

# Advanced Quoting

## Quick and Easy Quoting in Oracle CRM On Demand

Advanced Quoting is a zero-install solution for generating quote data and documents in Oracle CRM On Demand from opportunities. It is lightweight and easy to maintain, but powerful enough to handle pricing rules, synching of opportunity and quote records, generation of industry-leading documents in DOCX and PDF format, and ability to email the quote directly from CRM On Demand.

## Spend your time Selling, not creating Docs

We'll walk your team through the straightforward process of creating your quote templates once, then you can kiss the tedious job of copying and pasting data from CRM On Demand goodbye! Even if you only generate a handful of quotes per month, we guarantee the Advanced Quoting solution will pay for itself and help you sell more, ask us about our ROI calculator.

## How Advanced Quoting Works

1. Update your Opportunity record in CRM On Demand, to reflect correct products and quantities.
2. Press a button and let Merge On Demand update your line item and header pricing, including complex discounting workflow rules.
3. Select your quote, agreement, or contract template and press "Create Document".
4. In mere seconds, your quote record with line items have been created and your quote documents are merged and ready.
5. You can then click on the email button to select an email template or compose a new message with the new document attached. Once the email is sent, an activity is logged in Oracle CRM On Demand, so that you don't have to waste any more time.



## Modify

Changing document templates is a breeze with our Template Manager portal. Make any edits needed in Word 2007 or above, update any mappings needed using XML tagging, save, and upload the file in our portal. Instantly, your document is updated and ready to merge in Oracle CRM On Demand.