

Results Order Form Instructions

Prepare the Customer File

- 1) Make a copy of the Excel file.
- 2) Re-name the copy using customer name and quote date
- 3) Save the renamed copy.
- 4) Open the file and add customer company name and the quote date in header area.

Create the Quote

- 1) Use the Quantity column to insert the number for each license type.
- 2) For Integrations, place a 1 as the Quantity for each integration selected.
- 3) Integrations, Contacts Portal, API Data Access, Document and File Storage as well as the Client Support sections may be accessed by clicking the plus sign (+) to the left of the section. They can be collapsed if not needed by clicking the minus sign (-) to the left of each section.
- 4) Toggle the Priority Care option to “Yes” or “No” by selecting the Quantity column and using the dropdown choices (click small arrow in lower right of field).

Note: After all quantities are updated, the Monthly Subtotal will be displayed (with the discounted values for Annual and 3-Year). The total recurring payment amounts for each of the agreement terms will also be populated.

- 5) Add One-Time Services for initial Onboarding, Deployment and Training. For Additional Optional Services, expand the section using the plus sign (+) on left side.

Order Totals Section

- 6) If adding Order Notes, use Alt-Return to insert line breaks in the Order Notes field.
- 7) Select Monthly, 1-Year or 3-Year term.
- 8) For 1-year or 3-year terms choose whether to finance or to pay the full term amount with the order.

Preparing the Quote for Printing and Sending

Note: It is generally not recommended to send the Excel file, due to its complexity and because it cannot be easily printed directly. Here's how to save it as PDF before sending.

- 9) Select “File”, then choose “Print”
- 10) For Printer, choose “Print to PDF”
- 11) Under Settings, change to “Print Entire Workbook”
- 12) Click “Print” at top, then select file location, and name the file using customer name and quote date (recommended).
- 13) Hit “Save”.

The PDF version of the order is now ready to be printed and/or emailed.