CQM Training Outline

(Commercial Quote Manager)

**Briefly discuss how we use CQM and how it integrates with Navigator and Salesforce crossover**

* A licensed product and CQM is limited to a certain number of users.
* All users have access to the integration onto Navigator.
* The PDF quotes are logged in Salesforce and attached to opportunities.

**Menu**

* Many of the options available In CQM are not utilized. This is due to Salesforce.
* Dashboard – Not used by LTD
* Accounts – Not used by LTD
* Contacts – Not used by LTD
* Opportunities- Used but only when creating a quote and done in the quote screen.
* Job quotes – Used to create and distribute quotes out of CQM.
* Orders – Logs when orders are created using the Navigator CQM interface.
* Products – Used and will show you what items or categories are used on Quotes

**Job Quotes**

How to search for existing jobs quotes in CQM

* You can search many several fields. Below are the most popular
  + Opportunity
  + Owner
* You can do basic sorting using the columns and clicking on the headers.

How to create a job quote

* Opportunity is required and is selected or created as first step in creating a quote.
* Account tied to Opportunity should always be Job Quote. We do not tie a specific account to Opportunities in CQM. This is done in Salesforce.
* Each Quote is assigned the unique quote #
* Quotes can be copied
* Status is not mandatory and tracking in Salesforce.
* The Expiration Date is displayed on the quote and should be entered.
* Active status will default to active and should remain set to active.

Pricing Billto account

* The quote can be priced by any account. This only is setting up what the system pricing will use when adding items. It is not tying the quote to a specific account.
* Many users use test accounts for pricing on the quote. It can be branch and project specific.

Loading products into the quote

* You can load quoting items my 4 types. Manufacturer, Item, Price Class, and Product Line. Price class and Item are the used 99% of the time.
  + The system can only price using the billto account if using Item. If you use Price Class, the system uses List Price. That would need to be overwritten to the proper price.
  + Manufacture and Product Line does not display nay pricing. That would need manually entered if used.

Internal and External Notes

* Internal notes are shown only in Nav Order Management when the order is created.
* External notes are shown on the Job Quote that is distributed out to customers.

Quote Distribution

* Once the quote is created and no other changes are expected, it is distributed out via email and a PDF version is loaded in Salesforce attached to the Opportunity.
* Each quote is customized to the location that quoted the product. Each licensed user is assigned a default overlay and can also be changed on the prior to distribution.
* The Quotes can also be printed or saved in addition to email in this screen.

Screen configuration

* The columns can be organized and viewed as you like to see them. Other data points can be included and removed to customize the users view.

**Navigator Integration**

Order Search

* Order Management search filter contains 3 CQM search functions. The only one useful to LTD is the CQM Job Quote #. This will find Navigator orders that were flipped from CQM quotes.

Flipping an CQM quote to a Navigator Order

* Start a new order for the customer account that is being billed for the job.
* Choose the CQM Job Quote button on the right side of the screen, below the header.
* Here you can search by job quote. If you have the quote # you can simply type it into the search box and search. Other popular search method to search is to search by Opportunity name.
* Select the quote that needs turned into an order.
* The screen will load the quote and allow for changes. You can change the following:
  + Choose what items to order and not order.
  + Quantity of each line item on the order.
  + Unit of Measure can be change to valid UM for that item.
  + Unit Price can be modified, if needed.
  + Notes, that will show up on the order below the line items.
  + Special Order override flag
    - If the item is set at the item level to always special order, the item will special order anyway.
    - If something is stocked or centrally stocked, if the line quantity is over 500sf, you should use the override to special order.
      * This is to make sure the material gets the same serialization to match and to not wipe out stocked material.
* Once configured clicking next will load the order into Navigator.
* Once it is a Navigator, unprocessed order, you have normal edit rights as you would have on an order created normal navigator methods.