

# ChannelOnline™

## Quote & Order User Guide

Version 2.0

Last modified on Tuesday, January 5, 2016

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## Contents

Overview .....	4
High-level Document Workflow .....	4
Available Actions & Statuses .....	7
Activating Quote & Sales Order Functionality .....	10
Granting Quote & Sales Order Access Permissions .....	11
Managing E-mails & Notifications .....	13
Creating Quotes .....	14
Document Header .....	14
Product Table Organization .....	16
Live Cost .....	21
Totals Section .....	21
Merging, Importing & Special Pricing .....	24
Footer Actions .....	26
Converting Quotes to Sales Orders .....	27
Convert To Order .....	27
Send via E-sign .....	28
On Proposal .....	29
Sales Order Actions .....	29
Status Updates .....	32

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Reference and Help Icons ..... 32

Deleting Quotes & Orders ..... 32

Searching and Viewing Quotes & Sales Orders ..... 33

Exhibit A – Complete Document Workflow & Statuses..... 34

Exihbit B - Anatomy of a Document Page..... 35

Exhibit C – Header Fields ..... 36

Exhibit D – New 7.0 vs. Old 6.3 ..... 36

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## Overview

A major ChannelOnline primary business function is the capability to facilitate Quote, Proposal, and Sales Order creation for end-customers. This guide will focus on the Quote and Sales Order (SO) documents (a separate document is available for learning about Proposals). These two documents apply to the account types of Prospect and Customer. In order for these to be created, the Accounts must be assigned to a price profile, and at least one catalog for Quotes and Sales Orders needs to be created (more can be found on creating and assigning Price Profiles and Catalogs in the online Help Center). Quote creation can begin in a variety of ways that will be covered within this guide. Essential to understanding the connection between Quotes and Sales Orders is that they are the same basic documents, but with different names, statuses, and actions that can be performed.

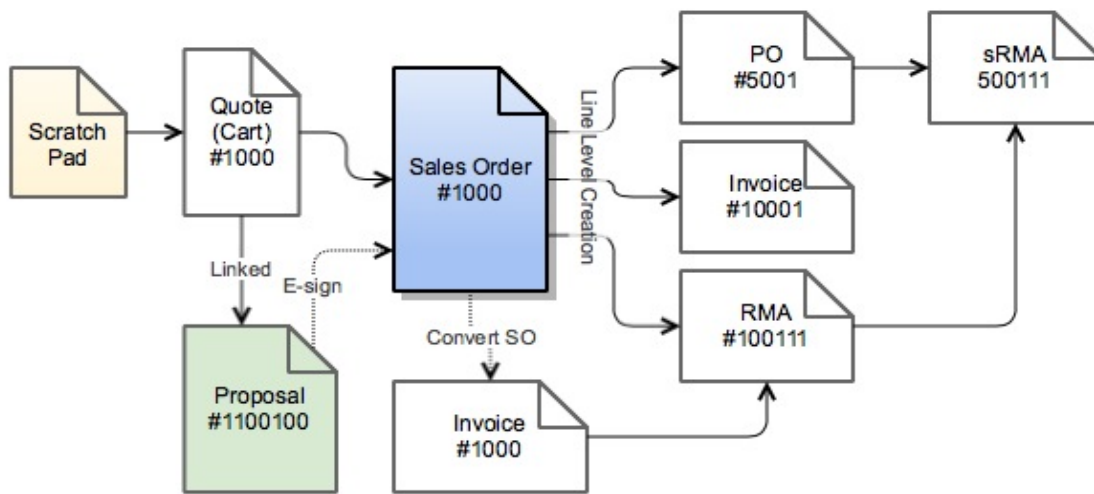
### *Quote & Sales Order:*

- The Quote and Sales Order in ChannelOnline is effectively the same document. Changes are in the name and the actions that you can do with it.
- Both documents have the same level of formatting options.
- Quotes can be shown to End Users on the StoreSite and be converted into Carts for ordering.
- Sales Orders are the master documents for all line-level activity associated with POs, Invoices, and RMAs.
- Neither document can be disabled; they are always on by default.

## High-level Document Workflow

The following workflow provides a quick look at how documents and line items move through the system. Each new document type is assigned a separate numbering scheme. This numbering is established when the ChannelOnline account gets created but can be altered from within Admin > Company Settings under the corresponding document type for all types except quote/sales order.

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Although the Scratch Pad is not technically a Quote, it is often used as the starting place for Quote creation. The two purposes that it serves are:

1. If a new client calls about pricing, you can save their items to the Scratch Pad until you have a chance to get their account information and copy the items to a quote for them.
2. If the "Active Quote" you were last working on is deleted by you or another SalesRep, the next document available in the dropdown automatically appears as the "Active Quote", which may be the Scratch Pad.

*A typical quote and order process may include:*

Creation of a . . .

- Quote from the Scratch Pad by using Copy to Customer feature.
- Quote from an Account record (Prospect or Customer) by an internal SalesRep.
- New Quote by copying an existing Quote or selecting one from your Quote Hot List.
- Quote and merging items from another quote into it.
- An empty Quote and importing items through the Config Import feature.
- Sales Orders by converting open Quotes.
- Sales Order from converting a StoreSite Cart on checkout.

*ChannelOnline provides you with the ability to:*

- Start a Quote on the Scratch Pad before having an account record.
- Add different item types: products, services, labor, bundles, and configurations to quotes and sales orders.

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- Add manual line items and create bundles on the fly.
- Pull items from other documents in ChannelOnline to start a Quote.
- Item table formatting for better end-customer presentation and usability.
- Browse through Quote and Sales Orders via a dedicated sub-tabs in the Documents Tab, Account View page, and through Search.
- Access permissions to control the creation, edit, and approval of Credit and Review holds.
- Print and email Quote and Sales Order documents.
- Send Quotes for Electronic Signature (once signed, they convert to Sales Orders).
- Once a Sales Order is in place, the items on it can be converted into Purchase Orders to suppliers, Invoices, or Return Merchandise Authorizations (RMAs).
- Line-level connections to all linked documents for statuses and quantities of all linked items.
- Use custom fields to gather information at both the document and line level.
- Ability to designate different ship-to locations by item line.
- Take multiple quote documents and add them to a single Proposal.
- Perform reporting against your Quotes and Sales Orders.

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## Available Actions & Statuses

### Quote to Sales Order

Created Quotes are usually left in the default active “Open” status. However, there is the ability to manually change the status from Open to On Hold, Lost, or Closed. There are only two states where the status is systematically updated - either when a Quote is sent out for electronic signature (Out for E-sign), or when it has been linked to a proposal (On Proposal).

Quotes have the ability to be tracked on the dashboard with the use of the Stage and Probability dropdown selections. Stage options include: Lead, Qualified, Discovery, Quoted, Commitment, Not Ready to Buy, and Closed. Probability is recorded by 10% intervals, starting at null and ending at 90%. A 100% probability is not listed because at that point it is a Sales Order, and the Quote will have been converted. The Quote Tracking widget sorts your quotes based on highest Probability. Those with the highest percent-to-close probability are on top.

Stage:	Discovery
Probability:	30%
Amount :	\$ 2,728.76

### *Quote Tracking*

Quote Progress Tracking						<a href="#">View All Quotes</a>
Doc#	Stage	%	Company	Contact	Total	
1000123	Quoted	50	DTH	Jack, Lucky	\$6.00	
1000136	Qualified	40	Fish Eye Photo	O'Larry, Dusty	\$4,628.69	
1000135	Closed	30	Anchor to Zinc Boat Parts	Sailorman, Popeye	\$782.56	
1000130	Discovery	30	Mike's Birdhouse Jewelry	Fowler, Michael	\$384.61	

Once a Quote has been converted into a Sales Orders, a different and more complex status structure is used. Multiple variables can affect the status and availability of a document. The standard Sales Order status workflow looks like:

Sales Order #:	6012 - rev 1 of 1		
Date:	08/07/2015	02:34 PM	PDT
Doc Status:	Submitted <input type="checkbox"/> Status Override		
Delivery Status:	Submitted		
Invoice Status:	Partial Invoiced		
Follow Up:	<input type="text"/>	<input type="checkbox"/> Required	

Submitted > Partial Ship > Shipped > Delivered > Completed

Additional document statuses that can appear include: Pending, Back Ordered, Cancelled, and Approved (E-sign)

Along with the document status for a Sales Order, the system provides information on the shipping status and the overall invoice status of a document.

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*Statuses And Their Meanings*

Status	Description
<b>QUOTE</b>	
Open	Quote default setting in create and edit mode
On Hold	Manual setting for quotes not currently being worked on
Lost	Manual setting for quotes that will not be converted to orders
Closed	Manual setting often used with integrations into 3 <sup>rd</sup> party applications
Out For E-Sign	System-generated status based on the sending of the Quote for Electronic Signature
On Proposal	System-generated status based on the attachment of the Quote to a Proposal
<b>SALES ORDER</b>	
Submitted	Default status for all Sales Orders after conversion from a Quote
Pending	Orders submitted from the StoreSite, order review, or credit hold
Back Ordered	Items on the Sales Order are back ordered with a supplier or linked PO
Partial Ship	One or more items have shipped, but not all items
Shipped	All items have at least a shipped status (some items may be delivered)
Delivered	All items have been delivered to the Ship-to destination
Approved	Quote was converted into a Sales Order using E-sign
Complete	Non-active status, removes from Sales Order totals on dashboard and sets Sales Order to read-only
<b>Delivery Statuses</b>	Information based on the statuses of the associated lines
Submitted	No items have shipped
BackOrder	All items on the SO are on Back Order
Partial Ship	One or more items have shipped, but not all items
Shipped	All items on the SO have at least a Shipped Status (some items may be delivered)
Delivered	All items have been delivered to the Ship-to destination(s)
<b>Invoice Statuses</b>	Information based on the statuses of the document lines onto Invoices
None	None of the items on the Sales Order have been added to an Invoice
Partial	One or more items have been placed on an invoice, but not all items
Invoiced	All items on the Sales Order have been invoiced

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*Useful Terminology*

Term	Description
Activity (View or Log)	High-level tracking details about document status, actions, and item changes.
Add/Import/Update	Incorporates different ways to bring outside information into an active document.
All Supplier (View)	Document view that displays all suppliers that the item can be sourced from while highlighting the selected supplier.
Billing & Shipping (Bill to / Ship to)	End-customer addresses in the header.
Carrier (Shipper)	Company delivering the product items to the end-customer.
Confidential (for print or email)	Any time a document has internal information on it, the preview will reflect this at the top of the document.
Credit Hold / Review	The total original limit established for an account on Net Terms on the customer edit page.
Custom Fields	Custom Fields can be established at both the Document Header and Item Line Level
Delivery Status	Combined shipping status of all lines and items on a Sales Orders.
Delivery Window	When clicking on the Send button in the footer, it will launch the with the print, email and PDF options
Doc Status	Overall status of the document based on shipping, holds, or document actions.
Document Actions	Broad term that incorporates the creation, modification, copy, cancellation, and deletion of documents.
Document Links (Links)	The connection of items from one document type to another, as in order to invoice.
Document Notes	Note can be either internal or external in nature.
End Customer	Account company or contact associated with the order.
Footer	Bottom section with the action buttons (example: Save or Send)
Header	Top portion of the document, containing information about the document, associated account, and internal users.
Invoice Status	Invoicing summary of the item lines on the sales order.
Line Item Fees	Nontaxable lines with a description and price.
Line Level Ship To	Select an account shipping address for a line item
Miscellaneous Fees	Placeholder for any order-based fees that are nontaxable
Order (Payment) Options	How the order will ship and be paid.
Product Action Buttons	Row of buttons at the top of the Product Table; buttons and options vary by document type.
Product Table	Area of the document that products, service, labor, and paragraphs are placed.
Quote	A document to manage inbound customer requests for products and services.
Revisions	Manual ability to save documents as revision for later use and reference.
Sales Order (Order)	Master document, created from a Quote, for all line-level activity associated with POs, Invoices, and RMAs.
Selected Supplier (View)	Document view that displays the supplier that the item is being sourced from.
Serial / Shipping (Tracking)	Line-level view of items that have shipped containing the serial and tracking information from the supplier.
Shipping Cost	Display of estimated shipping cost and weight that the end-customer's price is based on.
Standard (View)	Document view without any information about suppliers; best for use with end-customers.

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## Activating Quote & Sales Order Functionality

As the primary documents supported, both Quote and Sales Order documents are always enabled in the system. Optional settings for both document types can be found at: *Admin -> Company Settings -> Document Settings*.

### Quotes Setting Options


<b>Quotes</b>	<input checked="" type="checkbox"/>	Enabled (system default)
	<input checked="" type="checkbox"/>	Re-apply price profile rules and update tax rates when a quote is copied.
		Quote Name on Emails and Print Preview <span>SMBI Awesome Quote</span>
	<input checked="" type="checkbox"/>	Enable Expiration Date; a quote will Expire the following number of days after the Creation Date. <span>30</span>
	<input checked="" type="checkbox"/>	Enable Line Item Ship To Addresses (single shipping address per line item).
	<input checked="" type="checkbox"/>	Display Profit column on Line Items. Select the way profit will be displayed. <span>% Margin</span>
Enable Config Imports. This activates a link on the quote that allows you to import the line times for the selected manufacturer's configurator document into a quote. <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> HP SalesBUILDER</li> <li><input checked="" type="checkbox"/> Cisco</li> <li><input checked="" type="checkbox"/> Generic Import</li> <li><input checked="" type="checkbox"/> HP eConfigure Solutions</li> <li><input checked="" type="checkbox"/> IBM</li> </ul>		
Enable External Quote Imports. This activates a link on the quote that allows you to import the line times and bid # from the selected HP document type into a quote. <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> HP Value Express Pricing</li> <li><input checked="" type="checkbox"/> HP Value Big Deal</li> </ul>		
	<input checked="" type="checkbox"/>	Require shipping address to be present for Quote Export.

From the Quote settings area, you can configure ChannelOnline to:

- Change the printed name on your Quote documents from Quotation (often used to change it to Estimate)
- Enable and set the Quote expiration calculation date.
- Activate the ability to select ship-to location at a line-item level. For use with large accounts which have multiple locations.
- Choose to display the profit column in the product table to see GP on a line-by-line basis and select how it displays the calculated result.
- Allow specified external configurations or quotes to be imported straight onto a document (list of supported types can change; check Admin > Company Settings to see current listing).
- For users of the Export Quote or XML API, a requirement can be set to make sure all quotes contain a shipping address before they can be exported.

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### Sales Orders Setting Options

<b>Sales Orders</b>	<input checked="" type="checkbox"/>	Enabled (system default)
Order Processing Default		Manual 
<input checked="" type="checkbox"/>	Update Sales Order Date to Date converted to Sales Order.	
<input checked="" type="checkbox"/>	Enable Manual Status for Sales Orders.	
Review All Orders Over to the following dollar amount:		10001
<input checked="" type="checkbox"/>	Enable Auto Update Credit Limit for all customers with set credit amounts (see customer view or edit).	
<input checked="" type="checkbox"/>	Enable Line Item Drop Ship	
<input checked="" type="checkbox"/>	Trigger Last Modified Times on Sales Orders when PO links for the document changes. (Only applies to new PO links added or deleted PO links.)	

From the Sales Order settings area, you can configure ChannelOnline.

- The order processing default is systematically set at Manual. Specific requirements must be met to enable the automatic processing feature (contact Support for more details).
- Set the system to update the Sales Order creation date to the date it was converted from a Quote to a Sales Order. Otherwise, it will continue to use the creation date of the Quote.
- Place an order amount threshold for all orders created that flags them on an Order Review hold. Only users with proper access rights can unlock these documents. The threshold can also be overridden at the account level (see account Payment Options).
- When using credit limits on accounts, you can enable the system to deduct the total amount of the Sales Order from the amount of available credit.
- Enabling Line Item Drop Ship allows specific lines from a sales order to be shipped to an address that is different from the Ship-to address in the header.
- Last modified data can be updated whenever a line has been updated by a link PO. For example, with a shipping status update from shipped to delivered.

## Granting Quote & Sales Order Access Permissions

As the primary documents supported, both Quote and Sales Order documents are always enabled in the system. How your personnel team members interact with the documents can be controlled through the proper access rights and group permissions. By default, all Quote and Sales Order permissions are enabled for members of the “Admin SalesRep – Buyer” profile. Any custom Access Right Profiles will need to be modified to include this capability. Access Rights Profiles can be found at: *Admin -> Personnel -> Access Rights*.

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The permission options available allow for team members to have varying capabilities. It separates users that have to work on, create, and edit from those that can only view them or have the ability to approve them. There are six primary and four secondary user access rights available for Invoices that can be found below the 'Documents' section.

### Primary

- **View all Quotes, Proposals, Sales Orders, Invoices and RMA(s)** – Needed to view documents on customer account records and the Documents tab.
- **Create / Edit Quotes and Proposals for all Customers** – Basic right for quote creation from customer account records and the Documents tab.
- **Create / Edit Sales Orders for all Customers** – Enables user to convert quotes into sales orders.
- **Ability to unlock Quotes, Sales Orders Invoices and RMAs** – In the event that a document gets locked from an export or system rule, only these users can unlock it to put it back into edit mode.
- **Ability to approve for Credit Hold or Review All Orders** – This right works in conjunction with the use of the credit setting on prospect or customer accounts.

Documents ?
Edit Price (i.e. Customer Price, Cost, Margin, Profit)
Create / Edit Manual Line Item
Ability to unlock Quotes, Sales Orders, & Invoices
Ability to approve for Credit Hold or Review All Orders
View all Quotes, Proposals, Sales Orders, Invoices and RMA(s)
Create / Edit Quotes and Proposals for all Customers
Create / Edit Sales Orders for all Customers
Create / Edit Invoices
Edit Expiration Date

### Secondary

- **Edit Price (i.e. Customer Price, Cost, Margin, Profit)** – Users with this access can make adjustments to the line items cost, margin, and pricing.
- **Create / Edit Manual Line Item** – Opens up the ability for users to place manual line items onto a quote or sales order document.
- **Edit Expiration Date** – This right only applies to quotes.
- **View Company Purchase Approval System documents in Admin** – gives users the ability to open documents that were created by customers using CPAS.

Note: Users will also need view and/or edit access rights in order to create or follow linked Invoices, RMAs or POs.

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## Managing E-mails & Notifications

Quote and Sales Order notification emails are available in the Document Delivery section of the System Emails admin module. The following is a breakdown of the available email options. Note that many email templates consist of both a text version for use with an HTML attachment as well as one for a PDF attachment of the document being sent.

*Document Delivery Section – These emails are generated manually by a rep or a customer by clicking ‘Send’ and/or ‘email’ on a document*

- **Quote (Customer View) – [StoreSite Link, HTML and PDF]** – These three templates control the default content of the email that your sales team members will generate to send the customer from a Quote document internally in Admin.
- **Quote (Internal View) – [HTML and PDF]** – These two templates control the default content of the email that your sales team members will generate to send to other members of your company from a Quote document internally in Admin.
- **Quote (Store) – [HTML and PDF]** – These two templates control the default content of the email that your customer will generate on the StoreSite to send out.
- **Sales Order (Customer View) – [StoreSite Link, HTML and PDF]** – These three templates control the default content of the email that your sales team members will generate to send the customer from a Sales Order document internally in Admin.
- **Sales Order (Internal View) – [HTML and PDF]** – These two templates control the default content of the email that your sales team members will generate to send to other members of your company from a Sales Order document internally in Admin.
- **Order (Store) – [HTML and PDF]** – These two templates control the default content of the email that your customer will generate on the StoreSite to send out.
- **E-Sign Link (To Customer) – [E-sign Document Link]** – This template controls the default content of the email that your sales team members will generate to send a Quote to a customer for electronic signature.
- **Invoice (Customer View) - [StoreSite Link, HTML and PDF]** – These three templates control the default content of the email that your sales team members will generate to send the customer from an Invoice document internally in Admin.

*Document Delivery Section – These emails are system generated automatically based on the identified action*

- **Order Submitted - Pending Approval (Internal)** – Sends an email notification to the assigned sales rep when a submitted order is waiting for approval. Only used when customer order approval has been enabled.

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- **Order Item Shipped Notification (Global)** – Sends an email notification of items shipped to customer. This is triggered by the updating of the shipping status on the item lines of a Sales Order.
- **Order Submitted Notification [Manual]** – Notification of an Order placed on the StoreSite to the assigned SalesRep.
- **Customer Order Submitted Notification [Manual]** – Generates an Order Confirmation email to customer when an order is placed on the StoreSite.

## Creating Quotes

Quote creation may be initiated from three different places within the application.

1. The first method is to place items into your Scratch Pad and then click on the Copy To Customer link in the footer.
2. The second method is go to the Account View page for that customer or prospect and click on the Create Quote button in the documents section (there is also a Create Quote link in the Account Actions component).
  - a. Add products to the quote by part number, browsing, or the favorites list.
  - b. Add products in bulk by merging in another document (Merge into this Document) or importing a configuration.
3. The third method is to go to an existing quote, sales order or invoice and select Copy to New Quote.

Once the Quote document has been generated, you are ready to begin building the Quote. Before items are added, it is important to understand how to navigate the document page. Also, be sure that the correct account information is in the document header section. Verify the company name, contact, and any default billing and shipping addresses.

## Document Header

---

At the top of the document page is the header section. This section contains the document title, a row of sub-tabs, displays custom links (when active), and rows of order and customer information.

Below the page's "view" sub-tabs, the document header is divided up into three main rows containing three columns in each row. Although the first row is always visible, the second and third rows can be hidden or expanded for better usability. The breakdown of the header section areas can be outlined as follows:

1. Document sub-tabs and custom links
2. Document processing information

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3. Customer and contact
4. Internal users and stats
5. Bill to & Ship to
6. Order payment and shipping options
7. Custom Fields and/or Remit to address (for Invoices)
8. Company logo with show / hide option

### Quote Header (Open)

**Quote (Open)** View in classic style

Standard | Sourcing - Selected Supplier | Sourcing - All Suppliers | Activity | Revisions

Send to Liaison | **1**

---

Quote #: *	6042 - rev 1 of 1	Company:	Anchor to Zinc Boat Parts	Created By:	Wilson, Keith
Date: *	08/31/2015 02:48 PM PDT	Contact:	Sailorman, Popeye	SalesRep:	Wilson, Keith
Doc Status:	Open	Work Phone:	777-732-7245	Acct Mgr:	Wilson, Keith
Follow Up:	01/11/2013 <input type="checkbox"/> Required	Email:	N/A	Stage:	Closed
Expiration:	11/29/2015	Description:	None	Probability:	---
			Amount :	\$ 2,805.76	

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<b>Bill To:</b>	<b>Ship To:</b>	<b>Order Options:</b>
Anchor to Zinc Boat Parts Sailorman, Popeye 1500 Harbor Road Dock 8 San Diego, CA 92106 United States	Anchor to Zinc Boat Parts Sailorman, Popeye 1500 Harbor Road Dock 8 San Diego, CA 92106 United States	Payment Terms: Customer PO: Delivery Method: Road Runner Desert Delivery Carrier Account #: Special Instructions:

---

<b>Custom Fields:</b>	<b>Autotask Opportunity:</b>	<b>Buyer ID:</b>	<b>SMB Insights</b>
Proposal Temp: Kiln	< empty >		
Approver: Keith			
ConnectWise Opport...			

Custom Fields **8** Hide Logo

The highest portion of the header contains:

- Document Title (Status) – will also display document hold or lock information.
- Document Sub-tabs which include:
  - Standard (view) – hides all supplier information and is suitable for end-customer viewing.
  - Selected Supplier (view) – displays the supplier that has been selected as the source for the cost and pricing of the item in a table below the description of the line item.
  - All Suppliers (view) – this view shows all available suppliers, including the selected supplier, for all line items.
  - Activity (log) – behind this tab is a list of actions that have been taken on the document being viewed.
  - Revisions – quotes, proposals, and orders can be saved as revisions. The Revisions tab provides access to the captured revisions for and functionality for reverting back to a previous one.

- Custom Document Links (optional) – any configured and enabled global or customer URLs will appear here.

Below that are the three header rows. Those rows are sectioned out into groups of information.

1. Focuses on document related information. The left column has document number and revision, important dates (created, expire, and follow up), and statuses. In the center, you will find the customer related details. In the right column is the internal related data like SalesRep, account manager, and amounts.
2. Contains information on the client's bill-to and ship-to addresses, plus any payment and shipping method details.
3. Used mainly for optional fields and images like custom fields and logo. It is also used to place the company remit-to address on Invoices.

*See Appendix C Header Fields for a complete breakdown of fields and their meanings.*

## Product Table Organization

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After making sure that the correct information is in the document header, it is time to begin building the quote. There are many ways to set up a Quote, but much of the time users begin with adding products, services, or labor items onto it.

### *Adding Items (Products, Services, or Labor)*

The products that get added to a quote rely on the catalog that is assigned to the end-customer. To double check the catalog the system is using, look at the current catalog in the left menu or see it in the title of the page when selecting the Products tab. For further verification of an account's assigned catalog, go to the account view page. Once the catalog is verified, the correct products will be able to be placed on the Quote. Products are added through:

- Search Field – Type in the keyword or part number you are searching for to be taken to the search results page. From there, select Add to Quote or click on the product for more details (items may also be added from the product page).
- Products Tab – Click on the Products tab in the top navigation, and then select the category (sub-category), manufacturer, bundle, paragraph, or supplier to drill down into. From the search results page, select Add to Quote or click on the product for more details (you may add to quote from the products page also).
- Favorites List – The favorites list will take you straight to the product page. Select the quantity and Add to Quote.
- Add Product (quick) – On the quote page itself, there are two places that you can quickly add products - the Add Product field at the bottom of the page, or from the Add/Import/Update action button from the product table action bar.

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## Bundles

Bundles can be managed in Products Admin (recommended method for use with reporting) or created on the fly within a document. From within the document, select the lines that need to be part of the bundle (lines must be one after the other), go to the Line Action button and select Convert to Bundle. Bundle header and subtotal lines will be added above and below those items selected for the bundle. In the empty header fields, enter a name, description, and part number for the bundle and click the check icon to save. If the new bundle needs to be added to a catalog, it can be saved into Products Admin by clicking on the “Add to Database” icon to the right of the part number field.

## Applying Quantity and Price Adjustments

Users with Edit Price access can adjust all items for price and quantity directly in the product table. Once the quantity or sell price is changed, the document will automatically apply that change to the document's totals and GP % amounts. Applying a per-line adjustment can be achieved manually or by utilizing the line item calculator. By clicking on the calculator icon to the right of the sell price, a pop-up window will appear that allows for modification of price by:

- Change Sell Price – directly in the price field
- Add or Subtract a fixed amount
- Apply a discount % based on the list price
- Margin or Markup percentage

Shortcut keys are available in the calculator

- Press '**D**' to change the method to 'Discount (off list)'
- Press '**M**' to change the method to 'Margin'
- Press '**K**' to change the method to 'Markup'
- Press '**S**' to change the method to 'Sell At'
- Press '**A**' to change the method to 'Add or Subtract X dollars'



The 'Update Price' pop-up window contains the following fields and controls:

Current	149.00
Apply	149.00
Rate Method	Sell At (\$) ?
New	149.00
<input type="checkbox"/> Round Up	
Update Price	

It is also possible to select multiple line items, or document wide, at one time to change the margin or markup by going to the Apply section of the Gross Profit box in the Totals section of the document (more details are provided in the Totals section of this document).

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## Editing a Line Item

After an item is placed on a document, you may edit some of the information for that item. To get to the edit window, select the 'Edit' button icon to the left of the description to see line item details. The edit window will allow you to view or modify characteristics such as:

- Line One and Two Description – Update the descriptions provided by CNET Content Solutions or the selected supplier (these only affect the description on the document).
- Item Type – Select from product, service, or labor.
- Part number, Qty, and Unit / List Price – Adjustments made will be automatically applied on save.
- Package Weight – Can be adjusted when using custom items and suppliers; is also a good indication that the shipping price needs adjusting.
- Modify Category and Manufacturer – Is useful if the item was incorrectly categorized or was found in additional products (these only affect the item on the document).
- Item Notes – For additional details about the item to be viewable by the customer.
- Drop Ship Addresses – When activated from the Company Settings, ship-to addresses can be assigned to the individual lines of a Quote or Sales Order (optional functionality). This allows for a delivery address that is different than the one in the header; for use with accounts that have multiple locations for a single order.
- Cost Centers – Select from a list of cost center names/codes that have been set up for the assigned account (optional functionality).
- Supplier Costs & Availability – Change selected supplier and confirm cost, margin/markup, and profit.
- Contract #s – An adjusted cost and contract # can be added in the Cost Section. Adjustments made to cost will not be updated by 'Live Cost & Availability' so long as a Contract # has been provided and will be sent with the item to the PO.

## Line Level Actions

In addition to adding products to the document product table, you also have the ability to add some simple formatting to the quote or sales order.

### Line Item Actions

The Line Actions drop-down menu can be used to make changes to items or to add additional structure to your quotes. Available item related action tools are:

- **Delete:** Removes the selected line(s).
- **Compare:** Side by side comparison of selected items (up to 4).



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- *Price History*: What has been quoted for that specific item in the past.
- *Add to Catalog*: Quickly adds the item to a custom catalog.
- *Convert to bundle / Unbundle*: Select multiple products in a row to bundle together under a single price or group. The feature will add a header row to the group for the description of the bundle and the qty of bundles to be purchased, plus a subtotal row for the bundle's total selling price.
- *Line Item Fees*: Line item fees are used for adding e-waste, recycle, or additional non-taxable fees and associating it with a specific line in a document.
- *Print Selected*: Select specific items from the list in order to create packing slips or partial order print and email documents.

## Formatting Lines

The Line Actions dropdown allows you to add structure to your quote by utilizing these actions:

- *Headers*: A text description for a group of lines that can be placed anywhere inside the product table.
- *Subtotals*: Price subtotal for a group of lines. A subtotal will tally results from below the last header or subtotal header.
- *Formatting Lines*: A logical spacer (blank or horizontal) that adds separation between line items or groups of items; often used with Headers and Subtotals for cleaner section separation.
- *Copy Lines*: Select a line(s) that you would like to have duplicated within the document body, and it will be copied (with qty, notes and pricing) onto the bottom of the product table.
- *Link (Unlink) Lines*: Linking lines together to show a relationship between items. Unlike bundles that are grouped for a specific price, linked lines can be placed anywhere in the body of the product table. For example, it could be used to show the relationship between a hardware item and a maintenance contract or license.

## Reorder Lines

To change the order of the lines in the product table, you click on the "Reorder Lines" action button at the top of the Product Table. Clicking the button changes the view of the item lines to only their descriptions and enables the ability to drag and drop them into place. (Tip: it works best to place items between lines; when placing at the top or bottom, put the line you want there next to the top/bottom line and then move the top/bottom item into the position of the one the was placed next to it.)

## Style and Organization

Quotes and Sales Orders are often organized by item types (product, service, labor), configuration/builds, project phases, or engagement stages. Here are some typical applications of the formatting tools:

- Use of headers to clearly identify a block of items or phases.

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- Inclusion of spacers between header sections or builds.
- Addition of a horizontal line above your subtotal lines or headers as separation.
- Enclosing an entire line or group of lines by using two add line types (blank or line).
- Insertion of paragraphs to provide more description around installation requirements, Ts & Cs, and definitions of scope.
- Line linking to assist in showing item relationships.
- Bundling used as a way to provide to the end-customer a cleaner version of items under a single price.

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## Live Cost

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At any time after product items have been added to the document, a real-time price check on supplier cost can be performed. Items eligible for the real-time check are those that are carried by supported suppliers with a real-time integration to ChannelOnline. Those suppliers not supported with real-time P&A will return the cost from the last successful price file import. The real-time check will update the costs but will only update the selling price to the customer if the “Update Sell \$” box is checked. (To see a complete list of suppliers and their level of integration, go to the Suppliers section of the [channelonline.com](http://channelonline.com) website.)


☐ Update Sell \$

On Sales Orders there is an additional option next to Live Cost called “Show Serial/Shipping”. Selecting this button will display any serial numbers and tracking information associated with that item right below the description line. Serial and shipping information can come from linked Purchase Orders (PO) or be updated directly on the Sales Order document. Updating it directly onto the Sales Order can only take place if there is no link to a PO.

## Totals Section

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Below the product table, the Totals section provides a breakdown of line items’ calculated prices and fees. Standard fields that are always active in the totals section:

- Product Table Subtotal – the first subtotal directly relates to all the items in the product table above it but will be broken out into taxable and non-taxable below.
- List Price – a totaling of all the list prices captured at the line level within the product table.
- Taxable Items & Subtotals – all items (product, service, or labor) that are taxable based on the established tax profile rules for that state (bill-to or ship-to) are totaled, taxed, and subtotaled.
- Nontaxable Items & Subtotals – all items (product, service, or labor) that are not taxable (nontaxable) based on the established tax profile rules for that state (bill-to or ship-to), or which have been manually set to nontaxable within this document, are totaled and subtotaled.
- Tax – tax is applied for all taxable items unless the account on the document is exempt from taxation.
- Shipping – calculated from product weights provided by suppliers and the longest delivery route, the shipping field can move from taxable to non-taxable sections based on tax rules being applied.
- Total – the bottom-line; includes all items, taxes, discounts, and fees.

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<b>List Price \$616.00</b>		<b>Subtotal \$541.00</b>	
Taxable Items:		\$	541.00
Tax (on \$541.00):		8.000 %	\$ 43.28
<b>Taxed Subtotal:</b>		\$	<b>584.28</b>
Nontaxable Items:		\$	0.00
Shipping ( 17.0... Customer )	* Shipping Cost \$	12.30	\$ 19.00
* Misc. Fees:		\$	0.00
* Line Item Fees:		\$	0.00
* Promo Code:	* Discount:	0.00 \$	-\$ 0.00
<b>Nontaxable Subtotal:</b>		\$	<b>19.00</b>
<b>Total:</b>		\$	<b>603.28</b>

Besides the standard fields, ChannelOnline provides some special fee and discount options. To enable these options, go to Admin > Company Settings. The optional fields that can be used are:

- **Shipping Cost** – enabling the ability to view and edit shipping cost allows for greater accuracy when running reports for order gross profit. When this setting is enabled, the Gross Profit box will display a breakdown of the shipping profit, cost, and gross profit percent.
- **Apply a coupon / discount code** – From within Admin > Marketing, coupon or discount codes can be created. Once enabled, internal and StoreSite users can enter the Coupon Code and receive the established discount on the document. The actual name used for the discount line in the Totals section can be modified in Company Settings.
- **Line Item Fees** – When line item fees are being used, they will be totaled onto a line visible in the Nontaxable totals section. The actual name used for the item fee line in the Totals section can be modified in Company Settings.
- **Miscellaneous Fee** – when activated, it can be used for surcharges, e-waste, handling, or any additional fee that is often applied to customer orders.

To the left of the item totals and fees is the Gross Profit box. The gross profit box by default contains a breakdown of the profit, cost, and gross profit percent for the document. When the ability to display the shipping cost is activated, the box will contain three rows – top for items, middle for shipping, and the bottom for the combined calculation of both.

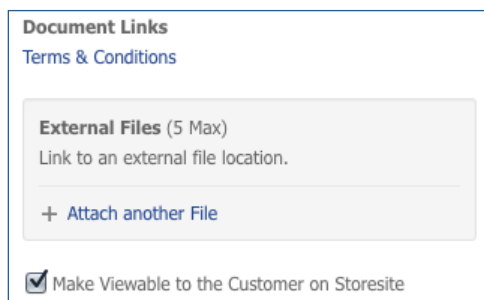
Item Profit: \$29.96	Item Cost: \$112.04	Item GP %: 21.10%
Shipping Profit: \$9.30	Shipping Cost: \$8.70	Shipping GP %: 51.67%
Profit: \$39.26	Cost: \$120.74	GP %: 24.54%
Apply	%	Markup <input type="text"/> <input type="button" value="✓"/>

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Also contained within the Gross Profit box is the ability to adjust the selling price of multiple lines on the order by entering an amount and selecting to apply it as either a margin or markup percentage. This feature eliminates the need to go line by line down the product table to make the changes. To apply the change, first select the lines that need to be adjusted, enter the amount, select either margin or markup from the dropdown in the Gross Profit box, and then click the Check (Apply) button.

## Options and Links

To the bottom left of the document in the Totals section are some additional options and features that can be taken advantage of.



- Terms & Conditions – the terms and conditions link will display the terms and conditions from the StoreSite that the account is assigned to.
- Attach an External File – when there are other external documents (ones not generated within ChannelOnline, like end-customer POs) that need to be linked to the document, you can attach them with this feature. Just click the “+ Attach File” link, enter a title, enter the URL and click the Attach button.

- Display this document in the StoreSite? – Checking the box will allow users on the StoreSite to see the document in the Account Activity tab once they have logged in.

## Notes

All documents have a series of note text boxes at the very bottom of the page. Both Quotes and Sales Orders have three boxes. Each can contain specific messaging targeted at different audiences.

- Document Notes (Optional) - for messages that will be shown when printing/emailing the document in all views.
- Internal Document Notes – notes pertaining to the document that are for internal recipients only. They are not to be displayed or sent to a customer. To show on print/email, the “Notes & Comments (int.)” box must be selected in the delivery window.
- Customer Comments – come from the account edit page on Prospects and Customers and are often used as reminders for special pricing, account, or handling information. To show on print/email, the “Notes & Comments (int.)” box must be selected in the delivery window.

## Tasks

Tasks can be created for documents by using the ‘+’ (plus) icon in the active document tab scroll-over information window or in the top row of the document header. More information on tasks can be found in the Organizer User Guide.

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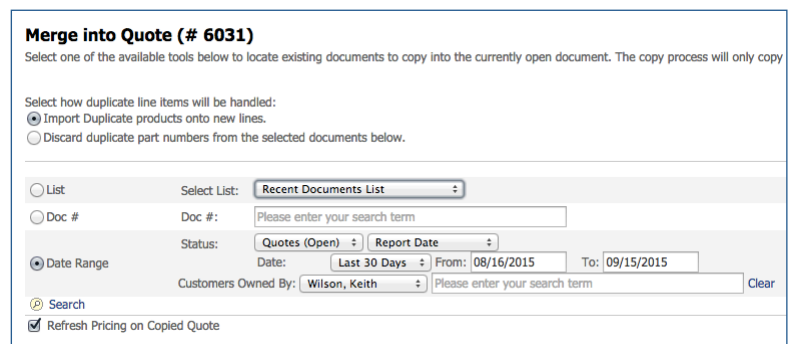
## Merging, Importing & Special Pricing

A quick way to bring multiple outside items into a quote is by using the Merge into the Document or the Import Config functionality. Merge into the Document takes another document from within ChannelOnline and pulls it into the active one being built. Import Config focuses on taking specific predefined external documents and bringing them into ChannelOnline and onto the active document.

### Merging Documents

This ability takes Quotes in an Open status and merges all the lines in the product table (or adds them) into the open Quote or submitted Sales Order document that you are working on. After selecting Merge into this Document from the Add/Import/Update button, a popup window will appear to assist in locating the document to be merged. Options for locating the document are by:

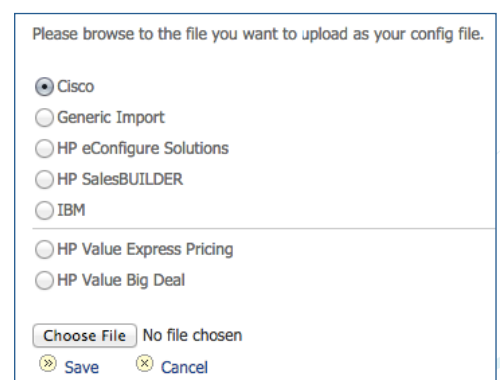
- List type:
  - Recent Docs List
  - Hot List
  - Recently Modified
- Document number.
- Date Range – Select from a dropdown of ranges or create your own range by using the date entry fields. These ranges may also be combined with the selection of a specific sales rep and/or account company name. Just select the SalesRep from the dropdown and begin typing the name of the account being searched for.



### Importing 3<sup>rd</sup> Party Quotes

Your Admin must first enable 'Config Imports' from Company Settings > Settings for the specific import files to be used. Once activated, users are able to select the 'Import Config' link in the Add/Import/Update action button at the top of the product list in the body. For each supported Import Config type, a sample file is available for download to check for compatibility and for instructions on how to format your import. Import file types that can be available to import:

- Cisco Configurations



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- HP eConfigure and SalesBuilder Quotes
- IBM Configurations
- HP Value and Value Express Quotes

## Generic Import

The Generic Import feature allows for the building of an entire quote in Excel and then importing it into ChannelOnline. This is the most flexible and commonly used format for importing external pricing deals or configurations. It is important to know the following details about Generic Import:

- Virtually every product level field is available to be imported in this way
- Can be configured to import a special 'bid number' which will serve as the contract number
- Supplier cost can be imported but will be overwritten if no bid number is provided
- Formatting lines can be included in the file (headers, subtotals, horizontal lines, etc.)

## Special Pricing Controls

Special Pricing can be handled in a variety of ways:

- Supplier Promo pricing – these promotional discounts are uploaded by suppliers within the pricing feed and marked with a Promo icon (looks like a light bulb) at the line level.
- Volume Big Deal - these contract price letters are often used by HP and IBM (config import or contract supplier)
- 3<sup>rd</sup> Party Quotes – HP Value Big Deals for example (config import or contract supplier).
- Line Item level cost adjustment – editing the line item with contract and adjusted cost information.
- Imported contract suppliers – to be used, contract special pricing must first be enabled at the supplier level using the 'enable contracts' option (Admin > Supplier > Edit *Selected Supplier*).
- Generic Import – using special 'bid number' which will serve as the contract number along with the adjusted cost. Contract pricing is marked with a Contract icon (looks like an award sticker) at the line level.
- Discount or Coupon Codes – in the totals section, discounts for dollar amount or percentage off can be taken off the total for the entire document (requires activation in Admin > Marketing).

## Volume Import

Importing volume pricing is done by first defining a 'contract supplier' in Admin > Suppliers > Contract Suppliers. For suppliers to be used as a Contract Supplier, the Enable Contracts box must be checked in the supplier's setup page. Contract Suppliers can be supported suppliers or custom suppliers. Each supplier who will fulfill the special pricing list must be defined independently, meaning a file import must be done for each one. Use the 'Import File' button to import a

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list of products with special pricing to the selected contract supplier. Once imported you can make that pricing available to a specific customer by adding it to their price profile. Items from the import will all be marked with the Contract icon.

When all modifications to the quote or sales order are complete, click the 'Save' or 'Save & Close' button at the bottom of the page. At any time in the process, the document may be sent to others by using the 'Send' button.

## Footer Actions

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At the bottom of all documents are a series of buttons that change depending on the document type and status. The footer action buttons available on the quote include:

- **Save Options** – four different variations of saving are available:
  - **Save:** saves your current progress and keeps you on the active document.
  - **Save & New:** saves the active document, closes it, and opens up the Create New Quote window.
  - **Save & Close:** saves the active document, closes it, and opens up the next active document in the Open Documents dropdown.
  - **Save as Revision:** saves the active document with an automatically generated revision number and optional description, and places the user back on the active document.
- **Copy to New Quote** – takes the items, quantities, pricing, and formatting and allows them to be placed in a new quote for any account available to that user.
- **Add to Hot List** – adds that specific quote to that user's Quote Hot List located in the Control Panel.
- **Convert to Order** – begins the process of converting the Quote into a Sales Order.
- **Export to Autotask / Connectwise** – for exporting to supported 3<sup>rd</sup> party applications (additional service options).
- **Send Options** – four methods are available for sharing Quote documents:
  - **Send:** Opens the document Delivery Window with Email, Print, and PDF options.
  - **Email:** Generates the document and automatically opens up the Email send window.
  - **Print:** Generates the document and automatically opens up the user's browser print function.
  - **Electronic Signature:** Generates the document and automatically opens up the E-Sign specific Email send window.

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## Converting Quotes to Sales Orders

Quote conversion to Sales Order occurs when the end-customer has agreed to the item and service details provided in the quote or cart. When capturing a Sales Order, it is important to validate all the information that is populated in the header, bill-to / ship-to, and all amounts auto calculated in the totals. This is the first step in making sure that the Sales Order will be set up correctly.

### Convert To Order

The following steps should be taken whenever converting a Quote to a Sales Order:

- Field Validation for all line level field information (even formatting), item notes, quantities, and totals.
- In the Totals section, check Tax, Shipping, Discount, Miscellaneous, or Item Fees (if used), and grand Total.
- Completion of any required custom document fields.
- Save (whenever any document information is updated).
- Document Status for Quotes should be Open to convert or send for electronic signature.

When all data is correct, select the “Convert to Order” button at the bottom of the page. This prompts the system to check the billing and shipping addresses as well as the payment and shipping method during the conversion process.

1. Billing and Shipping is checked so that taxes and shipping charges can be calculated correctly. All required fields, designated by an asterisk (\*), must be filled in prior to being able to move to the next screen.

#### Billing and Shipping Addresses

Enter new billing and shipping information here, or edit existing. You may also use the "Copy" buttons located between the columns to avoid re-typing similar addresses.

Billing Info (one per company)		Shipping Info (multiple per company)	
Copy from existing billing address		Copy from existing shipping address	
478 W 6th St, San Pedro		478 W 6th St, San Pedro	
Company		Company	
Acme Computer Services, LLC.		Acme Computer Services, LLC.	
First Name *		First Name *	
Last Name *		Last Name *	
Phone	Ext	Phone	Ext
Fax	Ext	Fax	Ext
E-mail		E-mail	

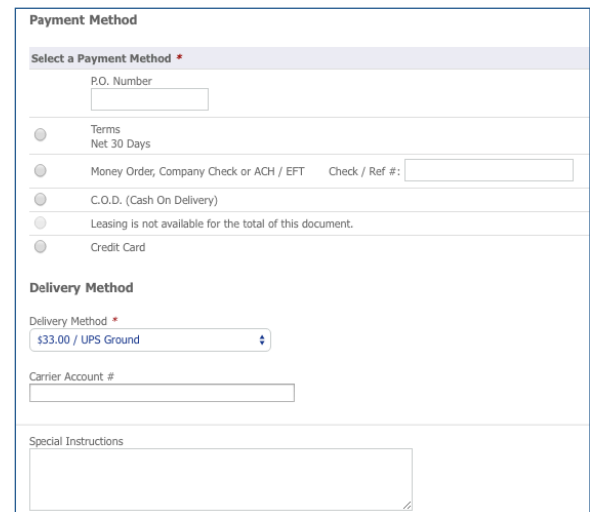
Copy >

< Copy

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2. Payment method and Shipping method will be prompted if previously undefined on the Quote. Payments that have been assigned to the account are displayed, as well as a dropdown selection of carrier options with estimated costs. PO number is required for all terms and optional for use with other payment methods. Carrier account numbers and special delivery instructions can also be added at this stage.

The new Sales Order will be placed in Submitted status upon creation.



The screenshot shows a form titled "Payment Method" with a section "Select a Payment Method \*". It includes a "P.O. Number" field, a "Terms" dropdown set to "Net 30 Days", a "Money Order, Company Check or ACH / EFT" option with a "Check / Ref #:" field, a "C.O.D. (Cash On Delivery)" option, a note "Leasing is not available for the total of this document.", and a "Credit Card" option. Below this is a "Delivery Method" section with a "Delivery Method \*" dropdown set to "\$33.00 / UPS Ground", a "Carrier Account #" field, and a "Special Instructions" text area.

## Send via E-sign

The following steps should be taken whenever using the Electronic Signature method to convert a Quote to a Sales Order:

- Field Validation for all line level field information (even formatting), item notes, quantities, and totals.
- In the Totals section, check Tax, Shipping, Discount, Miscellaneous or Item Fees (if used), and grand Total.
- Completion of any required custom document fields.
- Save (whenever any document information is updated)
- Document Status for Quote must be Open to convert and send for electronic signature.

When all data is correct and the user selects the "Electronic Signature" from the "Send" button at the bottom of the page, the document will be sent through the same two checks as in the Convert to Order process. The system checks the billing and shipping addresses as well as the payment and shipping method during the conversion process. Once this process is complete, the document will appear in the Delivery Window. Make a review of all desired view options and then click on the Send E-sign Link to email the document link to the end customer for acceptance.

As soon as the document is sent, the status of the Quote is updated to Out For E-Sign. Upon approval by the end-customer, it will be converted into a submitted Sales Order.

Quote (Out For E-Sign)  **QUOTE HAS BEEN LOCKED.**

For more details on how to set up and use the Electronic Signature feature, please refer to the Using Electronic Signature PDF document available in the Help Center.

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## On Proposal

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The following steps should be taken whenever using the Proposal method to convert a Quote to a Sales Order:

- Field Validation for all line level field information (even formatting), item notes, quantities and totals.
- In the Totals section, check Tax, Shipping, Discount, Miscellaneous or Item Fees (if used), and grand Total.
- Completion of any required custom document fields.
- Save (whenever any document information is updated)
- Document Status for Quotes must be Open to add them to a Proposal.

When all data is correct, the quote can be attached to a Proposal. Once attached, a quote cannot be edited or updated because it can adversely affect the Proposal document. To edit a quote attached to the Proposal, it must be removed, edited, and then reattached.

Quotes attached to Proposals will be converted to submitted Sales Orders upon the acceptance of the Proposal through Electronic Signature. For more details on how to set up and use Proposals, please refer to the Building a Proposal PDF document available in the Help Center.

## Sales Order Actions

Although Quotes and Sales Orders are very similar in design and function, Sales Orders have some unique capabilities that are not available on the Quote document. These features mostly focus around the individual item lines in the product table, but some can be located in the header and footer areas of the document.

### Product Table Actions

As mentioned earlier, the Sales Order is the master document from which all other sales related documents are created. To facilitate the creation of Purchase Orders, Invoices, and RMAs, users can select the lines from the product table, click the “Create Doc” button, and select the proper document type to be generated. In this way, a single item can be linked to more than one document. For example, the item on the Sales Order can be linked to the Purchase Order with the supplier and then be converted onto an Invoice for billing and payment.



Because various lines on the Sales Order document can be linked to other document types or items in the document, special viewing filters have been added to make finding some of them easier.

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- Lines w/o PO – shows only line items that do not have a link to a PO. Helpful in finding items that still need to be sourced from suppliers.
- Lines w/o Invoice – shows only line items that have not been invoiced. Helpful in finding items that need to be invoiced for payment.
- Linked Only – provides a view of only items with line level links.

Show Serial/Shipping – after POs have been created and the status has been updated to Shipped or Partial Ship, selecting the “Show Serial/Shipping” button will toggle the display of carrier status/tracking information and any serial numbers available. Remember that the Sales Order will be updated as long as the links to the POs remain intact.

*Note: All other Product Table actions and line item editing that was available on the Quote is also available on the Sales Order.*

### Updating Serial and Tracking Details

When line items on a Sales Order are used to create Purchase Orders for supplier fulfillment, the serial and tracking details will flow back to the Sales Order. If the products are being fulfilled directly, not through a supplier with electronic ordering, or the Purchase Order link is broken, the serial and tracking/shipping information can be updated directly on the Sales Order.

First, make sure that Sales Order is in an editable state, and then start by clicking the “Show Serial / Shipping” button to display the related fields. To see the serial number and container relationships, click on the Serial # icon in the serial numbers section of the line details. Serial numbers can be unallocated and reallocated to the correct containers, if needed. Two things that need to be kept in mind regarding tracking:

- PO linked items need to be edited from the PO.
- Non-linked or broken linked items can be edited on the SO.

Tracking numbers are linked to the carrier’s website through the shipping icon in the Tracking # section for quick access to the detailed shipping status of the package(s).

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Lenovo ThinkPad X230 Tablet 3435   
 Convertible - Core i5 3320M / 2.6 GHz - Windows 7 Pro 64-bit - 4 GB RAM - 180 GB SSD - no optical drive - 12.5" touchscreen 1366 x 768 ( HD ) - Intel HD Graphics 4000 - 3G/4G upgradable - TopSeller



34355AU

\$1,699.00

3



4.78%

1,148.00



\$3,444.00

Cost Center		Shipping Address	
Island		Lucky, Jack, Avalon Bay, Slip 32, Avalon	

Status	Shipped On	Carrier	Tracking #
Shipped 3	09/22/2015	UPS Ground	1Z9999999987654999

Serial #s
AO825K9999 , AO825K9888 , AO825K9777

## Footer Actions

Most of the footer actions on the Sales Order are the same as on the Quote, with some exceptions:

- Save Options – Four different variations of saving are available.
  - Save: saves your current progress and keeps you on the active document.
  - Save & New: saves the active document, closes it, and opens up the Create New Quote window.
  - Save & Close: saves the active document, closes it, and opens up the next active document in the Open Documents dropdown.
  - Save as Revision: saves the active document with an automatically generated revision number and optional description, and places the user back on the active document.
- Copy to New Quote – takes the items, quantities, pricing, and formatting and allows them to be placed in a new quote for any account available to that user.
- Add to Hot List – adds that specific quote to the user's Quote Hot List located in the Control Panel.
- View Invoices & RMAs – takes users to either a page that lists all invoices or a page that lists all RMAs that have been created from that Sales Order.
- Approve – appears when an order is on hold for order or credit review.
- Cancel / Complete – Cancel will keep a record of the order but will remove it from reporting and dashboard results. Moving an order to Complete status once it has been invoiced removes it from the sales order totals for reporting and dashboard results.
- Edit – to modify a completed Sales Order, including Cancel, users with the access right can select the Edit button to move it to an editable state.
- Export to Autotask / Connectwise – for exporting to support 3<sup>rd</sup> party applications
- Send Options – four methods are available for sharing Quote documents.
  - Send: Opens the document Delivery Window with Email, Print, and PDF options.

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- *Email*: Generates the document and automatically opens up the Email send window.
- *Print*: Generates the document and automatically opens up the user's browser print function.

## Status Updates

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The status of the Sales Order document will be automatically updated based on the activity of the Items on the Purchase Orders (see Document Statuses table). In addition to shipping statuses, the document will also be updated with the Invoice status of all items that have been invoiced (see Exhibit A).

Once all the items have been delivered or have been placed on Invoices, the Sales Order status should be moved to Completed.

## Reference and Help Icons

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**Date** – this icon will tell you information about when a document was created as a Quote, converted to a Sales Order, and when it was last modified.

**Delivery Status** – get a shipping status overview of all the products submitted on the order. Information on the number of items ordered, shipped, and delivered.

**Tax** – provides details on non-taxed states or tax-exempt customer accounts.



When this icon is present, it means that there is more information on this feature in the Help Center.

## Deleting Quotes & Orders

Deleting either of these document types removes them from the search results and places them into the Recycle Bin. To delete a document, go to the document results on the Documents tab or Account View, and click on the “Delete” icon in the right side column of the document you want to delete.

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## Searching and Viewing Quotes & Sales Orders

INTERNAL (in Admin) – All documents can be searched for in the Documents tab, Customer record sub-tabs, and in Sales Reports. In either the tab or the account page, you can use All Orders or drill down into the specific document type by using the sub-tabs.

The Sales section of Reports has many variables to use to build reports and run queries. Use of the document, account, and personnel can maximize the report results.

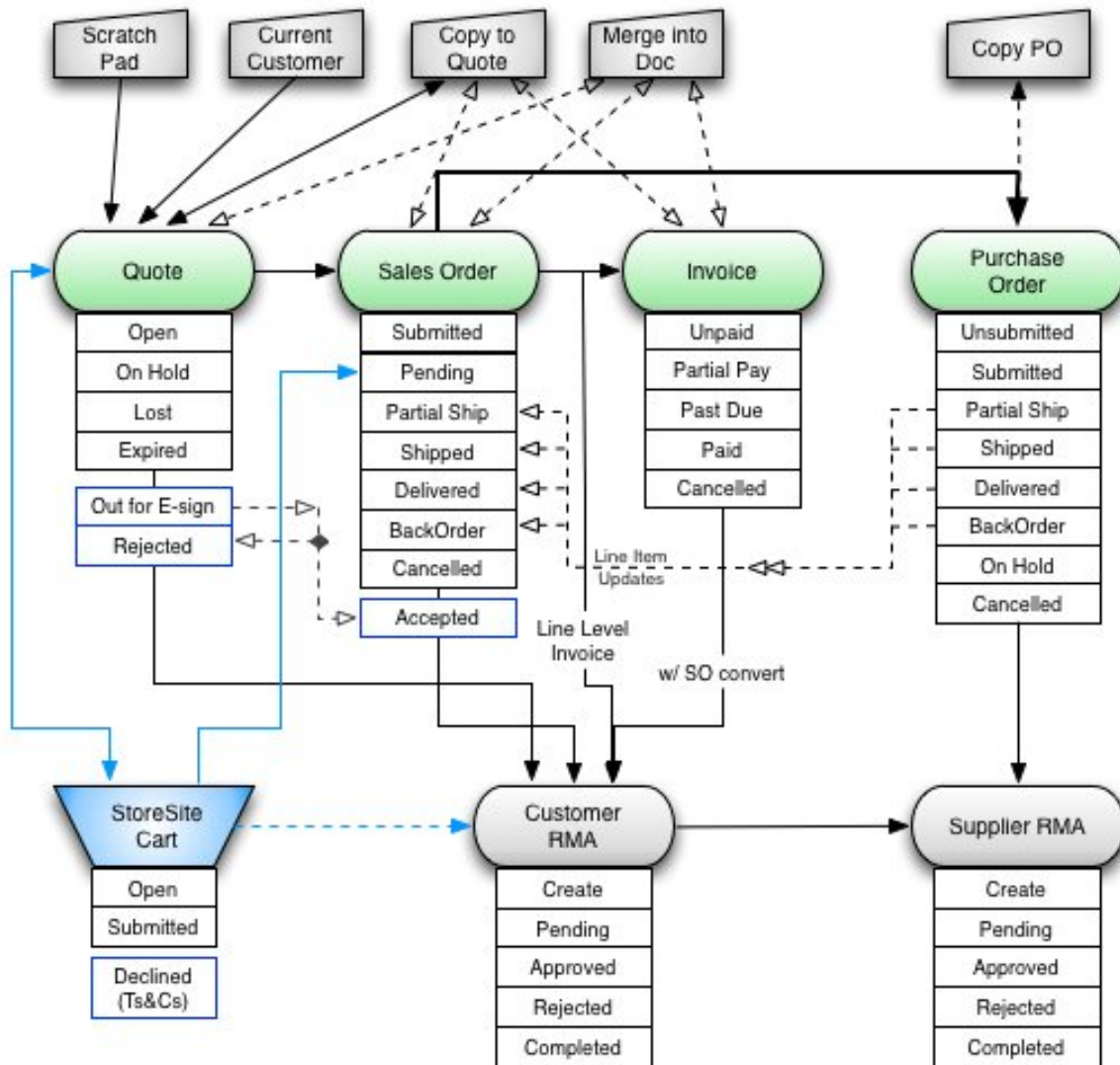
### Customer Record View

Documents												
All Quotes & Sales Orders												
<div> <a href="#">Create Quote</a> <a href="#">Create Proposal</a> <a href="#">Create RMA</a> <a href="#">Recycle Bin</a> </div> <div> Modified By (All) ▾ Status (All) ▾ Last 90 Days ▾ </div>												
Store	Doc #	Contact	Doc Type	Status	Description	Total	GP%	Customer PO	Last Modified	Modified By	PO #	Del
<input checked="" type="checkbox"/>	6096	Sailorman, Popeye	Quote	Open	None	\$2,455.10	4.34%		Sep 16, 2015 06:43 PM PDT	Wilson, Keith (SalesRep)		
<input checked="" type="checkbox"/>	6042	Sailorman, Popeye	Quote	Lost	None	\$2,805.76	92.25%		Sep 14, 2015 02:14 PM PDT	Wilson, Keith (SalesRep)		
<input checked="" type="checkbox"/>	6071	Sailorman, Popeye	Sales Order	Pending	None	\$1,392.07	12.21%	3214234213	Sep 11, 2015 03:28 PM PDT	Wilson, Keith (SalesRep)		
<input checked="" type="checkbox"/>	6069	Ferguson, Gary	Sales Order	Submitted	This comment show's on doc.	\$205.16	21.73%	312412343	Sep 11, 2015 11:11 AM PDT	Wilson, Keith (SalesRep)		
<input checked="" type="checkbox"/>	6047	Ferguson, Gary	Sales Order	Pending	This comment show's on doc.	\$68.36	36.40%		Sep 04, 2015 04:25 PM PDT	Wilson, Keith (SalesRep)		
<input checked="" type="checkbox"/>	6009	Sailorman, Popeye	Quote	Lost	None	\$2,805.76	92.25%		Sep 03, 2015 09:31 PM PDT	Wilson, Keith (SalesRep)		
<input checked="" type="checkbox"/>	5833	Sailorman, Popeye	Invoice	Unpaid	This comment show's on doc.	\$78.24	24.97%	21421341	Sep 03, 2015 04:23 PM PDT	Wilson, Keith (SalesRep)		
<input checked="" type="checkbox"/>	6046	Sailorman, Popeye	Sales Order	Submitted	This comment show's on doc.	\$29.12	33.29%	12342341	Sep 03, 2015 04:02 PM PDT	Wilson, Keith (SalesRep)	5301	

EXTERNAL (on StoreSite) – End-customers can access their documents through the Account Activity tab after logging into their assigned StoreSite.

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## Exhibit A – Complete Document Workflow & Statuses



### Notes:

- There are four ways to start a quote; two begin with existing documents.
- Individual line items from Sales Orders can be added to single purchase orders, split into multiple purchase orders, and line items from different sales orders can be added to a single purchase order.
- Individual line items from Sales Orders can be split into multiple Invoices, or the whole Sales Order can be converted into an Invoice.
- Individual line items from Sales Orders can be used to create an RMA.
- Shipped, Partial Shipped and Delivered statuses, as well as tracking and serial information, update from the purchase order back to the original sales order.

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## Exhibit B - Anatomy of a Document Page

- Document Title (Status)
- Document Sub-tabs
  - Standard (view)
  - Selected Supplier (view)
  - All Suppliers (view)
  - Activity (log)
  - Revisions
- Custom Document Links (optional)
- Header layout (rows and collapse)
  - Document Info
  - Customer / Contact
  - Internal users / amount info
  - Bill To / Ship To / Payment Options
  - Custom Fields / Remit To / Logo
- Product Table
  - Product table buttons
    - Line Actions
      - Manual line items
      - Bundles, adding bundle to the database and catalogs
    - Doc Actions
    - Re-order Lines
    - Filter Views (All, w/o PO, w/o Inv, w links)
    - Add/ Import/ Update
  - Inline editing: Edit icon / page, qty
    - Links
    - Qty
    - Price / Calculator
  - Line Level Custom Fields
  - Supplier Details
- Totals Section
  - Tax / non-tax items subtotals
  - Line item fees / misc fees
  - Shipping Cost / Price
  - GP for items and shipping costs (optional)
  - Markup multiple lines
  - Attach External File
- Footer bar action buttons
  - Save / Save & New / Save & Close / Save as Revision
  - Copy to New Quote / Add to Hot List
  - Convert
  - Export
  - Cancel / Complete
  - Send (Email / Print / Electronic Signature)

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## EXHIBIT C – Header Fields

### Quote

Field Name	Default Value present?	Editable	Field Type	Additional Notes
Quote #	Yes (document number)	No	N/A	
Date	Yes (creation date)	Yes	Date, time	This is referred to as the Report Date. To see the created date and last modified date, you may click the i icon to the right of the current value.
Doc Status	Yes ( <i>Open</i> )	Yes	Dropdown	
Follow Up	No	Yes	Date	Required checkbox present
Expiration	Yes (configurable in Company Settings)	Yes	Date	
Company	Yes	No	N/A	
Contact	Yes	Yes	Dropdown	To edit, click the pencil icon to the right of the current value.
Work Phone	Yes	Yes	N/A	Inherited from Contact. To edit, change the contact.
Email	Yes	Yes	N/A	Inherited from Contact. To edit, change the contact.
Description	No	Yes	Text	
Tasks	Yes	Yes	N/A	To edit, click the + symbol to add a task.
Created By	Yes	No	N/A	
SalesRep	Yes (defaults to created by rep)	Yes	Dropdown	
Acct Mgr	Yes	No	N/A	
Stage	No ( <i>Select One</i> )	Yes	Dropdown	
Probability	No (---)	Yes	Dropdown	
Amount	Yes (\$0.00)	Yes	Text	This value inherits the value from the total field at the bottom of the quote.
Bill To	Yes	Yes	Text and dropdown fields	To edit, click the pencil icon to the right of this section.
Ship To	Yes	Yes	Text and dropdown fields	To edit, click the pencil icon to the right of this section.
Order Options	Yes	Yes	Text and dropdown fields	To edit, click the pencil icon to the right of this section.

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## EXHIBIT D – New 7.0 vs. Old 6.3

Changes made to Quote and SO options:

Section / Feature	NEW 7.0	OLD 6.3
Header Layout	Updated 3-row layout with defined data areas and ability to be collapse rows when needed.	Two rows of unaligned stacked data
Header Layout	Amount field added, includes available credit and limit on SOs.	N/A
Header Layout	Hide Logo (print logo is based on templates)	Logo always present internally
Header Layout	Custom Fields can span the 3 <sup>rd</sup> row	Stacked in the fourth right side column
Custom URLs	Top of document below the Sub-tabs	Was in section above Bill To / Ship To
Bill To / Ship To	Added email address	N/A
Product Table	Line Actions button dedicated to item actions and formatting.	All actions, item or doc creation, were here.
Product Table	Create Doc button is dedicated to the creation of available document types from the SO	Was part of Line Actions
Product Table	Reorder Lines - ability to switch into drag and drop mode for arranging line items on a document.	Needed to use arrow on each line to select the number to move it to.
Product Table	Add/Import/Update brings many of the import and merging features into one button as well as providing a 2 <sup>nd</sup> location for Add Product and Update Margin / Markup.	Import, merge, and 3 <sup>rd</sup> party application links were spread across the Totals section and the Footer.
Product Table	View Filters help to identify items that are not on POs and Invoices or have line links.	N/A
Product Table	Copy Line Item with all details to the bottom of the product table	N/A
Product Table	Link Line Items creates a visual relationship between two or more lines.	N/A
Product Table	Print Lines allows for only the selected items on the doc to be printed; for use with packing slips.	N/A
Product Table	Live Cost button	Was a link.
Product Table	Show Serial/Shipping button	Was a check box
Product Table	Update Sell \$ check box.	Was Change Sell Price: Yes / No radio buttons
Totals	Show Nontaxable total provides a subtotal of the items that tax is not being applied to	N/A
Totals	Line Item Fee Total adds up the total of all line item fees into the nontaxable section	N/A
Totals	Shipping Cost enabled show weight and amount of what shipping price is based on; helps to better calculate GP on the complete order.	N/A

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Totals	Display Tax Breakdown will show you what percent of the tax is from state, city, and county. Also viewable on print.	N/A
Totals	External File links are to be used to link to a file on a shared drive outside of ChannelOnline	N/A
Totals	Removal of Import Config and Add Manual Item into the product table action button Add/Import/Update	Links in the Totals section
Quote Tracking	Stage and Probability are used in a new tracking widget on the dashboard.	Fields were only viewable on the document.
Footer	Narrow footer with Action buttons that are multi-function	Wide footer band with columns of rows with hard coded links
	Quick Email and Print functionality is now available to all in the Send button	Had to be activated manually in document template preference settings

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