



c360 Advanced Quote and Order Processing for Microsoft Dynamics CRM 4.0

Overview

c360 Advanced Quote and Order Processing is a Microsoft Dynamics CRM enhancement which allows you to create quotes and orders in a **single screen**. You can easily print or email quotes to Accounts (or Contact), edit and track revisions and manage the profitability of each quote all from within Dynamics CRM.

Advanced Quote & Order Processing makes it easy to send quotes to your customers the way they want to see them. With a click your quote becomes a Word, Excel, pdf file or an email. Modifications are made easily and saved without losing the original quote. Line items can be added, deleted and modified.

Unique features allow users to adjust the profit they want by modifying discounts and margin percentages instantly on the fly all on one screen. And your team no longer needs to spend time after hours creating pipeline reports since it's automatically done for them.

Advanced Quote & Order Processing also prints the shipping label, packing slips and picking documents by retrieving data from Microsoft Dynamics CRM

The screenshot displays the Microsoft Dynamics CRM interface for a quote titled "Computer Equipment Proposal". The interface includes a navigation pane on the left with options like "Information", "Quote Products", and "Activities". The main area is divided into tabs: "General", "Info", "Addresses", "Notes", "Printing", and "Administration". The "Info" tab is active, showing fields for "Quote ID", "Name", "Potential Customer", "Primary Contact", "Revision ID", "Price List", "PO Number", "Sub-Total", "Discount", "Freight", "Tax", "Total", "Probability", "Quote Discount (%)", "Currency", and "Tax Rate (%)". Below these fields is a "Products" section with a table listing items:

Product Number	Alternate Name	Price Per Unit	Quantity	Extend
10 53847A	15" Flat Screen Monitor - black	\$998.00	1.00000	\$898.00
20	Color Printer 1000	\$3,000.00	1.00000	\$3,000.00

The status bar at the bottom indicates "Status: Draft" and "Done".



The features of Advanced Quote and Order Processing are

- Quickly create customer quotes and orders from Microsoft CRM
- View multiple lines of a Quote or Order and header information in a single screen
- Easily add, delete, edit or re-sequence items on a Quote or Order
- Search for items by part number, partial part number or item description
- Off-line Outlook client
- Complete customization control of all windows using Microsoft Dynamics CRM customization tools - including adding and removing fields from all windows
- Java script customization
- Easily link a Quote or Order to a Contact or an Account
- Easily link a Quote or Order to an Opportunity
- One click print, email or fax quotes from Microsoft CRM
- Create Acrobat PDF Quote or Order from Microsoft CRM
- Provides multiple Quote and Order forms to be printed
- Calculates margin and margin percentage per line item
- Permits change of item pricing by modifying margin, margin percentage, discount, list price and cost
- Permits write in products on Quotes and Orders
- Quotes and Orders can be copied from one Account or Contact to another
- Select ship via or default ship via from Account or Contact
- Auto creates Quote numbers and revision numbers
- Pipeline reporting based upon active quotes
- Allows probability to be associated with a quote
- Permits Quote or Order to be exported to Microsoft Excel
- Search Quotes and Orders for a single part number and then copy to create a new Quote or Order
- Convert Quotes to Orders
- Activate, Deactivate or Revise Quotes and Orders
- Print shipping labels & picking tickets directly from Microsoft CRM
- Quickly create customer orders, sample orders, literature requests or quotes directly in Microsoft CRM for any Contact in the database
- Easily select items from a lookup menu
- Search for items by part number, partial part number or item description
- Easily edit or delete line items
- Default price level from Contact record or choose from alternate pricing levels
- Automatically create opportunities and schedule follow-up activities using CRM Workflow
- Track filled and unfilled orders
- Print Shipping Labels, Picking Tickets and Product Labels directly from Microsoft CRM
- Select ship via or default ship via from Contact



- Easily modify Pricing, Cost and Profit information
- Create, edit and view the expanded detail of each line item in a single view
- Modify discounts, margins and margin percentages for each line item
- Easily write in line items on a Quote or Order
- Re-sequence line items on a Quote or Order

- Print Quotes and Orders to different output formats (Adobe PDF, HTML)
- Email Quotes or Orders
- Output Quotes and Orders to Excel
- Re-Sequence items on Quotes or Orders



Evaluation Copies

Free evaluation copies of c360 Advanced Quote and Order Processing can be obtained from c360 Solutions' web site. Evaluation copies come with a license key that provides unlimited usage with the sample installations ('Adventure Works Cycle', 'Adventure Works Cycle Demo') of Microsoft CRM. 15-day trial production evaluation license files are also available on the c360 web site.

Pricing

The cost of Advanced Quote and Order Processing is

Advanced Quote & Order Processing Server	Per Server	\$1500
Advanced Quote & Order Processing	Per User	\$400
Advanced Quote Processing	Per User	\$250

Licensing

The licenses are sold by named Microsoft Dynamics CRM users who are creating quotes or orders. For example, if your company has 20 active Dynamics CRM users but only 5 users will be creating quotes or orders, you only need to purchase 5 licenses of Advanced Quote and Order Processing

Support, Upgrades and Enhancements

The list price of Advanced Quote and Order Processing includes first year support, upgrades and enhancement per the c360 Solutions Software license agreement. After the first year, a support and enhancement plan can be purchased for 20% of the total cost

c360 Partner Program

Authorized Microsoft CRM partners may inquire about the c360 partner program by visiting <http://www.c360.com/PartnerProgram.aspx>.

Information

For more information on c360 Advanced Quote and Order Processing, contact c360 Solutions at:

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