

## Using the Results Order Form

### 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 add the number of each license type.
2. For Integrations, place a 1 as the Quantity for each integration selected.
3. Contacts Portal, API Access and Storage sections are collapsed. To display or adjust these options click the plus sign (+) to the left. To re-collapse section use the minus sign (-).
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 term options will also be shown.*

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. Select the Payment Term field and use the dropdown (small arrow on bottom-right) to choose Monthly, 1-Year or 3-Year. Order totals will then adjust automatically.
7. If adding Order Notes, use Alt-Return to insert line breaks in the Order Notes field.

### 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 printed directly. Here's how to save it as PDF before sending.*

1. Select “File”, then choose “Print”
2. For Printer, choose “Print to PDF”
3. Under Settings, change to “Print Entire Workbook”
4. Click “Print” at top, then select file location, and name the file using customer name and quote date (recommended).
5. Hit “Save”.

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