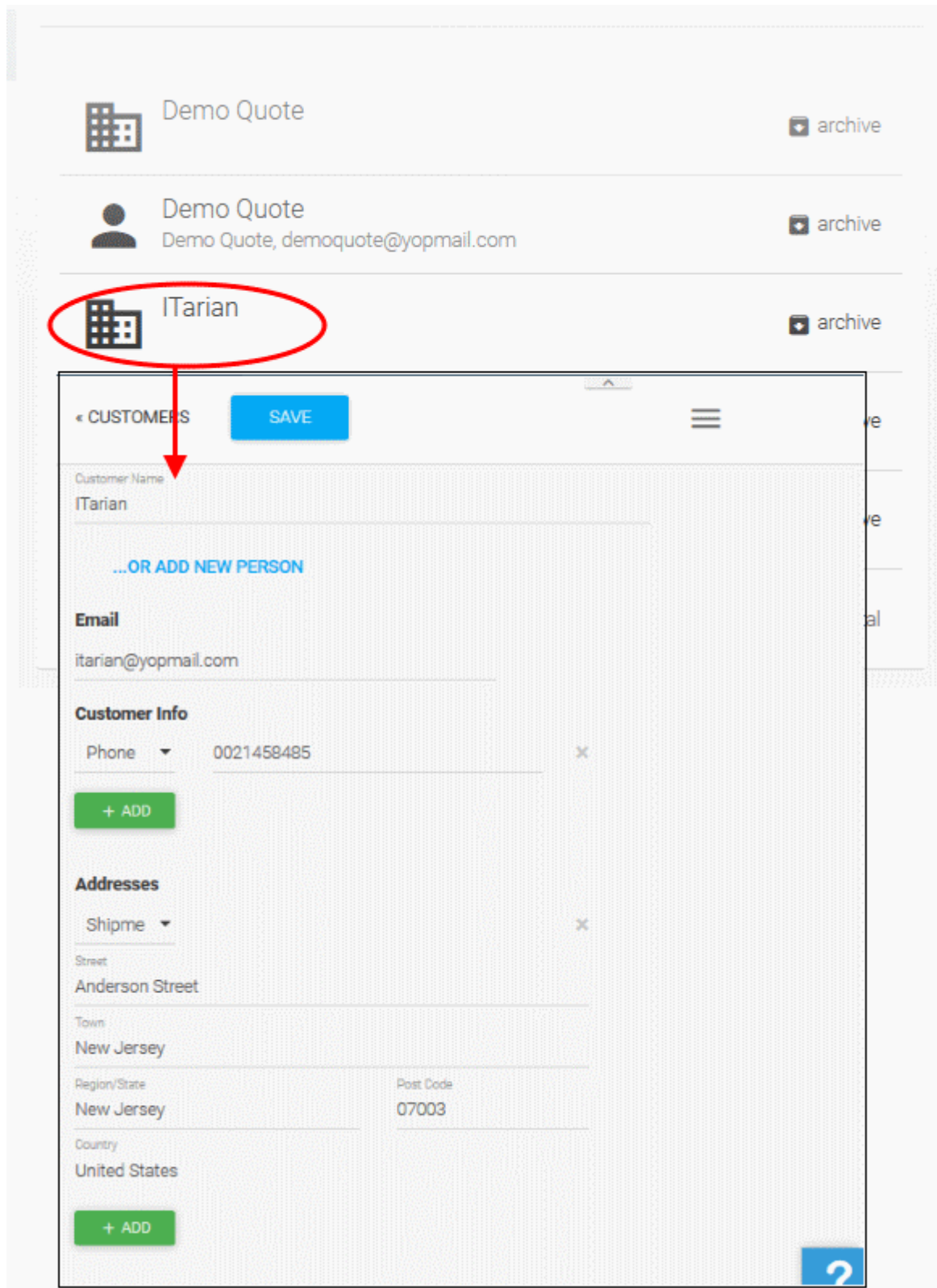
The edit form is the same as the new customer form. See the previous section if you need help with the form fields.

- Click 'Save' at the top to apply your changes.

4.3   Archive a Customer

You can archive companies for whom you no longer need to generate quotes. This will remove them from the list of active contacts. You can re-add the customer at anytime if required.

To archive a customer

- Open the 'Customers' interface by clicking 'Customers' from the left side navigation

- Click on the Archive icon at the right end of the customer row
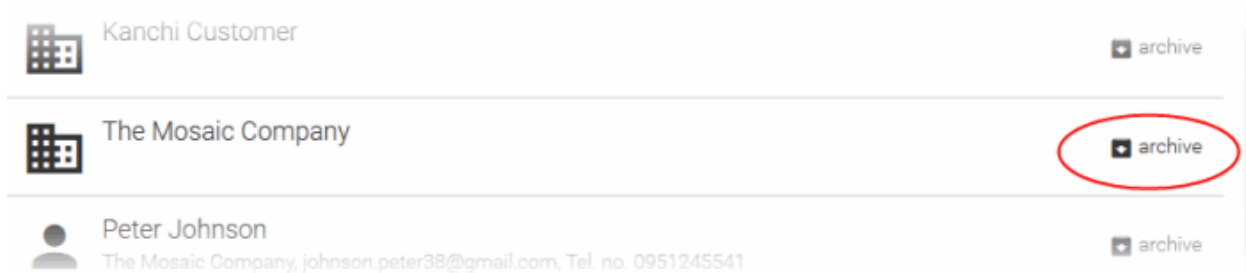
Alternatively, click on the customer to view the contact details, click the 'Options' button from the top right and choose 'Archive' from the drop-down.

The customer will be archived and will not be available for selection while creating a quote.

To view the list of archived customers

- Open the 'Contacts' interface by clicking 'Contacts' from the left side navigation

- Choose the customer type from the left drop-down beside 'Filter'

- Choose 'Archived' from the right drop-down
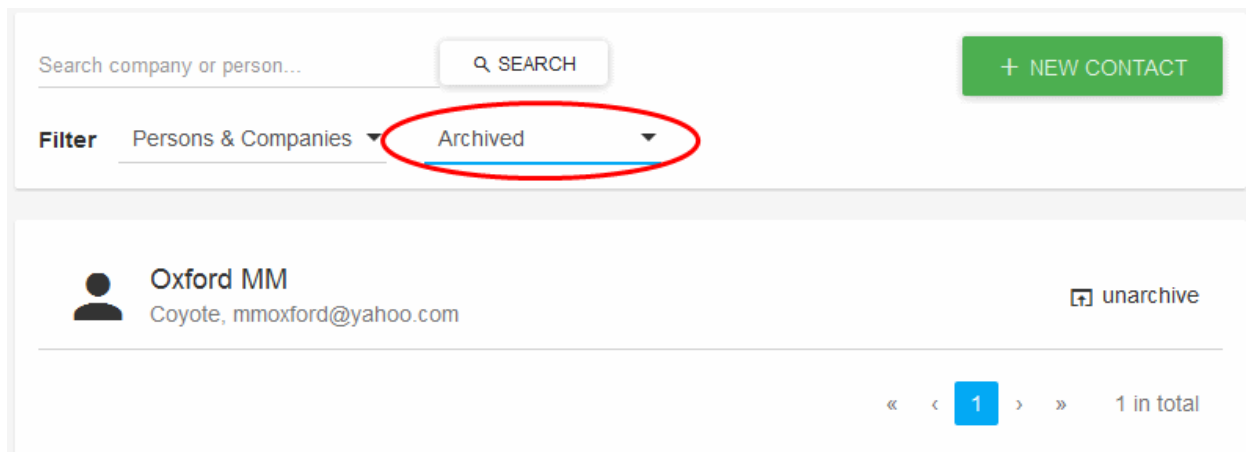
- To re-add an archived customer to default available customer list, click the 'unarchive' icon at the right end of the customer row

5   Manage Quotes

The 'Quotes' interface allows you generate, view and manage customer quotes. You can perform the following

actions on the 'Quote Manager' Interface

- Create a new quote from scratch, or use a template to accelerate the process.

- View a list of all existing quotes, including quote status and value

- Open a quote and respond to customer feedback

- Set reminders about particular quotes.

> **Tip**: You can also view and generate quotes from the 'Home' screen. See **The Home Screen** for more details.

- To open the 'Quotes' interface, click 'Quotes' from the left side navigation

The interface displays the list of quotes with different statuses and allows you to add new and manage existing quotes.

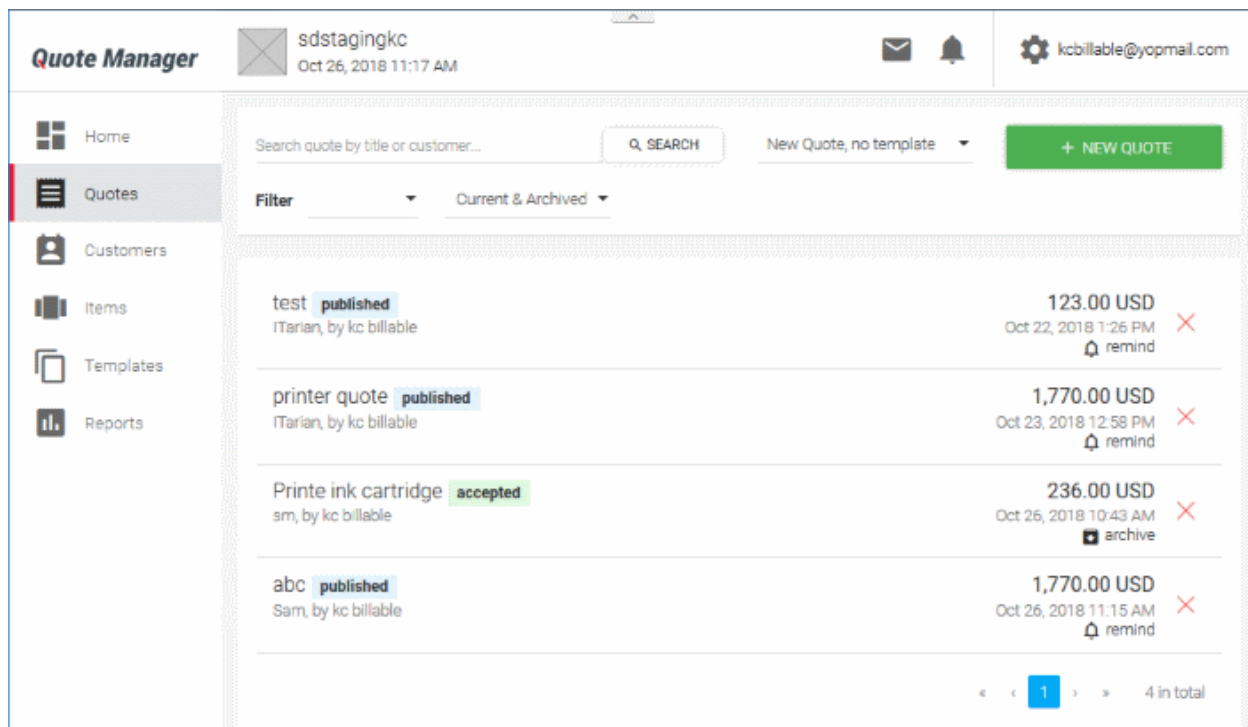## Searching and Filtering options:

- To search for a specific quote, enter the title of the quote or the contact detail of the customer in part or full, as search criteria in the 'Search' field and click the magnifier icon. To remove the filter, click 'X' at the right of the search field.

- To filter the list based on status, click the drop-down beside 'Filter'. The available options are:

  - Any Status - Displays all quotes.
  - Draft - Displays quotes that have been generated but not yet sent to the customer.
  - Published - Displays quotes that have been sent to the customer and are 'in-progress'. These quotes may be awaiting customer response or awaiting a reply to customer feedback.
  - Accepted - Displays quotes that have been accepted by the customer.
  - Rejected - Displays quotes that were rejected by the customer.
  - Withdrawn - Displays quotes that were withdrawn by the administrator.

- You can further filter entries based on their availability:

  - Current - Displays all non-archived quotes.

- Archived - Displays quotes whose 'expiry date' has passed.
- Current and Archived - Displays both currently active and archived quotes.

See the following sections for more details on:

- **Generate a New Quote**
- **Answer Feedback and Process**
- **Set a Reminder**
- **View Quote Activity**

5.1   Generate a New Quote

Administrators can generate a price quote for any billable item.

> **Prerequisites:**
> - At least one billable item has been added to the 'Items' list in QM. See **Add a New Item** for more details.
> - At least one recipient company or individual has been added to the contacts list in QM. See **Manage Customers** for more details.

A quote can be generated in two ways:

- From the QM interface - Based on customer requests, administrators can generate a new quote from scratch or from a template. See **Create a New Quote** for more details
- From Service Desk - If a ticket which requests billable items is submitted to the sales department of Service Desk, the staff member addressing the ticket can initiate a quote from the ticket itself. The quote will be added as a draft to the to Quote Manager with the prefix 'Service Desk'. See **Generate a Quote from Service Desk** for more details.

QM also allows you to customize the appearance of quotes in 'Settings' > 'Quote Appearance'. All styles you create will be available for selection when you are generating a new quote. See **Quote Appearance Settings** for more details.

Creating a New Quote

A new quote can be generated from both the 'Home' and 'Quotes' interfaces. If you have created a quote template containing pre-set products, select the template you want to use from the drop-down before clicking 'New Quote'. For more details on creating and managing templates, see **Manage Quote Templates.**

To generate a new quote

- First, choose a quote template from the drop-down at the right of the 'New Quote' button. Select 'New Quote, no template' to use the default style.

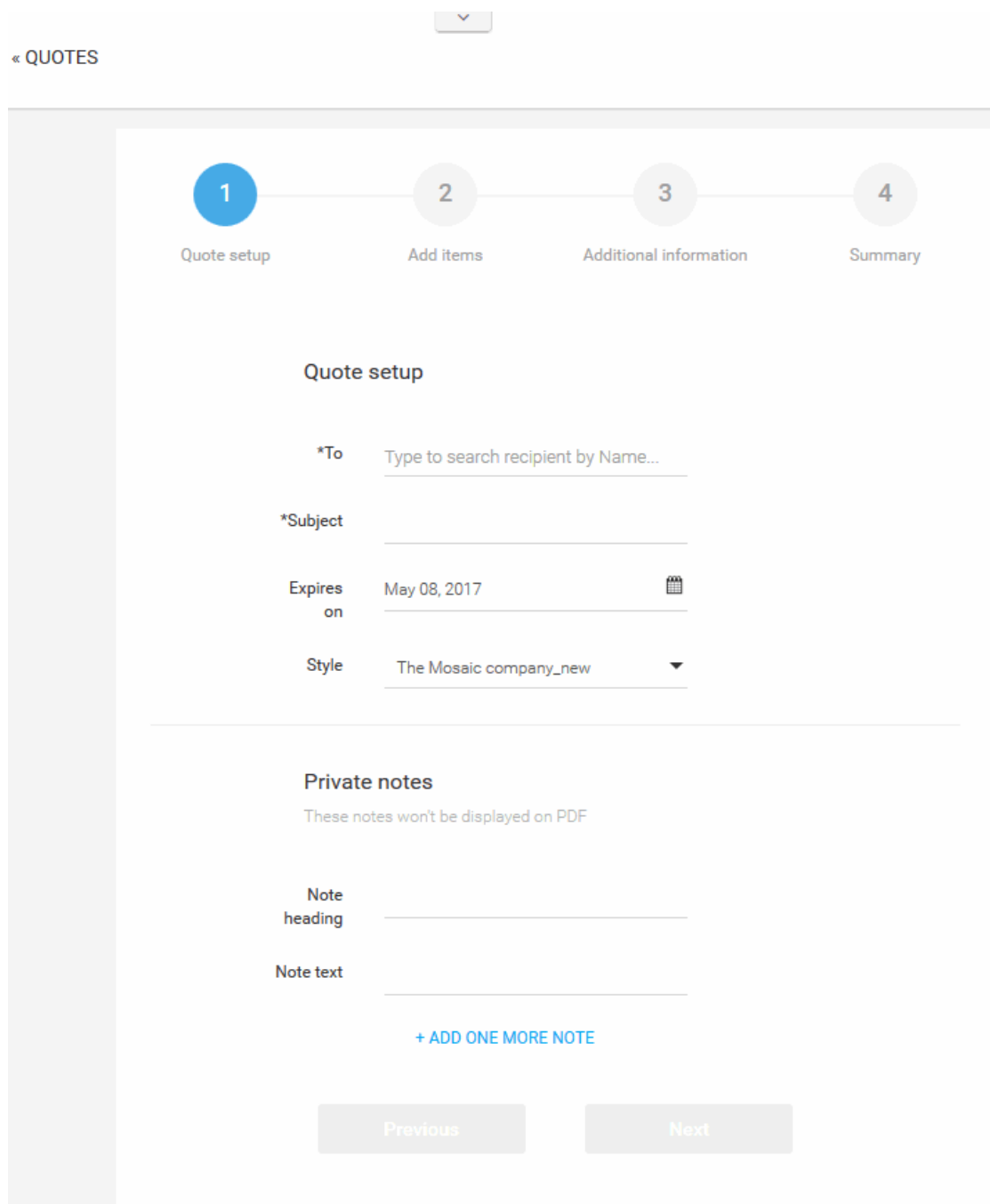- Next, click the '+NEW QUOTE' button
- Go through four steps to generate the quote form:
  - **Quote setup**

- **Add items**
- **Additional information**
- **Summary**

Step 1 - Quote setup

The Quote setup stage contains two areas:

- Quote setup
- Private note
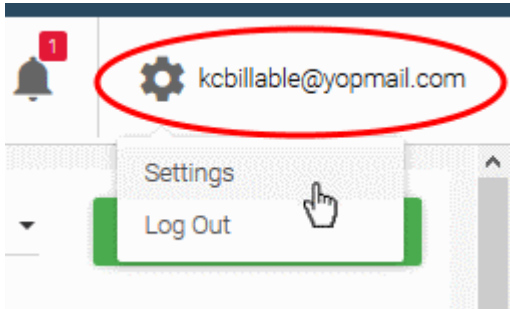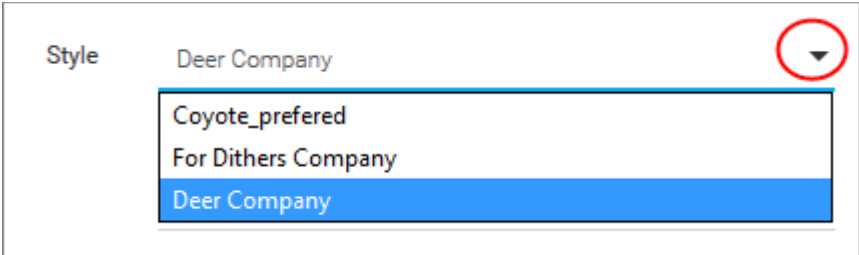
« QUOTES

Quote Setup - Description Form Fields
Quote setup - Stores quote details of the contact or a company name the quote is generated, the subject of the quote, set a period within your quote due to expired, the view of the quote such as the logo of the company and etc.

*To	Select a recipient that you added in **Step 2 - Add Customers**. Enter a contact or company name in part or full. Matching contacts will be displayed for you to select.
*Subject	Subject line of the quote email which will be sent to your contact.
Expires on	The date up to which the quote is valid. • This is set at 30 days in the future by default. Click the calendar icon to change the expiry date • To change the default date, click your user-name then 'Settings' > 'Quote Default Settings'
Style	Select the appearance of the quote. • 'My Style' is selected by default • To change the default quote style or add new styles, click your user-name then 'Settings' > 'Quote Appearance'. You can upload your company logo, change font/header/link styles and more. You can save multiple quote styles • Once saved, new styles will be available for selection in the 'Style' drop-down of the 'New Quote' form
Private notes - Allows you to enter a note on the quote for your reference and internal communication. This note will not be displayed in the Quote page.	
Note heading	Enter a heading for the note.
Note text	Enter the note text. To add additional notes for the quote, click the 'ADD ONE MORE NOTE' button:

Fields marked as * are mandatory.

- Click 'Next' to proceed into the next step

Step 2 - Add items

The 'Add items' stage allows you to fill out fields available in the customer quote page.

- Specify the currency which you want to use in quote. All items added to the quote will be charged in the selected currency. You can specify the billed items parity directly affect a cost and whether the currency symbol or the currency name will be shown in the quote. See **Quote Currencies Settings** and **Quote Parity Settings** for more details.

- To add products to the quote, choose the category into which your item fits then start searching the item in the text box as follow in **search item explanation** in the **Create a New Quote Template** section.

- If you wish to add a brand new item instead (one that does not exist in Quote manager), click the 'ADD NEW ITEM' button and follow the guidance in **Step 3 - Add Items.**

- • Repeat the process to add more items

- • To remove an item click 'X' at the right of the Item name

- • To re-order the items in the list use the 'Up' and 'Down' arrows at the right end of the item details

- Enter the discount that can be applied to the item price in the 'Quote discount' field.

- After creating the item, QM will return you to the 'Add items' interface with the new item added.

Once the item has been added, basic details will be auto-completed from database records:

- Code, name and description will auto-complete with the defaults on record for the item.

- You can modify 'Price', 'Quantity', 'Unit Of Measurement', 'Tax' and 'Quote discount' on the quote.

- Set a client discount (optional) Encourage further purchases by setting a % discount on the total price.

- Click '+ Add New Item' to add more products and services to the quote.

- The total value for all items, including tax, is displayed on the lower-right of the form.

- Click 'Next'

Step 3 - Additional Information

The 'Additional Information' step allows you to define whether your image signature and contact details such as phone, email, website and heading and / or footer will be displayed in the quote page.

- Click 'Next'

Step 4 - Summary

The 'Summary' stage displays the Quote overview page and summarized data and signature provided during the quote page creation.

- Click 'SAVE QUOTE AS DRAFT'. The quote will remain in 'Draft' status until you send it.

- To forward adhe quote to the customer from QM, click the 'Send' button. The quote 'Status' will change to 'Published'.

A mail will be sent to the customer with a link to view the Quote page.

New quote: abc
From: staging-noreply@c1communication.com
Date: 2018-10-26 17:15

Encoding: [English ∨]

New Quote Created
Hi Tuticorin Sam, sdstagingkc has prepared a quote for you

You can review and discuss or accept the quote by clicking this link:
https://staging.quote.comodo.com/quotefeedback/#/75415480-d910-11e8-8ba5-a9b426c7e19b

Sincerely yours, kc billable ,
sdstagingkc

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- Clicking the link in the mail will take the customer to the quote page.

- The customer will be able to send a feedback on the quote to QM, by entering their message in the Feedback field. See **Answer a Feedback** for more details on answering the feedback.

- The quote will be added to the list in the quotes interface with the status 'Published'.

- If you have skipped sending the quote to the customer, the quote will be saved as a draft.
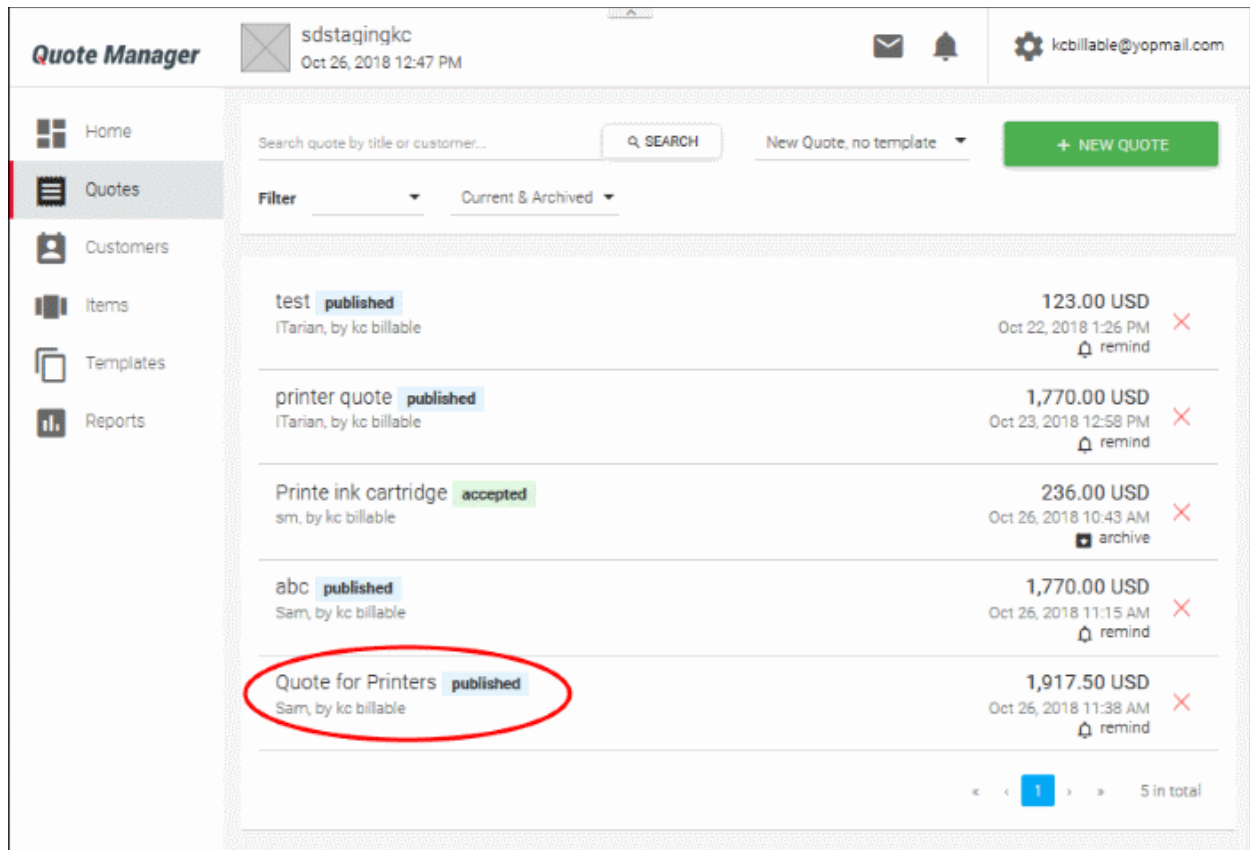
- Click on the name of a quote to view, edit or forward a draft.
- Click 'Options' at top right, to perform various actions on it
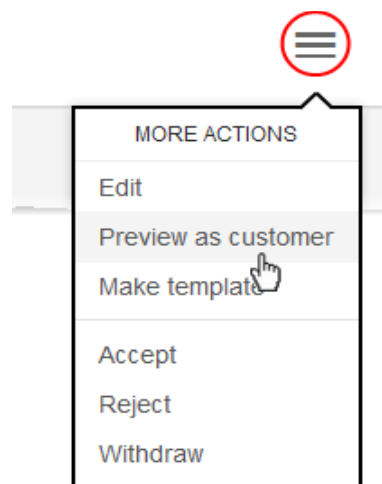
- Edit - Allows you to add or remove items, categories, change title, header/footer text and more
- Preview as customer - Displays the quote page as it would be shown to the customer
- Make Template - Allows you to save the quote as a template, if you want to re-use the quote for other customers
- Accept - Change the status of the quote to 'Accepted' if it is accepted by the customer by any out-of-band communication
- Reject - Change the status of the quote to 'Rejected' if it is rejected by the customer by any out-of-band

communication

- Withdraw - Withdraws the quote from the customer.

Generating Quote from Service Desk Ticket

Quotes that arrive from the Service Desk module will have the suffix 'Service Desk' in the title. You can edit the quote to add items and forward it to the customer:

The quote details screen contains the details of the service desk ticket, internal notes from the service desk staff and a link to access the ticket.

To generate the the quote from the draft

- Click the draft ticket from the 'Quotes' interface or 'Home' screen, to open the quote details screen

- Click 'Options' menu at the top right of the details screen and select 'Edit'

The form for creating a quote will open with the quote workflow pre-populated.
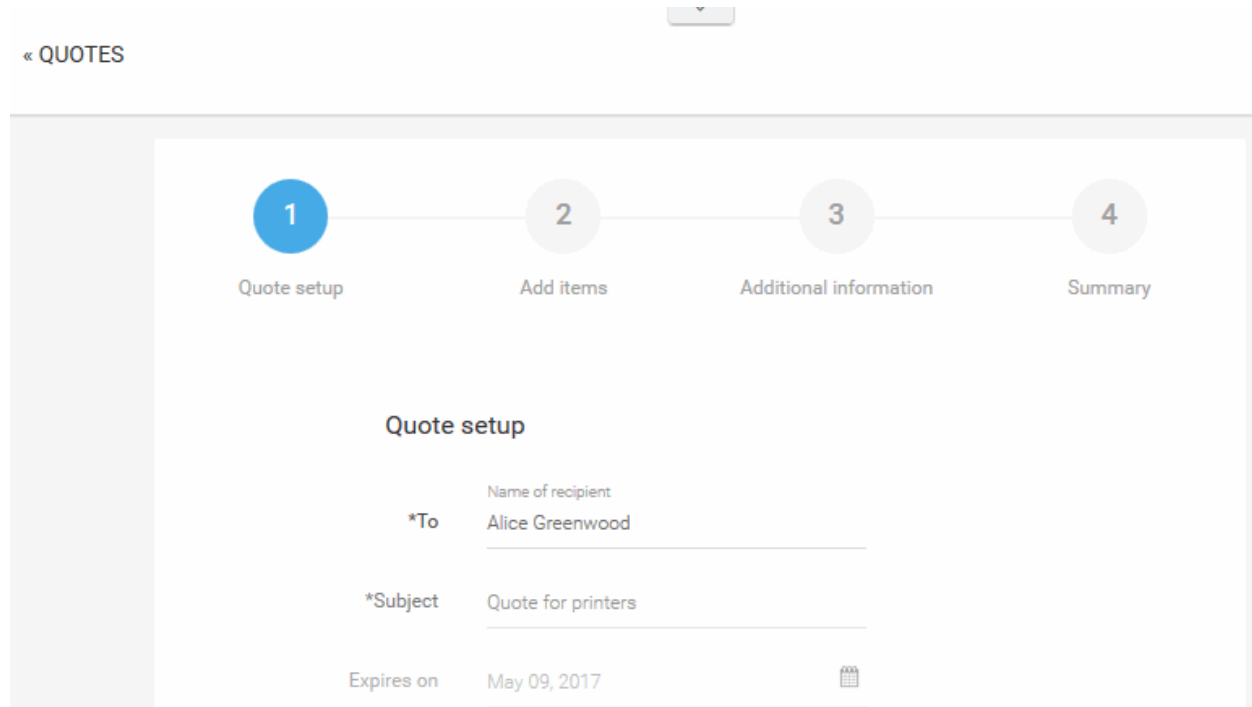
- Enter the details of the customer and items to be included in the quote.

The process is similar to adding details for a new quote and forwarding the quote to the customer. See the **explanation above** for more details.

5.2   Answer Feedback and Process Quotes

The administrator can manage customers' responses to a quote under processing in two ways:

- Increment in the number beside the mail icon in the title bar

- Appearance of a mail icon on the quote in the home screen
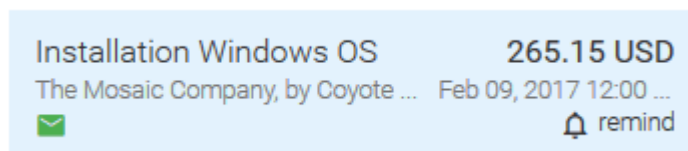
To view the response from a customer for a quote

- Click on a quote which has the mail icon under on it on the home screen

    or

- Click on the mail icon at the title bar and choose the response

- The quote details page will open with the feedback message from the customer.

- Enter your response to the feedback in the text box and click 'Answer'.

  - The quote will be updated and a notification mail will be sent to the customer with a link to the quote page.

  - The customer will be able to view your answer, continue negotiation or accept/reject the quote.

- If you do not wish to answer, click DISMISS - NO NEED TO ANSWER. The quote will be paused. You can start re-processing the quote from the next response message from the customer.

The conversion can be continued in the same manner. The quote my be accepted, rejected or withdrawn.

Acceptance or Rejection of the quote:

The customer can accept to the quote or reject it by clicking the 'Accept Quote' or 'Reject' at the bottom left of the Quote page as shown below. The status of the quote will be changed to 'Accepted' or 'Rejected' accordingly.

If the customer sends the acceptance or rejection message through any out of band communication method like phone or email, you can move the quote to accepted/rejected status from the quote details page.

To accept or reject a quote based on customer feedback

- Click your quote from the 'Home' screen or 'Quotes' interface to open the quote details
- Click the options icon at the top right of the quote details page and select 'Accept' or 'Reject':
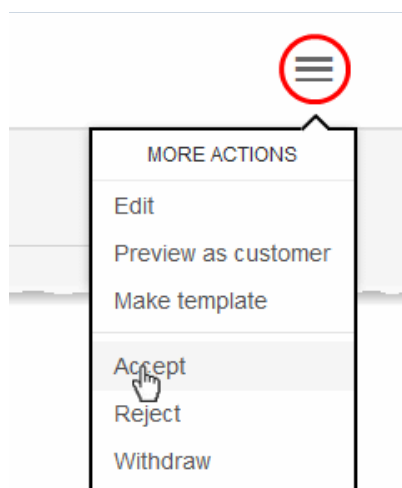
Once the quote is accepted, you can arrange for delivery of the item. If a quote is accepted or rejected, you can archive the quote. See **Archiving a Quote** for more details.

Withdrawing a Quote

You can withdraw quotes that are no longer required or valid. The customer will not be able to view the withdrawn quote, but it will stay in the 'Quotes' interface with the status 'Withdrawn'. You can archive the quote if required. See **Archive a Quote** for more details.

5.3   Set a Reminder

- Quote Manager allows you to set internal reminders for quotes that are in process.
- For example you may wish to send a followup message to a customer if they have not replied within a certain time.
- You will be alerted at the specified time by the notification icon at the right of the title bar.

To set a reminder

- Open the 'Home' screen or the 'Quotes' interface to view the list of quotes
- Choose the quote for which you wish to set the reminder and click 'remind' icon at the right end of the quote row
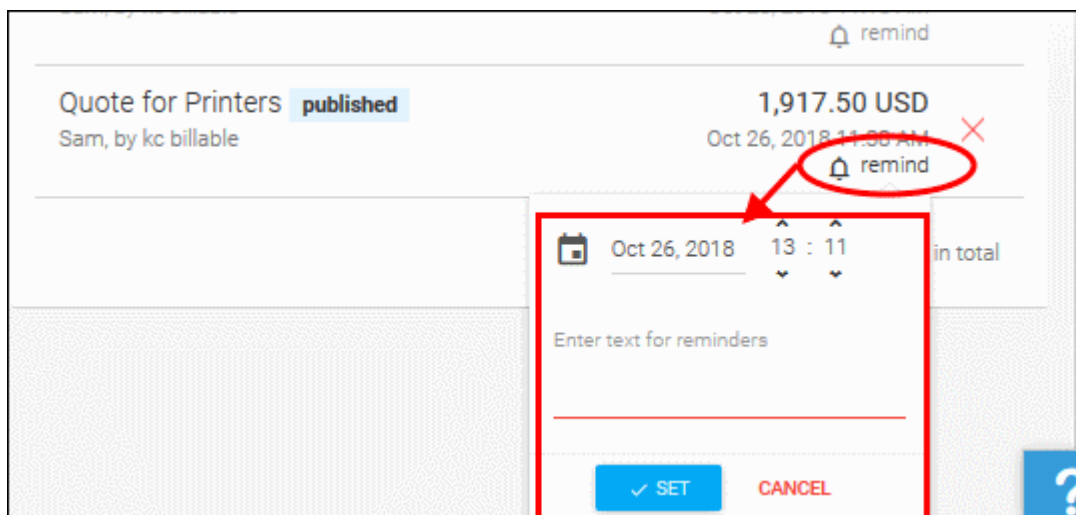
- Set the date and time you wish to be reminded
  - Click the calendar icon and select the date
  - Enter the time using the HH:MM combo boxes
- Enter the reminder text to be displayed in the text field and click 'SET'

The reminder will be set and the bell icon in the quote will turn black.
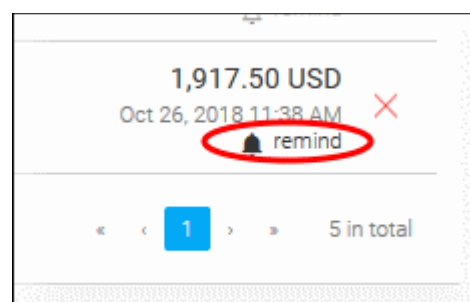
- Clicking the bell icon at anytime displays the reminder and allows you to edit the date/time and the message.
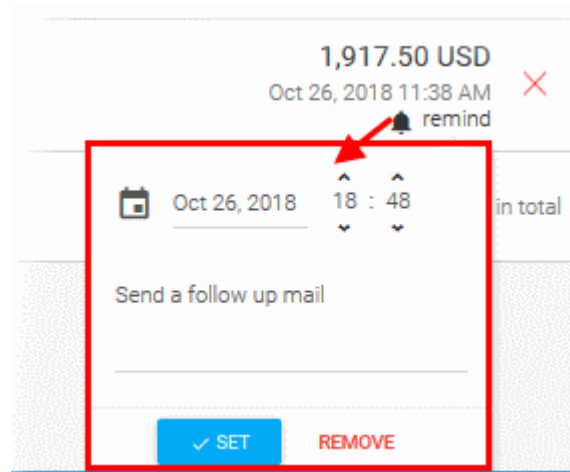
- To remove the reminder, click 'REMOVE'

On the set time, the administrator will be alerted by the notification icon at the right of the title bar.

To view the reminder

- Click the notification icon
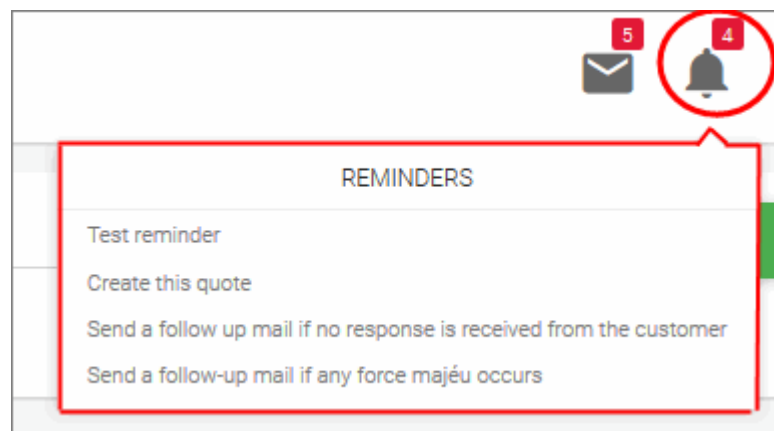
The list of reminders pending at that time will be displayed.

- Clicking the reminder will open the respective quote.

5.4 View Quote Activity

The 'Quotes' interface shows interactions between your team and your customers.

View activities on a quote

- Click 'Quotes' in the left-hand menu
- Click on a quote name to open it's details page:

- Click 'Show Quote Activity' at the foot of the page

The activities taken place on the quote will be displayed in chronological order.

5.5   Archive a Quote

- Archived quotes are hidden from the list in the 'Home' and 'Quotes' interfaces. You may want to archive a quote if it is accepted, rejected or withdrawn.

- You can re-add archived quotes to the live list at anytime.

- Click 'Quotes' on the left to open the quotes interface.

- Click the 'Archive' icon at the right end of the quote:
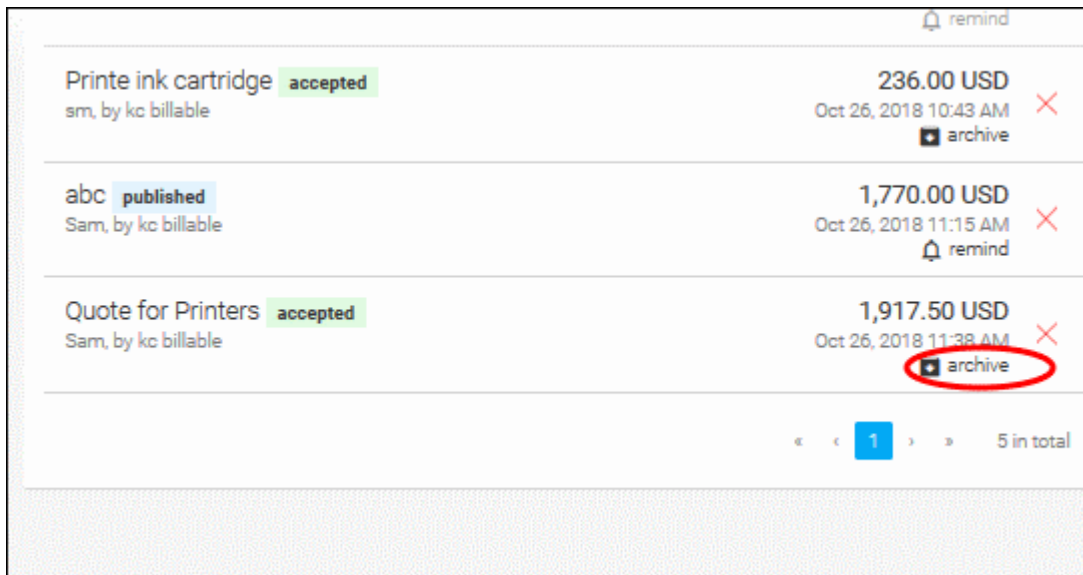
> **Note**: The archive icon is only available for the quotes with the statuses 'Accepted', 'Rejected' and 'Withdrawn'.

The quote will be moved to archive.

To view the list of archived quotes

- Click 'Quotes' in the left side navigation

- Select the status filter criteria for the list of archived quotes you wish to view, from the left drop-down, beside 'Filter'

- Select 'Archived' from the right drop-down,beside 'Filter'.
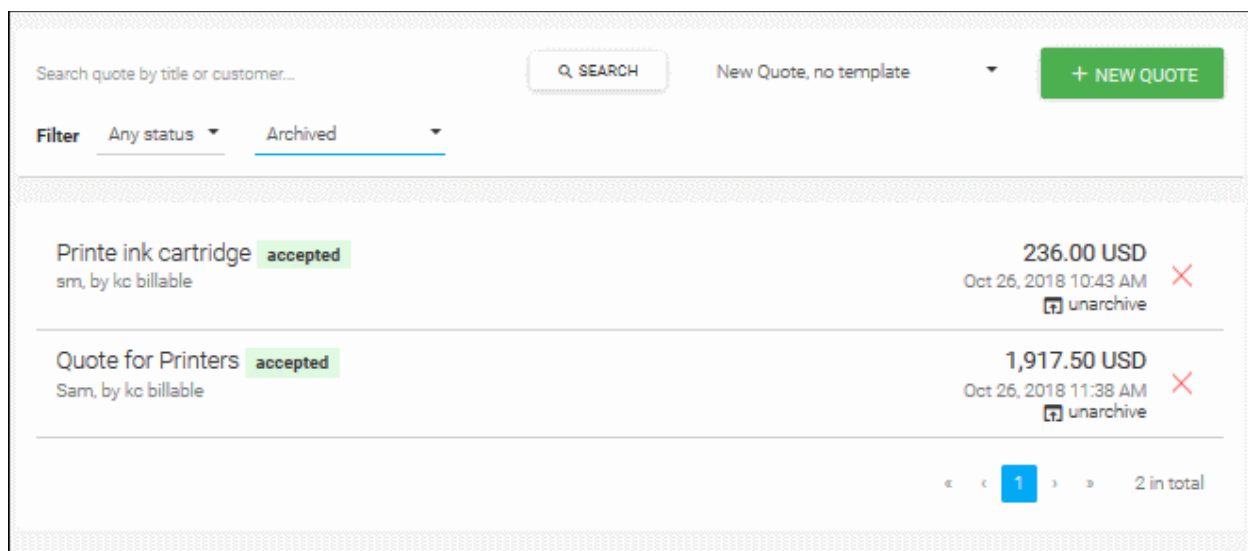
- Click the 'Unarchive' icon at the right end of the quote row, to re-add an archived quote to list of live quotes.

6   Manage Quote Templates

- You can create reusable quote templates with specific products, prices and layout for your most frequently requested items.
- Templates save time by letting you create quotes for repeat orders without re-entering product information every time.
- Click 'Templates' on the left to open the interface:
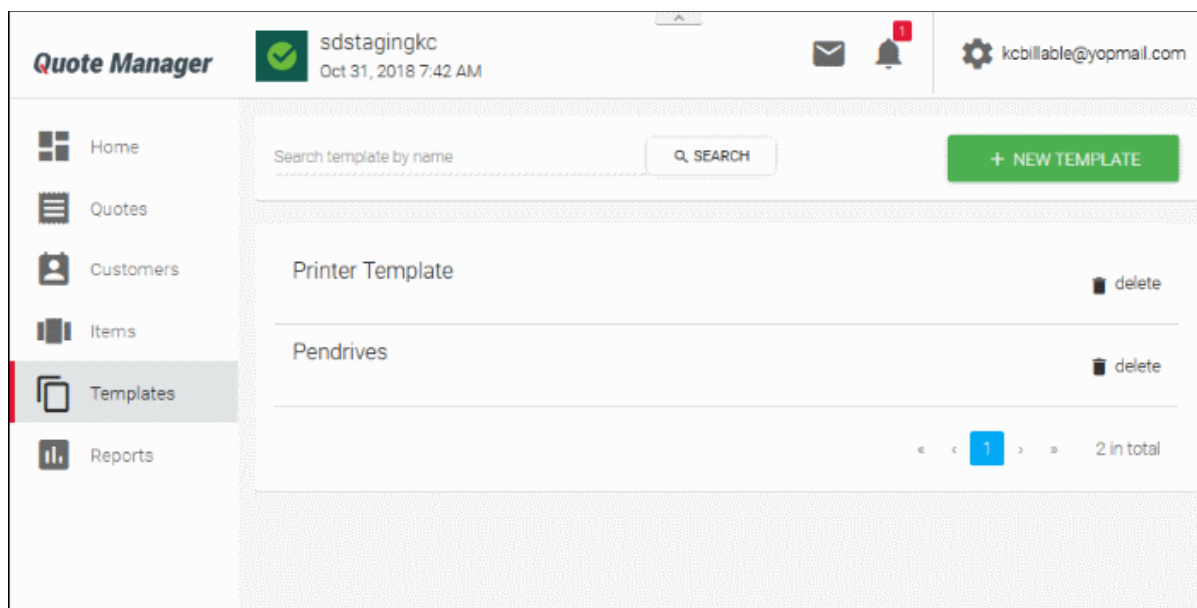
- The interface shows all templates added to Quote Manager and lets you add and manage new templates.
- Use the search box to find specific templates

Visit the following sections for more help:

- **Create a New Quote Template**
- **Remove a Quote Template**

6.1   Create a New Quote Template

- You can create quote templates for frequently requested orders. Each template includes specific items and prices.
- You choose the template just before clicking the '+ New Quote' button:

Select a quote template from the drop-down   Then click '+ New Quote'
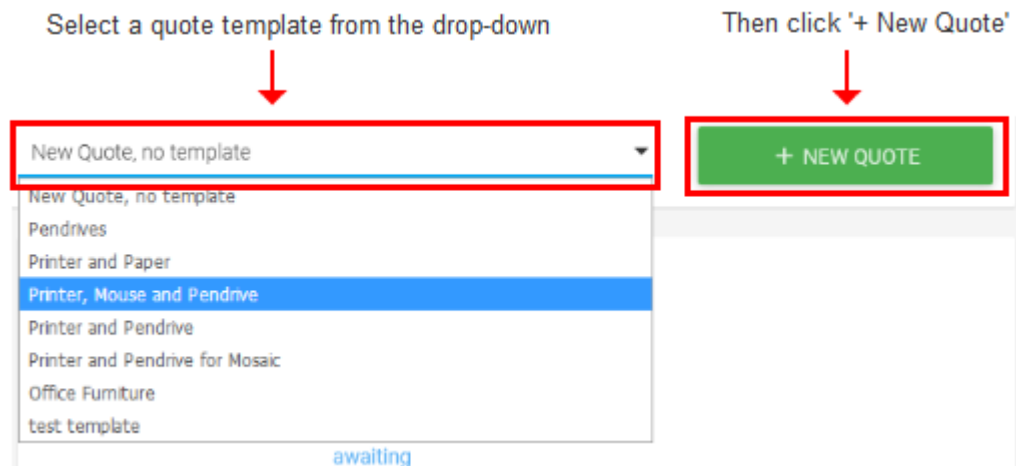
- You can, of course, customize the details in the template as you go through the new quote wizard
- An existing quote can also be used as the basis of a template.

Create a new template

- Click 'Templates' in the left-hand menu
- Click ' + NEW TEMPLATE ':

- Complete the new template form. Form fields are explained below:

Add New Template - Description of Form Parameters	
Title of the Template	Name of the template. For example, you could name the template after the products offered therein.
Style	Select a design for the template. The style determines the logo placement, colors and fonts used in the quote. To add/manage styles: • Click the gear icon at top-right then choose 'Settings' • Click 'Quote Appearance' • Configure your logo, color scheme and font. • Select 'Make Default' in the 'Title' row to have this style presented first in the 'Style' drop-down.

	• Click '+ ADD' at the bottom of the page to create a new style. • See Quote Appearance Settings for more details.
Header	Text which appears just underneath the subject of the quote. • Subject (H1 - main heading of the quote) • Header (H2 - sub-heading) For example: Quote for IT Services (subject) From Acme MSP inc. (header)
Footer	Text which appears directly underneath the product and price summary. For example, 'All prices include sales and tax'. Note - this is not the 'contact details' footer which appears at the bottom of the quote page.

Product Category Details	Add items (your products and services) to the template.
	• You can select items in three categories - Hardware, Software and Service
	• Use the search box to quickly find existing items.
	• You must have created some items before you can use this field.
	   • Click 'Items' in the left-hand menu to view and edit existing items.
	   • Click ' + New Item' to create a new product or service.
	   • You can create tax rates by clicking the cog icon at top-right > settings > Tax rates
	   • You can set taxes on specific items when you create the item.
	• Each item you add to the template is accompanied by its code, price, description and tax rate. You can change the item quantity as required. These details are shown in the final quote.

• Click 'Save' to commit your template to the library.
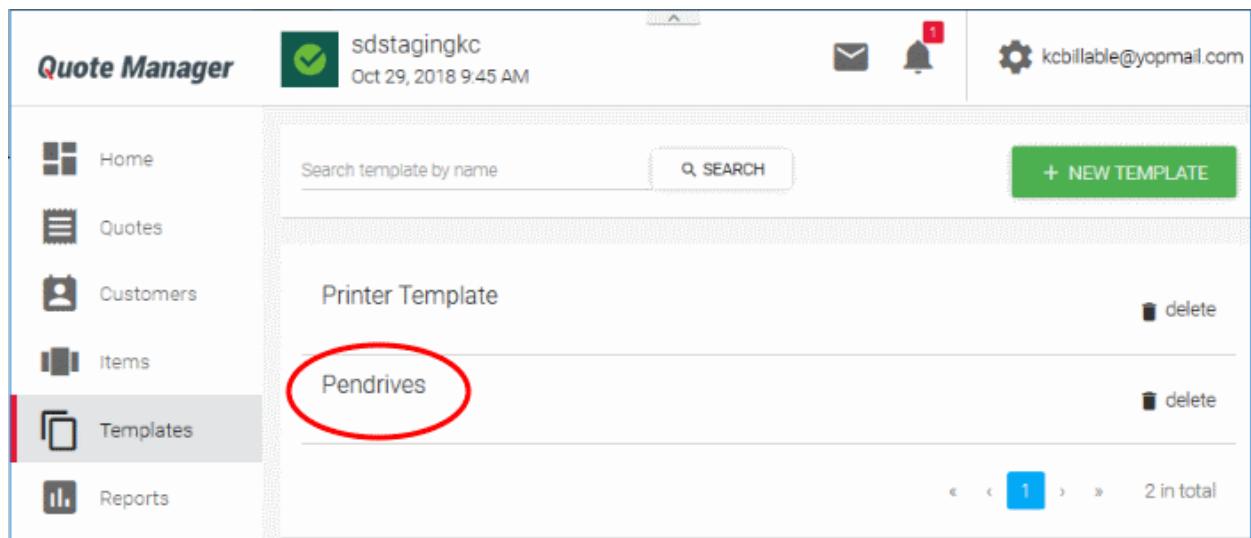
• You can now use the template as the basis of a new quote:
  ○ Go to the Quote Manager home page
  ○ Select your quote from the drop-down

o   Click ' + New Quote'

Select a quote template from the drop-down

Then click '+ New Quote'
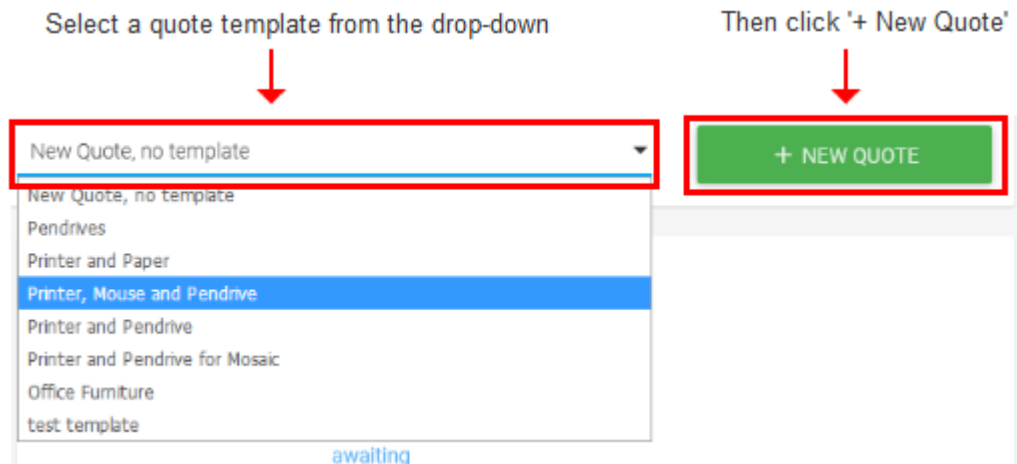
6.2   Remove a Quote Template

- Click 'Templates' in the left-hand menu
- Click the trash-can icon on the right of the template you want to delete:
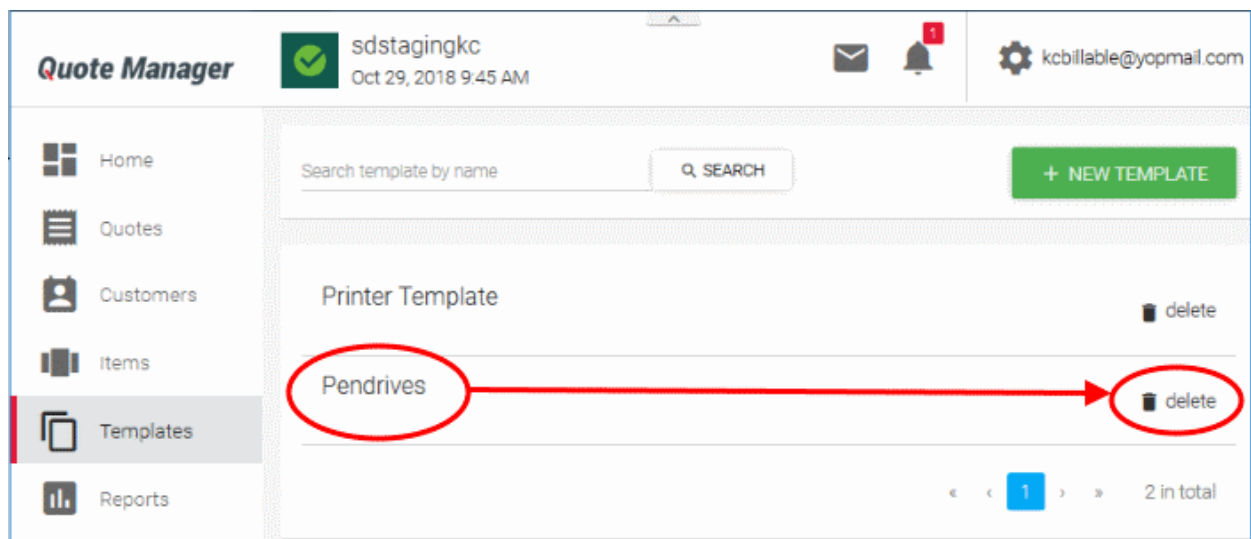
7   Settings

- Click the gear icon next to your user name at the top-right. Choose 'Settings' from the drop-down:

The settings menu lets you configure every aspect of your quotes. See the following sections for more details on each:
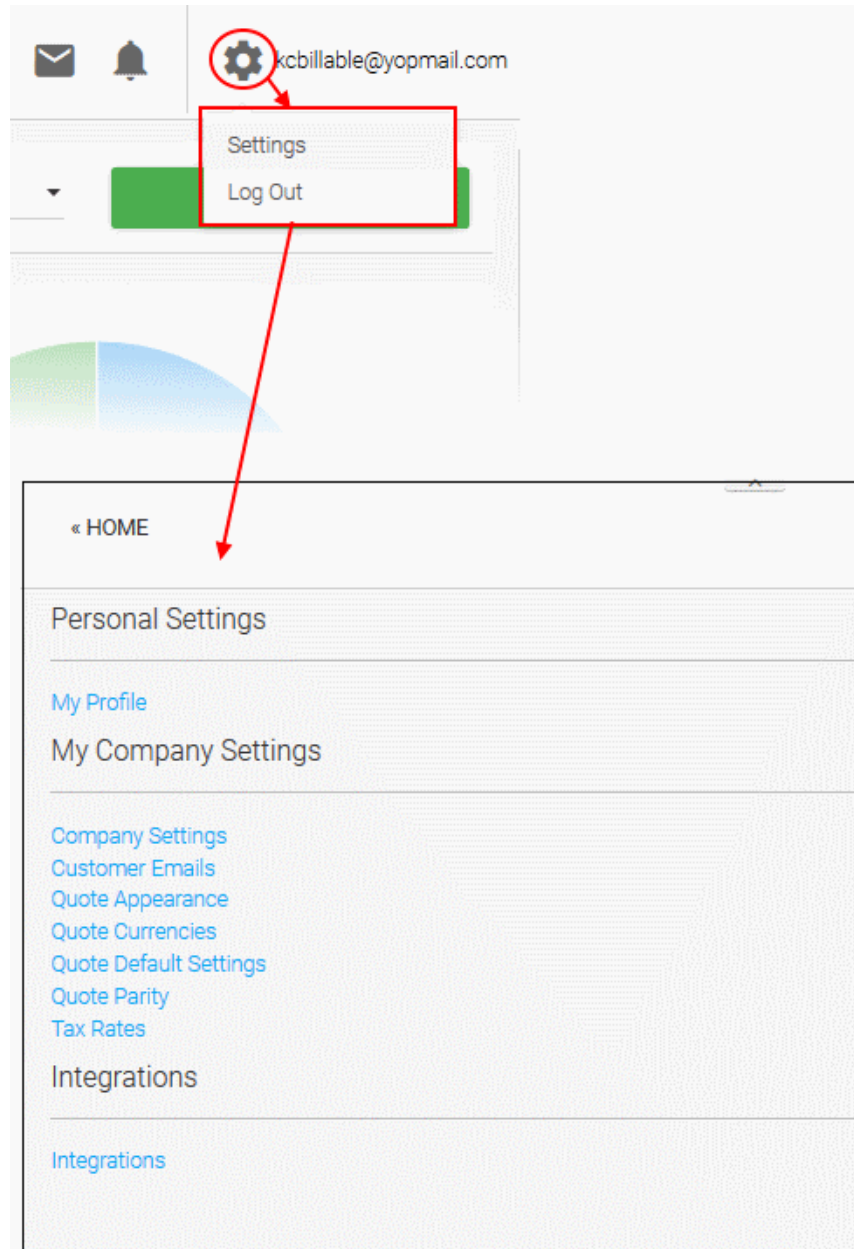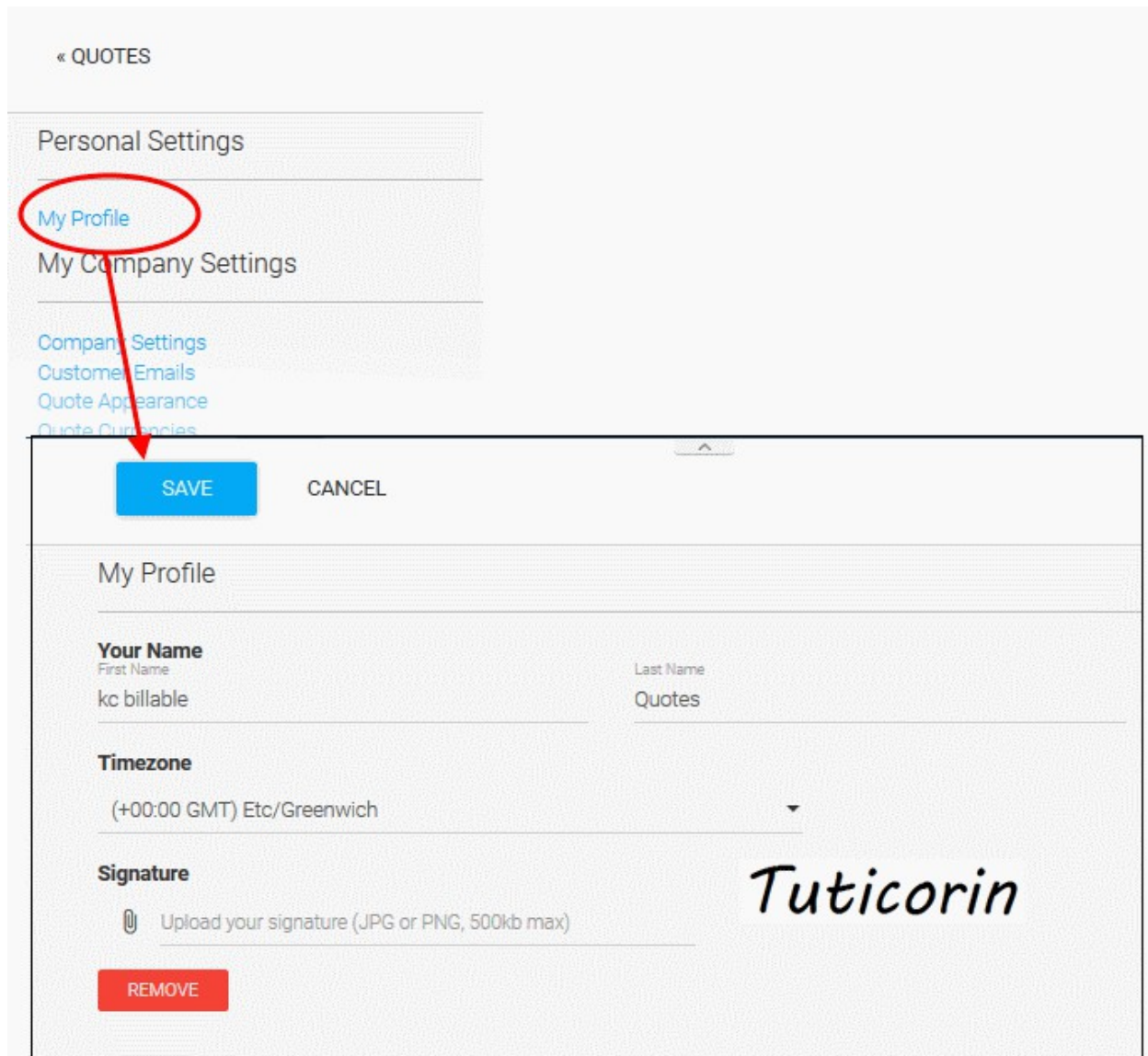
- **Personal Settings**
- **My company Settings**
    - **General Settings**
    - **Quote Appearance Settings**
    - **Configure Email Templates**
    - **Configure Company Settings**
    - **Quote Parity Settings**
    - **Quote Currencies Settings**
    - **Configure Tax Rates**
- **Configure Integrations**

7.1   Personal Settings

'My Profile' lets the current user edit their name, time zone and signature.

To configure your profile settings

- Click the gear icon at the top right to open the 'Settings' page
- Click 'My Profile' under 'Personal Settings'

- **First name / Last name** - Used to populate the 'From' field in a quote.
- **Timezone** - Choose your time zone of your current location.
- **Signature** - Upload a .png or .jpg image of your signature (max. size 500 kb). You can add your signature to a quote if required. It will appear immediately underneath the tax summary.

- Click 'Save' for your changes to take effect

7.2 My Company Settings

The 'My Company Settings' area lets you configure company details, emails, quote settings, currencies and item tax rates.
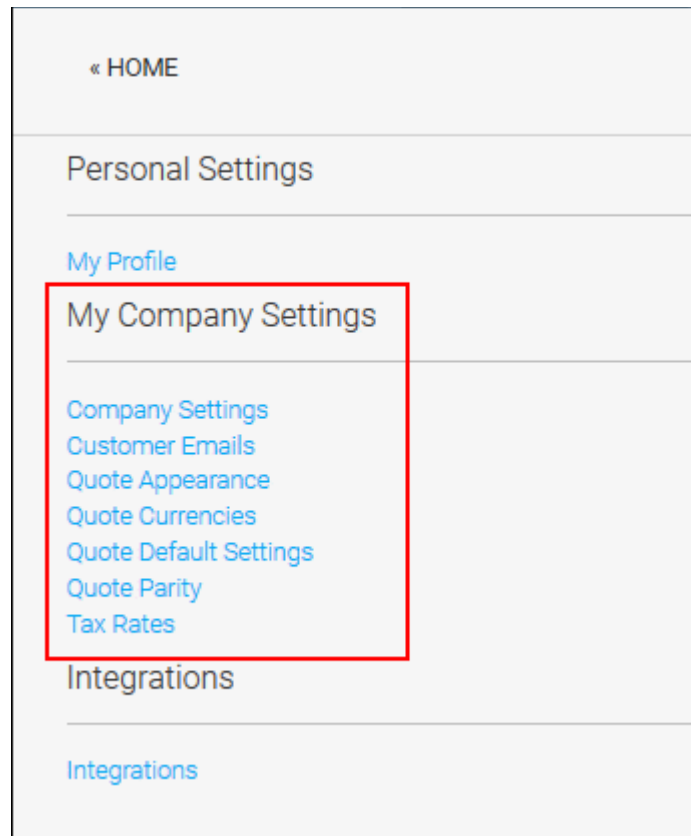
The following sections explain more about:

- **General Settings**
- **Quote Appearance Settings**
- **Quote Parity Settings**
- **Quote Currencies Settings**
- **Configure Email Templates**
- **Configure Company Settings**
- **Configure Tax Rates**

7.2.1 General Settings

You can configure the validity period for quotes and enter/edit the 'Terms and Conditions'. The 'Terms and Conditions' are displayed at the foot of the quotes sent to the user and in the .pdf versions of the quote.
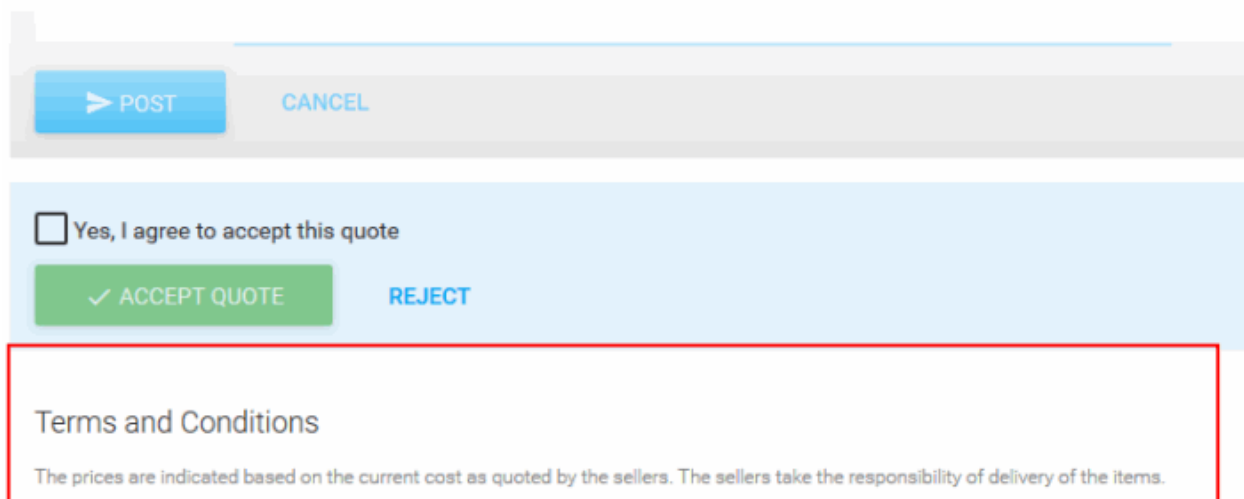
To configure quote general settings

- Click the gear icon at top right then choose 'Settings'
- Click 'Quote Default Settings' under 'My Company Settings'
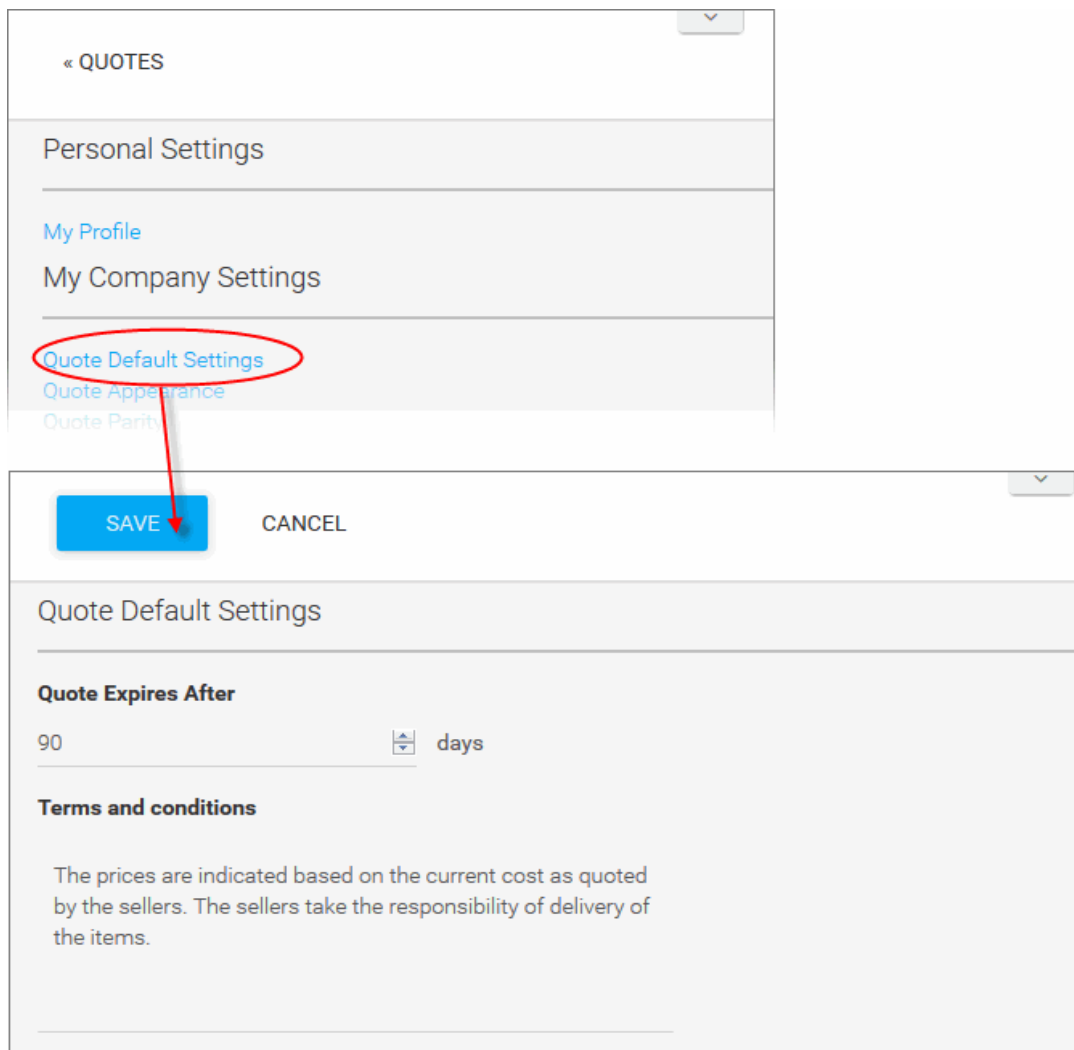
- Set the period for which the quote should be valid in the 'Quote Expires After' box. Once a quote expires it

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will be automatically archived.

- Add or edit the 'Terms and Conditions' text as required.

- Click 'Save' for your changes to take effect

7.2.2   Quote Appearance Settings

- The quote web-page which is presented to customers allows them to download the quote as a pdf.

- You can customize the appearance of this pdf.

- Customizable items include your company logo, header and footer, terms and conditions and contact information. An example is shown below:
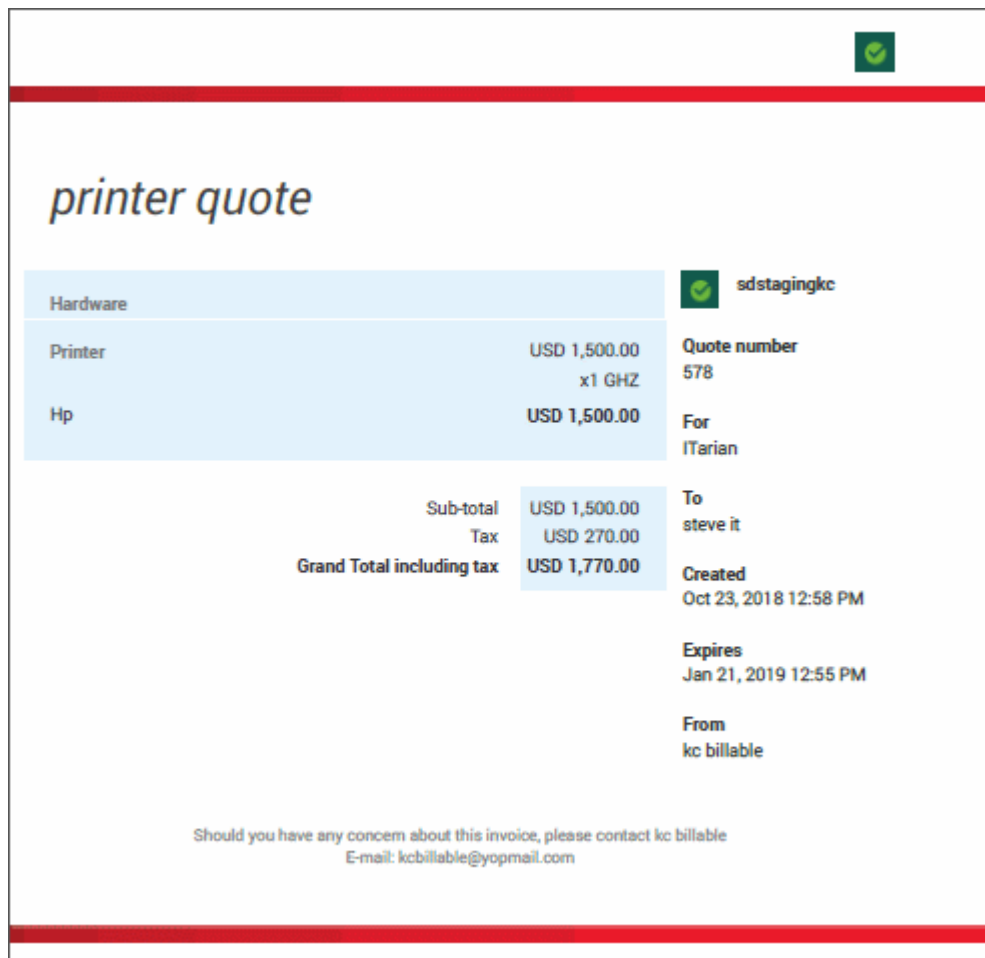
You can create multiple designs for different use-cases and customers.

To configure quote appearance

- Click the gear icon at the top right then choose 'Settings'

- Click 'Quote Appearance' in 'My Company Settings'
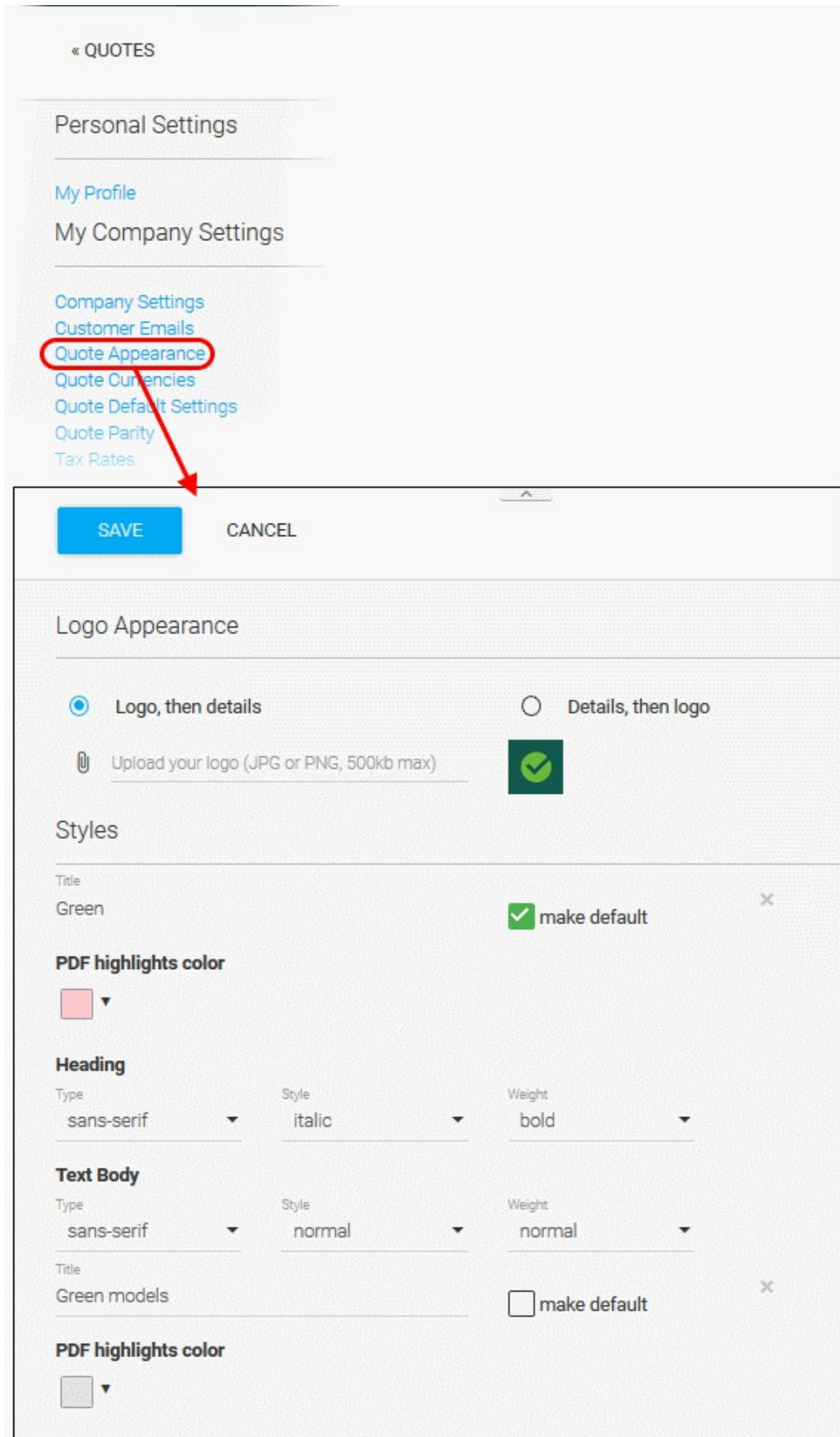
Logo Appearance

Upload your company logo and specify where it should be displayed:

- Click 'Upload your logo'. QM accepts images in .png or .jpg format. The maximum file size is 500 KB.

Choose logo positioning:

- **Logo, then details** - Logo appears on the right of the page, above the quote summary.

- **Details, then logo** - Logo appears on the right, underneath the quote summary.

Note: Logo positioning is 'universal' to all styles. Once chosen, the logo position applies to all styles.

Styles

- Each style consists of a background color and font settings for heading and body text.

- You should provide a name for each style. The styles will then be available for selection when creating a new quote or a template for a customer.

- Make default – This style is listed first in the 'Style' drop-down. It will be auto-applied if the user does not choose a different style. We recommend you make this style your 'standard' design.

- You can configure a single style, or click the 'Add' button to create additional styles.
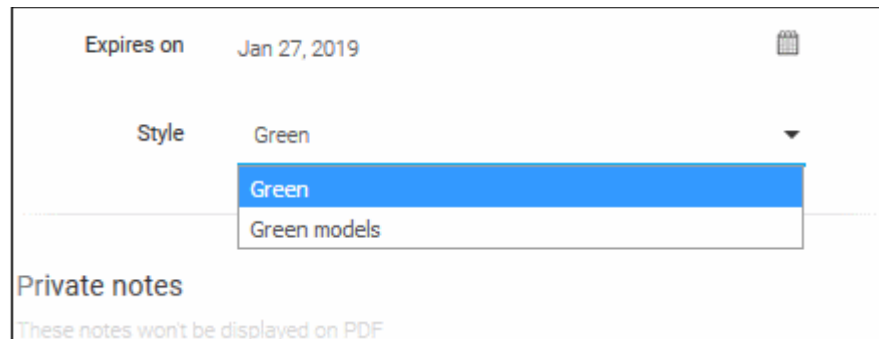
Add a new style

- Click the gear icon at top-right and choose 'Settings' from the drop-down

- Click 'Quote Appearance' in 'My Company Settings'

- Click the 'ADD' button at the bottom of the page

- This will open the style configuration fields:
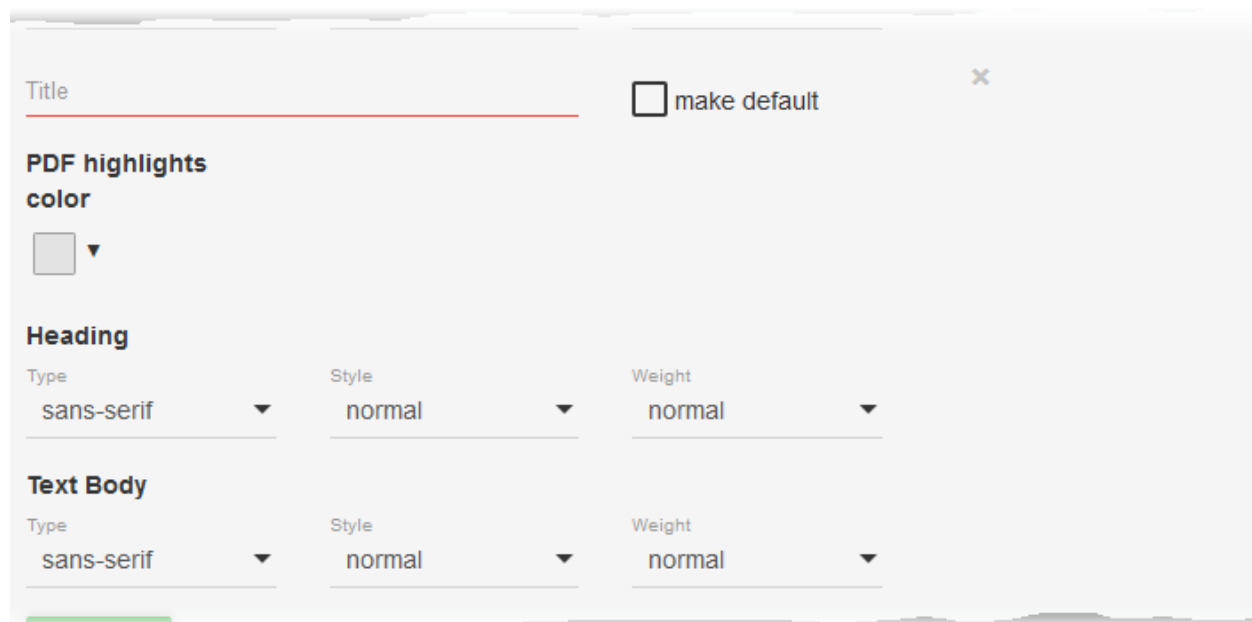
- **Title** – Type a name for the style. This name will appear in the 'Style' drop-down when creating a new quote or template.

- **PDF highlights color** – Color used as the background to the item list and charges. The example below shows a pink background:

- **Heading / Text body** – Choose the font, font style and weight of these items.

- Select 'make default' if you want this style to first in the list. The default style will be applied unless the user proactively changes the style.

- Click 'Save'.

- Repeat the process to add more named styles

The new styles will be available for selection when creating a new quote or a template.

7.2.3 Quote Parity Settings

- The 'Quote Parity' feature allows admins to convert the price of billed items into another currency when creating a quote.

- Click the 'gear' icon next to the company name at top-right, to open 'Quote Parity' interface
- Click 'Settings' > 'Quote Parity'
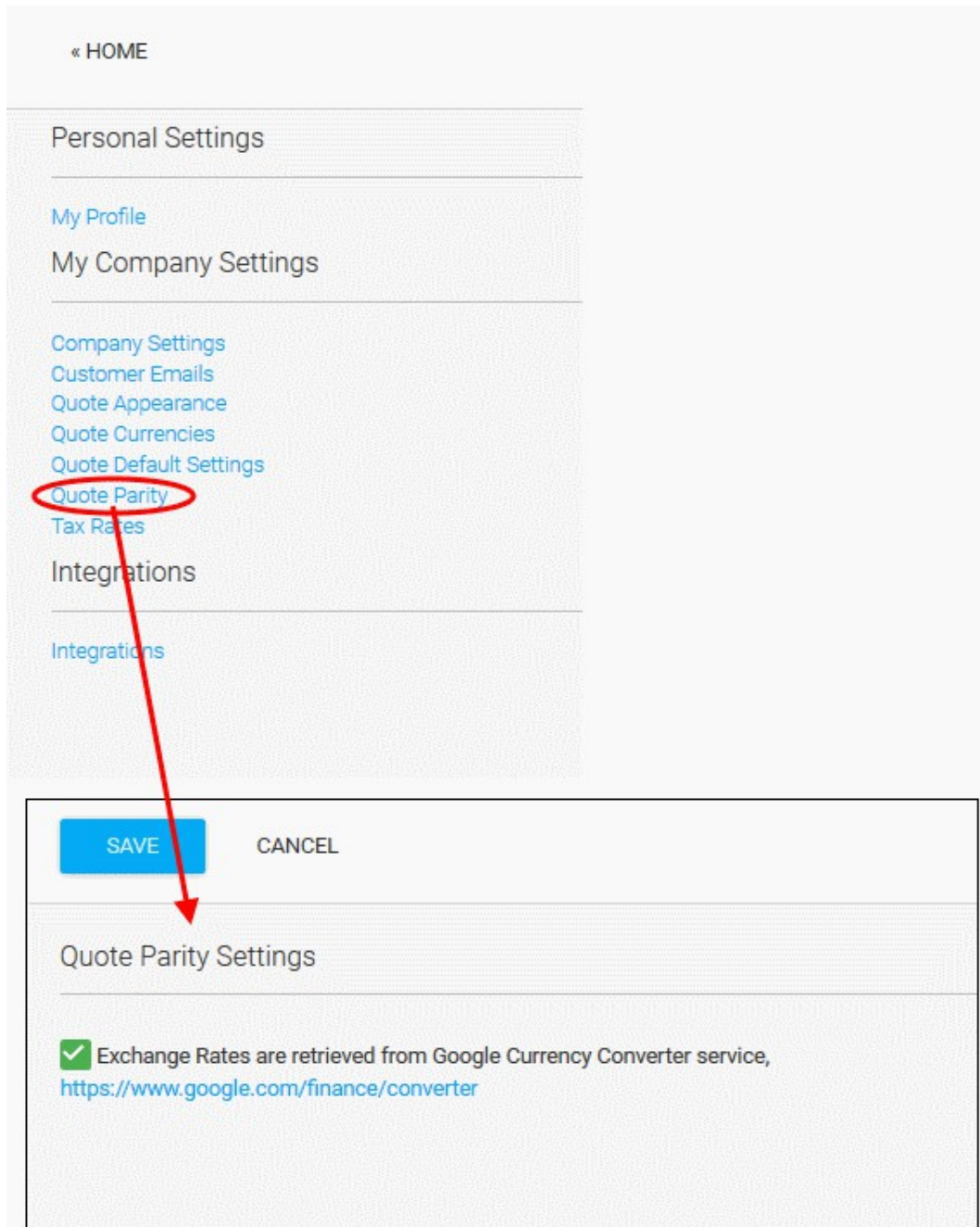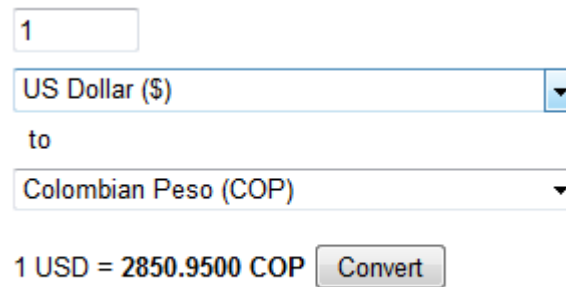
- Click the link to open the service.
- Enabling 'Exchange Rates are retrieved from Google...' will allow you to change the currency of your quote during the quote creation process. Prices are initially shown in USD.
- Prices will be automatically converted using the latest, live, exchange rates. You can then manually adjust the exchange rate if you wish.

To calculate an exchange rate

- Click the 'gear' icon next to the company name at top-right
- Click 'Settings' > 'Quote Parity'
- Click the link to open **https://www.google.com/finance/converter**
- Enter the cost amount and choose your 'to' and 'from' currencies.

- Click 'Convert' to view the latest conversion rate

7.2.4   Quote Currencies Settings

- The 'Quote Currencies' interface lets you set which currencies are available for you to convert your product prices into.

- You can change the currency used in a quote in step 2 of the 'New Quote' wizard. As an overall summary:

    - You define the cost of a product in the 'Items' interface. The default currency is USD.

    - You enable the dynamic exchange rate calculator in 'Settings' > 'Quote Parity'.

    - You select which currencies should be available in 'Settings' > "Quote Currencies'.

    - You create a new quote and add item(s) in step 2, 'Add Items'.

    - You can change the currency using the drop-down at the top-left. The prices in the quote will be automatically converted to the desired currency at the latest exchange rate.

    - You can modify the price by manually changing the rate in the 'Parity' drop-down.

- The 'Quote Currencies' area also allows you to specify whether the currency symbol or the currency name should be shown in the quotes.

- The Add/Remove buttons let you choose which currencies should be available for selection in the currency drop-down during quote creation.

- Fewer currencies make it easier to find the currency you want in the list. Note: You cannot remove the default USD currency from the list.

To configure quote currencies

- Open the 'Settings' page by clicking the gear icon at the top right and choosing 'Settings' from the drop-down

- Click 'Quote Currencies' in 'My Company Settings'

- Enable 'Show currency sign instead of currency name' to show symbols instead of names (e.g. '£' instead of 'GBP'). This change will be reflected in the 'Add Items' stage of the quote creation wizard at the bottom right of the page. It will also be shown in the 'Summary' and in the quote pdfs.

To add a particular currency to the list

- Select the currency in 'Show currency sign instead of currency name'
- Click 'Add'

To remove a particular currency

- Select the currency on the right and click the 'Remove' button
- Click 'Save' for the settings to take effect

7.2.5   Configure Email Templates

- Quote Manager sends notification mails to customers at various stages of the quote life-cycle.
- Admins can customize the content of these mails by creating email templates.
- Each template contains variables like quote title, company name and customer name which are auto-populated based on the quote details.
- Once these templates are configured, admins can check the content of the resultant emails by sending test emails.

Emails are sent for the following stages:

- New Quote created
- Quote updated by admin
- Quote accepted by the customer
- A question from the customer on the quote has been answered by the admins

The 'Email Templates' interface allows the admins to view and manage the content of the email templates.

To manage email templates

- Open the 'Settings' page by clicking the gear icon at the top right and choosing 'Settings' from the drop-down
- Click 'Customer Emails' under 'My Company Settings'

The 'Email Templates' interface will open with a list of templates available with QM.

Each template will have a standard content and variables. The variables are indicated by text inside square brackets and will be substituted by respective information, from the quote details. For example,

- [customer-name] will be substituted by the name of the customer for whom the quote is generated
- [company-name] will be replaced by your MSP company / enterprise name

The link in the body of the email will be replaced by the link to point the quote page of the respective quote.

- To change a notification message displayed in the subject line of the email, edit the content under 'Quote Title'
- To change the content in the Message text and/or Message footer, directly edit the text in the respective white boxes
- To change a variable to have a constant text, for example, to permanently replace [company-name] with the name of your company, directly replace the variable with the content
- Click 'Save' for your changes to take effect
- To check the content of notification email, click 'SEND TEST EMAIL'

The test mail will be sent to your email address.

7.2.6   Configure Company Settings

- The 'Company Settings' interface allows you to specify your MSP company / enterprise details, address and other contact information for display in the quotes and notification emails.
- Click the gear icon at the top right and select 'Settings' from the drop-down, to open the 'Settings' interface.
- Click 'Customer Emails' in 'My Company Settings'.
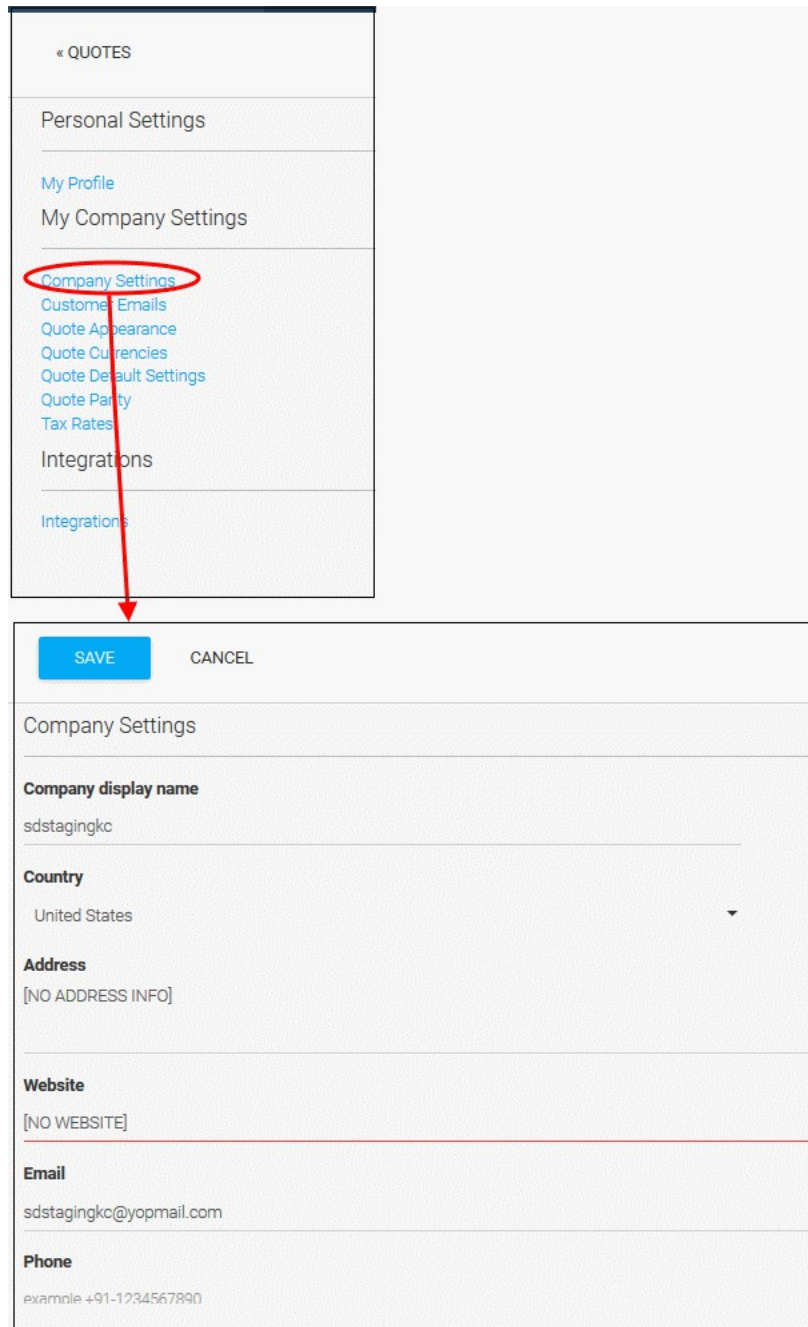
| Company Settings - Form Parameters	
Form Element	**Description**
Company display name	Your company name, as it should be displayed on the quote page and notification email. Enter your company name.
Country	Choose your country from the drop-down.
Address	Add particulars of your company. These details will be displayed beneath your company name in the quotes.
Website	Lets you add the URL of your website.
Email	Lets you add your email address at which you wish to receive the mails from QM.
Phone	You can add your phone number.

- Click 'SAVE' to enter the details

7.2.7   Configure Tax Rates

- The 'Tax Rates' interface lets you specify taxes which apply to items in your quotes.

  - You can apply the rates you save here to individual items ('Items' > '+ New Item')

  - You can also select tax rates after you have added an item to a new quote or template.

- 'Make default' - The default rate appears first in the tax selection list, and is applied to items for which no other rate is chosen.

To configure tax rates

- Click the gear icon at the top-right

- Select 'Settings' from the drop-down

- Click 'Tax Rates' under 'My Company Settings':
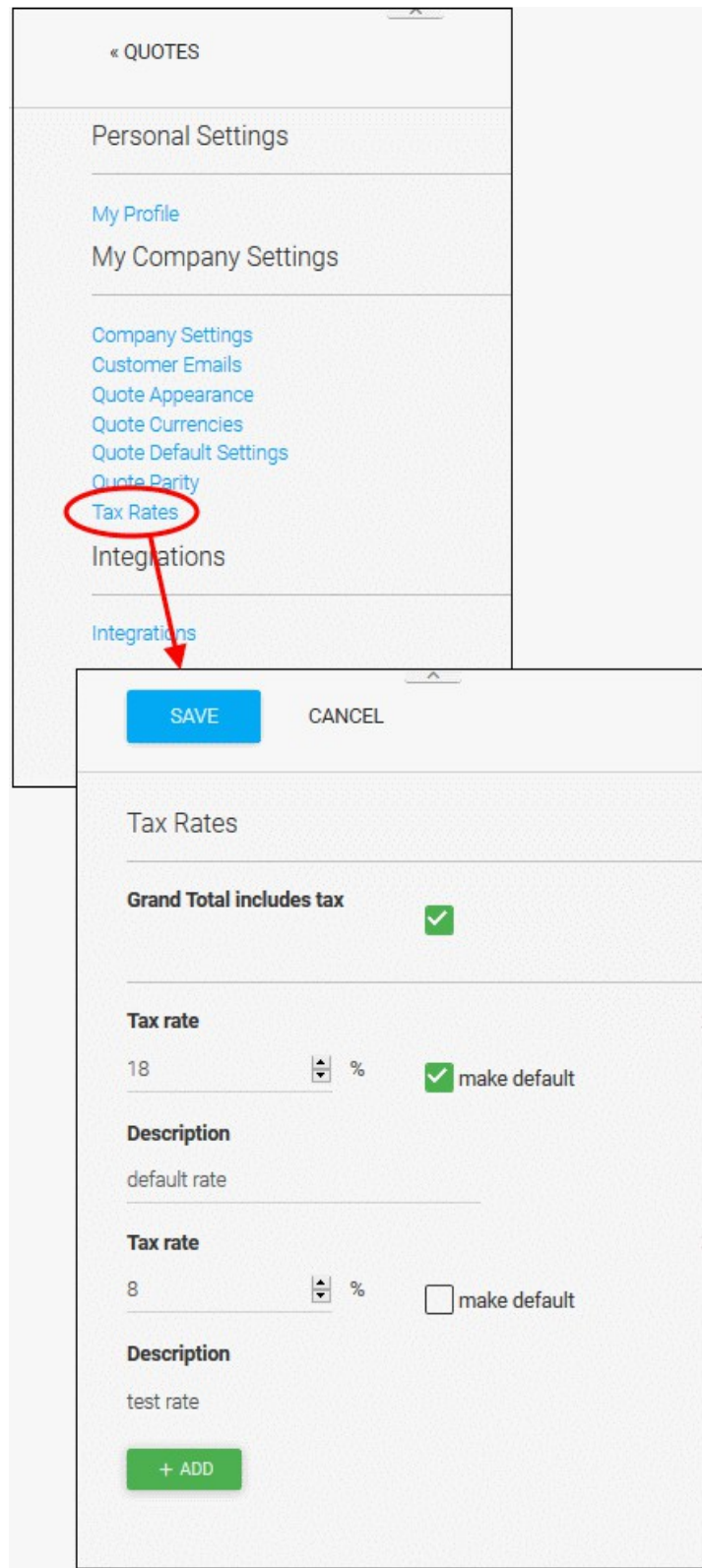
- To add a new tax rate, click 'ADD'

A new tax rate field will appear:

- **Tax rate** - Percentage of item price that is added to total cost by this tax
- **Make Default** - This rate appears first in the tax selection drop-down when you create an item. This means it is 'auto-applied' unless you change it to another tax. You can only choose one rate as the default.

Click 'SAVE' to add the new entry to the list of tax rates.

The tax rates you create will be available for selection when adding an item to a quote or quote template:

- To remove a tax rate from the list, click 'X' beside the tax rate.

7.3 Configure Integrations

You can integrate Quote Manager with the Service Desk module and with QuickBooks online.
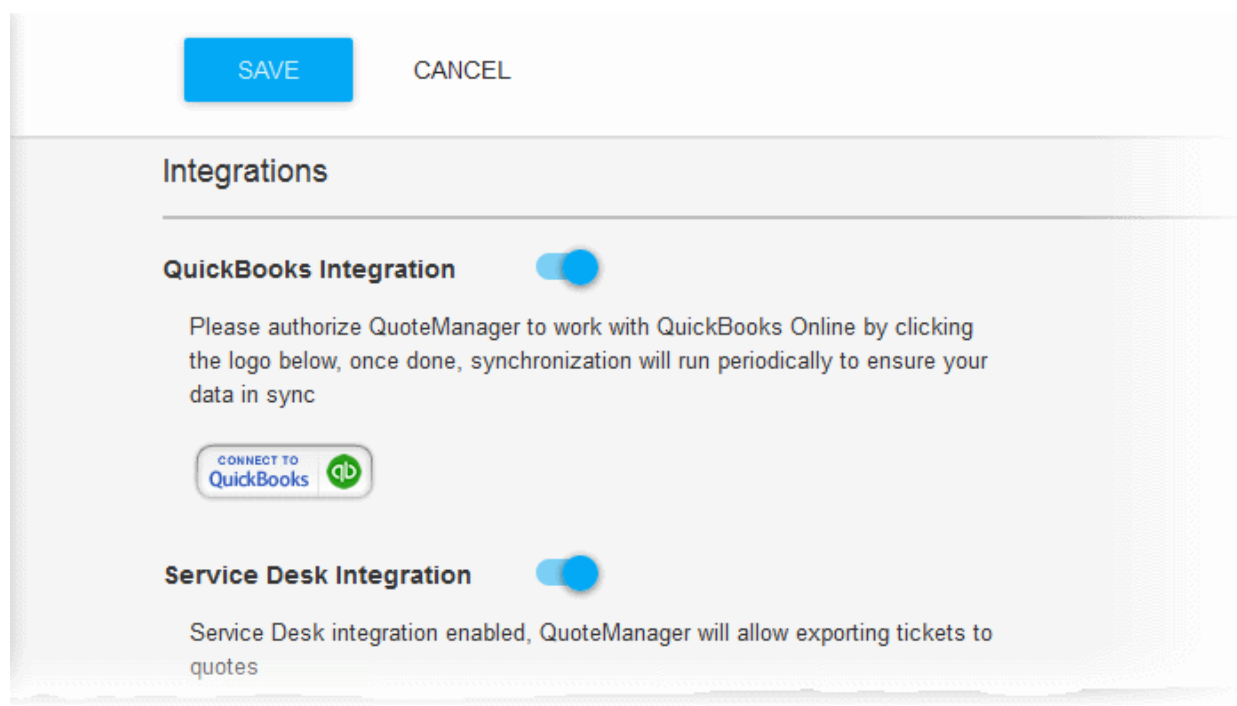
QuickBooks Integration:

- QM can be integrated to QuickBooks online for accounting purposes. Once complete, QuickBooks items and contacts will be synchronized with Quote Manager

- You need a valid QuickBooks account in order sync your data with QM. You can sign-up for a new account or use an existing account.

Service Desk Integration:

- Service Desk staff can initiate a quote direct from a ticket.

- The quote is added as a draft in Quote Manager. These quotes have 'Service Desk' in the quote title.

- The QM admin can edit the quote, forward it to the customer, and handle the process going forward.

- See **Generate a Quote from Service Desk** if you want to read more about this.

To open the 'Integrations' interface

- Click the gear icon at top-right then click 'Settings'.

- Click the 'Integrations' link to open the interface:

Integrate QM to QuickBooks online

- Use the slider beside 'QuickBooks Integration' to enable QuickBooks integration

- Click the 'Connect to QuickBooks' button

The login screen for QuickBooks will open.

- Enter your username and password in the respective fields for authorizing QM to connect to QuickBooks and start synchronizing data. If you do not have a subscription, you can signup for a new account from this interface.

To Integrate QM to Service Desk

- Use the slider beside 'Service Desk Integration' to enable Service Desk integration

Your staff can now initiate quotes from the 'Staff Panel' in Service Desk.

8   Reports

- Click 'Reports' from the left-hand navigation
- There are two types of report:
  - **Top Statistics** - Your top five staff by revenue, your top 5 quotes, and your sales funnel.
  - **Revenue Statistics** - Charts about the income generated by your quotes.
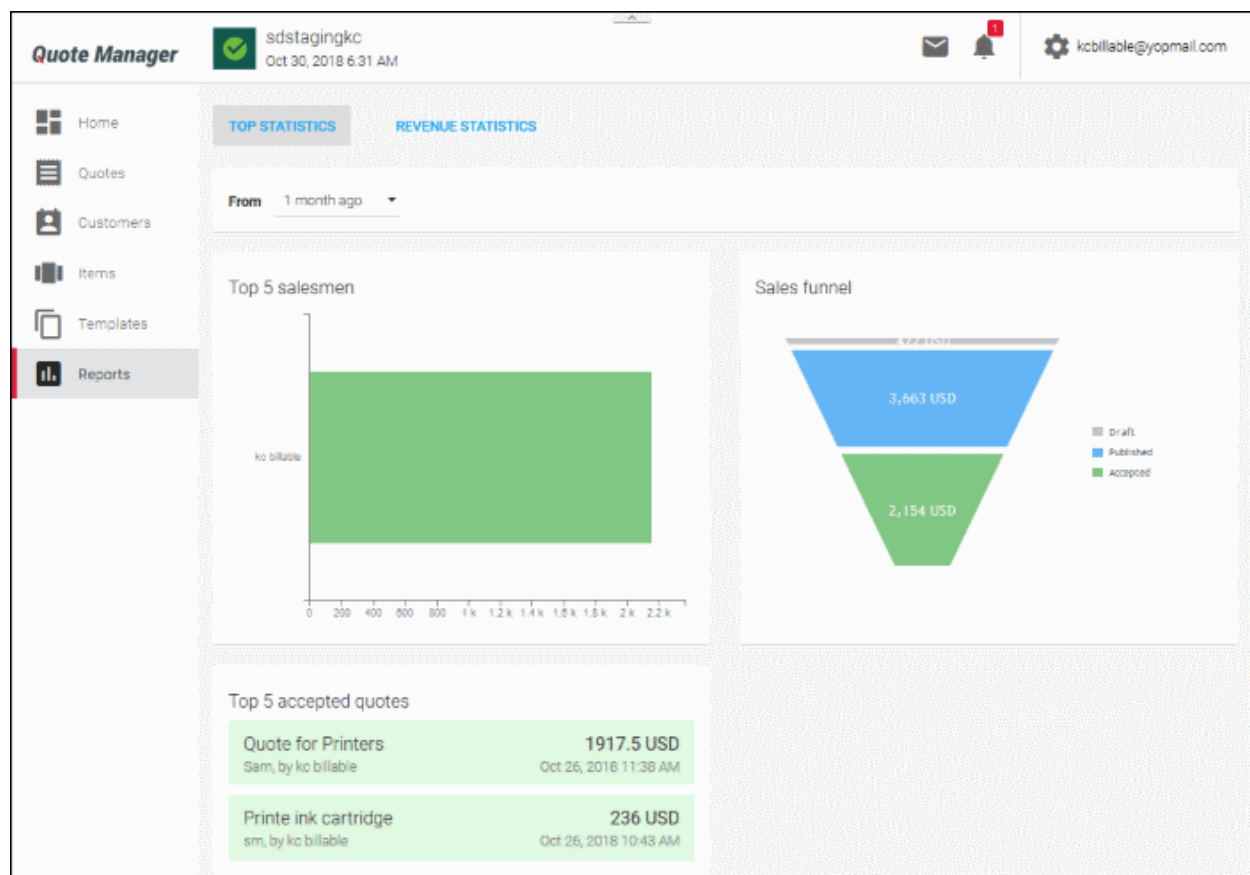
See the following sections for more details on each:

- **Top Statistics**
- **Revenue Statistics**

8.1   Top Statistics

- Click 'Reports' > 'Top Statistics'
- 'Top Statistics' lets you identify the best performing staff, and most successful quotes in your organization.
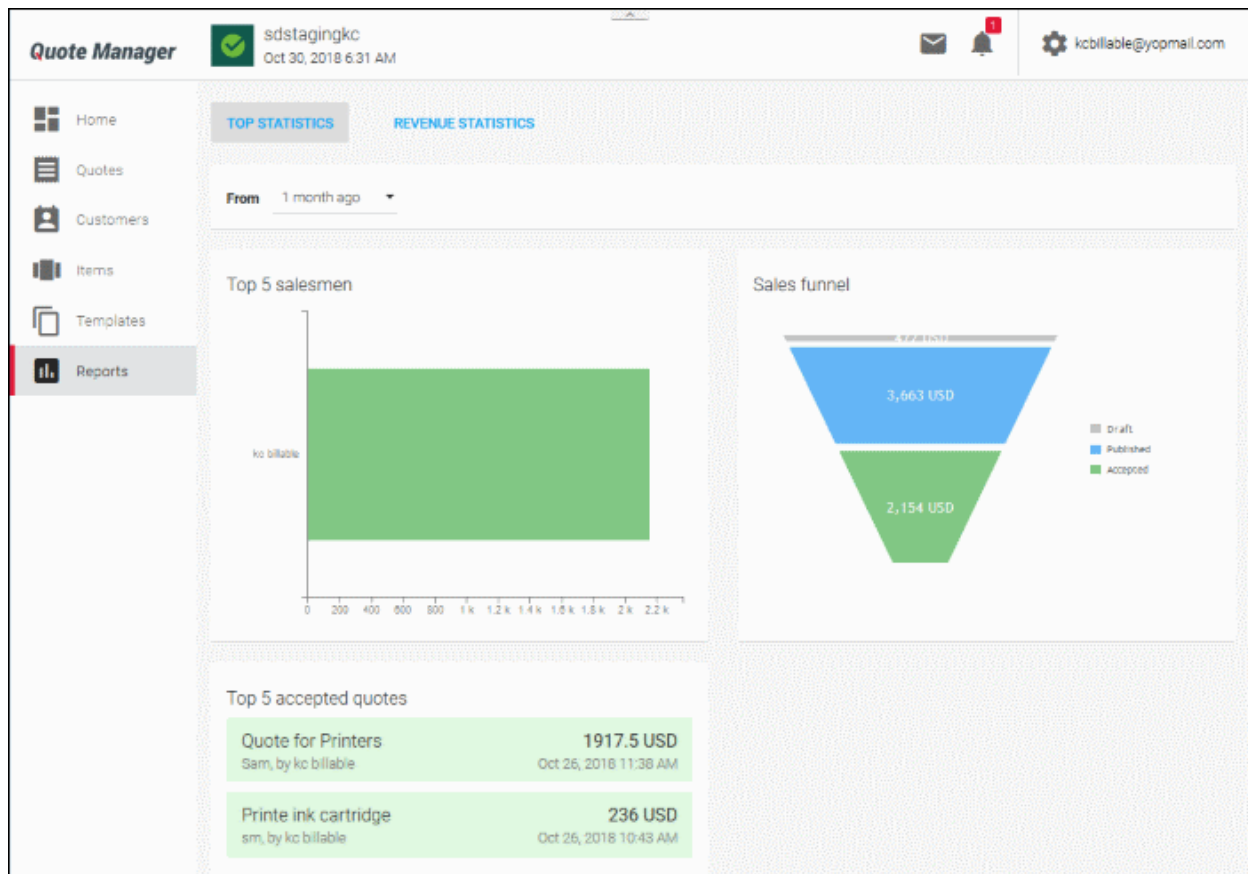
The report contains three charts:

- **Top 5 Salesmen**
- **Sales Funnel**
- **Top 5 accepted quotes**

Top 5 Salesmen

The 5 salespersons whose quotes have generated the most revenue.

- Place your mouse cursor over a bar to view income generated by the salesperson.

Sales Funnel

The monetary value of quotes in each of the 'draft,' 'published' and 'closed' stages.

Top 5 accepted Quotes

The 5 top quotes based on actual revenue generated.
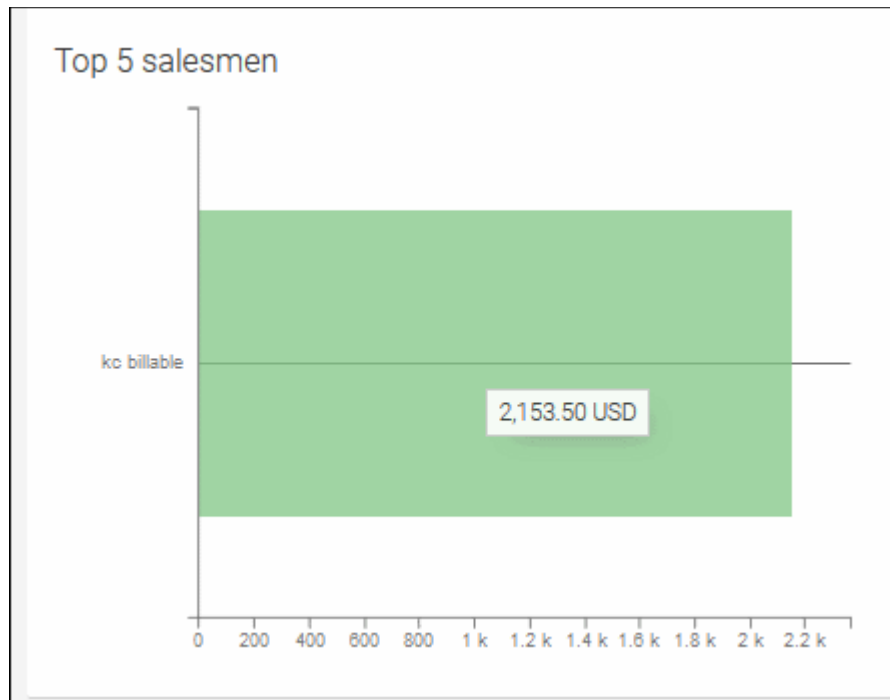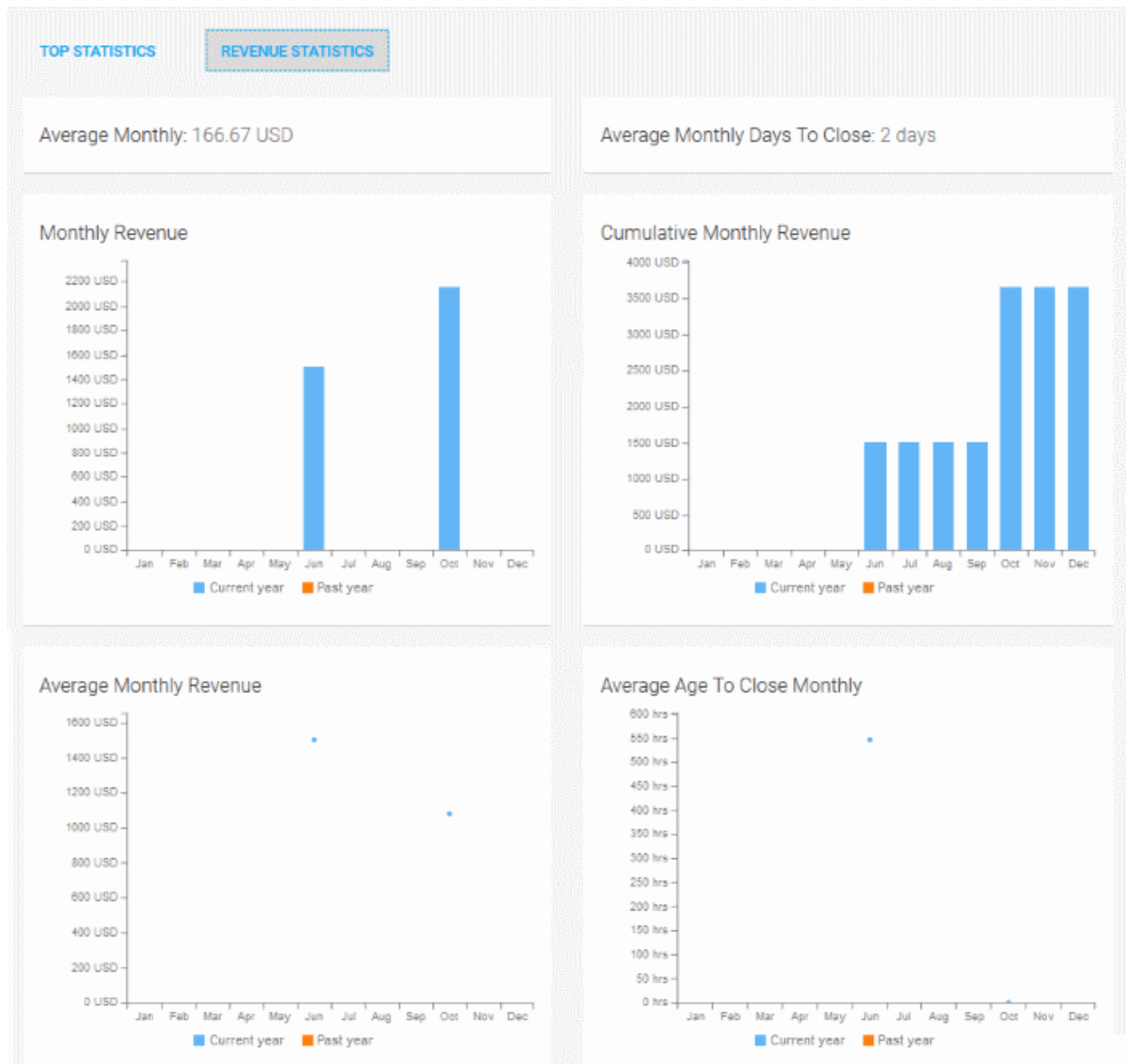
- Click a quote name to open its details page.

8.2   View Revenue Statistics

- The 'Revenue Statistics' report displays bar-charts of monthly revenue compared to previous years.
- Click 'Reports' from the left navigation, to view the top statistics report.
- Click the 'REVENUE STATISTICS' tab from the top

An example is shown below.

- Average Monthly - Displays the average revenue generated per month for the current year
- Average Monthly Days to close - Displays the average of life-cycle time of quotes dealt per month, for the current year

The report contains four charts:

- Monthly Revenue - The bar-chart displays the income generated on each month of the current year and the previous year.
- Cumulative Monthly Revenue -The bar-chart revenue generated on a cumulative basis for each month of the current year and the previous year
- Average Monthly Revenue -The graph displays the average monthly revenue calculated for each month of the current year and the previous year.
- Average Age To Close Monthly -The graph displays the average of time taken for closing quotes dealt in each month of the current year and the previous year.

About ITarian

The comprehensive and powerful ITarian IT operating platform helps you simplify operations, boost productivity, and better utilize IT resources. It includes all the essential IT management tools, including remote monitoring and management, remote access and control, service desk and ticketing, and patch management. For free.

About Comodo Security Solutions

Comodo Security Solutions is a global innovator of cybersecurity solutions, protecting critical information across the digital landscape. Comodo provides complete, end-to-end security solutions across the boundary, internal network and endpoint with innovative technologies solving the most advanced malware threats. With over 80 million installations of its threat prevention products, Comodo provides an extensive suite of endpoint, website and network security products for MSPs, enterprises and consumers.

Continual innovation and a commitment to reversing the growth of zero-day malware, ransomware, data-breaches and internet-crime distinguish Comodo Security Solutions as a vital player in today's enterprise and home security markets.

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