

# **LMI TCO Analyzer**

**lmitools.com**

User Guide

© 2013 LMI Solutions, All rights reserved.

# Table of Contents

<b>Chapter 1 Introduction.....</b>	<b>3</b>
1.1 Installation requirements .....	3
1.2 Contacting technical support .....	3
<b>Chapter 2 Using TCO (Imitools.com) .....</b>	<b>4</b>
2.1 Logging on.....	4
2.2 Understanding the interface .....	4
2.3 Creating a proposal.....	5
Adding a company.....	5
Copying a company .....	6
Deleting a company.....	6
Starting the proposal .....	7
Getting devices into the proposal .....	7
Get Meters .....	8
Manually Add .....	10
Quick Add.....	12
Generating proposal documents .....	12
2.4 Managing users .....	13
Edit user details .....	14
Add a new user .....	15
2.5 Managing the dealer .....	16
Changing dealer details.....	16
Edit Dealer Contact .....	16
Edit Lease Factors .....	17
Edit Defaults.....	17
Downloading Templates .....	17
Uploading Templates .....	18
Vertical Templates.....	19
Using Margin Categories.....	19
<b>Appendix A: Sample Reports .....</b>	<b>22</b>
Sample Proposal Pages .....	22
Sample Master Services Page .....	23
Sample Quarterly Business Review Pages .....	24

Please visit [http://support.lmisolutions.com/techsupport/FAQ/TCO\\_FAQ.html](http://support.lmisolutions.com/techsupport/FAQ/TCO_FAQ.html) for our TCO FAQ

# Chapter 1 Introduction

Welcome to LMI's TCO Analyzer—a proposal generation tool for managed print services designed to help owners, sales representatives, and administrative personnel grow and streamline their business.

This is guide designed to assist users with using and managing the TCO system.

## 1.1 Installation requirements

Since TCO is a web application, it does not require installation of any kind. Google Chrome or Mozilla Firefox are the recommended web browsers for access [lmitools.com](http://lmitools.com).

## 1.2 Contacting technical support

Contact technical support toll-free at 866-980-8722 or by email at [support@lmi-solutions.com](mailto:support@lmi-solutions.com).

## Chapter 2 Using TCO

The TCO web console located at [www.lmitools.com](http://www.lmitools.com) is the primary means by which users create proposals based on real meters imported from PageTrac.com or another meter read software.

This chapter discusses:

- Logging on
- Understanding the interface
- Creating a proposal
- Managing users
- Managing the dealer

### 2.1 Logging on

Each user is assigned a unique user name (typically an email address) and password to log on to lmitools.com.

**To log on to TCO:**

1. In your browser window, navigate to <http://www.lmitools.com>.
2. Enter your user name and password in the designated boxes, and then click **Log in**

Please Login to Access TCO Analyzer


**TCO Analyzer Login:**

Username:

Password:

### 2.2 Understanding the interface

The TCO as shown upon login is shown below.



Add Person
Edit Dealer
Change My Settings
Logout

<b>Dealer Name:</b>	LMI Demo Dealer
<b>Address:</b>	46 N 49th Ave
<b>City:</b>	Phoenix, AZ 85043
<b>Phone:</b>	(866) 9808722
<b>Fax:</b>	
<b>Contact:</b>	(demo@lmisolutions.com)

Show  entries

Search:

Users	Last Login	Actions
Demo	2013-03-26 11:16:40 MDT	<a href="#">View Meter Reads</a> <a href="#">View Proposals</a>

Showing 1 to 1 of 1 entries

Previous
Next

Depending on the access a user has, some features may or may not be available.

## 2.3 Creating a proposal

### Adding a company

A company must be added to create the proposal for. The information entered when creating a company will be displayed on the proposals that are generated.

#### To add a company:

1. From the person list, click **"View Proposals"** to the right of the representative completing the proposal.

The screenshot shows the LMI user interface. At the top, there are buttons: Add Person, Edit Dealer, Change My Settings, and Logout. Below this is a form for a dealer with the following information:

Dealer Name:	LMI Demo Dealer
Address:	46 N 49th Ave
City:	Phoenix, AZ 85043
Phone:	(866) 9808722
Fax:	
Contact:	(demo@lmisolutions.com)

Below the form, there is a table with columns: Users, Last Login, and Actions. The first row shows 'Demo' as the user, with a last login of '2013-03-26 11:16:40 MDT'. In the Actions column, there are two links: 'View Meter Reads' and 'View Proposals'. The 'View Proposals' link is circled in red. At the bottom, it says 'Showing 1 to 1 of 1 entries' and has 'Previous' and 'Next' navigation buttons.

2. Click **"Add Proposal"** to add a company.

The screenshot shows the LMI user interface. At the top, there are buttons: Add Proposal, Change My Settings, Dealer Home, and Logout. Below this is a form for a company with the following information:

Company Name		Monochrome Margin	50
Address		Color Margin	50
City		<input type="checkbox"/> Use Margin Categories	
State		<input type="checkbox"/> Toner Only Proposal	
Zip			
Phone	+ ( ) ext:		
Contact		Default Black Coverage	7
Contact Email		Default Color Coverage	21
Current TCO			

At the bottom, there are 'Cancel' and 'Save' buttons. The 'Save' button is circled in red.

3. Fill in the details for the company and click **Save**.

The screenshot shows the LMI user interface. At the top, there are buttons: Change My Settings, Proposals, and Logout. Below this is a form for a company with the following information:

Company Name		Monochrome Margin	50
Address		Color Margin	50
City		<input type="checkbox"/> Use Margin Categories	
State		<input type="checkbox"/> Toner Only Proposal	
Zip			
Phone	+ ( ) ext:		
Contact		Default Black Coverage	7
Contact Email		Default Color Coverage	21
Current TCO			

At the bottom, there are 'Cancel' and 'Save' buttons. The 'Save' button is circled in red.

#### Note

In the **"Current TCO"** field you may enter a set total current cost for the customer. If left blank, the TCO will calculate the current cost by each device.

<b>Note</b>	By checking the <b>“Use Margin Categories”</b> box you will enable the use of Margin Categories. Margin Categories allow you to set specific devices to have a different margin than what is specified on this screen. Please see <b>“Using Margin Categories”</b> on page 19 for more information.
<b>Note</b>	The <b>“Toner Only Proposal”</b> box allows you to exclude all maintenance kits and labor costs from your pricing.

## Copying a company

Companies can be copied in TCO to help you make changes to your proposals without having to change the original.

### To copy a company:

1. From the person list, click **“View Proposals”** next to the user name.
2. Click **“Copy”** to copy a company

The screenshot shows the LMI Proposal List for Demo interface. At the top, there are navigation buttons: Add Proposal, Change My Settings, Dealer Home, and Logout. Below these, there is a search bar and a dropdown menu for 'Show 50 entries'. The main table has columns for Name, Phone Number, Address, and Options. The first row shows 'ABC Dealer' with phone number '(866) 9808722' and address '46 N 49th Ave'. In the Options column, there are links for 'Edit Customer Info', 'Edit Proposal', 'Copy' (circled in red), and 'Delete'. At the bottom, it says 'Showing 1 to 1 of 1 entries' and has 'Previous' and 'Next' navigation links.

## Deleting a company

Companies can be removed from TCO.

### To remove a company:

1. From the person list, click **“View Proposals”** next to the user name.
2. Click **“Delete”** to delete a company

The screenshot shows the LMI Proposal List for Demo interface, similar to the one above. In this instance, the 'Delete' button in the Options column is circled in red, indicating the action to be taken to remove the company.

<b>Warning</b>	As soon as you click <b>“Delete Proposal”</b> the company will be deleted. You will receive no confirmation.
----------------	--------------------------------------------------------------------------------------------------------------

## Starting the proposal

After a company has been saved, you will be taken to the listing of all companies for that representative.

### To begin working on the proposal:

1. Click **“Edit Proposal”** next to the company.

LMI Home | Proposal List for Demo

Add Proposal Change My Settings Dealer Home Logout

Show 50 entries Search:

Name	Phone Number	Address	Options
ABC Dealer	(866) 9808722	46 N 49th Ave	Edit Customer Info Edit Proposal Copy Delete

Showing 1 to 1 of 1 entries Previous Next

2. You will be taken to the proposal device screen

LMI Home | Proposal List | Device List for ABC Dealer

Manually Add Device Change My Settings Proposals Logout

Clear All Data Clear Meters Reports Get Meters Manual Add Quick Add

#	Model	Name / Network ID	Device Type	Monthly Volume Black	Monthly Volume Color	Proposed Cost Black	Current Cost Black	Proposed Cost Color	Current Cost Color	Equipment Cost
Summary										

Change Defaults Refresh

## Getting devices into the proposal

There are three methods for getting devices into a proposal. These methods are:

- Get Meters
- Manually Add
- Quick Add

### Get Meters

Getting Meters allows you to pull actual devices and meter information from your meter read source or import a RAK file.

To begin pulling meters from your Meter Read Source:

1. Click the **Get Meters** button.

LMI Home | Proposal List | Device List for ABC Dealer

Manually Add Device Change My Settings Proposals Logout

Clear All Data Clear Meters Reports Get Meters Manual Add Quick Add

#	Model	Name / Network ID	Device Type	Monthly Volume Black	Monthly Volume Color	Proposed Cost Black	Current Cost Black	Proposed Cost Color	Current Cost Color	Equipment Cost
Summary										

Change Defaults Refresh

2. The following screen will appear:

Home | Proposal List | Device List | Meter Reads for LMI Demo Dealer

Change My Settings | Dealer Home | Logout

User: demo@misolutions.com Site: LMI Tools Demo Go! Import Meters Excel PDF Return

Please select a user and site and press Go.

Select	Printer	Date	Model	Source	Serial	Black	Color	Total	Days	Monthly Black

Printer	Date	Model	Source	Serial	Black	Color

3. Select the user from the drop down list. This matches up to the email address entered on the customer record in your Meter Read Source.
4. Select the customer site to pull meters from.
5. Click **Go!**
6. A listing of all devices will be displayed at the top with the corresponding meter read sources listed at the bottom.

Home | Proposal List | Device List | Meter Reads for LMI Demo Dealer

Change My Settings | Dealer Home | Logout

User: demo@misolutions.com Site: LMI Tools Demo Go! Import Meters Excel PDF Return

41 printers found for (click on a printer name to see meter reads)

Check All Uncheck All Go!

Select	Printer	Date	Model	Source	Serial	Black	Color	Total	Days	Monthly Black
<input type="checkbox"/>	HP Color LaserJet 2600n 6541 192.168.101.65	2013-03-15	HP Color LaserJet 2600n	TCO	CNGC67527F	0	0	0	0	0
<input type="checkbox"/>	hp color LaserJet 4500 0532 192.168.5.50	2013-03-19	hp color LaserJet 4500	TCO	JPHMC62152	1	250	251	10	2
<input type="checkbox"/>	HP LaserJet 4050 Series 6541 192.168.101.06	2013-03-26	hp color LaserJet 4500	TCO	JPDKB41123	123	25020	25143	25	106
<input type="checkbox"/>	hp color LaserJet 4500 6434 192.168.100.52	2013-03-26	hp color LaserJet 4500	TCO	JPBKC34094	0	0	0	0	0
<input type="checkbox"/>	HP Color LaserJet 4700 02FA 192.168.2.250	2013-03-19	HP Color LaserJet 4700	TCO	JPTLB38540	3	632	635	2	33
<input type="checkbox"/>	HP Color LaserJet 4700 320A 192.168.50.10	2013-03-19	HP Color LaserJet 4700	TCO	JPBLD21065	7	1397	1404	10	15

1 meterread found

Printer	Date	Model	Source	Serial	Black	Color
HP Color LaserJet 2600n 6541 192.168.101.65	2013-03-15	HP Color LaserJet 2600n	TCO	CNGC67527F	2763	25304

7. Select the devices you want included in your proposal. You may also click **Check All** or **Uncheck All**.
8. Click **Go!** next to **Uncheck All**.

A RAK file is a specially formatted Excel file that is used to import meters and devices into the TCO. [Click here](#) to download a template for your own use.

#### To import meters using a RAK file:

1. Click the **Get Meters** button.
2. Click the **Import Meters** button.



Home | Proposal List | Device List | Meter Reads for LMI Demo Dealer

Change My Settings | Dealer Home | Logout

User: demo@lmisolutions.com Site: LMI Tools Demo

Go! Import Meters Excel PDF Return

Please select a user and site and press Go.

Select	Printer	Date	Model	Source	Serial	Black	Color	Total	Days	Monthly Black

Printer	Date	Model	Source	Serial	Black	Color

3. The following screen will appear:

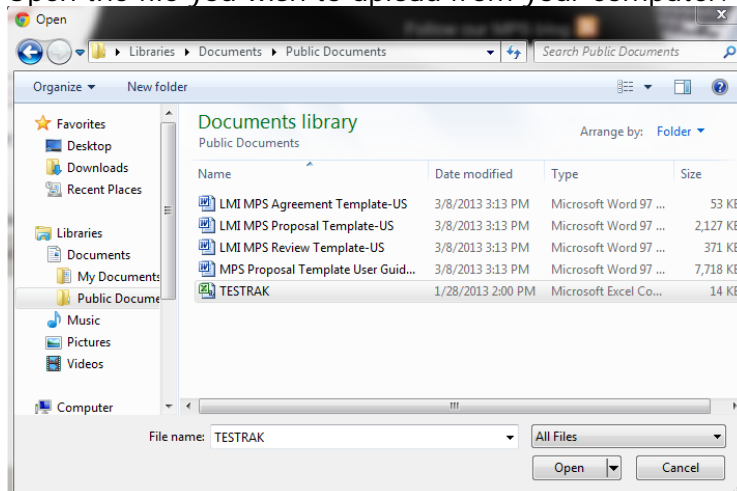
**Import Meters** [X]

- ☒ Upload a single RAK comparison file.
- ☐ Upload a single PA RAK comparison file.
- ☐ Upload two RAK snapshot files.
- ☐ Upload a TCO XML file.

1st File:  
 No file chosen

2nd File:  
 No file chosen

4. Select the file type you wish to upload, then click the **Choose File** button.
5. Open the file you wish to upload from your computer.



6. Click **Go!**.

**Import Meters** [X]

- ☒ Upload a single RAK comparison file.
- ☐ Upload a single PA RAK comparison file.
- ☐ Upload two RAK snapshot files.
- ☐ Upload a TCO XML file.

1st File:  
 TESTRAK.csv

2nd File:  
 No file chosen

7. A listing of all devices will be displayed at the top with the corresponding meter read listed at the bottom.

Home | Proposal List | Device List | Meter Reads for LaserMasters Inc. Change My Settings Dealer Home Logout

User:  Site:  Go! Import Meters Excel PDF Return

167 printers found for: (click on a printer name to see meter reads)

Check All Uncheck All Go!

Select	Printer	Date	Model	Source	Serial	Black	Color	Total	Days	Monthly Black	Monthly Color
<input type="checkbox"/>	hp 6980 series 156	2012-12-04	hp 6980 series	RAK	165	87	0	87	22	87	
<input type="checkbox"/>	hp Color LaserJet 2600n 142	2012-12-04	hp Color LaserJet 2600n	RAK	151	6	10	16	22	6	
<input type="checkbox"/>	hp Color LaserJet 2605dn 160	2012-12-04	hp Color LaserJet 2605dn	RAK	169	0	0	0	22	0	
<input type="checkbox"/>	hp Color LaserJet 3600 190	2012-12-04	hp Color LaserJet 3600	RAK	199	6	1633	1639	22	6	
<input type="checkbox"/>	hp color LaserJet 3700 55	2012-12-04	hp color LaserJet 3700	RAK	64	270	137	407	22	270	
<input type="checkbox"/>	hp color LaserJet 3700 52	2012-12-04	hp color LaserJet 3700	RAK	61	18	1	19	22	18	

2 meterreads found.

Printer	Date	Model	Source	Serial	Black	Color
hp 6980 series 156	2012-12-04	hp 6980 series	RAK	165	7375	
hp 6980 series 156	2012-11-04	hp 6980 series	RAK	165	7288	

- Select the devices you want included in your proposal. You may also click Check All or Uncheck All.
- Click Go! next to Uncheck All.

## Manually Add

From here you can manually add printers, copiers, or MFPs that show up as unsupported.

### To begin:

- Click Manual Add

LMI Home | Proposal List | Device List for ABC Dealer Manually Add Device Change My Settings Proposals Logout

Clear All Data Clear Meters Reports Get Meters Manual Add Quick Add

#	Model	Name / Network ID	Device Type	Monthly Volume Black	Monthly Volume Color	Proposed Cost Black	Current Cost Black	Proposed Cost Color	Current Cost Color	Equipment Cost
Summary										

Change Defaults Refresh

- Select a device manufacturer and model information from the drop down lists. You may select unsupported for devices that are not listed.

Printer Manufacturer: (NOTE: if your printer is not listed, please select "Unsupported Printer")

Brother Select Printer: Brother DCP-7020

☐ Include device ONLY in proposed costs (e.g. a new purchase not represented in current costs)  
☐ Replaces the following device(s):

1 - hp color laserjet 4550 2  
 2 - hp laserjet 3050 1  
 3 - hp LaserJet 4240 6420 192.168.100.32  
 4 - HP LaserJet M3035 MFP 6412 192.168.100.18

Brother DCP-7020 (Fax)

Name / Network ID		Serial Number	
Beginning Black Meter Read		Average Monthly Black Volume	50
		Black Coverage *	7
Proposed Black Cost *	123.27	Current Black Cost *	270.98
Proposed Black Yield *	7000	Current Black Yield *	7000
Proposed Maintenance Kit Cost *		Current Maintenance Kit Cost *	
Proposed Maintenance Kit/Labor Yield *		Current Maintenance Kit/Labor Yield *	
Proposed Labor Cost *	65.00	Current Labor Cost *	75.00
		Equipment Cost	
		Lease Term	None

Color Information:

Beginning Color Meter Read		Average Monthly Color Volume	50
		Color Coverage *	21
Proposed Color Cost *	153.28	Current Color Cost *	286.98
Proposed Color Yield *	5000	Current Color Yield *	4000

**Add Device** **Cancel**

- Fill in all applicable information.
- Click **Add Device**.

**Note**

All of the fields are editable so you have the flexibility to override any values you may need, however, if you input a value in the **"Current TCO"** field on the Edit Customer Info page, you cannot edit any current cost information.

**Quick Add**

From here you can enter in a leased piece of equipment to blend in your cost per page.

**To Begin:**

- Click

**Quick Add**

Manually Add Device Change My Settings Proposals Logout

Clear All Data Clear Meters Reports Get Meters Manual Add **Quick Add**

#	Model	Name / Network ID	Device Type	Monthly Volume Black	Monthly Volume Color	Proposed Cost Black	Current Cost Black	Proposed Cost Color	Current Cost Color	Equipment Cost
Summary										

Change Defaults Refresh

- Select your device type from the drop down list.

LM Home | Proposal List | Device List | Quick Add Device

Change My Settings | Proposals | Logout

Device Type: **Printer**

☐ Include device ONLY in proposed costs (e.g. a new purchase not represented in current costs)

☐ Replaces the following device(s):

- 1 - hp color laserjet 4550 2
- 2 - hp laserjet 3050 1
- 3 - hp LaserJet 4240 G420 192 168 100 32
- 4 - HP LaserJet M3035 MFP G412 192 168 100 18

☒ **Color**

Name / Network ID		Serial Number	
Average Monthly Black Volume			
Proposed Black Cost Per Page		Current Black Cost Per Page	
Equipment Cost		Lease Term	None

Add Device Cancel

3. Check the "Color" box if you wish to add a color device.
4. Enter Name/Network ID, Serial Number, Average Monthly Black Volume, and Cost Per Page details.
5. Click **Add Device**.

## Generating Proposal Documents

All devices that have been imported using Get Meters or entered manually will be shown in the Device List as shown below:

LM Home | Proposal List | Device List for ABC Dealer

Manually Add Device | Change My Settings | Proposals | Logout

Clear All Data | Clear Meters | Reports

Get Meters | Manual Add | Quick Add

#	Model	Name / Network ID	Device Type	Monthly Volume Black	Monthly Volume Color	Proposed Cost Black	Current Cost Black	Proposed Cost Color	Current Cost Color	Equipment Cost
1	hp color LaserJet 4600	HP LaserJet 4050 Series 6541 192 168 10	Color Printer	108	22258	\$5.35	\$4.77	\$3,598.93	\$4,024.93	
2	HP Color LaserJet 4700	HP Color LaserJet 4700 320A 192 168 50	Color Printer	15	3073	\$0.72	\$0.57	\$485.61	\$481.61	
3	HP Color LaserJet 4700	HP Color LaserJet 4700 0317 192 168 3.23	Color Printer	11	4426	\$0.53	\$0.42	\$699.42	\$693.66	
4	HP Color LaserJet 4700	HP Color LaserJet 4700 0318 192 168 3.24	Color Printer	11	4209	\$0.53	\$0.42	\$665.12	\$659.65	
5	HP Color LaserJet 4700	HP Color LaserJet 4700 0408 192 168 100	Color Printer	10	11159	\$0.48	\$0.38	\$1,742.64	\$1,702.98	
6	HP Color LaserJet 4700	HP Color LaserJet 4700 0416 192 168 10 2	Color Printer	2	416	\$0.10	\$0.08	\$66.23	\$66.24	
7	HP Color LaserJet 4700	HP Color LaserJet 4700 0317 192 168 3.23	Color Printer	11	4426	\$0.53	\$0.42	\$699.42	\$693.66	
8	HP Color LaserJet 4700	HP Color LaserJet 4700 029A 192 168 2.25	Color Printer	33	6952	\$1.58	\$1.26	\$1,092.45	\$1,076.55	
9	HP Color LaserJet CP1518ni	HP Color LaserJet CP1518ni 6534 192 168	Color Printer	69	1231	\$6.22	\$4.24	\$391.07	\$345.14	
10	HP Color LaserJet CP5225n	HP Color LaserJet CP5225n 6550 192 168	Color Printer	289	1002	\$14.68	\$11.75	\$193.76	\$196.83	
11	HP Color LaserJet CP5225n	HP Color LaserJet CP5225n 6550 192 168	Color Printer	289	1002	\$14.68	\$11.75	\$193.76	\$196.83	
12	HP LaserJet 4050 Series	HP LaserJet 4050 Series 0533 192 168 5.5	Black Printer	200		\$6.36	\$7.01			

**Summary**

Proposed Cost Black: 2,140.59	Current Cost Black: 2,430.50
Proposed Cost Color: 9,828.41	Current Cost Color: 10,138.07
Avg. Proposed CPP Black: 0.02659	Avg. Current CPP Black: 0.03020
Avg. Proposed CPP Color: 0.16333	Avg. Current CPP Color: 0.16848
Equipment Cost: 0.00	Avg. Equipment CPP: 0.00000
Monthly Pages Black: 80,491	Monthly Pages Color: 60,174
Avg. Black Coverage: 7.00%	Avg. Color Coverage: 21.00%
Monochrome Margin: 40%	Color Margin: 15%

Change Defaults Refresh

Once you have created your cost per page that you are going to propose you now need to create a proposal. This is done by doing the following:

1. Select **Reports**
2. A list of available reports will be shown

LMI Home | Proposal List | Device List | Reports

Change My Settings Proposals Logout

**MSA** Generate a Master Services Agreement Contract in the form of a Word Document.

**Excel** Export Device List to Excel.

**Analysis** Create Technical Analysis in Excel.

**Proposal** Create a Proposal.

**QBR** Generate a customer Quarterly Business Review.

**Verticals**  Select a Vertical Proposal template.

**Return**

3. Select the Proposal button to create a Selling Proposal. This will download a Word document. If prompted, click the Open button.
4. You can also select the MSA button to create a Master Services Agreement between your dealership and your customer. This also downloads a Word document. If prompted, click the Open button.
5. These reports can all be modified once open in Word or Excel.

**Note**

Please see the Appendix A: Sample Proposal Documents for examples of the Selling Proposal, Master Services Agreement, Quarterly Business Review, Technical Analysis, and Device List.

## 2.4 Managing users

### Edit user details

To change the password or details of the currently logged in user:

1. Click **Change My Settings** at any time at the top right of the TCO interface.

LMI Add Person Edit Dealer **Change My Settings** Logout

**Dealer Name:** LMI Demo Dealer

**Address:** 46 N 49th Ave

**City:** Phoenix, AZ 85043

**Phone:** (866) 9808722

**Fax:**

**Contact:** (demo@lmisolutions.com)

Show  entries Search:

Users	Last Login	Actions
Demo	2013-03-26 11:16:40 MDT	<a href="#">View Meter Reads</a> <a href="#">View Proposals</a>

Showing 1 to 1 of 1 entries Previous Next

2. Make necessary changes, however, you may not edit your own permissions.

Username: Demo

Password:

Name: Demo

Email: demo@lmisolutions.com

**Permissions:** (you can only add permissions you have been granted)

- ☒ User can edit Margin
- ☒ User can edit Labor
- ☒ Enable User
- ☒ User can edit own user info
- ☒ User can **only** see their meter reads and their user
- ☒ User can delete companies
- ☒ Edit labor of devices in proposal
- ☒ View Basic Dealer Info
- ☒ View Advanced Dealer Info
- ☒ Edit Dealer Contact Info
- ☒ Edit Users
- ☒ Edit Lease Factors
- ☒ Edit Default Dealer Info

Save Cancel

3. Click **Save**.

**To change the password or details of the currently logged in user:**

1. Click on the user in the User List below Company Information.

Dealer Name: LMI Demo Dealer

Address: 46 N 49th Ave

City: Phoenix, AZ 85043

Phone: (866) 9808722

Fax:

Contact: (demo@lmisolutions.com)

Show 50 entries Search:

**Users** Last Login Actions

Demo	2013-03-26 11:16:40 MDT	View Meter Reads View Proposals
------	-------------------------	---------------------------------

Showing 1 to 1 of 1 entries Previous Next

2. Click **Edit Person** at the top right of the TCO interface.

Personnel Information:

Name: Demo

Email Address: demo@lmisolutions.com

Username: Demo

3. Make necessary changes.

Username: Demo

Password:

Name: Demo

Email: demo@lmsolutions.com

**Permissions:** (you can only add permissions you have been granted)

- ☒ User can edit Margin
- ☒ User can edit Labor
- ☒ Enable User
- ☒ User can edit own user info
- ☒ User can **only** see their meter reads and their user
- ☒ User can delete companies
- ☒ Edit labor of devices in proposal
- ☒ View Basic Dealer Info
- ☒ View Advanced Dealer Info
- ☒ Edit Dealer Contact Info
- ☒ Edit Users
- ☒ Edit Lease Factors
- ☒ Edit Default Dealer Info

Save Cancel

4. Click **Save**.

## Add a new user

To add a new user to the system:

1. Click on **Add Person** from the Dealer Home page at the top of the TCO interface.

Dealer Name: LMI Demo Dealer

Address: 46 N 49th Ave

City: Phoenix, AZ 85043

Phone: (866) 9808722

Fax:

Contact: (demo@lmsolutions.com)

Show 50 entries Search:

Users	Last Login	Actions
Demo	2013-03-26 11:16:40 MDT	View Meter Reads View Proposals

Showing 1 to 1 of 1 entries Previous Next

2. Fill in user details.

Username: Demo

Password:

Name: Demo

Email: demo@lmsolutions.com

**Permissions:** (you can only add permissions you have been granted)

- ☒ User can edit Margin
- ☒ User can edit Labor
- ☒ Enable User
- ☒ User can edit own user info
- ☒ User can **only** see their meter reads and their user
- ☒ User can delete companies
- ☒ Edit labor of devices in proposal
- ☒ View Basic Dealer Info
- ☒ View Advanced Dealer Info
- ☒ Edit Dealer Contact Info
- ☒ Edit Users
- ☒ Edit Lease Factors
- ☒ Edit Default Dealer Info

Save Cancel

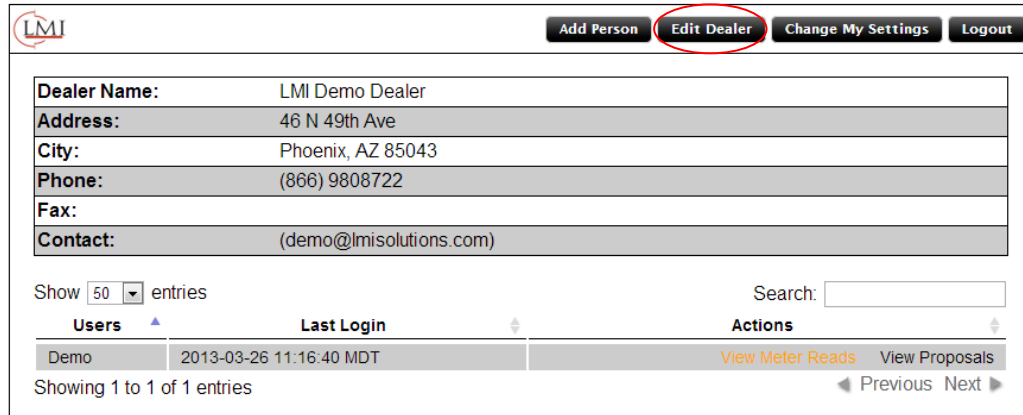
3. Click **Save**.

## 2.5 Managing the dealer

### Changing dealer details

**To change Dealer Contact:**

1. Click **"Edit Dealer"** from the top of the TCO interface.



The screenshot shows the top of the TCO interface. At the top right, there are four buttons: "Add Person", "Edit Dealer" (circled in red), "Change My Settings", and "Logout". Below these buttons is a form for dealer details. The form has the following fields:

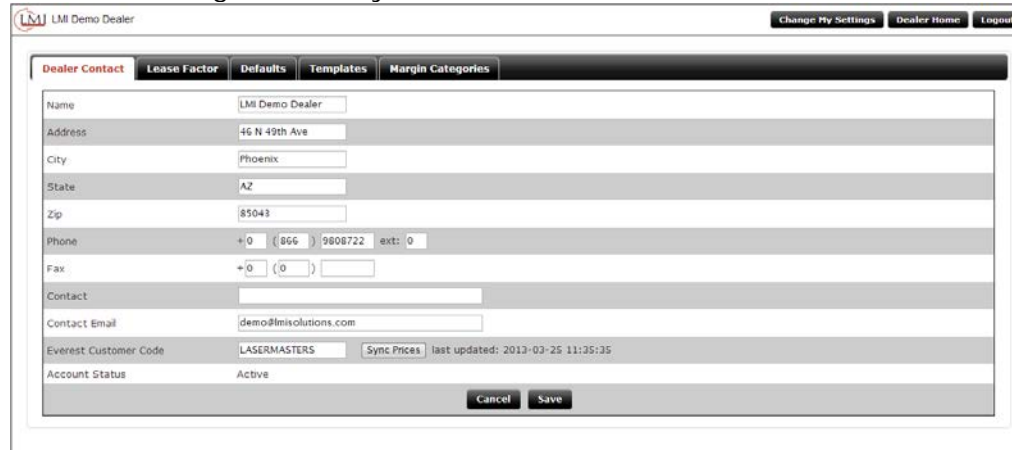
Dealer Name:	LMI Demo Dealer
Address:	46 N 49th Ave
City:	Phoenix, AZ 85043
Phone:	(866) 9808722
Fax:	
Contact:	(demo@lmi-solutions.com)

Below the form, there is a "Show" dropdown set to "50" and "entries". To the right is a "Search:" input field. Below this is a table with columns "Users", "Last Login", and "Actions".

Users	Last Login	Actions
Demo	2013-03-26 11:16:40 MDT	<a href="#">View Meter Reads</a> <a href="#">View Proposals</a>

At the bottom, it says "Showing 1 to 1 of 1 entries" and has "Previous" and "Next" navigation links.

2. Change necessary details in the Dealer Contact tab.



The screenshot shows the "Dealer Contact" tab selected. The form contains the following fields:

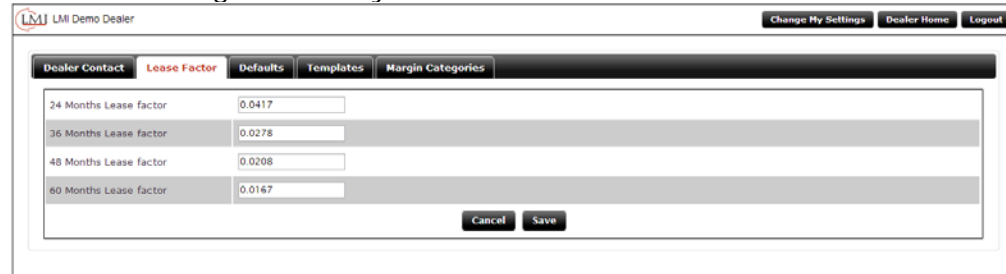
Name	LMI Demo Dealer		
Address	46 N 49th Ave		
City	Phoenix		
State	AZ		
Zip	85043		
Phone	+0 (866) 9808722	ext:	0
Fax	+0 (0)		
Contact			
Contact Email	demo@lmi-solutions.com		
Everest Customer Code	LASERMASTERS	Sync Prices	last updated: 2013-03-25 11:25:35
Account Status	Active		

At the bottom right of the form are "Cancel" and "Save" buttons.

3. Click **Save**.

**To change Lease Factors:**

1. Change necessary details in the Lease Factor tab.



The screenshot shows the "Lease Factor" tab selected. The form contains the following fields:

24 Months Lease factor	0.0417
36 Months Lease factor	0.0278
48 Months Lease factor	0.0208
60 Months Lease factor	0.0167

At the bottom right of the form are "Cancel" and "Save" buttons.

2. Click **Save**.

**To change Defaults:**

1. Change necessary details in the Defaults tab.



2. Click **Save**.

**To download new Templates:**

1. Go to Templates tab

2. Click on the LMI Banner where it says "CLICK HERE TO DOWNLOAD YOURS!"

3. If prompted, click the Open Button

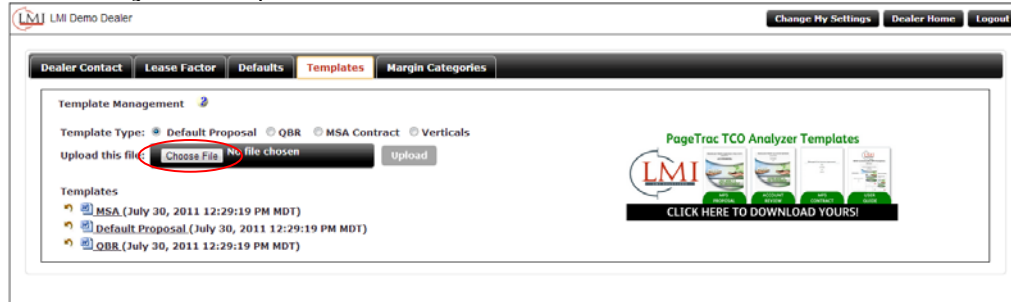
### Note

You must download and edit our templates here. Once you have completed the edits, please upload the new template into the TCO. Please reference the User Guide that is downloaded with the templates for more information on how to edit the documents.

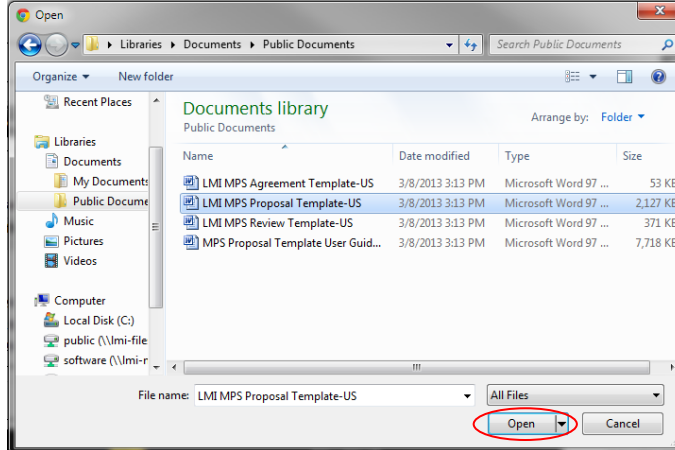
**To upload new Templates:**

1. Once you have made necessary changes to the templates, select which template type you wish to upload

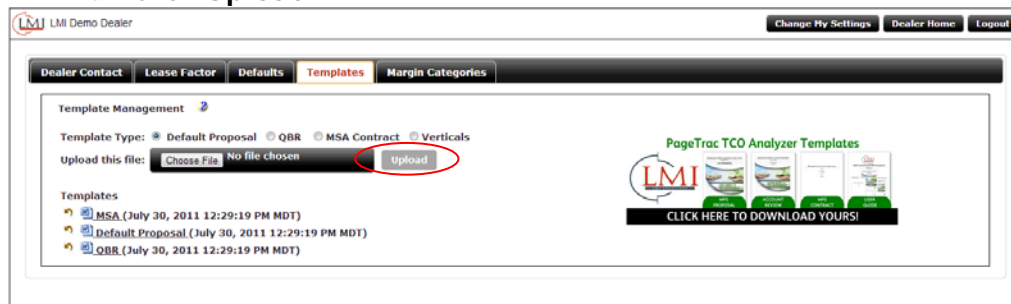
- Click the **Choose File** button and choose the file you saved the template as on your computer.



- Select the file from your computer and Click **Open**.



- Click **Upload**.



### Note

Notice each document and date under **Templates**. This is the last date and time each template was uploaded.

## Vertical Templates

Vertical Templates give you the ability to load multiple proposal templates. You can design your own templates for different industries such as healthcare, government, manufacturing, etc. You may load as many vertical templates as you would like.

## Using Margin Categories

Margin Categories allow you to create a category with specific Color and Monochrome margins, then assign printers to that category and those printers will keep the margins you have set in any proposal for which you enable margin categories.

### To add a Margin Category:

- Click **"Edit Dealer"** from the top of the TCO home page.
- Go to Margin Categories tab.

LMI Demo Dealer

Change My Settings Dealer Home Logout

Dealer Contact Lease Factor Defaults Templates **Margin Categories**

+ Add Category + Assign Devices

Margin Category	Mono Margin	Color Margin	Devices

### 3. Click **"Add Category"**

LMI Demo Dealer

Change My Settings Dealer Home Logout

Dealer Contact Lease Factor Defaults Templates **Margin Categories**

+ Add Category + Assign Devices

Margin Category	Mono Margin	Color Margin	Devices

### 4. Fill in Category Name, Monochrome Margin and Color Margin

**Margin Category** [X]

All fields are required.

Category Name

Monochrome Margin

Color Margin

Save Cancel

### 5. Click **Save**.

## To add a Margin Category:

### 1. Click **"Assign Devices"**.

LMI Demo Dealer

Change My Settings Dealer Home Logout

Dealer Contact Lease Factor Defaults Templates **Margin Categories**

+ Add Category + Assign Devices

Margin Category	Mono Margin	Color Margin	Devices

### 2. Scroll through the device list and select the category from the drop down menu for which you would like each device to be assigned.

**Assign Devices to a Margin Category** [X]

Brother DCP-7020 / Brother 7020	<input type="text"/>
Brother DCP-8020 / Brother 8020	<input type="text"/>
Brother DCP-8040 / Brother 8040	<input type="text"/>
Brother HL-1240 / Brother 1240	<input type="text"/>
Brother HL-1250 / Brother 1250	<input type="text"/>
Brother HL-1440 / Brother 1440	<input type="text"/>
Brother HL-1650 / Brother 1650	<input type="text"/>
Brother HL-1670 / Brother 1670	<input type="text"/>
Brother HL-1850 / Brother 1850	<input type="text"/>
Brother HL-2030 / Brother 2030	<input type="text"/>
Brother HL-2040 / Brother 2040	<input type="text"/>
Brother HL-2070 / Brother 2070	<input type="text"/>
Brother HL-2140 / Brother 2140	<input type="text"/>
Brother M-3170 / Brother 3170	<input type="text"/>

Save Cancel

### 3. Click **Save**.

### 4. Be sure to check the box **"Use Margin Categories"** in the Edit Customer Info screen to enable the use of Margin Categories. If this box is not checked, all device margins will be set to the margin specified on this screen.

LMJ Edit ABC Dealer for Demo Change My Settings Proposals Logout

Company Name	ABC Dealer	Monochrome Margin	40
Address	45 N 49th Ave	Color Margin	15
City	Phoenix	<input checked="" type="checkbox"/> Use Margin Categories	
State	AZ		
Zip	85043	<input type="checkbox"/> Toner Only Proposal	
Phone	+00 (866 ) 9808722 ext. 0		
Contact	Demo	Default Black Coverage	7
Contact Email	demo@lmjsolutions.com	Default Color Coverage	21
Current TCO	0.00		

Cancel Save

## Appendix A: Sample Reports

## Sample Proposal Pages

## COVER PAGE

**MANAGED PRINT SERVICES SOLUTION**  
*prepared for*

**ABC Company**

**SAVE MONEY &  
THE ENVIRONMENT**

**PREPARED BY**  
John Smith  
Director - Business Development  
513-555-1234  
j.smith@lmsolutions.com

**LMI**

CONFIDENTIAL

## TABLE OF CONTENTS

<b>MANAGED PRINT OPPORTUNITY</b>		<b>SAVE MONEY &amp; THE ENVIRONMENT</b>
<b>Table of Contents</b>		
Executive Summary		3
Why LSP?		4
Assessment Process		6
Current State & Observations		7
Opportunities		7
Current Costs		8
Proposed Costs		9
Customized Program Components		10
Realized Benefits		11
Proposed Implementation Schedule		12
Appendix A - Supported Devices		13

## EXECUTIVE SUMMARY

## MANAGED PRINT OPPORTUNITY



## SAVE MONEY & THE ENVIRONMENT

### Executive Summary

LM Solutions Inc. would like to thank ABC Corporation for the opportunity to assess your organization's document fulfillment environment. We appreciate the thorough cooperation you have extended during this assessment phase as we have tried our best to ensure your document fulfillment requirements and bring up directly to you our current costs of producing both print and electronic documents.

The result of our discussions with key personnel identified the following desired objectives:

- Reduce the cost of producing documents
- Standardize on equipment and supplies
- Reduce discretionary print
- Leverage electronic documents
- Improve data security
- Secure documents while in transit
- Extend e-read and e-sign capabilities
- Streamline current workflow programs

Based on our assessment, your present document currently costs \$4.075 per page for production documents. This includes \$3.075, 1440 dpi black/white documents and \$1.000 for color documents. This represents an average cost of \$2.000 per page for black/white documents and \$3.333 per page for color documents.

Our proposal offers a Customized Managed Print Strategy that will reduce ABC Corporation's monthly cost to \$2.000 (a cost of \$3.000 per page for black/white documents and \$3.000 per page for color documents).

Current CPP		Proposed CPP		SAVINGS OPPORTUNITY	
Black/White	\$3.075	\$2.000		\$1.075/mo. in savings	
Color	\$3.333	\$3.000		\$333.33/mo. annually	

Beyond cost savings, we are confident the proposed strategy will also offer ABC Corporation immediate benefits from environmental sustainability, workflow efficiency and security protection.

Using implementation offers a Customized Managed Print Strategy, ABC Corporation will have ongoing access to usage data and to executive status reports available on the secure of the system. To maximize the success of this customized program, LM Solutions Inc. will conduct quarterly reviews to ensure that the strategy continues to meet your agreed upon goals.

This proposal details our business philosophy, our disclosure, our recommendations and an implementation plan to become your Managed Print Partner.



LM SOLUTIONS INC. 10000 W. 16TH AVE. SUITE 1000 DENVER, CO 80202

Page 1 of 2

## WHY US?

## MANAGED PRINT OPPORTUNITY



SAVE MONEY & THE ENVIRONMENT

### Why Us?





### Accreditation





### References

Here is a snapshot of organisations currently benefitting from our Managed Print Services



1 National Insurance Company



2 ACME Engineering



3 National Health Services, Inc.



4 The Phoenix Corporation



5 Landowme, Landowme and Smith Legal



Page 4 of 7

### DEDICATED SUPPORT TEAM



# MANAGED PRINT OPPORTUNITY

SAVE MONEY & THE ENVIRONMENT

## Dedicated Support Team

### Account Management



**Mike Smith**  
Vice President  
[mike.smith@managedprint.com](mailto:mike.smith@managedprint.com)



**Director - Business Development**  
[director@managedprint.com](mailto:director@managedprint.com)



**Service Sales**  
Account Executive  
[service@managedprint.com](mailto:service@managedprint.com)

### Sales Service Personnel



**Julie Stewart**  
Service Manager  
[jstewart@managedprint.com](mailto:jstewart@managedprint.com)



**Tom Smith**  
Parts & Supplies Manager  
[tom.smith@managedprint.com](mailto:tom.smith@managedprint.com)



**Kim Bailey**  
Service Coordinator  
[kimb@managedprint.com](mailto:kimb@managedprint.com)

### Administrative Contacts



**Bethlee Reynolds**  
Business Administrator  
[b.reynolds@managedprint.com](mailto:b.reynolds@managedprint.com)



**Lisa Carpenter**  
Customer Care Centre  
[lcarpenter@managedprint.com](mailto:lcarpenter@managedprint.com)





**Ted Nugent**  
Accounting  
[t.nugent@managedprint.com](mailto:t.nugent@managedprint.com)



CONFIDENTIAL

Page 3 of 18

## ASSESSMENT PROCESS

### Assessment Process

Our goal in conducting this assessment was to identify all equipment and usage for all workgroups within ABC Company. The methodology used to perform our assessment included the following activities:

#### Data Acquisition

- Locate Devices
  - Locate all devices with a walk through and mark on floor plans
  - Scan master meter reads on all devices
  - Scan all network devices via Data Collection Agent
- Review needs and strategies with users where possible
- Gather all local information – support, incident, hardware, maintenance, service call
- Agree on what estimate efforts to be used
- Identify any equipment requirements needed to be made

#### Workflow Assessment

- Comfort user interview
- Take master meter readings

### Devise and Workflow Optimization

- Analyze optimized environment
- Use workflow needs
- Optimum cost/efficiency ratio
- Support sustainability effort

### Financial Analysis


- Compile and analyze all information
- Validate raw information and current costs


### Optimalities and Recommendations

- Present ABC Company management team with results of assessment, cost savings opportunities, workflow improvements and recommended implementation

### Implementation

- Propose implementation schedule





## CURRENT STATE & OBSERVATIONS




**SAVE MONEY &  
THE ENVIRONMENT**

## Current Status & Observations

### Challenges

Issues are for improvement include:

- Low flexibility of usage or expense
- Limited envelope control
- Unpredictable expense
- Desktop printers purchase procurement process
- Supplies purchased at retail price
- Multiple print-related entities
- Inefficient supply ordering and storage
- Privacy doesn't flow across entire print environment
- Inexpensive task balancing on current print device (under utilized)
- Many legacy devices that can't be managed online
- Expense outsourcing print & copy jobs
- Confidentiality risks
- Complex billing / payment process

### Opportunities

Benefits with proposed Managed Print Strategy:

- Increased cost savings
- Improved cost visibility and control
- Simplified procurement process - one invoice
- Greater print environment sustainability
- Proper device allocation
- Fractional printing management
- Simplified consumable/cost/toner inventory expense
- Determinate or user usage controls or charge back
- Improved security protection of confidential data
- Eliminate outsourced print
- Reduce or eliminate reliance on IT Support




**SAVE MONEY &  
THE ENVIRONMENT**

## Current Status & Observations

### Challenges

Issues are for improvement include:

- Low flexibility of usage or expense
- Limited envelope control
- Unpredictable expense
- Desktop printers purchase procurement process
- Supplies purchased at retail price
- Multiple print-related entities
- Inefficient supply ordering and storage
- Privacy doesn't flow across entire print environment
- Inexpensive task balancing on current print device (under utilized)
- Many legacy devices that can't be managed online
- Expense outsourcing print & copy jobs
- Confidentiality risks
- Complex billing / payment process

### Opportunities


Benefits with proposed Managed Print Strategy:

- Increased cost savings
- Improved cost visibility and control
- Simplified procurement process - one invoice
- Greater print environment sustainability
- Proper device allocation
- Fractional printing management
- Simplified consumable/cost/toner inventory expense
- Determinate or user usage controls or charge back
- Improved security protection of confidential data
- Eliminate outsourced print
- Reduce or eliminate reliance on IT Support



### CURRENT COSTS

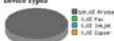
## MANAGED PRINT OPPORTUNITY



### SAVE MONEY & THE ENVIRONMENT


Current Costs		Number of Copies	Pages Per Month	Monthly Cost	Avg. LPI
Black & White Primary	127	86075	\$27,071.24	0.0480	
Color Prints	244	29402	\$4,037.48	0.13179	
<b>Totals</b>	<b>365</b>	<b>115477</b>	<b>\$31,108.73</b>		

### Device Types




- 100% All Printer
- 0% All Plot
- 0% All Copier

### Monthly Print Volume - B/W vs. Color




- 80% All Black
- 20% All Color Pages

### Number of Manufacturers




- 100% HP
- 0% Canon
- 0% Brother
- 0% Ricoh
- 0% Xerox
- 0% Konica Minolta
- 0% Samsung
- 0% Fuji Xerox
- 0% Sharp
- 0% Kyocera
- 0% Lexmark
- 0% Epson

### Monthly Expense - B/W vs. Color




- 80% All Black
- 20% All Color

### Monthly Expense - B/W vs. Color



- 80% All Black
- 20% All Color

### Monthly Expense by Device




- 80% All Plot
- 20% All Printer
- 0% All Copier

**Report Assumptions** – description and name of individual who provided data. Example:

- Description: All business cards
- Name: Joe Smith
- Device used: Ricoh Aficio Pro C7000 color printer
- Number of copies: 100 copies per month
- Number of color pages per month: 10
- Number of black pages per month: 100
- Number of color pages per copy: 10
- Number of black pages per copy: 100
- Number of color pages per page: 10
- Number of black pages per page: 100
- Number of color pages per page: 10
- Number of black pages per page: 100

### PROPOSED COSTS

## MANAGED PRINT OPPORTUNITY



**SAVE MONEY &  
THE ENVIRONMENT**

**Proposed Costs**

Devices	Number of Devices	Monthly Page Baseline	Proposed Monthly Costs	Avg. CPS
Black & White Printers	117	880071	\$24,313.19	0.00825
Color Printers	244	244012	\$1,400.00	0.12911
Totals	361	894473	\$25,713.68	

Monthly Savings


**Annual Savings**

**\$15,744.74**

**\$164,936.83**


**\$494,810.49**

**Existing Monthly Expense**




87.4% Black & White  
12.6% Color

**Proposed Monthly Expense**



97.4% Black & White  
2.6% Color

Note: see Appendix A for full supported devices



CONFIDENTIAL

Page 9 of 10



## IMPLEMENTATION SCHEDULE




# MANAGED PRINT OPPORTUNITY

## SAVE MONEY & THE ENVIRONMENT

### Proposed Implementation Schedule

Date	Activity
Today	Review proposal & recommendations
1/3/2012	ABC Company: accepts proposal
1/3/2012	ABC Company: completes documentation
1/3/2012	L&M Solutions Inc. conducts pre-installation site survey for space, power, & cabling
1/3/2012	L&M Solutions Inc. installs equipment and provides end-user training
0-60 Days	L&M Solutions Inc. migrates results of implemented solutions
90 Days	L&M Solutions Inc. & ABC Company will review results of implementation to ensure customer satisfaction
Ongoing	L&M Solutions Inc. will conduct reviews every three (3) months to identify further opportunities to improve business processes and reduce costs throughout the organization





20120103 12:13 PM

Page 12 of 21



## APPENDIX C - SUSTAINABILITY

Appendix C – Sustainability

**LMI**

# SUSTAINABILITY

IN EVERY CARTRIDGE

Targeting to be a zero landfill print cartridge manufacturer, **LMI** is a recognized leader for environmental sustainability throughout North America in the cartridge remanufacturing arena.

- ▲ 97% of cartridge components are reused or recycled
- ▲ 100% of package materials are reused or recycled
- ▲ Complimentary cartridge return program
- ▲ 4 distribution centers throughout North America
- ▲ Produced in an ISO 14001 certified facility

**GO GREEN TODAY**

100% SATISFACTION GUARANTEE **LMI**

## APPENDIX F – QUALITY GUARANTEED

[illegible]

22

## Managed Services Agreement

You can customize this agreement to properly reflect the terms and conditions you are offering your customers

After you've customized this document, you can upload it to PageTrac TCO Analyzer system by following the instructions provided in the section – **How to Upload Your New Templates** (page 21).

Areas that require manual input include:

1. Managed Print Services **Agreement #**
  - Fill in a unique agreement number for each customer
2. Term of Agreement
  - Fill in the **number of months** for term of agreement
3. **Customer Initials** acknowledging they have read the Standard Terms and Conditions
4. Enter appropriate **governing authority**

1

### Managed Print Services Agreement

between  
«CUSTOMER»  
and  
«DEALER»

CONFIDENTIAL

#### Managed Print Services Agreement

##### Managed Print Service Agreement #

This Managed Print Service Agreement with all Attachments, Schedules and Addenda shall be collectively referred to as this "Agreement".

«CUSTOMER»  
ABC Company (herein referred to as "Customer"), with its principal place of business at: 5150 W. Southside Blvd  
Compton CA 90220

«DEALER»  
LMI Solutions Inc. (Herein referred to as "DEALER"), with its principal place of business at: 157 W Van Buren St  
Phoenix AZ 85043

**Services**  
DEALER will provide Customer a Managed Print Service as described in Attachment A, "Scope of Services" for all equipment and OEM accessories herein referred to as "the Equipment" and locations as listed in Schedule A.  
DEALER will provide on-site support, as described in Attachment A.

Additional Services may be added to this agreement with the consent of Customer and DEALER, added by Addendum and signed by both parties.

##### Managed Print Services Fees

Customer shall pay a base monthly Managed Print Service fee to DEALER. Such fee is determined by multiplying the cost per page as provided herein, by the number of monthly pages agreed to by customer and DEALER during the audit. This Agreement shall carry a cost per page Black of 0.02825 and a monthly base page amount Black of 868,071 and a cost per page Color of 0.12911 and a monthly base page amount Color of 26,402.

Payment Terms: Net 30 Days

##### Term of Agreement

This Agreement shall have a \_\_\_\_\_ month term for performance, unless terminated or extended as provided herein.

This Agreement shall commence immediately upon approval of Agreement by both parties at which point, DEALER shall commence the Implementation Procedure as described in Attachment A, "Scope of Services".

##### Terms and Conditions

Both parties agree to the terms and conditions set forth herein. Customer acknowledges that it has read the terms and conditions as set forth under Standard Terms and Conditions. \_\_\_\_\_ (Initial)

This agreement shall be governed and construed in accordance with the laws of the state of \_\_\_\_\_.

LMI Solutions Inc.

ABC Company

By: \_\_\_\_\_ By: \_\_\_\_\_

Name: \_\_\_\_\_ Name: \_\_\_\_\_

Title: \_\_\_\_\_ Title: \_\_\_\_\_

Date: \_\_\_\_\_ Date: \_\_\_\_\_

MPS Agreement US

#### Managed Print Services Agreement

##### Conditions

Equipment of parts as installed by normal use of the equipment, except in the event of negligence, or causes beyond DEALER's control are not covered. Liability shall be borne by personnel other than those employed by DEALER or without.

DEALER

Agreement at Customer's site capable of using DEALER supplied toner and additional monthly pages will be added to the base amount.

Term: 12 months after the initial term, upon the consent of CUSTOMER.

Customer shall inform DEALER in writing and DEALER shall have a period of 30 days to correct the problem. The Customer shall have the option of terminating the agreement for non-performance. Customer shall not be liable for equipment and/or supplies.

Information concerning its affiliates or Customers (such information shall be treated as confidential information on a confidential basis). If a party agrees to provide information to any person, firm or corporation except (1) the services contemplated hereunder, DEALER agrees upon request to remove all such information from this paragraph.

DEALER agrees to provide the following types of insurance: general liability, workers' compensation, and property damage.

Issue of action or damage for actual or alleged infringement of any intellectual property rights. Customer agrees to defend DEALER at Customer's sole expense in the event of termination for non-performance. Customer shall not be liable for equipment and/or supplies.

DEALER's non-performance, any breach of this Agreement, or any act of negligence.

This Agreement cannot be changed or terminated orally. No modification of the Agreement shall be valid and enforceable unless it is in writing and signed by the party and any other party who has the right or obligation of any party in any respect at any other time and is subject to annual increases.

DEALER may (a) refuse to provide service or supplies for the equipment and (2) the Customer agrees to pay DEALER costs and expenses of all rights and remedies available to DEALER.

#### Managed Print Services Agreement

DEALER

Reporting of hardware failures should be directed to Customer give to the customer service representative.

DEALER will provide an inspection of the Equipment to be serviced under this agreement and the Equipment will be brought to the Customer's site.

DEALER will provide an inspection of the Equipment to be serviced under this agreement and the Equipment will be brought to the Customer's site.

DEALER will provide an inspection of the Equipment to be serviced under this agreement and the Equipment will be brought to the Customer's site.

DEALER will provide an inspection of the Equipment to be serviced under this agreement and the Equipment will be brought to the Customer's site.

DEALER will provide an inspection of the Equipment to be serviced under this agreement and the Equipment will be brought to the Customer's site.

DEALER will provide an inspection of the Equipment to be serviced under this agreement and the Equipment will be brought to the Customer's site.

DEALER will provide an inspection of the Equipment to be serviced under this agreement and the Equipment will be brought to the Customer's site.

DEALER will provide an inspection of the Equipment to be serviced under this agreement and the Equipment will be brought to the Customer's site.

DEALER will provide an inspection of the Equipment to be serviced under this agreement and the Equipment will be brought to the Customer's site.

DEALER will provide an inspection of the Equipment to be serviced under this agreement and the Equipment will be brought to the Customer's site.

DEALER will provide an inspection of the Equipment to be serviced under this agreement and the Equipment will be brought to the Customer's site.

DEALER will provide an inspection of the Equipment to be serviced under this agreement and the Equipment will be brought to the Customer's site.

DEALER will provide an inspection of the Equipment to be serviced under this agreement and the Equipment will be brought to the Customer's site.

#### Managed Print Services Agreement

Monthly Base Color	Start Meter Read Black	Start Meter Read Color
106	-22	107
14	-179	5
825	-3978	5427
843	-495	846
189	-14093	14190
813	-488	614
912	-1646	2913
807	-482	1608
	439	
	100	
	1088	
	281	
	2847	
	81	
	606	
	5107	
	841	
	419	
	2784	
	3804	
	167	
	499	
	2046	
	3295	
	514	
	3110	
	11291	
	565	
	3495	
	85	
	463	
	3213	
	124	
	11080	
	482	
	136	
	1349	
	1357	
	179	
	3278	
	2248	
	848	
	158	

# Sample Quarterly Business Review Pages

## COVER PAGE

**MANAGED PRINT ACCOUNT REVIEW**  
prepared for

ABC Company  
January 4, 2012

**SAVING MONEY & THE ENVIRONMENT**

PREPARED BY  
John Smith  
Director - Business Development  
j.smith@lmi.com

**LMI**

CONFIDENTIAL

## EXECUTIVE SUMMARY

**MANAGED PRINT REVIEW**

**Executive Summary**

This review was conducted to ensure that the Managed Print Strategy implemented by ABC Company continues to meet the agreed upon objectives. The following areas will be reviewed:

- Program Objectives Review
- Financial Review
- Observations and Opportunities
- Devices under MPS Program

**Program Objectives Review**

Continue to reduce costs under each objective:

- Reduce the cost of producing documents
  - Current OFF costs continue to provide cost savings when compared to pre-strategy implementation
- Standardize on equipment and supplies
  - Add notable benefits to this section such as:
  - Reduced number of printers from 1 to 1
  - Reduced number of device models from 12 to 6 and 2 manufacturers
- Reduce discretionary print
  - Enabling rules-based printing reduced discretionary printing by 15%
- Leverage electronic documents
  - Scanning documents and storing electronically has reduced filing space and improved search times
  - Improved team collaboration on projects
- Improve data security
  - Sensitive documents are secured from prying eyes with lock up printing. Documents are secured
- Secure documents when in transit
  - New network encryption strategy has improved secure transit of documents
- Exceed end-user requirements
  - Implement cartridge recycling program
  - Take advantage of our toner cartridge recycling program

**THANK YOU FOR YOUR BUSINESS**

CONFIDENTIAL Page 1 of 7

## FINANCIAL ACCOMPLISHMENTS

**MANAGED PRINT REVIEW**

**Financial Accomplishments**

As ABC Company's Managed Print Partner, we conduct periodic reviews to identify improvement opportunities resulting from specific changes to ensure improved efficiency and continued financial benefits. Below is a summary of our accomplishments thus far:

MANAGED PRINT ENVIRONMENT COMPARISON		
	PRE IMPLEMENTATION	CURRENT
# Devices - black/white	117	117
# Devices - color	244	244
Total # of Devices	361	361
Cost per Page - black/white	0.04340	0.03823
Cost per Page - color	0.15179	0.12911
Page Volumes - black/white	868071	868071
Page Volumes - color	26402	26402
Print Costs - black/white	\$7,671.24	\$24,525.19
Print Costs - color	4,007.46	\$3,408.69
Total Print Costs	41,678.61	\$27,933.88
Monthly Savings		\$3,744.74
Annual Savings		\$44,936.89

**THANK YOU FOR YOUR BUSINESS**

CONFIDENTIAL Page 2 of 7

## OBSERVATIONS & OPPORTUNITIES

**MANAGED PRINT REVIEW**

**Observations and Opportunities**

Our latest findings identify the following opportunities to enhance ABC Company's Managed Print Strategy:

**Workflow Opportunities**

Review current workflow methods of operation and look for opportunities to take steps out of the process, streamline any way do business, how they distribute information/documents, how the store them and improve access to them documents. The following are examples - will be added to brief.

**Electronic Documents through Scanning**

- Save space
- Instant Access
- Version change control
- Less printing - more scanning
- Easily attach or reference in electronic communications
- Easily accessed by mobile devices - iPhone, iPad, Tablets
- Supports GREEN sustainability program

**Rules-Based Printing**

- Increase security
- Reduce print costs
- Protect sensitive documents

**Over-Utilized / Under-Utilized Print Activity**

- Realign print routing to balance device capabilities

**Device Consolidation**

- Further opportunities to reduce models and manufacturers
- Reduce user training - simplify confusion

**Duplex Printing**

- Areas where duplex printing should be default

**Outsourced Printing**

- Intermittent outsourced print with appropriate device

**THANK YOU FOR YOUR BUSINESS**

CONFIDENTIAL Page 3 of 7

## MANAGED FLEET

**MANAGED PRINT REVIEW**

**Managed Fleet:**

The following devices are maintained and supported under the current Managed Print Services Agreement.

Model Name	Serial Number	Age (Months)	Print Volume (Black)	Print Volume (Color)	Print Volume (Total)	Print Cost (Black)	Print Cost (Color)	Print Cost (Total)
HP LaserJet 4000	117111111	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111112	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111113	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111114	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111115	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111116	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111117	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111118	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111119	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111120	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111121	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111122	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111123	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111124	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111125	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111126	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111127	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111128	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111129	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111130	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111131	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111132	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111133	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111134	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111135	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111136	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111137	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111138	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111139	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111140	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111141	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111142	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111143	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111144	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111145	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111146	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111147	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111148	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111149	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111150	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111151	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111152	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111153	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111154	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111155	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111156	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111157	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111158	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111159	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111160	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111161	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111162	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111163	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111164	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111165	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111166	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111167	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111168	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111169	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111170	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111171	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111172	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111173	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111174	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111175	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111176	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111177	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111178	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111179	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111180	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111181	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111182	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111183	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111184	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111185	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111186	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111187	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111188	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111189	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111190	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111191	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111192	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111193	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111194	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111195	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111196	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111197	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111198	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111199	12	100	100	200	\$10.00	\$10.00	\$20.00
HP LaserJet 4000	117111200	12	100	100	200	\$10.00	\$10.00	\$20.00

**THANK YOU FOR YOUR BUSINESS**

CONFIDENTIAL Page 4 of 7

## Account Review Highlights

- Select only the pages you want
- Add new pages where needed
- Customize with your logo
- Personalize content
- Data automatically imported