



Quote Manager Quick Start Guide

Guide Version 3.26.052720

ITarian
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Clifton, NJ 07013

Quote Manager - Quick Start Guide

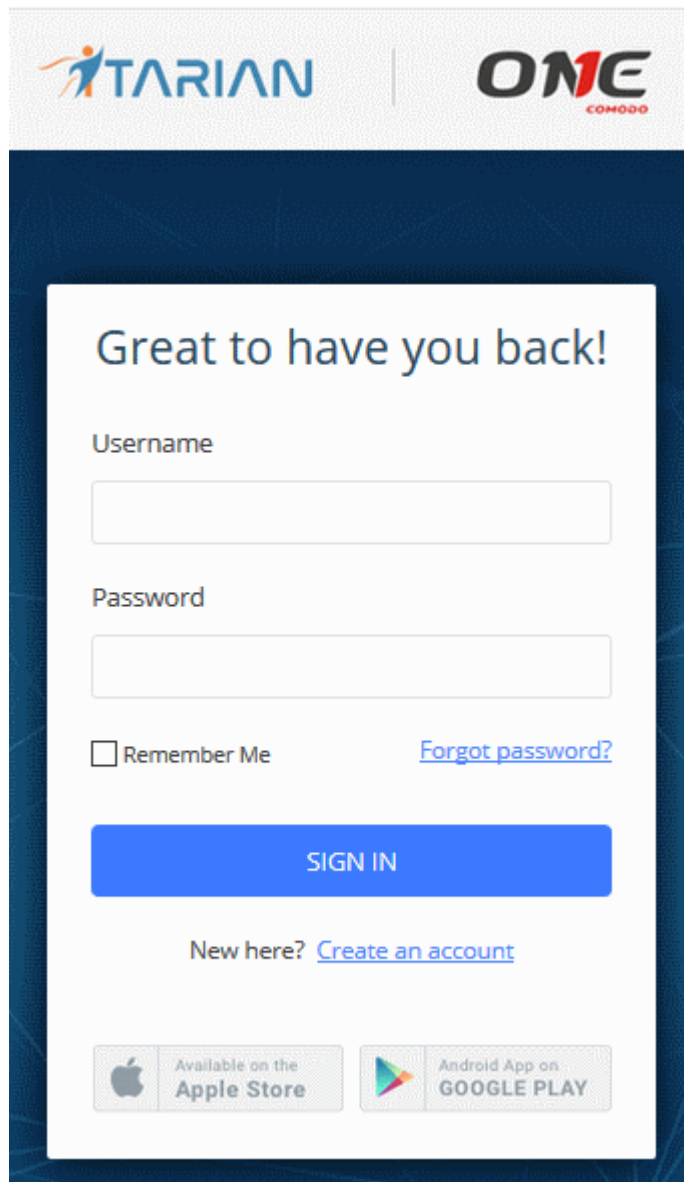
Quote Manager (QM) is an end-to-end quote management solution that lets businesses quickly create, send and follow-up on customer quotes.

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

- **Step 1 - Login to Quote Manager Module**
- **Step 2 - Add Contacts**
- **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/>



The screenshot shows the login interface for the ITarian platform. At the top, there are logos for 'ITARIAN' and 'ONE COMODO'. The main heading reads 'Great to have you back!'. Below this, there are two input fields: 'Username' and 'Password'. A checkbox labeled 'Remember Me' is positioned to the left of a blue link that says 'Forgot password?'. A prominent blue button labeled 'SIGN IN' is centered below the input fields. Underneath the button, it says 'New here?' followed by a blue link 'Create an account'. At the bottom, there are two buttons: 'Available on the Apple Store' with the Apple logo and 'Android App on GOOGLE PLAY' with the Google Play logo.

- 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

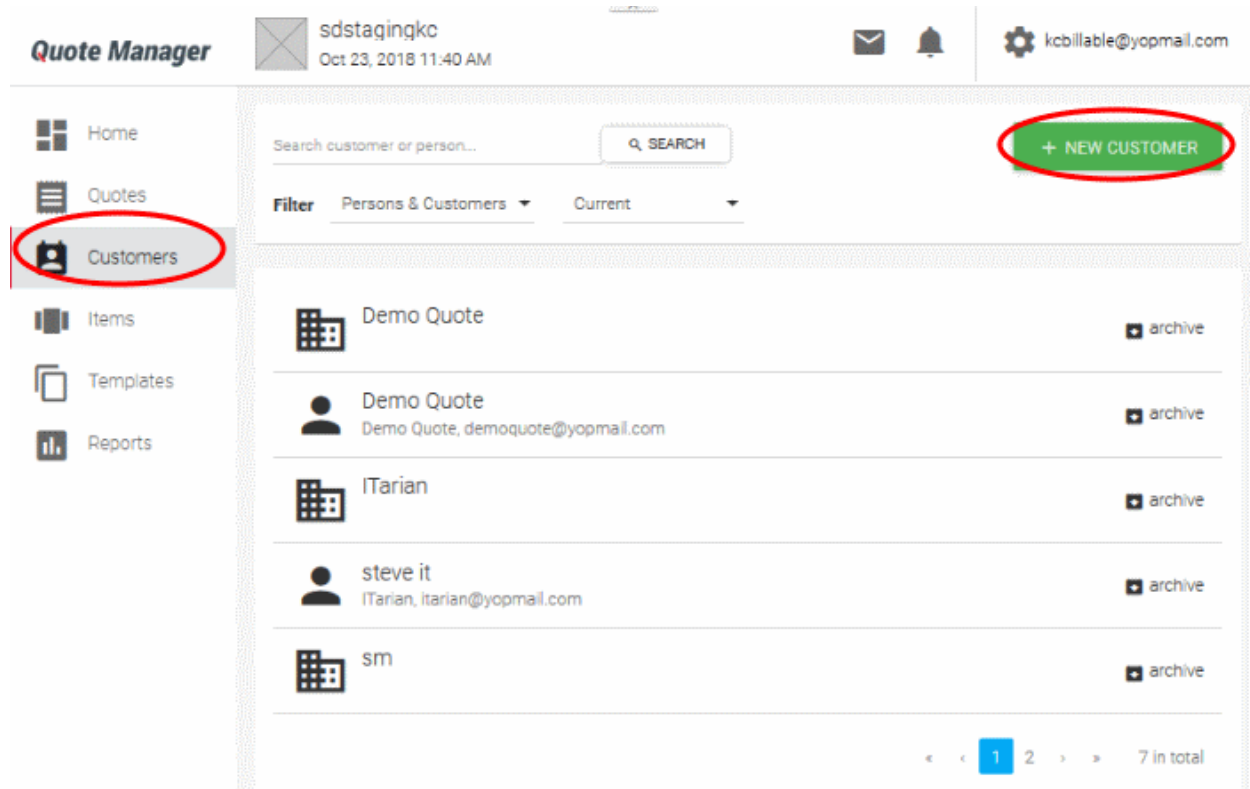
ITarian will open at the dashboard.

- 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 Contacts

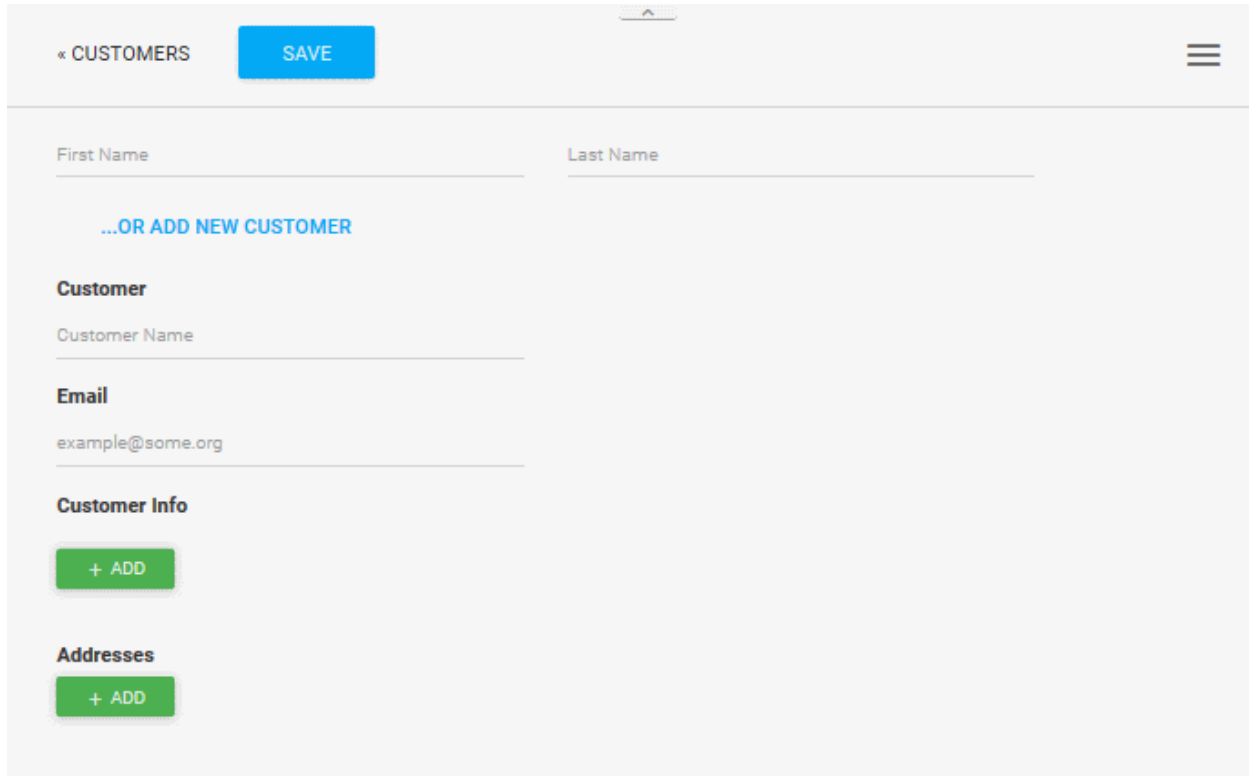
The next step is to add contacts/companies to whom you want to send quotes.

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



The screenshot displays the Quote Manager interface. At the top, the header shows the user's name 'sdstagingkc' and the time 'Oct 23, 2018 11:40 AM'. On the left, a navigation menu includes 'Home', 'Quotes', 'Customers' (highlighted with a red circle), 'Items', 'Templates', and 'Reports'. The main content area features a search bar with the text 'Search customer or person...' and a 'SEARCH' button. To the right of the search bar is a green button labeled '+ NEW CUSTOMER', which is also circled in red. Below the search bar, there are filter options: 'Filter Persons & Customers' and 'Current'. The main area contains a list of customers, each with a name, email address, and an 'archive' button. The list includes 'Demo Quote', 'Demo Quote, demoquote@yopmail.com', 'ITarian', 'steve it, ITarian, itarian@yopmail.com', and 'sm'. At the bottom right, there is a pagination control showing '1' selected, '2', and '7 in total'.

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.

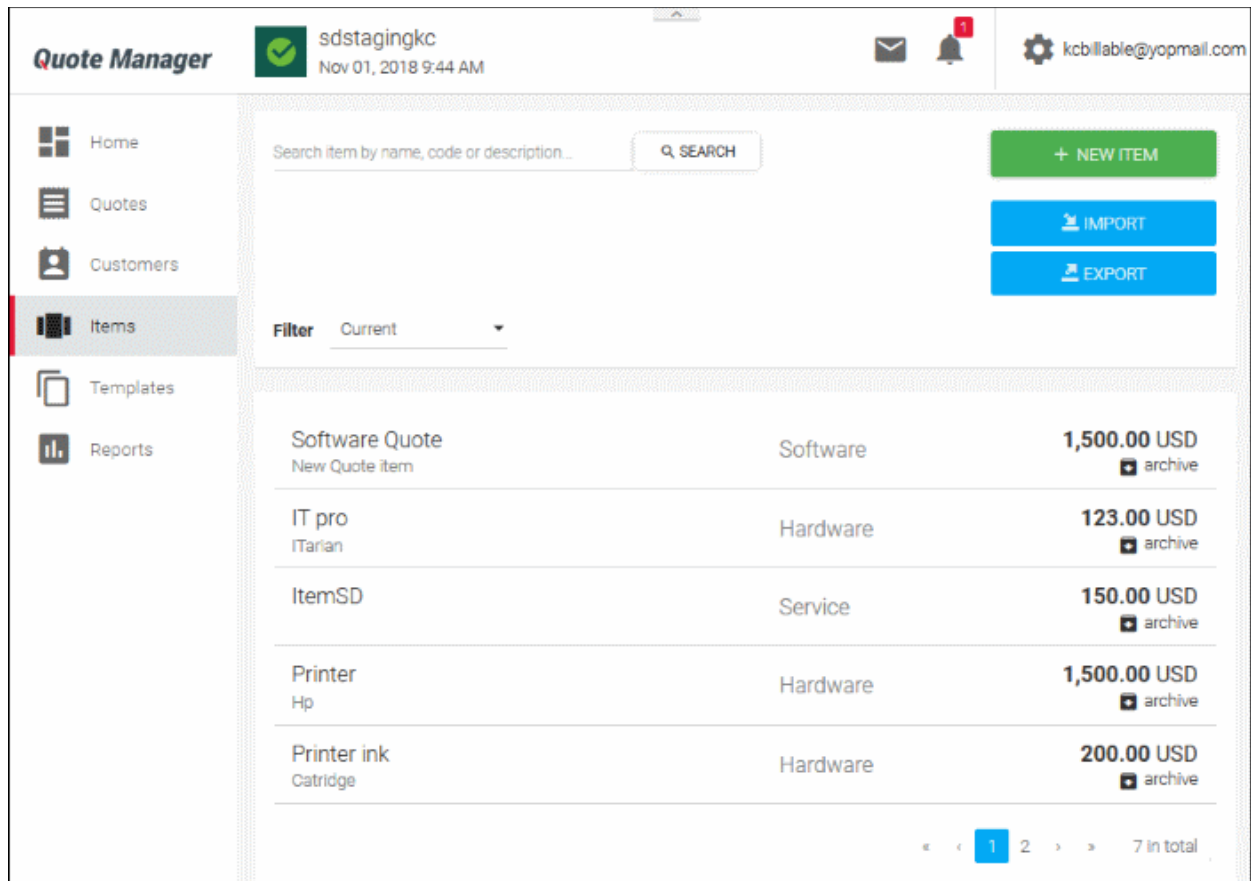
- Click the 'Save' button above the form when you are finished. The customer will be saved and listed in the 'Customer' screen. Repeat the process to add more contacts/companies.

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 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.

« ITEMS SAVE

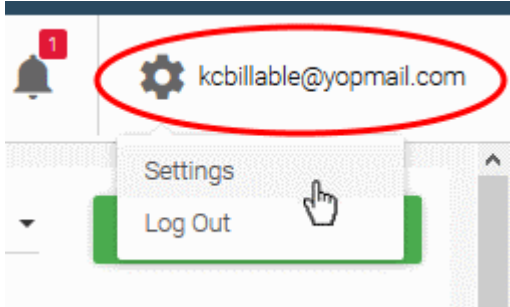
Item Code Product or Service Name

Item description

Item Cost VAT 2% Category Hardware

Type to search Unit of Measurement...

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

	<p>user-name then 'Settings' > 'Tax Rates'.</p>  <ul style="list-style-type: none"> • 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.
<p>Type to search Unit of Measurement</p>	<p>The unit of measurement you would like to assign to the item. For example,</p> <ul style="list-style-type: none"> • 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.
<p>Category</p>	<p>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.</p> <p>The available categories are:</p> <ul style="list-style-type: none"> • 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

« QUOTES

1
 Quote setup

2
 Add items


3
 Additional information

4
 Summary

Quote setup

***To**

***Subject**

Expires on 

Style ▼

Private notes

These notes won't be displayed on PDF

Note heading

Note text

+ ADD ONE MORE NOTE


Previous
Next

?

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 Contracts . 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. <ul style="list-style-type: none"> 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. <ul style="list-style-type: none"> 'My Style' is selected by default

	<ul style="list-style-type: none"> 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 <div data-bbox="555 311 1417 566" style="border: 1px solid black; padding: 5px;"> <p>Style Deer Company </p> <div style="border: 1px solid black; padding: 2px;"> <p>Coyote_prefered</p> <p>For Dithers Company</p> <p style="background-color: #007bff; color: white;">Deer Company</p> </div> </div> <ul style="list-style-type: none"> Once saved, new styles will be available for selection in the 'Style' drop-down of the 'New Quote' form
<p>Private notes - Add comments for your reference and internal communication. These notes will not be shown in the quote sent to the customer.</p>	
Note heading	Title related to your note.
Note text	<p>Brief information of the internal note. To add additional notes for the quote, click the 'ADD ONE MORE NOTE' button:</p> <div data-bbox="810 943 1134 994" style="text-align: center; margin-top: 10px;"> <p style="background-color: #00aaff; color: white; padding: 5px 15px; display: inline-block;">+ ADD ONE MORE NOTE</p> </div>

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.

« QUOTES

1 — 2 — 3 — 4

Quote setup — Add items — Additional information — Summary

Add items

Currency USD \$ ▼

Hardware Service Software

Search item in Hardware [+ ADD NEW ITEM](#)

CODE	NAME	DESCRIPTION	PRICE	QUANTITY	UNIT OF MEASUREMENT	RATE, %	ITEM TOTAL
To add existing item use search box above or Add new item							

[Previous](#) [Next](#)

- Specify the currency which you want to use in the quote (default = USD). If you change currency, all items will be charged in the new currency at the current exchange rate. You can manually change the exchange rate should you desire.
 - To add products to the quote, choose the category into which your item fits then start searching the item in the text box.
 - 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 2 - 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

1
 Quote setup

2
 Add items

3
 Additional information

4
 Summary

Add items

Currency USD \$

Hardware
Service
Software

Search item in Service + ADD NEW ITEM

CODE	NAME	DESCRIPTION	PRICE	QUANTITY	UNIT OF MEASUREMENT	RATE, %	ITEM TOTAL
Office furniture	Office furniture, table ligh-gray (40) chair blue (40)	Office furniture transportation	<input style="width: 40px;" type="text" value=""/>	<input style="width: 40px;" type="text" value="80"/>	<input style="width: 40px;" type="text" value="Piece"/>	<input style="width: 40px;" type="text" value="V"/>	2,320.00
Board	White plastic board		<input style="width: 40px;" type="text" value=""/>	<input style="width: 40px;" type="text" value="2"/>	<input style="width: 40px;" type="text" value="Unit"/>	<input style="width: 40px;" type="text" value="V"/>	30.00

Quote discount, %

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.

1 Quote setup 2 Add items 3 Additional information 4 Summary

Additional information

Signature *Tuticorin*

Contacts details [Select all](#)

Phone example +91-1234567891

E-mail sdstagingko@yahoo.com

Website [NO WEBSITE]

Header Quotes for Tuti

Footer Tuticorin Pvt Ltd

[Previous](#) [Next](#)

- 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.

• QUOTES
SEND
[SAVE QUOTE AS DRAFT](#)

1
Quote setup

2
Add items

3
Additional information

4
Summary

Review

Quote for Printers

Quotes for Tuticorin

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

SERVICE	
Services	USD 125.00
IT services	x1 Hours USD 125.00

Sub-total	USD 1,625.00
Pre Tax Total	USD 1,625.00
Tax	USD 292.50
Grand Total including tax	USD 1917.50

Tuticorin Pvt Ltd

adst...

Quote Number
581

For
Sam

To
Tuticorin Sam

Created
Oct 26, 2018
11:38 AM

Expires
Jan 24, 2019
12:27 PM

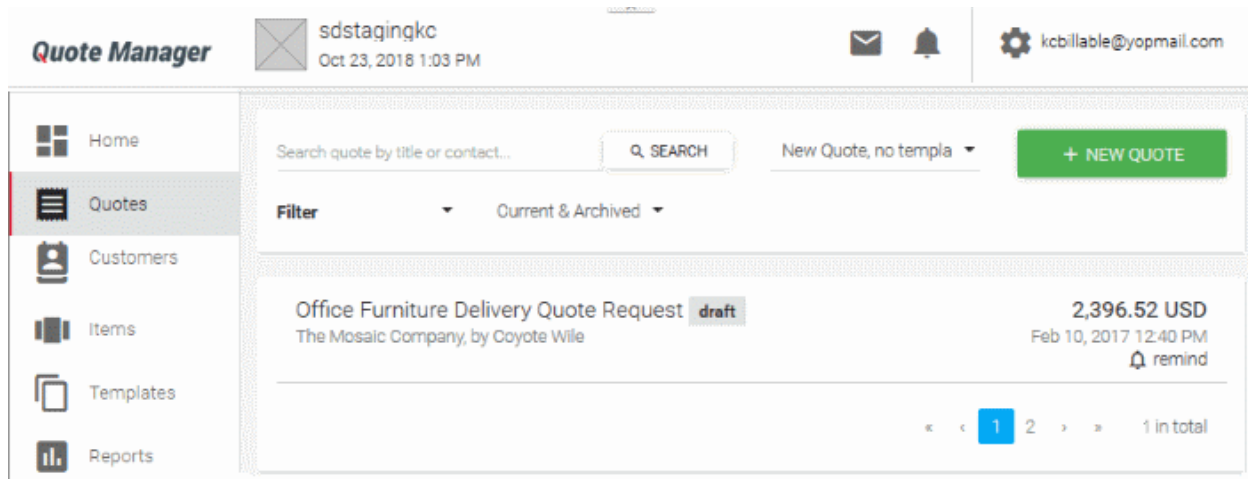
From
kc billable

Email
adstagingkc@yopmail.com

DOWNLOAD PDF

Previous
SEND
[SAVE QUOTE AS DRAFT](#)

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

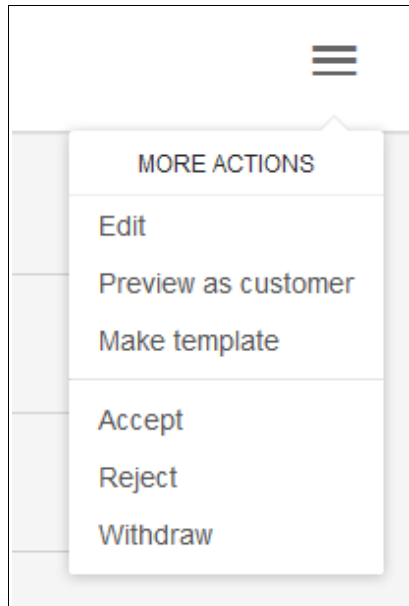


The screenshot shows the Quote Manager interface. At the top, there's a header with the logo, user information (sdstagingkc, Oct 23, 2018 1:03 PM), and navigation icons (mail, bell, settings). A left sidebar contains menu items: Home, Quotes (selected), Customers, Items, Templates, and Reports. The main content area has a search bar, a filter dropdown set to 'Current & Archived', and a '+ NEW QUOTE' button. Below this, a list of quotes is shown. The first quote is 'Office Furniture Delivery Quote Request' with a value of 2,396.52 USD, dated Feb 10, 2017 12:40 PM, and marked as a 'draft'. A 'remind' icon is also visible. At the bottom right of the list, there are pagination controls showing '1' of '1 in total'.

- 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

^ HIDE QUOTE ACTIVITY	
Feb 08, 2017 3:17 PM	Quote rejected by Coyote Wile
Feb 08, 2017 3:15 PM	Quote published by Coyote Wile
Feb 08, 2017 2:50 PM	Quote created by Coyote Wile

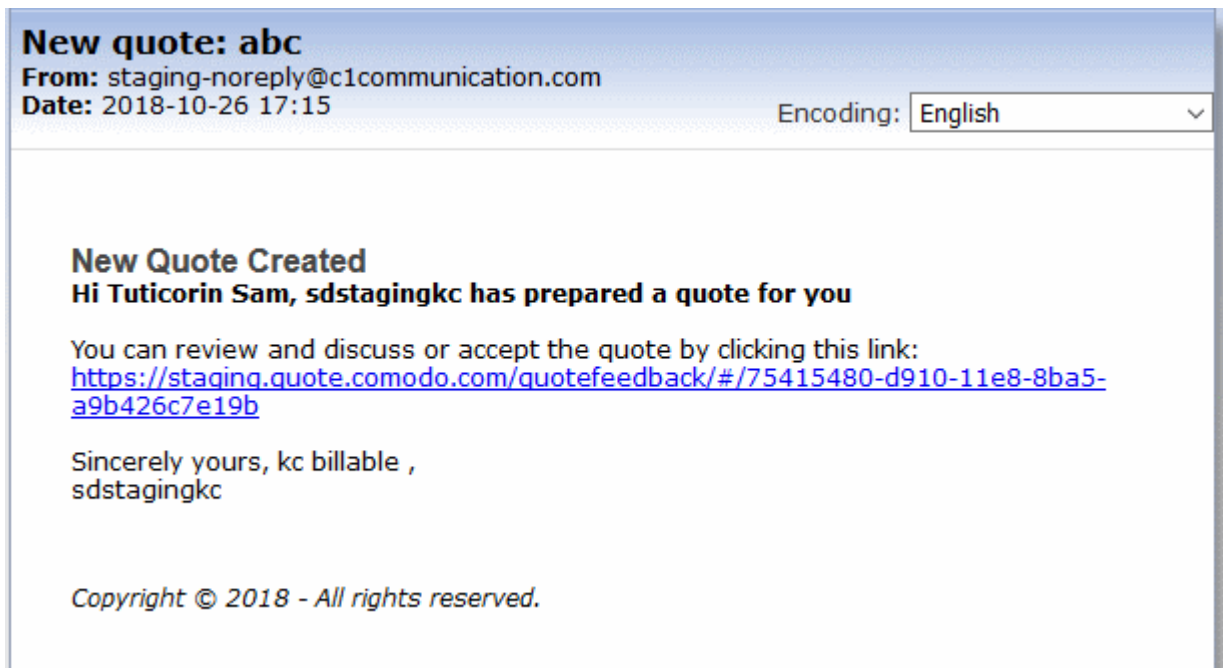
- The menu (top right) contains additional actions which allow you to edit the quote, preview it as a customer, convert the quote to a template or to withdraw the quote:



- 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, 2018 11:28 AM

Expires Jan 24, 2019 12:27 PM

From kc billable

Email sdstagingkc@yopmail.com

Tuticorin


Tuticorin Pvt Ltd

Feedback

▶ POST
CANCEL

Yes, I agree to accept this quote

✓ ACCEPT QUOTE
REJECT

 [DOWNLOAD PDF](#)

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:

DOWNLOAD PDF

Private notes

ServiceDesk Ticket ID
16

ServiceDesk Ticket Link
<https://coyote.servicedesk.comodo.com/scp/tickets.php?id=16>

ServiceDesk Notes
Send a quote for transend 8gb pendrive

Feedback

Oxford MM Apr 04, 2016 10:52 AM
This is above our budget. Can you consider providing some discount?

> ANSWER
DISMISS - NO NEED TO ANSWER

> SHOW QUOTE ACTIVITY

- 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:

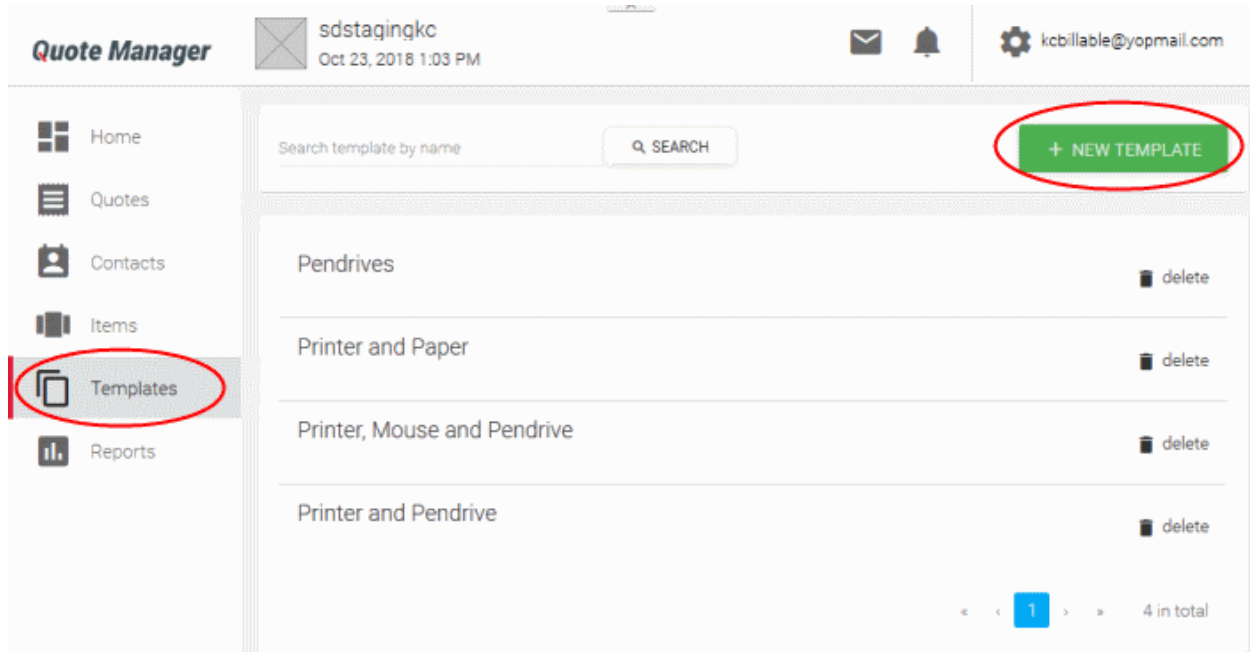
The screenshot shows the Quote Manager interface. On the left is a navigation menu with options: Home, Quotes, Customers (circled in red), Items, Templates, and Reports. The main content area shows a search bar for customers, a filter dropdown set to 'Persons & Customers', and a '+ NEW CUSTOMER' button (circled in red). Below this is a list of quotes with columns for quote name, customer name, and an 'archive' button. The list includes entries for 'Demo Quote', 'ITarian', 'steve it', and 'sm'. At the bottom right, there is a pagination control showing '1' of 2 pages and '7 in total' items.

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

Style ▼

Header

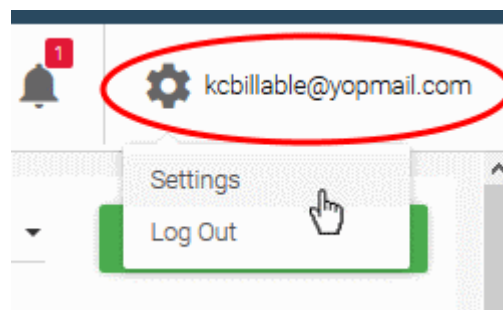
Footer

Hardware Service Software

Search item in Hardware

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.

« TEMPLATES
SAVE

Title of the template...

Title

Style

Header

Footer

Hardware

Service

Software

Search item in Service

CODE	NAME	DESCRIPTION	PRICE	QUANTITY	UNIT OF MEASUREMENT	RATE, %	ITEM TOTAL
Office furniture	Office furniture, table lighth-gray (40) chair blue (40)	Office furniture transportation	<input type="text" value="29"/>	<input type="text" value="40"/>	<input type="text" value="Unit"/>	<input type="text" value="VAT"/>	1,160.00

Sub-total USD 1,160.00

Tax USD 23.20

Total including tax **USD 1183.20**

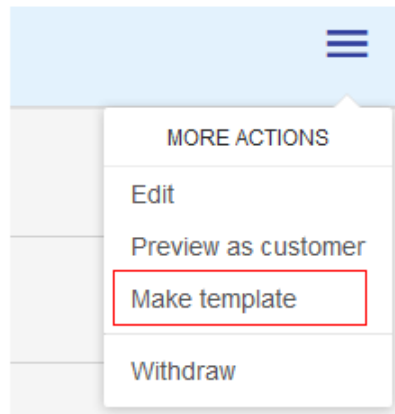
- Click the 'SAVE' button to save your template.

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.

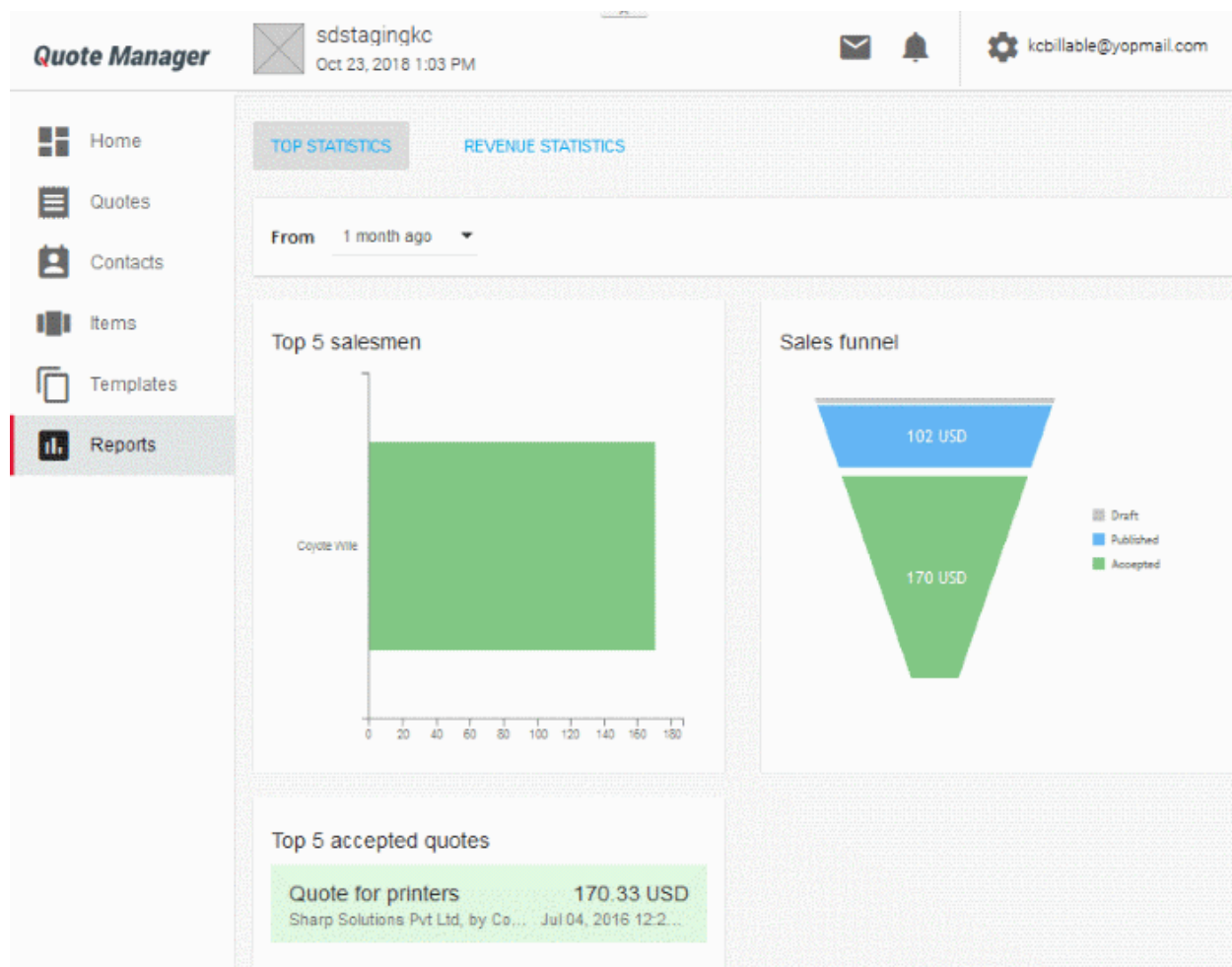
Your template can now be tailored to generate customer-specific quotes as explained in **Step 4 - Generate and Send a Quote**.

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':

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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