

# Streamline your Quote and Order Processing within Microsoft CRM!

## Advanced Quote & Order 4.0 Processing

The screenshot displays a Microsoft CRM interface for a Quote. The top navigation bar includes tabs for General, Bill to Address, Ship to Address, Administration, Printing, and Custom Fields. The main form contains the following fields:

- Quote Number: QUO-01112-TMUU1V
- Revision Number: 2
- Name: Bike Quote
- Contact: Feith, Jeff
- Customer: Ed's Bike Shop
- Price List: MSCRM ISV
- Shipping Method: FedEx
- Payment Terms: Net 30
- Probability: 80
- PO Number: 425
- Freight Amount (\$):
- Total Tax (\$): 0.00
- Total (\$): 1,067.00

Below the form is an 'Actions' bar with an 'Add Line' button. A table of line items is shown below that:

Product Name	Number	UOM	Quantity	Unit Price	Unit Cost	Tax	Ext'd Price	Seq. #
Bike Chain		Chain	8	28	19	0	224	10

A detailed view of the 'Bike Chain' line item is shown below the table:

Product Number	Alternate Name	UOM	Quantity	Unit Price	Current Cost	Unit Profit	Tax	Extended Price
Chain	Bike Chain		8	28.00	19.00	9.00	0.00	224.00
Sequence #	Product Name	Discount Percent	List Price	Standard Cost	Profit Margin %	Profit Margin \$		
10		30.00%	40.00	19.00	32.14%	72.00		

Buttons for 'Save', 'Cancel', 'Delete', and 'Comments' are visible at the bottom of the detailed view. Below the table, there are two more line items:

- Bike Seat with flame design: Quantity 6, Unit Price 95, Unit Cost 0, Tax 0, Ext'd Price 570, Seq. # 20
- Handlebars black with silver tip: Quantity 7, Unit Price 39, Unit Cost 0, Tax 0, Ext'd Price 273, Seq. # 30

The bottom of the interface shows '1 of 3 selected.' and 'Page 1'.

Create Quotes or orders quickly in a single screen. Easily print or email them to Accounts or Contacts, edit and track revisions and manage the profitability of each quote. All from within Microsoft CRM! The tools available in **Advanced Quote & Order Processing** allow users to:

- ◆ 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 any field in product database
- ◆ Off-line Outlook client - New for Version 4.0
- ◆ Complete customization control of all windows using Microsoft Dynamics CRM customization tools - including adding and removing fields from all windows - New for Version 4.0
- ◆ Java script customization - New for Version 4.0
- ◆ 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
- ◆ Convert Quotes to Orders
- ◆ Activate, Deactivate or Revise Quotes and Orders
- ◆ Print shipping labels & picking tickets directly from Microsoft CRM
- ◆ 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

General Bill to Address Ship to Address Administration Printing

Quote Number: QJO-01483-EAE022 Revision Number: 0

Name: Test Name for now Contact: Alberto, Oscar

Account: Cash and Carry Bikes Price List: Retail

Shipping Method: UPS Payment Terms: Net 60

Probability: 70 Total: 192.31

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Actions + Add Line

Product Name	Number	UOM	Quantity	Unit Price	Unit Cost	Ext'd Price	Seq. #
Product Number	Alternate Name	UOM	Quantity	Unit Price	Current Cost	Unit Profit	Extended Price
ST-1401	All-purpose bike stand	Each	2	47.25	43.5	3.75	94.5
Sequence #	Product Name	Discount Percent	List Price	Standard Cost	Profit Margin %	Profit Margin \$	
30	All-purpose bike stand	15%	55.59	87.45	7.94%	7.5	
<input type="button" value="Delete"/> <input type="button" value="Cancel"/> <input type="button" value="Save"/>							
LL Min Handlebars	HB-M243	Each	1	42.31	32.96	42.31	10
Write-In Product	New Product		15	10	8.5	150	20

1 of 3 selected. Page 1

General Bill to Address Ship to Address Administration Printing

Quote Type:  Eval  Regular Document Format: PDF

Document: Quote View Type:

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Actions + Add Line

Product Name	Number	UOM	Quantity	Unit Price	Unit Cost	Ext'd Price	Seq. #
LL Min Handlebars	HB-M243	Each	1	42.31	32.96	42.31	10
Write-In Product	New Product		15	10	8.5	150	20
All-purpose bike stand	ST-1401	Each	2	47.25	43.5	94.5	30

1 of 3 selected. Page 1

- ◆ 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 a Adobe Acrobat PDF format
- ◆ Email Quotes or Orders
- ◆ Output Quotes and Orders to Excel
- ◆ Re-Sequence items on Quotes or Orders

General Bill to Address Ship to Address Administration Printing

Quote Number: Product Lookup - Web Page Dialing

Name: Look Up Product

Account: Select a product and click OK.

Shipping Method: Product Name

Probability: \*Label Find

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Actions + Add Line

Product Name	Product...	Vendor...
All purpose bike stand	ST-1401	
Bike wash - dissolver	CL-9009	
Bike rack - 4 bike	RA-H123	
Mountain Bike Socks, L	SO-8909-L	
Mountain bike Socks, M	SO-890...	

1 of 5 selected. Page 1

Unit Price Unit Cost Ext'd Price Seq. #

42.31	32.96	42.31	10
10	8.5	150	20

Current Cost Unit Profit Extended Price

0 0 0

Standard Cost Profit Margin % Profit Margin \$

0 0% 0

OK Cancel

http://mscrm(AOP)Quote/Pages/ProductLookup.aspx Local intranet

1 of 3 selected. Page 1

- ◆ Search for items by part number, partial part number, item description or vendor part number

## Turn contacts into customers!

Business Solution Partners (BSP) specializes in the development and support of custom solutions built on the Microsoft CRM platform. Our goal is to help our clients improve the way they do business.

BSP technology solutions lower costs, increase speed, and improve business efficiencies. We use a time-proven methodology to analyze, plan, design, build, validate, deploy, train and support its technology solutions and ensure their success.

For additional information about **Advanced Quote & Order Processing** or to discuss developing a product specific to your business needs, please contact David Smooha at:

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**(516) 609-5010**



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