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Quote Manager

Comodo One

Software Version 3.26

Quote Manager
Quick Start Guide

Guide Version 2.6.120318

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 tutorial briefly explains how to start using QM

- **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 Comodo One management platform. To access the module, first login to Comodo One 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 Comodo account

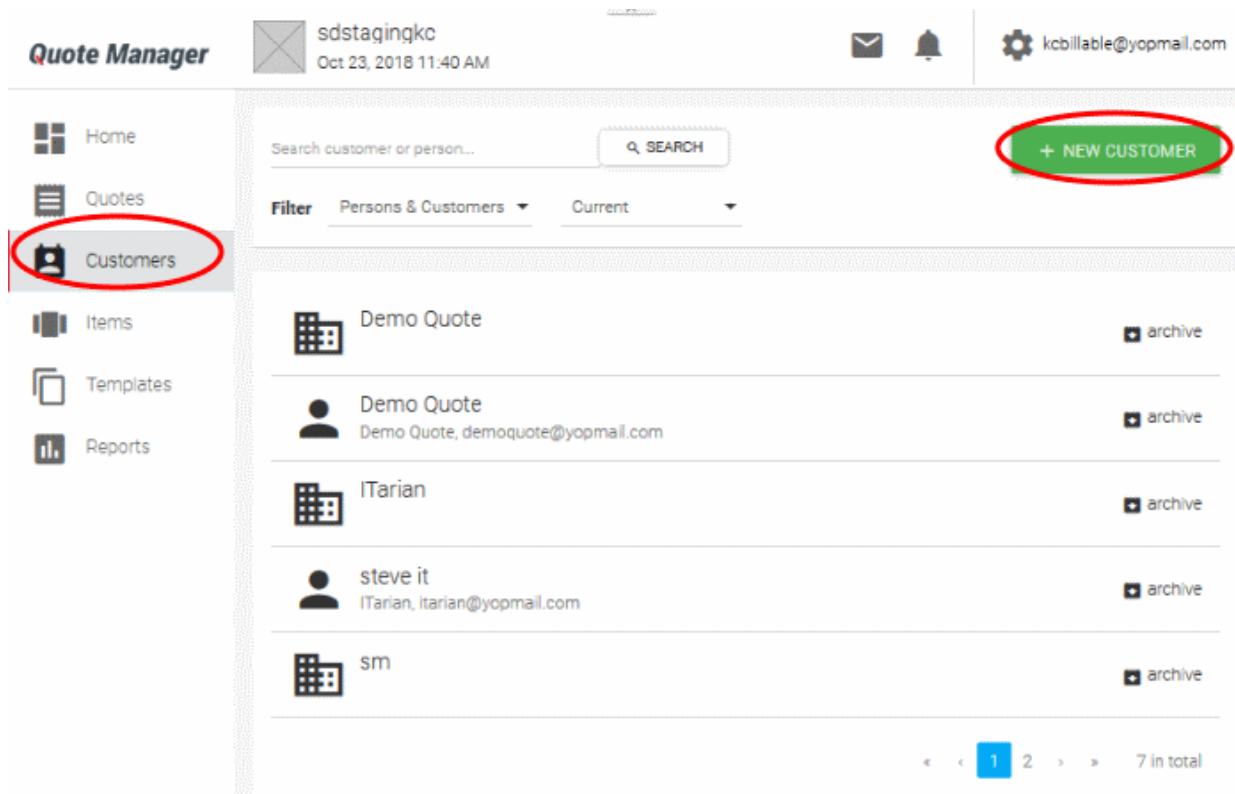Comodo will open at the dashboard.

- 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.
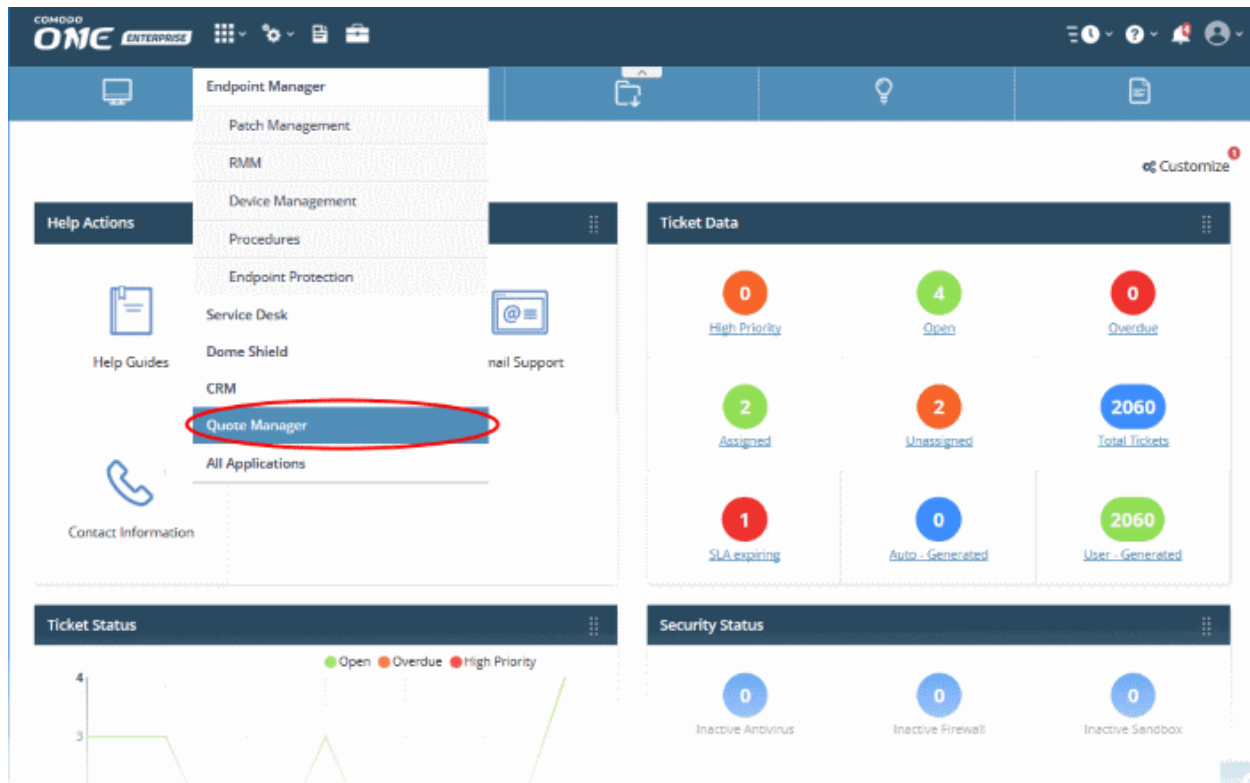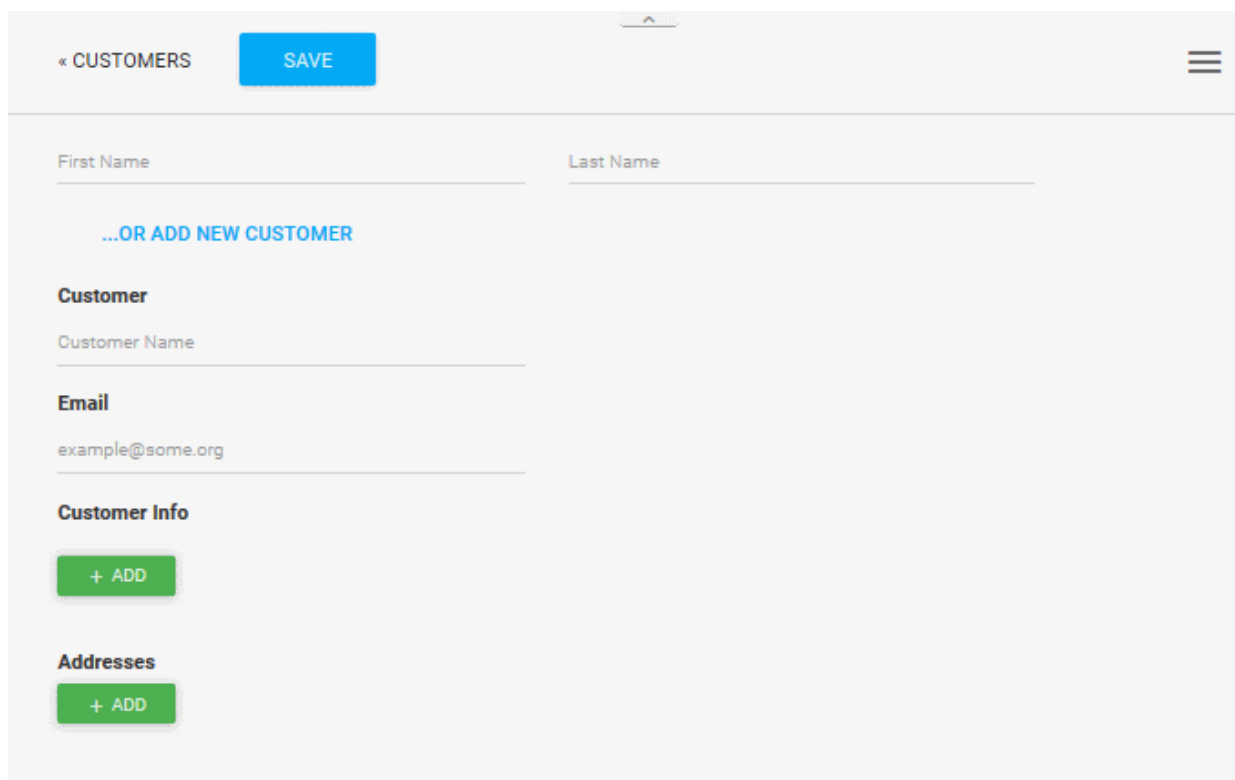

Step 2 – Add Contacts

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 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.
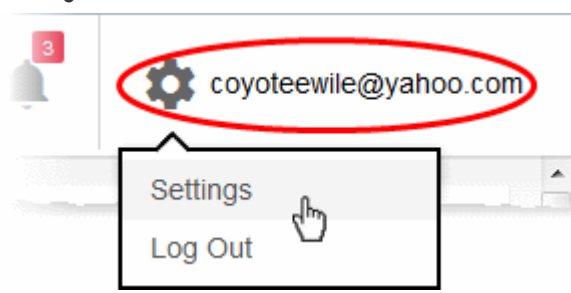

Add Item - Form Fields	
Item Code	The unique key identifier of the product. This can be an internal product ID, product code, version number, serial number or part number.
Product or Service Name	The official label of the item
Item description	Brief summary of the product or service.
Item Cost	Price 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. 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 'SAVE' 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.
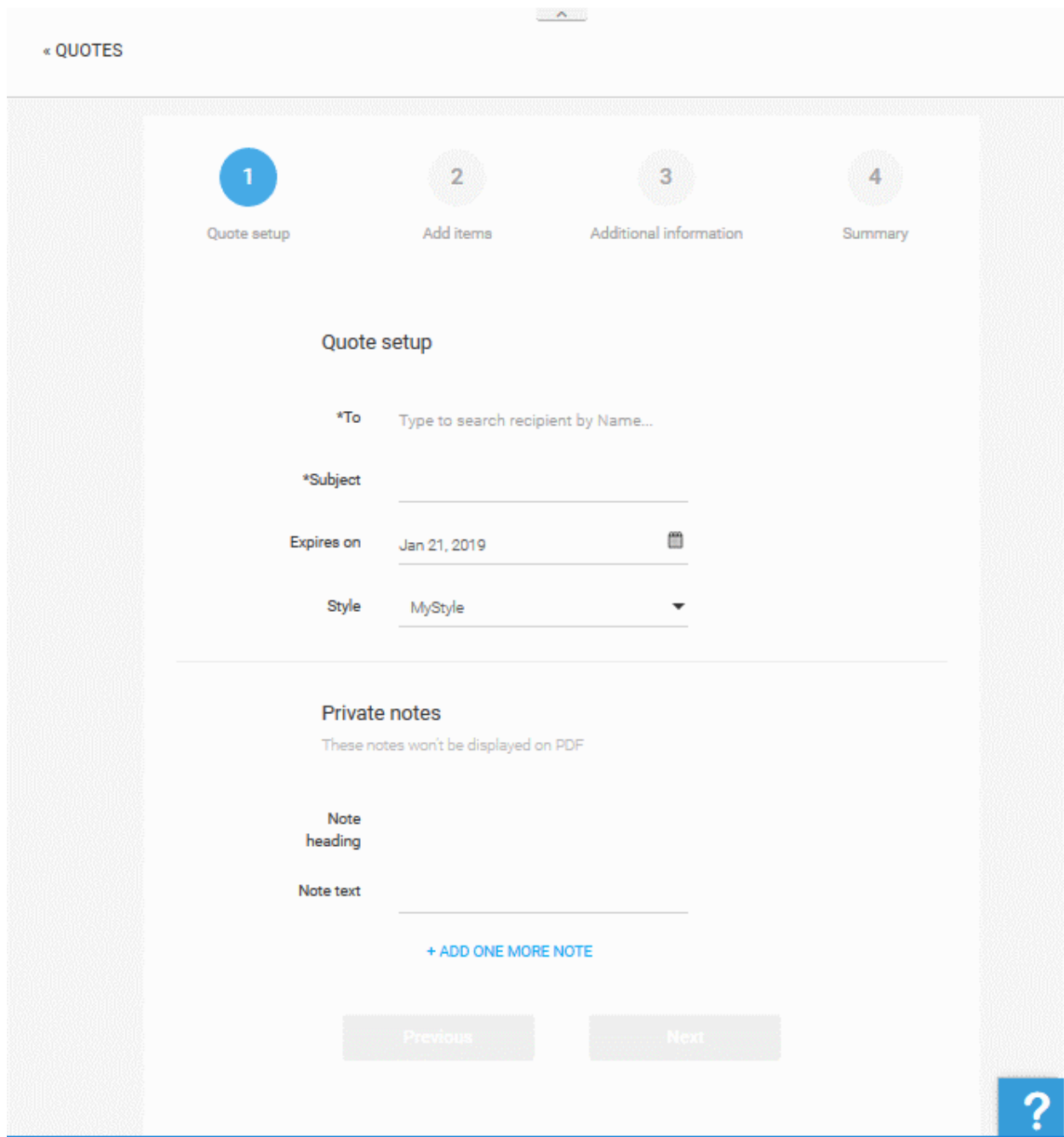
The new quote can be configured and executed in four steps:

- **Quote setup**
- **Add items**
- **Additional information**
- **Summary**

Step 1 - Quote setup

The setup stage has two areas:

- Quote setup
- Private note

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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 Contacts**. 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.

<table>
<tr>
<td></td>
<td>

• '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

</td>
</tr>
</table>

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.

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- 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:

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- 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.

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« QUOTES

1	2	3	4
Quote setup	Add items	Additional information	Summary

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

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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'
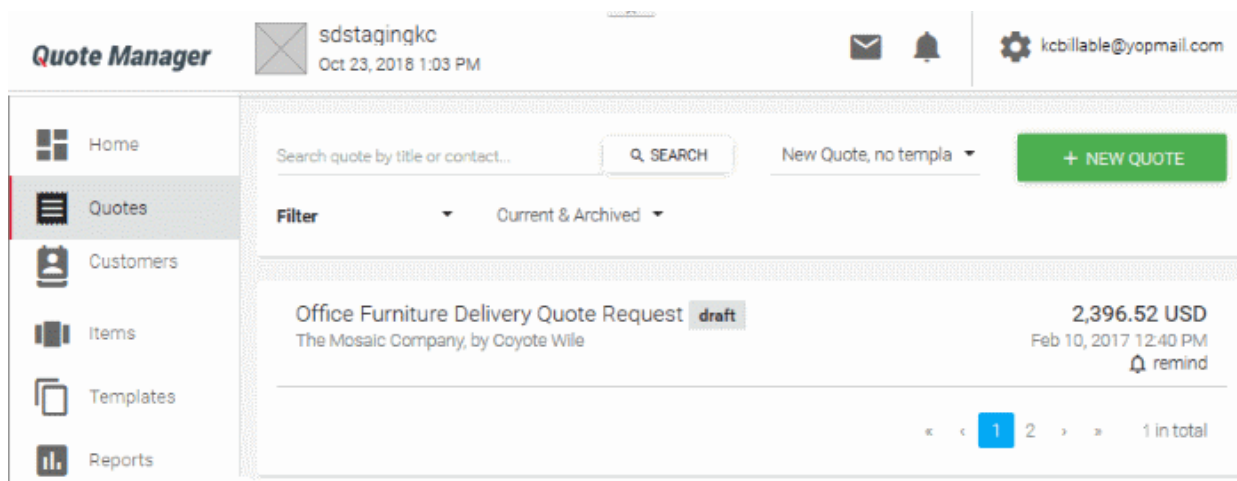
- Customers will receive a notification email which contains a link to a web-page containing your quote. Customers can provide feedback or accept/reject your quote on this page. Your quote is securely hosted on **https://quote.comodo.com**. See **Step 5** for more details on quote finalization.

- 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:
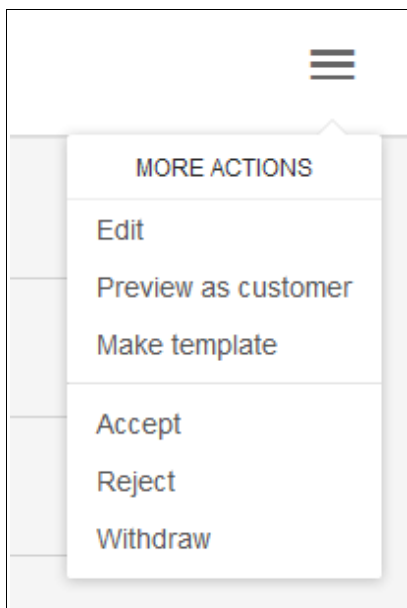
- All feedback from your customer regarding the quote will also be stored on the quote detail screen. Please see **step 5** for more details on this.

Step 5 – Answer Feedback and Finalize a Quote

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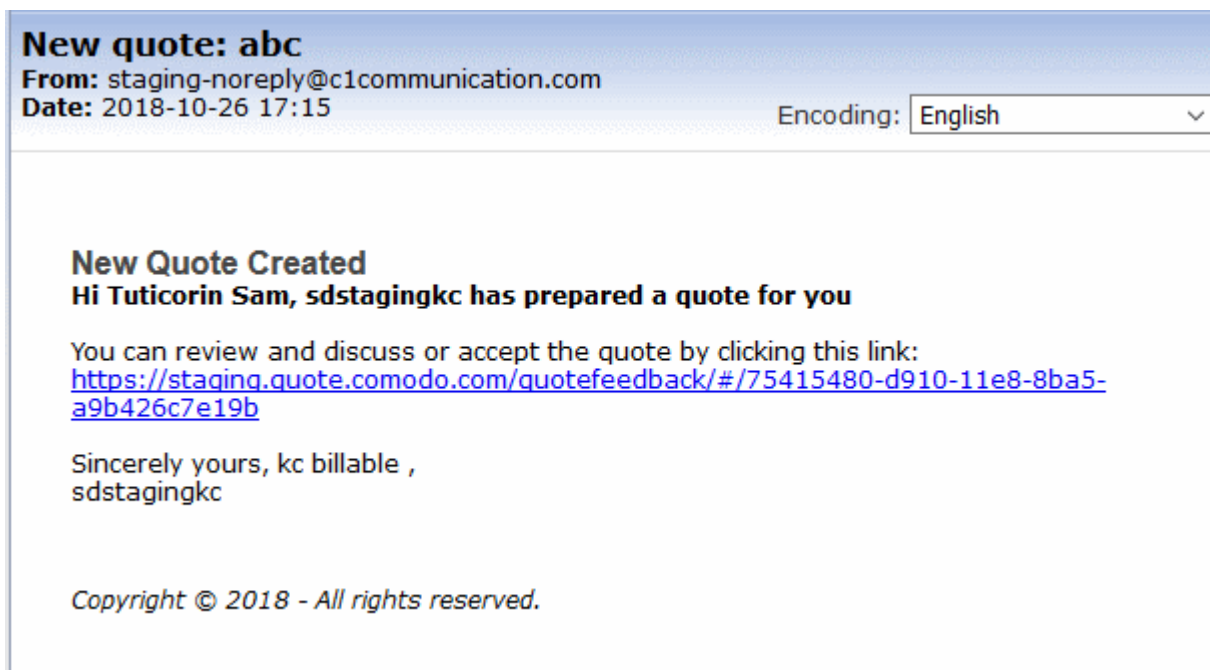
After clicking the link, your quote will open in a web browser and allow your client to post queries and/or accept/reject the quote.

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' on the left and then the '+New Template' button
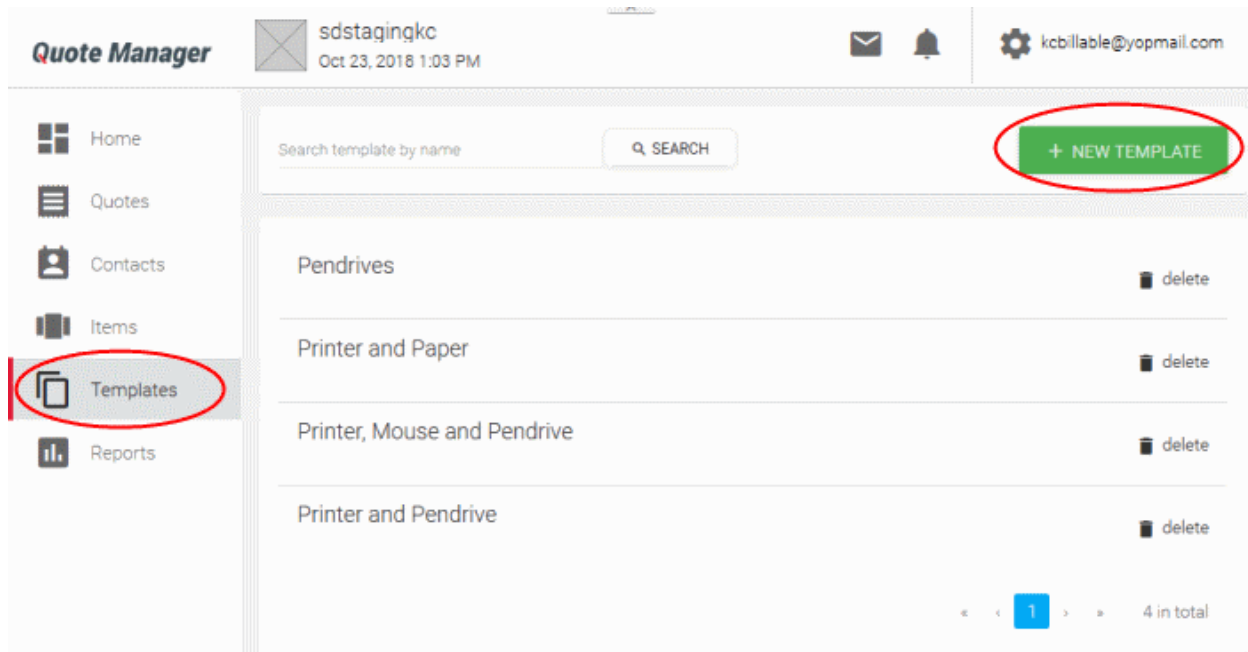
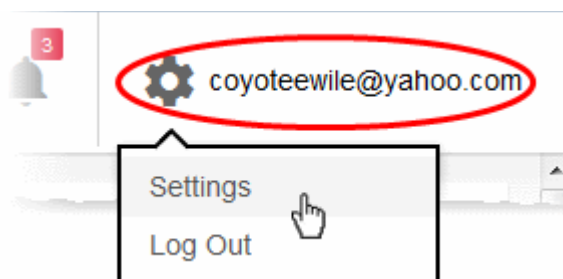The add new template screen will be displayed:

- **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':
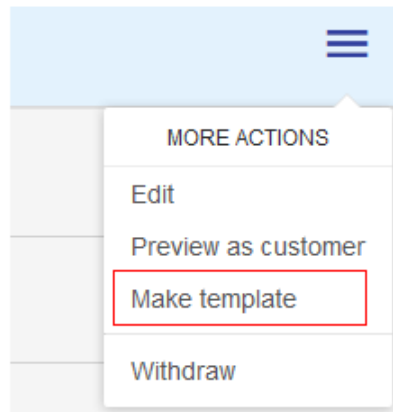

Step 7 - View Reports

- 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
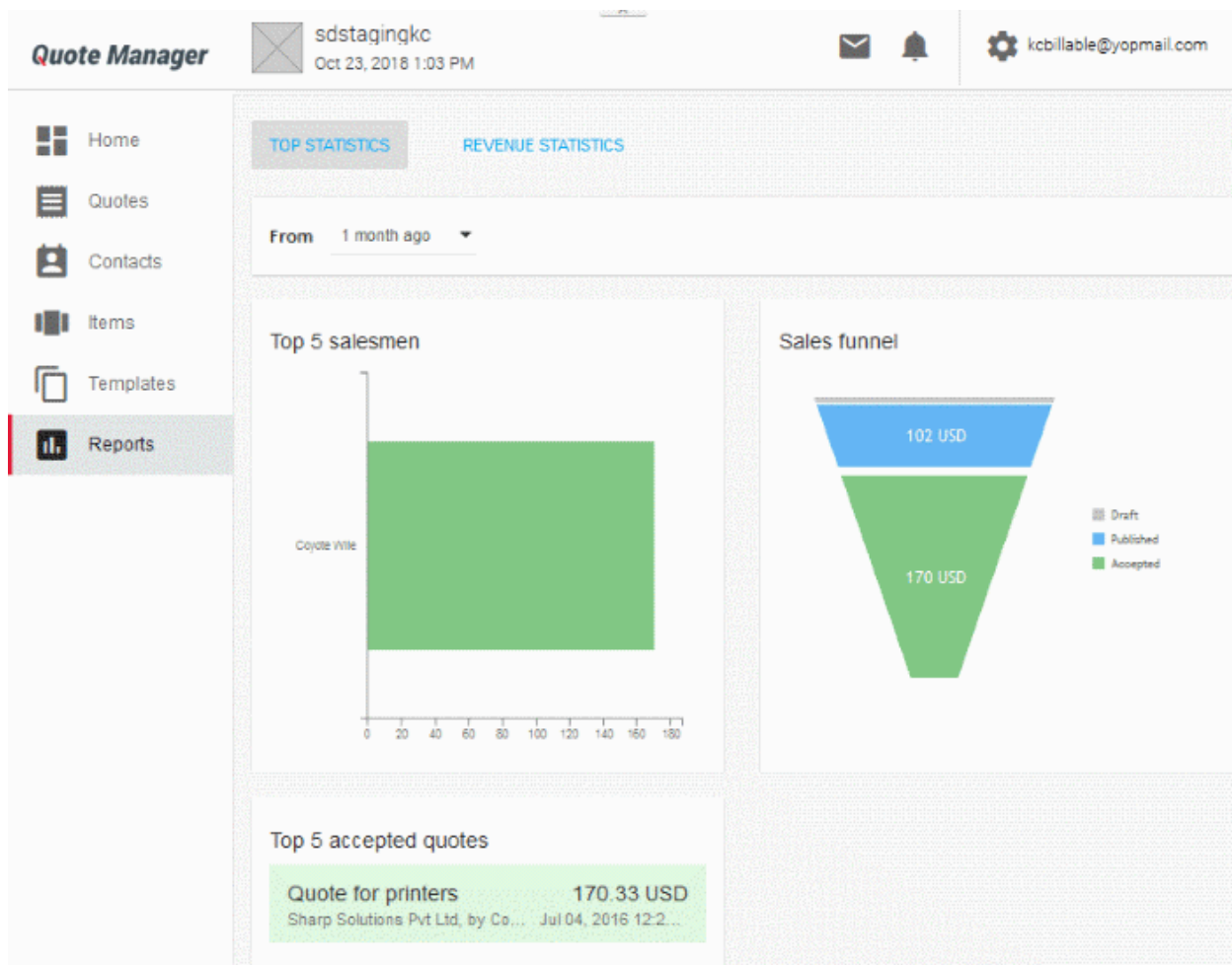
- **Top Statistics** - Displays total revenue generated by top 5 accepted quotes, lists the top 5 quotes by value and shows a funnel of the value of all generated quotes according to their life-cycle status.
- **Revenue Statistics** - Displays monthly, cumulative monthly and average monthly revenues. 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':
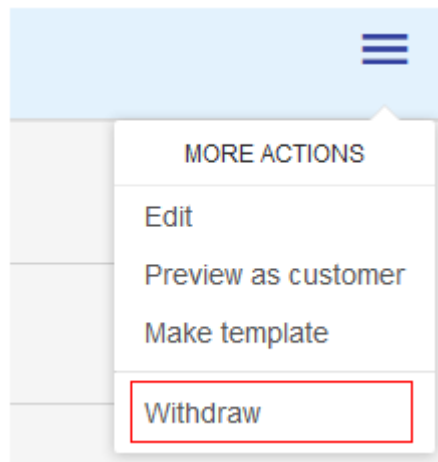
About Comodo Security Solutions

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.

About Comodo Cybersecurity

In a world where preventing all cyberattacks is impossible, Comodo Cybersecurity delivers an innovative cybersecurity platform that renders threats useless, across the LAN, web and cloud. The Comodo Cybersecurity platform enables customers to protect their systems and data against even military-grade threats, including zero-day attacks. Based in Clifton, New Jersey, Comodo Cybersecurity has a 20-year history of protecting the most sensitive data for both businesses and consumers globally. For more information, visit comodo.com or our **blog**. You can also follow us on **Twitter** (@ComodoDesktop) or **LinkedIn**.

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