ATLATL QUOTEBOOKS CRM

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QuoteBooks CRM Admin Quick Reference Guide

Welcome to QuoteBooks

This guide's intent is to assist the QuoteBooks CRM Client Admin's understanding of the functionalities of the QuoteBooks Administration Page (which we call the Admin Console). This guide also shows administrators how to set-up and maintain their QuoteBooks CRM Instance for their entire sales channel.

Admin Console
As the QuoteBooks CRM Client Admin, you control access to information for users in your organization. The Admin Console allows you to manage user access, set data permissions, manage security settings and generate periodic usage reports.

Access the Admin Console
This section will teach you about the admin console and will show you how to customize the system settings, user roles, permissions and quote layout settings. In this guide, we cover only what is needed to get your organization quoting.

- To open the admin console:
- Log in to your QuoteBooks CRM account: URL QuoteBooks Landing Page
- In the top-right corner of your QuoteBooks Dashboard, click 'Admin'.

Client Settings Overview
In order to get QuoteBooks up and running you will need to configure your Client Settings. We will explain how you as the system administrator are able to determine visibility settings and control access to various features within the system.

To customize your organization's settings, locate the "CONFIGURATION" section and 'click' the "Settings" text icon. Once you open your Settings panel, you may configure your system preferences to align with your sales process.

User Roles

QuoteBooks CRM provides you with 3 default permission roles. These roles have a predefined set of permissions that provide more capability for Admins and fewer capabilities for Sales Representatives. Additionally, as a Client Administrator, you have the ability to create and save custom roles based on your workflow requirements.

Client Administrator
The QuoteBooks Client Admin has the highest level of access within your organization. As the Client Admin, you can add or delete users, change company wide settings, update quote information, create and manage pricing, as well as various other data management related functions.

Distributor Administrator
The Distributor Admin role is one of the default roles created within QuoteBooks upon your initial setup. This role's primary purpose is to allow distributors admin access to their org and the role should only be granted at the distributor level.

Sales Rep
The most common role within the QuoteBooks user base is the Sales Rep. A Sales Rep role is designed for any internal and external reps within your sales channel to provide them with the ability to quote and manage deals. Unless specified by the Client Admin, the Sales Rep is allowed to only maintain their pipeline and sales activity, with no visibility to the sales activity of other users in the system.

Creating a Custom Role

- To create a custom role within QuoteBooks, access the Admin Console (demonstrated above). You will need to access the "Organizational Roles" section located at the top of the admin screen. "+Add" to begin the role creation process.

- Select a "Role Base" and name your role. Think of "Role Base" as a starting point in the creation process. *(For example, when creating a custom Sales Rep role, select the Sales Rep base and configure your settings from there).*

- Select your desired settings by adjusting the permission toggles.

- Modify the Name to describe the new role and then click “Save”.

- NOTE: Users should be assigned only one role.

Standardized Quote Layout

QuoteBooks allows you as the Administrator to provide a branded layout for all standardized quotes generated within the system. We will cover the “Quote Layout Tool” in an upcoming tutorial, but for this overview we are going to focus on the easiest way to customize your quote layout, so reps can begin sending great looking quotes as soon as you hit save.

- To begin click “Quote Logos” located in the “CONFIGURATION” section.You will be taken to the screen to upload all logos and images that will be associated with the quote. It is important to note these can be changed at any time, but the change will ONLY be applied to new “Quotes”.

- ‘Select’ “PDF” in the Context drop down menu.

- ‘Select’ your Organization you wish to add the logos to.

- Now add the files you want to use for your quote logos, cover sheets, etc by clicking the appropriate “Choose File” button.

- Click ‘SAVE’ to apply the changes.

    - Please note we will cover the features and functions of the layout tool in another guide.

Terms and Conditions

To add default Terms and Conditions to your quote, ‘Click’ the “Quote Terms and Conditions”text in the“CONFIGURATION” section. There are couple of methods that you can add your terms and conditions; Copying and pasting text from another word document (clear text formatting prior to copying).

Click the “Add Quote Terms and Conditions” buttons to access the text field.
After saving the desired text, all quotes generated will display standardized T&C’s.

Or you can type in your T&C’s right into the text box provided.

Select the Organization that the T&C’s apply to.

Click the “SAVE” button to apply your changes!

Common Terms

Lead:
An unqualified prospect for sale, used as a nurturing ground prior to disqualification or conversion to an opportunity.

Opportunity:
A qualified prospect for sale, that is used to track associated activities, contact data, quotes, and stages.

Configuration:
A grouping of parts and associated data generated by a QuoteBooks 2D or QuoteBooks 3D Configurator or a pre-generated Kit uploaded into the system. Configurations can generated from a 3D application can include specific dimensional drawings as well.

Kits:
A predefined set of parts that are grouped together and can be saved at an organization level and added to a quote as a single

Container:
A custom set of parts that are grouped together that can be manipulated as a group. Typically referred to in a quote bill of materials.

Acronyms

- BOM - Bill of Materials
- CPQ - Configure Price Quote
- CRM - Customer Relationship Management
- SRP - Sales Resource Planning
- FOB - Free on Board
- API - Application Program Interface
- SKU - Stock Keeping Unit

- URL - Uniform Resource Locator