broadsoft LearningCenter

BROADCLOUD ADMINISTRATION PROFESSIONAL

Module 5 - Quote Entry

broadsoft

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MODULE OBJECTIVES

- Understand the Process Flow for a BroadCloud Order
- Be able to Start, modify and process a Quote
- State the basic use of Examinet and be able to generate a request

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PROCESS FLOW

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TRADITIONAL PROCESS

Prospect Qualification → **Solution Presentation** → **Quote Creation** → **Negotiation** → **PO**

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TRADITIONAL PROCESS

Order Checkout | Optional Processes | Planning | Provisioning | Installation | Testing | Acceptance

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SALES PROCESS FLOW

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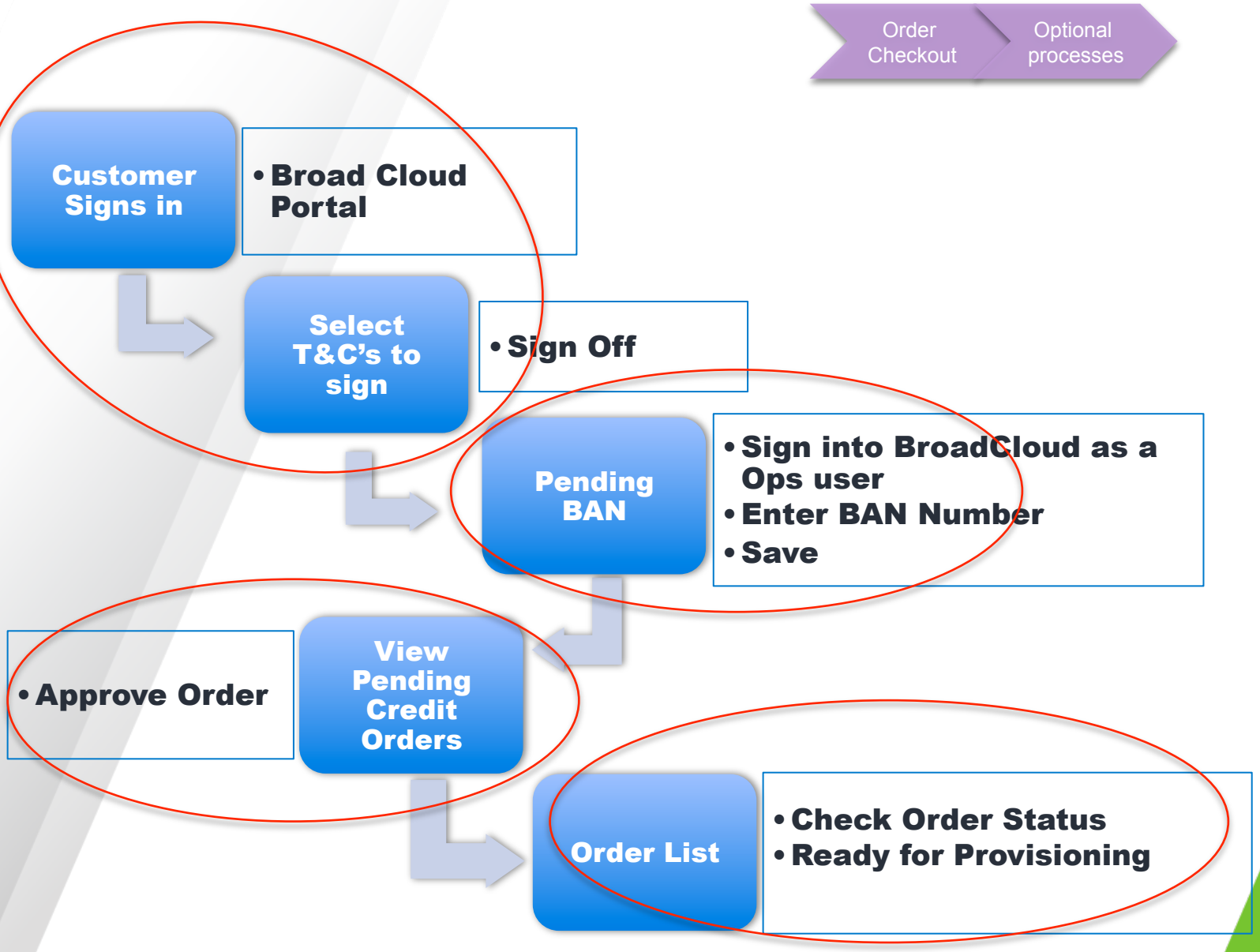
OPTIONAL PROCESS FLOWS



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PROVISIONING PROCESS FLOW

Order List

- Select Order
- Assign Order

Set to Created

- Set Service Activation Date

Set to Working

- Enter Numbers
- Assign Numbers
- Enter Devices

Set to Install Pending

- 15 Minutes Window

Provisioning

- System Auto Provisioning
- Not able to Stop at this point

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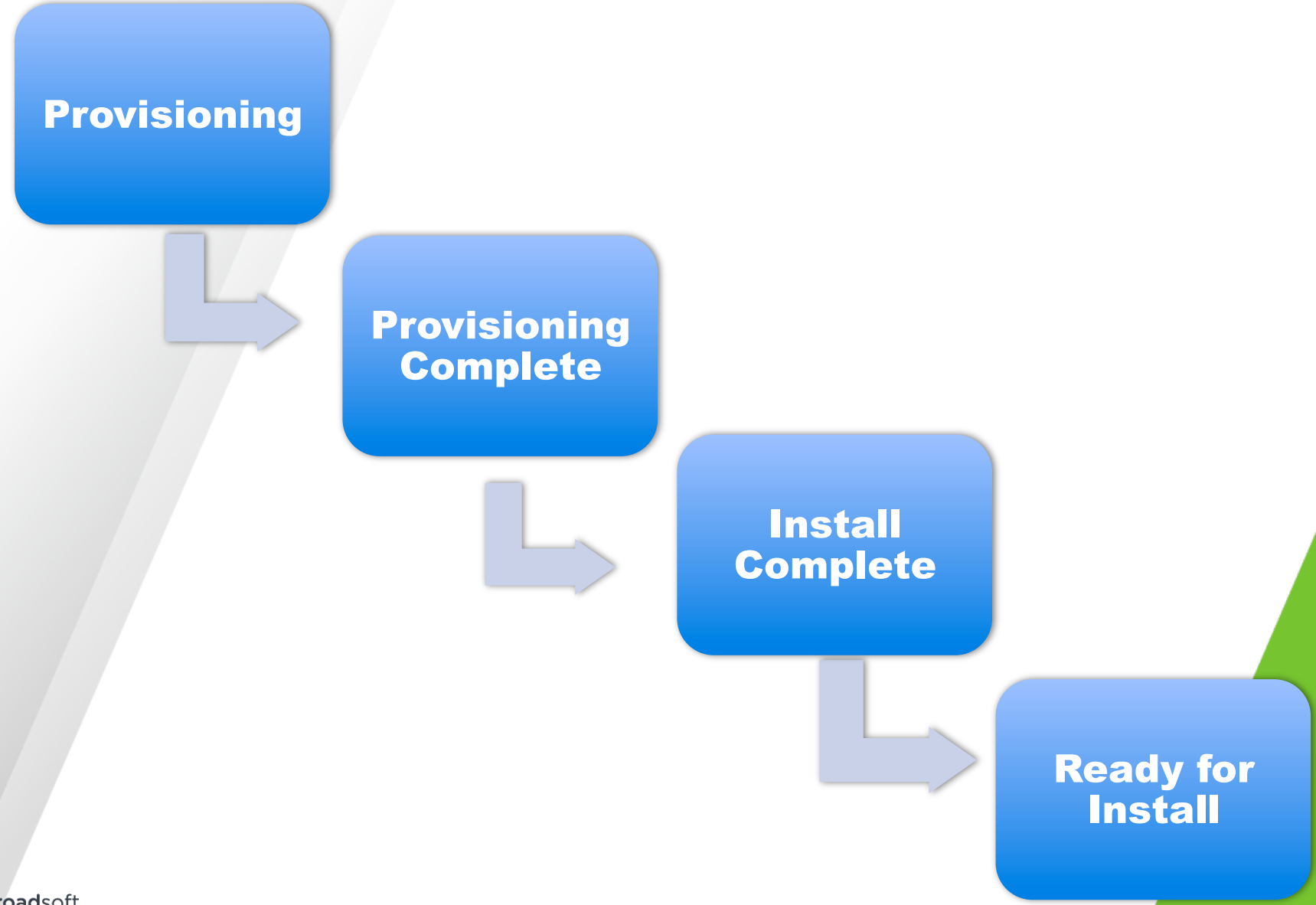
AUTO PROVISIONING PROCESS



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QUOTE ENTRY – LOGIN AS A SALES EXECUTIVE

BroadCloud Administration Professional

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PROCESS FLOW WITH USERS

Prospect Qualification → Solution Presentation → Create Quote

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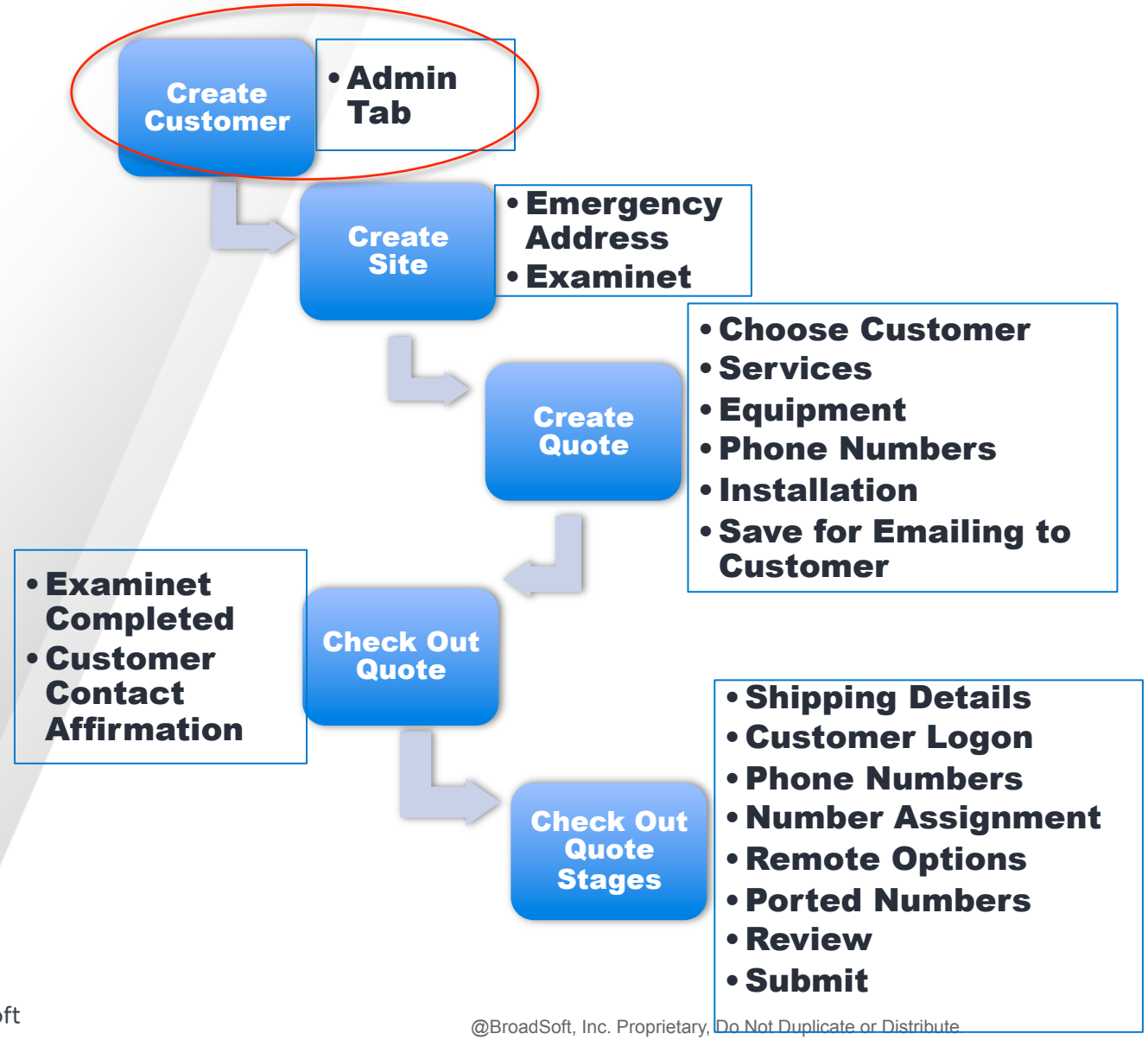
SALES PROCESS FLOW



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NUMBER CHECK

broadsoft businesscloud

Service Provider Portal
Welcome Sales Executive1!
Logout

English (United States)

Admin
- Home
- Profile
- Create Customer
- View Customers
- Customer Service Tool

Order
- Create Quote
- Create Field Services Quote
- Pending PMS Interface Scheduled
- Search Quotes
- Search Orders
- Reports

Examinet
- Initiate Request
- View Requests

SipAdvantage®

Sales Action Queue

Orders
- High Priority note(s)
- Unread Note(s)

Quotes
- Click Here

Reporting a Technical Problem?
SipAdvantage: Support Page

Examinet Requests

No results found

Tools

- **Training**
- **Sales Collateral**
- **Documents**
  - Terms and Conditions
  - LOA
  - Toll Free LOA
- **Check Service Availability**

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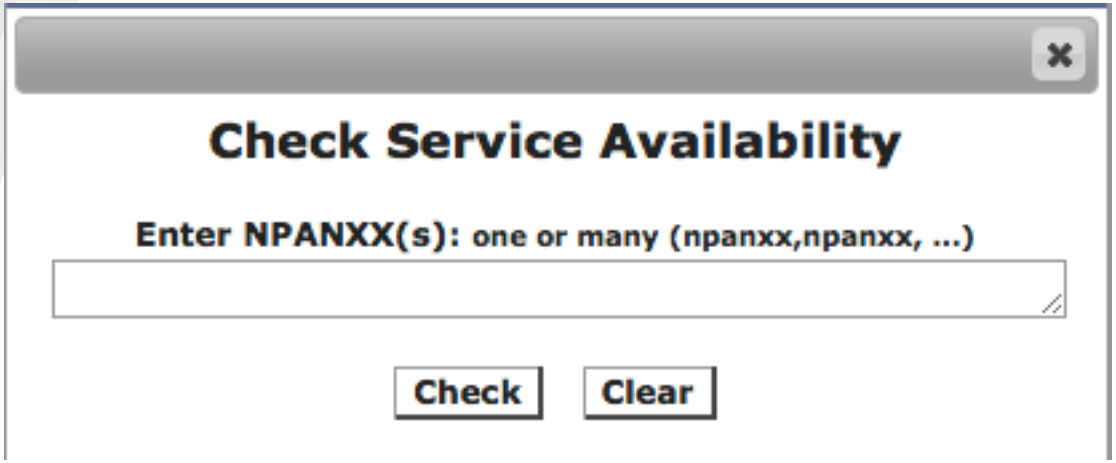
NUMBER CHECK



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CUSTOMER CREATION

broadsoft businesscloud

Service Provider Portal
Welcome Sales Executive1!
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CUSTOMER CREATION

broadsoft businesscloud

Service Provider Portal
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- Search Orders
- Reports

Examinet
- Initiate Request
- View Requests

Customer Information

Name:	Family Sporting Good Ltd
Billing Telephone Number:	
Address Line 1:	9737 Washingtonian Blvd
Address Line 2:	
City:	Gaithersburg *
State/Province:	Alabama *
Zip/Postal Code:	20878 *
Country:	United States *

Company Contact Info

Main Contact

Name:	Jane Doe *
Title:	CEO *
Phone Number:	3019779440 *
Fax Number:	
Email Address:	Jane.Doe@familysporting.com

Technical Contact

Name:	
Phone Number:	
Email Address:	

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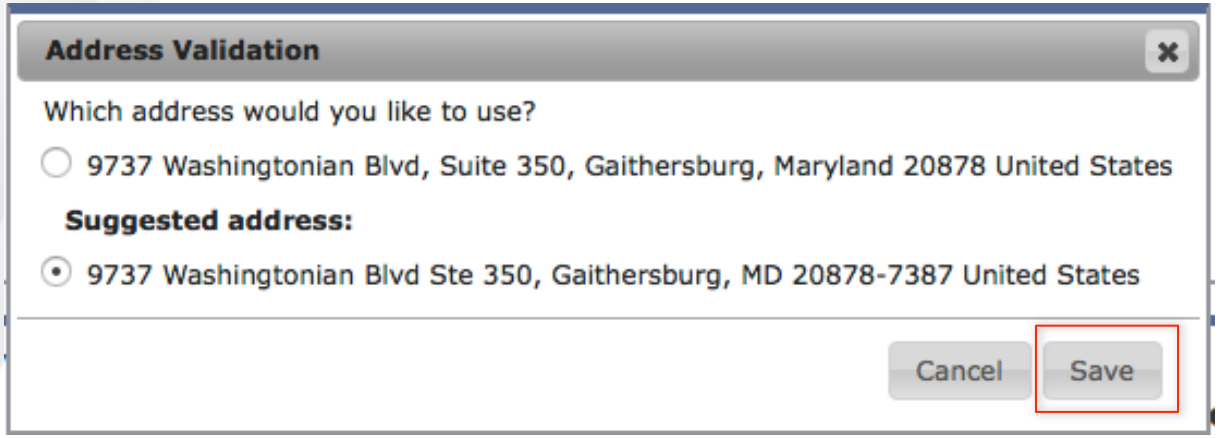
@Br Cancel Save uplicate or Distribute.

CUSTOMER CREATION



We subscribe to Postal Address Validation services in every country we have a system

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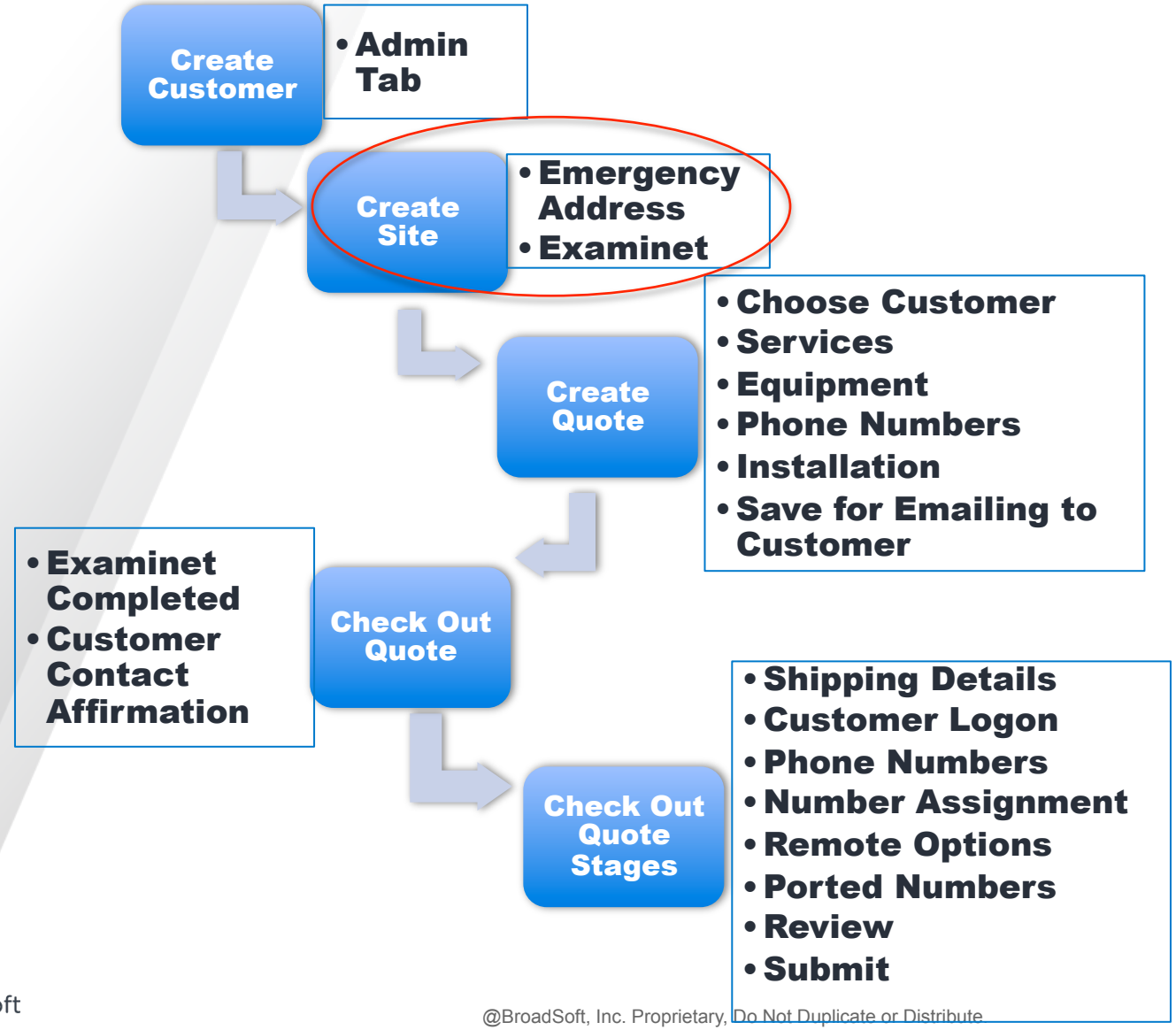
SALES PROCESS FLOW



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CUSTOMER CREATION

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- Search Quotes
- Search Orders
- Reports

Examinet
- Initiate Request
- View Requests

The Profile of "Family Sporting Goods Ltd"

Account ID: TRAIN103301
Assign service charges per site?: No
Name: Family Sporting Goods Ltd
Billing Telephone Number:

Save

Site(s) | Contact Info | Login

View Sites
Create multiple sites via CSV upload

Click on box to show all, or start typing a site name to search (case-sensitive)

Site(s):

Contact Information

Note: This is the actual physical address for this Site for E911 purposes and will be given to emergency responders such as Fire Department, Police, etc. when E911 is called.
Be careful and accurate in providing this address. No P.O. Box numbers please.

☑ Use Customer Contact Address

Address 1: 9737 Washingtonian Blvd Ste 350 *
Address 2:
City: Gaithersburg *
State: Maryland *
Zip/Postal Code: 20878-7387 *
Country: United States *
Internet Access Notes:
Global ID Number:
test:

Site Name: Main Store *
Type: Hosted PBX Site *

☑ Use Customer Contact Info

Site Contact Name: Jane Doe *
Phone Number: 3019779440 *
Fax Number:
Email Address: Jane.Doe@familysporting.com *
Time Zone: US Hawaii *
Internet Access Provider:

Save

CUSTOMER CREATION

- The Customer Contact Address is also the Customer Emergency Contact Address an used for emergency services.
- You can change it at any time if required but it will launch a new order just to validate the address and change it on the back end.
- Site Name can be changed here at any time, it just changes the name, the site is created on a unique ID so the name is not going to create a new order.

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EXAMINET OVERVIEW

BroadCloud Administration Professional

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OVERVIEW

- ExamiNet is a readiness assessment application that will conduct a series of basic network tests, the results of which will be used to identify potential network issues that should be addressed before the BLCD service can be supported on your local area network. The tests performed generate nominal low level network traffic, and the results of the test are securely stored for review by our technical staff.

- The information generated from these tests is used for the sole purpose of determining your network's ability to support BroadCloud services and is made available only to every user of the service.

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EMAIL SENT WITH A LINK

Please DO NOT REPLY to this message, this is an automated message.
Replies to this email address are not read.

If you have any questions or require further assistance,
please contact us by visiting the Support page on our web site,
https://info.broadcloudpbx.com/php/cpbx/

Hello Adam North,

This is a request for you to run ExamiNet on your network for the prequalification of VoIP services.

ExamiNet is a VoIP readiness assessment application that will conduct a series of basic network tests, the results of which will be used to identify potential network issues that should be addressed before VoIP service can be supported on your local area network. The tests performed generate nominal low level network traffic, and the results of the test are securely stored for review by our technical staff.

The information generated from these tests is used for the sole purpose of determining your network's ability to support VoIP services and is made available only to your authorized service representatives and our technical support staff.

In order for the results of these tests to be relevant for the support of VoIP services, the host computer on which these test are being conducted must be connected to the same local area network on which you intend to have VoIP services applied.

Your use of ExamiNet has been restricted to 3 successful executions of the test suite, after which the access link below will expire. If further testing cycles are required please contact your service representative for additional access. To run ExamiNet on your network, click the following link:

https://examinet.broadcloud.eu/examinet/client.jsp?rid=1422023019098

Please respond to this email with any questions or concerns you may have.

Thank you for your business,

BroadCloud UK Demo ® Customer Service

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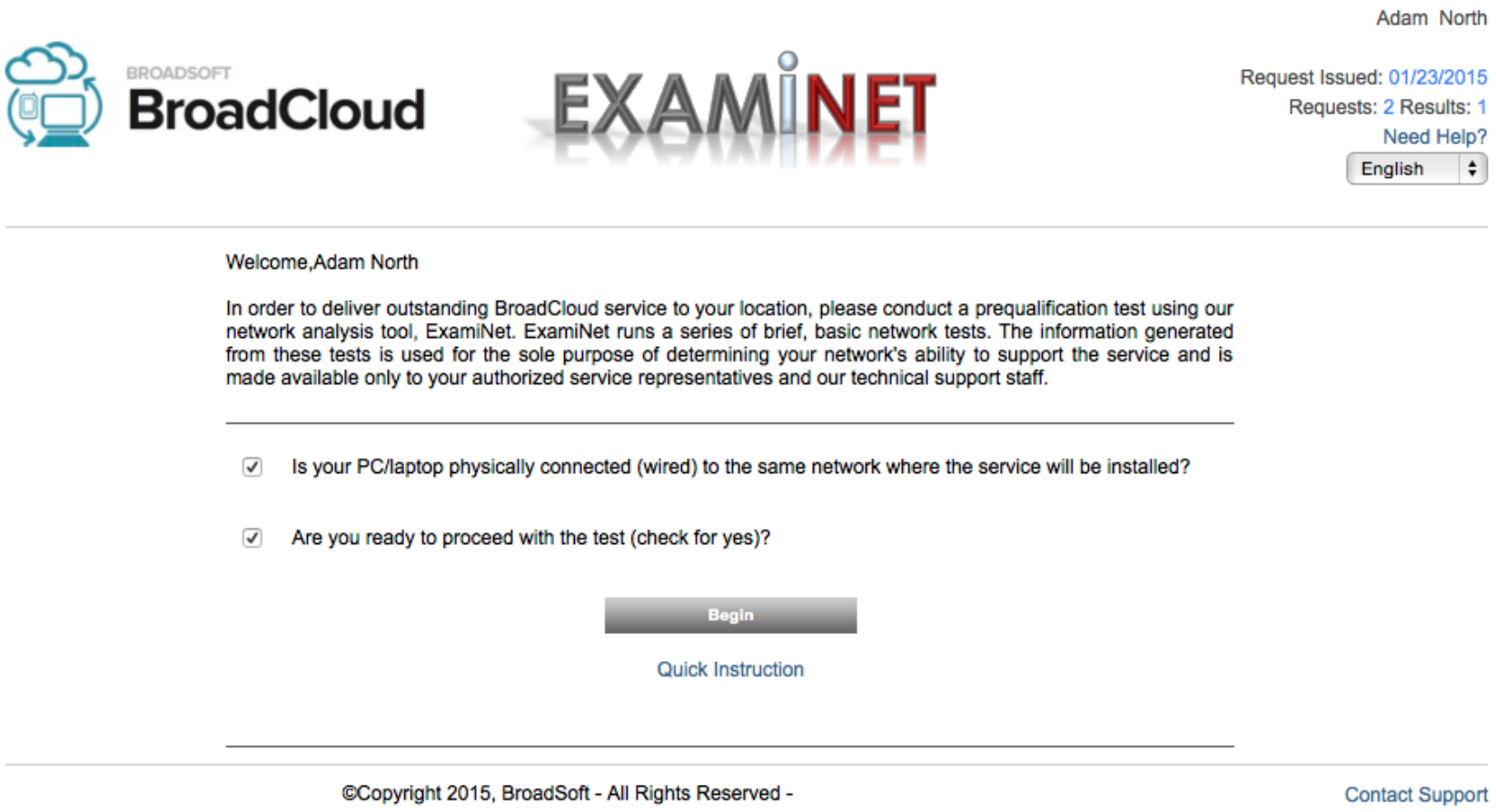
CONDUCT TEST – END USER EMAIL



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SENDING EXAMINET

BroadCloud Administration Professional

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CUSTOMER CREATION

Prospect Qualification → Solution Presentation → Create Quote

broadsoft businesscloud

Service Provider Portal
Welcome Sales Executive1!
Logout

English (United States)

Admin
- Home
- Profile
- Create Customer
- View Customers
- Customer Service Tool

Order
- Create Quote
- Create Field Services Quote
- Pending PMS Interface Scheduled
- Search Quotes
- Search Orders
- Reports

Examinet
- Initiate Request
- View Requests

The Profile of "Family Sporting Goods Ltd"

Account ID: TRAIN103301
Assign service charges per site?: No
Name: Family Sporting Goods Ltd
Billing Telephone Number:

Save

Site(s) | Contact Info | Login

View Sites
Create multiple sites via CSV upload

Click on box to show all, or start typing a site name to search (case-sensitive)

Site(s):

Contact Information

Note: This is the actual physical address for this Site for E911 purposes and will be given to emergency responders such as Fire Department, Police, etc. when E911 is called.
Be careful and accurate in providing this address. No P.O. Box numbers please.

☑ Use Customer Contact Address

Address 1: 9737 Washingtonian Blvd Ste 350 *
Address 2:
City: Gaithersburg *
State: Maryland *
Zip/Postal Code: 20878-7387 *
Country: United States *
Internet Access Notes:
Global ID Number:
test:

Site Name: Main Store *
Type: Hosted PBX Site *
☑ Use Customer Contact Info
Site Contact Name: Jane Doe *
Phone Number: 3019779440 *
Fax Number:
Email Address: Jane.Doe@familysporting.com *
Time Zone: US Hawaii *
Internet Access Provider:

EXAMINET

broadsoft businesscloud

Service Provider Portal
Welcome Sales Executive1!
Logout
Quote: Family Sporting Goods Ltd /

English (United States)

Customer: Family Sporting Goods Ltd
Site Name: Main Store
Site Type: Hosted PBX Site
Contact Name: Jane Doe
Phone Number:
Email Address: Jane.Doe@familysporting.com
Address: 9737 Washingtonian Blvd Ste 350 Gaithersburg, MD 20878-7387
New Site Quote:

<< Home

Send:

Send a launch request to a test contact from the drop-down or create a new contact. Then select a limit for the maximum uses allowed for this request ID.

First Name/Last Name: Jane / Doe
Email Address: Jane.Doe@familysporting.
Result Limit: 3

Secondary Test Options

Submit

Requests

Read?	ID	Contact Name	Email Address	Run Time	Result Limit	Current Use	Status
No results found							

Result limit = Number of times a test can be run from this one link
Secondary Test Options = Running the test to the secondary BroadCloud Location for your area.

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REVIEW QUESTION

- What is the order for Creating a Quote?
  - Create Customer
  - Create Site
  - Create Quote
  - Checkout Quote

- What is the purpose of ExamiNet?
  - ExamiNet is a readiness assessment application that will conduct a series of basic network tests, the results of which will be used to identify potential network issues that should be addressed before the BLCD service can be supported on your local area network.

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CREATING A QUOTE

BroadCloud Administration Professional

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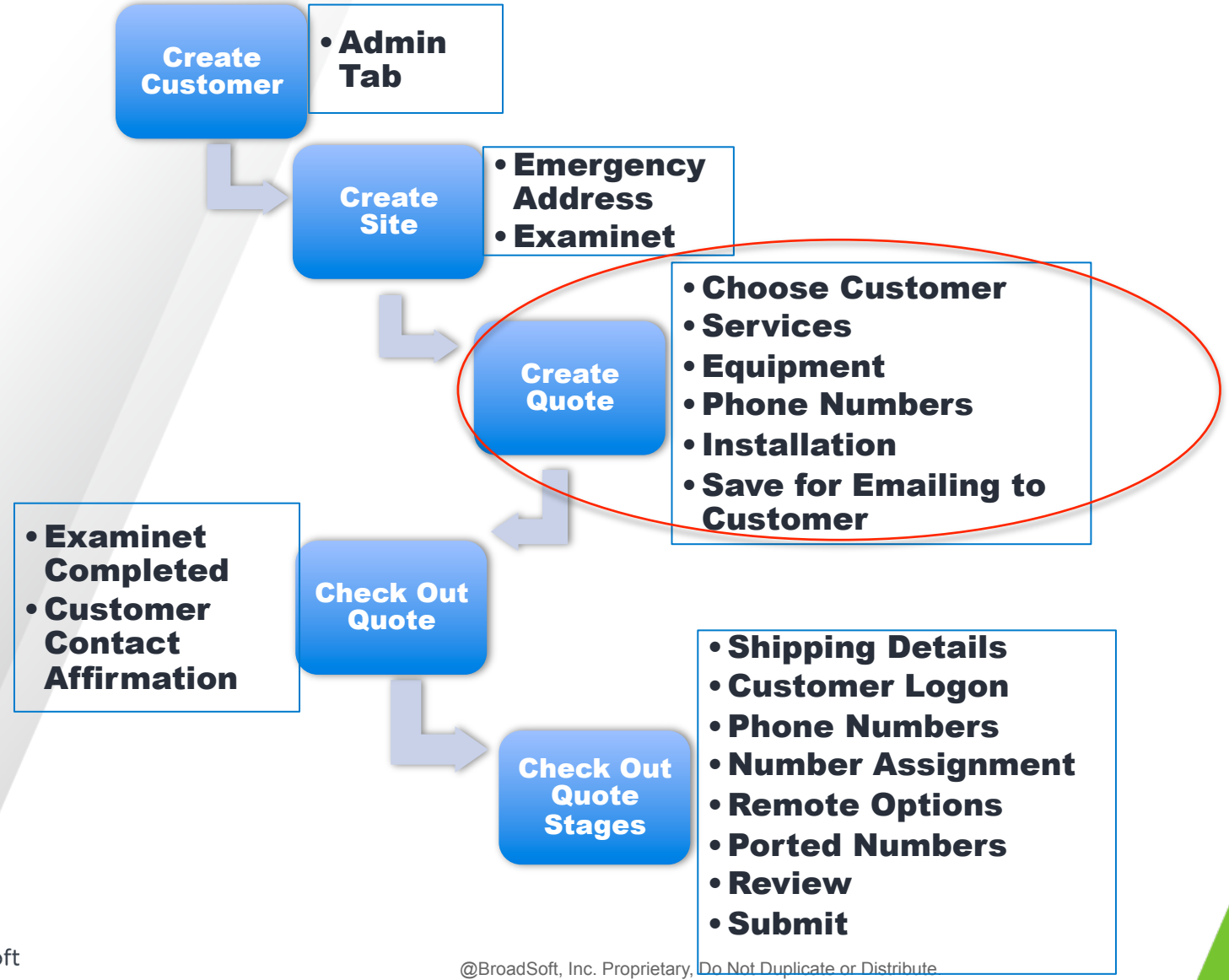
SALES PROCESS FLOW



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CREATING THE QUOTE

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Service Provider Portal
Welcome Sales Executive1!
Logout

English (United States)

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- View Requests

SipAdvantage®

Sales Action Queue

Orders
- High Priority note(s)
- Unread Note(s)

Quotes
- Click Here

Reporting a Technical Problem?
SipAdvantage: Support Page

Examinet Requests

No results found

Tools

- **Training**
- **Sales Collateral**
- **Documents**
  - Terms and Conditions
  - LOA
  - Toll Free LOA
- **Check Service Availability**

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CREATING THE QUOTE

broadsoft businesscloud

Service Provider Portal
Welcome Sales Executive1!
Logout
Quote: Family Sporting Goods Ltd / Main Store

English (United States)

Customer & Site | Services | Equipment | Phone Numbers | Installation

Check Service Availability

Select your Customer: Family Sporting Goods Ltd

Site Name: Create Site

Main Store

Cancel | Continue

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QUOTING

broadsoft businesscloud

Voicemail Portal
sp-001
Voicemail Portal and Base Site Feature Set

Hosted PBX Site Package comes with a base set of product features and services. The base ?site? package includes a DID used for accessing the site Voice Mail Messaging Portal in addition to the following features, which are applied to the main office phone number:

- Directory Listing
- E911
- 1 Auto Attendant
- 1 Hunt Group
- Customizable Music on Hold
- Unlimited local inbound and outbound calling
- Outbound Calling Number Delivery
- Outbound Calling Name Delivery
- Outbound Operator Services
- Outbound Directory Assistance
- **BroudCloud PBX** dashboard for feature control

My Account and My Site Web tools for Site self-administration and User Dashboard allow easy setup and manipulation of features such as Automated Attendant, Hunt Groups, Call Rules, Call History Reporting, Selective Call Forwarding, and Voice Messaging.

Requirements:

- The site Main Number is identified during the ordering processes if new numbers are being purchased.
- If numbers are ported, customer is required to identify the Main Number during the ordering process.
- The Main Number must be linked to a specific station or service (Premium Station, Standard User Station, Hunt Group Service or an Automated Attendant Service).

0	UC-One Collaborate Bundle	$5.00	N/A
0	UC-One Collaborate Video Conferencing Addon	N/A	N/A
☐	VPN Activation	N/A	N/A

Prospect Qualification → Solution Presentation → Create Quote

Line Stations			
0	Hosted POTS Line	$24.95	
☐	Hosted Square Key	N/A	N/A
Hosted Stations			
8	Premium User Station	$39.95	$49.95
0	Basic Station	$21.95	$29.95
7	Standard User Station	$29.95	$49.95
0	Messaging Station	$4.95	$9.95
Site Services			
4	UC-One Collaborate Bundle	$5.00	N/A
0	UC-One Collaborate Video Conferencing Addon	N/A	N/A
☐	VPN Activation	N/A	N/A
☐	BroadCloud UC-Desktop with Lync Integration	$100.00	$25.00
8	BroadTouch Mobile Client	N/A	$30.00
15	BroadTouch PC Client	$9.95	$14.95
0	PacketSmart PI-150	N/A	N/A
0	Auto Attendant	$24.95	$74.95
☑	Hunt Group Package	N/A	$9.95
2	Hunt Group	$7.95	N/A
0	Call Queue	$5.00	$9.95
5	Call Queue Agent	$24.95	$49.95
0	Call Center	$24.95	$75.00
0	Call Center Agent	$24.95	$75.00
0	Call Center Supervisor	$24.95	$75.00
0	Toll Free Service	$4.95	$9.95
☐	Music on Hold	$9.95	N/A
0	Office Anywhere Portal Number	$1.00	$1.95
0	Call Recording	$9.95	$14.95
1	Receptionist Client	$9.95	$14.95
1	Group Paging	$9.95	$14.95
0	Meet-Me Bridge	$24.95	$75.00
0	Meet-Me Conference	$24.95	$75.00

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Back Cancel Continue

: or Distribute.

ADDING DEVICES

Prospect Qualification → Solution Presentation → Create Quote

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Service Provider Portal
Welcome Sales Executive1!
Logout
Quote: Family Sporting Goods Ltd / Main Store

English (United States)

Customer & Site | Services | Equipment | Phone Numbers | Installation | Review

Check Service Availability

Quote Total

MRC	NRC
1×$5.00	1×$0.00
5×$39.95	5×$49.95
$204.75	$249.75

Calculate | View Quote

Would you like to order some Equipment?
This quote has 5 station(s) assignable to devices.

Device Purchase | Device Rental

Quantity	Make	Model	# of Line Keys	HD Audio	PWR Supply Included	Expansion Module	Price
0	PacketSmart PI-500						$0.00
0	PacketSmart PI-150						$0.00
0	Aastra	6731i	6	Yes	No	No	$130.00
0	Aastra	6731i w/ Pwr	6	Yes	Yes	No	$150.00
0	Aastra	6731i	6	Yes	No	No	$130.00
0	Aastra	6757i w/ Pwr	9	Yes	Yes	Yes	$280.00
0	Aastra	6863i	2	No	No	No	$100.00
0	Aastra	6865i	5	No	No	Yes	$100.00
0	Aastra	6867i	9	Yes	No	Yes	$100.00
0	Aastra	6869i	12	Yes	No	Yes	$100.00
0	Polycom	VVX 300 w/ Pwr	6	Yes	Yes	Yes	$209.00
0	Polycom	VVX 300 w/o Pwr	6	Yes	No	Yes	$134.25
0	Polycom	VVX 310	6	Yes	No	Yes	$220.00
0	Polycom	VVX 310 w/ Pwr	6	Yes	Yes	Yes	$249.00

Back | Cancel | Continue

broadsoft

ADDING DEVICES

Prospect Qualification → Solution Presentation → Create Quote

Quantity	Make	Model	# of Line Keys	HD Audio	PWR Supply Included	Expansion Module	Price
0	PacketSmart PI-500						$0.00
0	PacketSmart PI-150						$0.00
0	Aastra	6731i	6	Yes	No	No	$130.00
0	Aastra	6731i w/ Pwr	6	Yes	Yes	No	$150.00
0	Aastra	6731i	6	Yes	No	No	$130.00
0	Aastra	6757i w/ Pwr	9	Yes	Yes	Yes	$280.00
0	Aastra	6863i	2	No	No	No	$100.00
0	Aastra	6865i	5	No	No	Yes	$100.00
0	Aastra	6867i	9	Yes	No	Yes	$100.00
0	Aastra	6869i	12	Yes	No	Yes	$100.00
0	Polycom	VVX 300 w/ Pwr	6	Yes	Yes	Yes	$209.00
0	Polycom	VVX 300 w/o Pwr	6	Yes	No	Yes	$134.25
0	Polycom	VVX 310	6	Yes	No	Yes	$220.00
0	Polycom	VVX 310 w/ Pwr	6	Yes	Yes	Yes	$249.00
0	Polycom	VVX 400 w/ Pwr	12	Yes	Yes	Yes	$289.00
0	Polycom	VVX 400 w/o Pwr	12	Yes	No	Yes	$194.25
0	Polycom	VVX 410 w/ Pwr	12	Yes	Yes	Yes	$329.00
0	Polycom	VVX 410 w/o Pwr	12	Yes	No	Yes	$211.73
1	Polycom	VVX 500 w/ Pwr	12	Yes	Yes	Yes	$319.95
0	Polycom	VVX 500 w/o Pwr	12	Yes	No	Yes	$284.25

Back Cancel Continue

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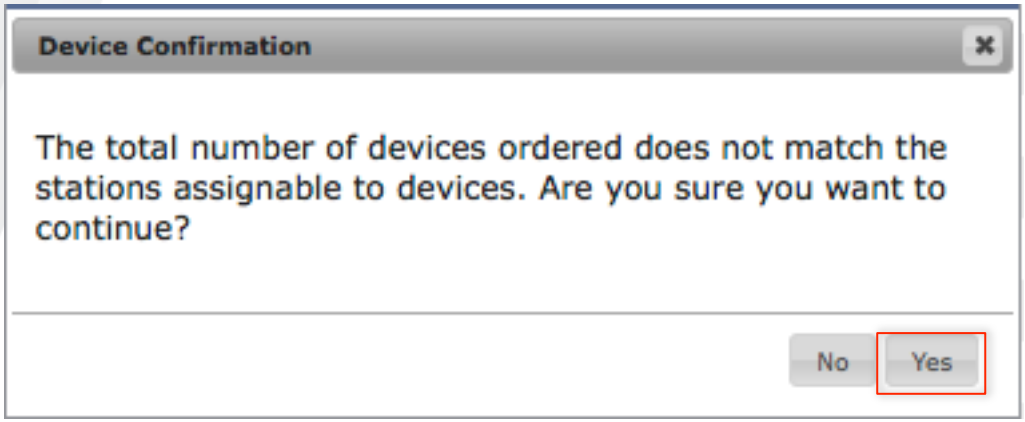
ADDING DEVICES



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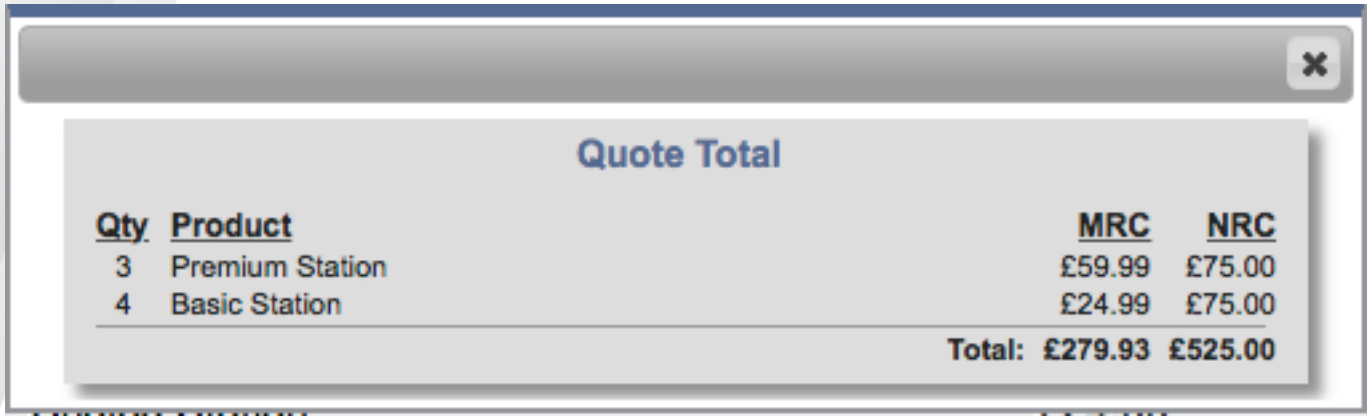
QUOTE TOTAL CALCULATOR



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SORTING OUT THE NUMBERS

broadsoft businesscloud

Service Provider Portal
Welcome Sales Executive1!
Logout
Quote: Family Sporting Goods Ltd / Main Store

English (United States)

Customer & Site | Services | Equipment | Phone Numbers | Installation | Review

Check Service Availability

Quote Total

MRC	NRC
1×$5.00	1×$0.00
8×$0.00	8×$30.00
15×$9.95	15×$14.95
7×$29.95	7×$49.95
8×$39.95	8×$49.95
1×$0.00	1×$9.95
2×$7.95	2×$0.00
1×$9.95	1×$14.95
1×$9.95	1×$14.95
5×$24.95	5×$75.00
4×$5.00	4×$0.00
1×$0.00	1×$284.25
$864.05	$1,912.60

Calculate | View Quote

Minimum Number Requirements:

Quantity Purchased	Number(s) Required
Number(s) Needed:	26

You are required to port and/or order 26 phone number(s). Please review the following options and select which one you want to do.

☐ Click here if you have numbers which you would like to port

☑ Click here if you would like to order new numbers

	One-Time Fees	Monthly Fees
How many numbers would you like to order? 1	$1.95	$1.00

Main Number Assignment

Should the main number be assigned to one of the Auto Attendant(s), Call Queue(s) or Hunt Group(s)? ◉ Yes ○ No
Which station would you like your main number assigned to? Auto Attendant

Phone Number Upgrades

	One-Time Fees	Monthly Fees
How many numbers are for Remote User(s)? What is This?	$1.95	$1.95

Back | Cancel | Continue

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SORTING OUT THE NUMBERS

Prospect Qualification → Solution Presentation → Create Quote

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Service Provider Portal
Welcome Sales Executive1!
Logout
Quote: Family Sporting Goods Ltd / Main Store

English (United States)

Customer & Site | Services | Equipment | Phone Numbers | Installation | Review

Check Service Availability

Quote Total

MRC	NRC
1×$5.00	1×$0.00
8×$0.00	8×$30.00
15×$9.95	15×$14.95
7×$29.95	7×$49.95
8×$39.95	8×$49.95
1×$0.00	1×$9.95
2×$7.95	2×$0.00
1×$9.95	1×$14.95
1×$9.95	1×$14.95
5×$24.95	5×$75.00
4×$5.00	4×$0.00
1×$0.00	1×$284.25
$864.05	$1,912.60

Calculate | View Quote

Minimum Number Requirements:

Quantity Purchased	Number(s) Required
Number(s) Needed:	26

You are required to port and/or order 26 phone number(s). Please review the following options and select which one you want to do.

Click here if you have numbers which you would like to port

How many numbers would you like to port? 10

One-Time Fees $9.95 | Monthly Fees $0.00

Click here if you would like to order new numbers

How many numbers would you like to order? 16

One-Time Fees $1.95 | Monthly Fees $1.00

Main Number Assignment

Should the main number be assigned to one of the Auto Attendant(s), Call Queue(s) or Hunt Group(s)? Yes No

Phone Number Upgrades

How many numbers are for Remote User(s)? 2 What is This?

One-Time Fees $1.95 | Monthly Fees $1.95

Additional Directory Listing

The Directory Listing for the Main Number of new site is free.

Do you want to have other Directory Listings? What is This?

One-Time Fees $20.00 | Monthly Fees $10.00

Back | Cancel | Continue

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INSTALLATION OPTIONS

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Service Provider Portal
Welcome Sales Executive1!
Logout
Quote: Family Sporting Goods Ltd / Main Store

English (United States)

Customer & Site | Services | Equipment | Phone Numbers | Installation | Review

Check Service Availability

Quote Total

MRC	NRC
1×$5.00	1×$0.00
8×$0.00	8×$30.00
15×$9.95	15×$14.95
7×$29.95	7×$49.95
8×$39.95	8×$49.95
1×$0.00	1×$9.95
2×$7.95	2×$0.00
1×$9.95	1×$14.95
1×$9.95	1×$14.95
5×$24.95	5×$75.00
4×$5.00	4×$0.00
1×$0.00	1×$284.25
10×$0.00	10×$9.95
2×$0.00	2×$1.95
$864.05	$2,016.00

Calculate | View Quote

Installation Services

Product	Price
☐ Site Survey	
☑ Installation	
Note: A minimum of 3 hours is required for onsite visits, additional time must be in 15 minute increments	
4 Pro Install - Business Hours	$150.00
0 Pro Install - Non-business Hours	$200.00

Service Provider Installation Services

Product	Price
☐ SP Site Survey	
☐ SP Installation	

Back | Cancel | Continue

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REVIEW YOUR QUOTE

Prospect Qualification → Solution Presentation → Create Quote

Customer Information

Customer: Family Sporting Goods Ltd
Site Name: Main Store
Type: New Order
Shipping Address: 9737 Washingtonian Blvd Ste 350 Gaithersburg, MD 20878-7387 USA

Date: 10/6/16
Expiration Date: 11/5/16
Last Modified By: Sales Executive1
Shipment Method: Ground

Services

Product Name	Quantity	One-Time Fees[Note 1]	Monthly Fees[Note 2]
Voicemail Portal (sp-001) Voicemail Portal and Base Site Feature Set **Package includes:** **1 - Auto Attendant** (pbx-009) **1 - Music on Hold** (pbx-010) **1 - Call Queue** (pbx-019)	1	N/A	$5.00 (1 * $5.00)
Standard User Station (pbx-001) Individual station with one assigned DID number. **Package includes:** **7 - BroadTouch Mobile Client** (bw-001) **7 - BroadTouch PC Client** (bw-002) **7 - Call Queue Agent** (pbx-029)	7	$349.65 (7 * $49.95)	$209.65 (7 * $29.95)
Premium User Station (pbx-003) Individual station with one assigned DID number with enhanced call handling and routing, including Follow-Me functions. **Package includes:** **8 - BroadTouch Mobile Client** (bw-001) **8 - BroadTouch PC Client** (bw-002) **8 - Call Queue Agent** (pbx-029)	8	$399.60 (8 * $49.95)	$319.60 (8 * $39.95)
Hunt Group Package (pbx-011) Designated Stations logically grouped together to take incoming calls.	1	$9.95 (1 * $9.95)	N/A
Hunt Group (pbx-015) Designated Stations logically grouped together to take incoming calls.	2	N/A	$15.90 (2 * $7.95)
Receptionist Client (pbx-030) The Receptionist Client is a web-based console providing functionality for those who screen inbound calls for businesses.	1	$14.95 (1 * $14.95)	$9.95 (1 * $9.95)
Group Paging (pbx-032) Group Paging	1	$14.95 (1 * $14.95)	$9.95 (1 * $9.95)
Call Center (pbx-035) Call Center	5	$375.00 (5 * $75.00)	$124.75 (5 * $24.95)
UC-One Collaborate Bundle (pbx-046) UC-One Collaborate Bundle	4	N/A	$20.00 (4 * $5.00)
Ported Local Number (pn-001) Port existing local numbers from an existing provider to SIP Advantage®.	10	$99.50 (10 * $9.95)	N/A
Remote User (cl-002) Remote User Station	2	$3.90 (2 * $1.95)	N/A
Pro Install - Business Hours (ins-003)	4	$600.00 (4 * $150.00)	N/A
	Services Sub Total:	$1,867.50	$714.80

Equipment

Product Name	Quantity	One-Time Fees[Note 1]	Monthly Fees[Note 2]
BroadTouch Mobile Client (bw-001)	8	$240.00 (8 * $30.00)	N/A
BroadTouch PC Client (bw-002)	15	$224.25 (15 * $14.95)	$149.25 (15 * $9.95)
Polycom VVX 500 12-line Desktop Phone with HD Voice with POE (at-pc-vvxp500)	1	$284.25 (1 * $284.25)	N/A
	Equipment Sub Total:	$748.50	$149.25
	Quote Total:	$2,616.00	$864.05

Back Cancel Save

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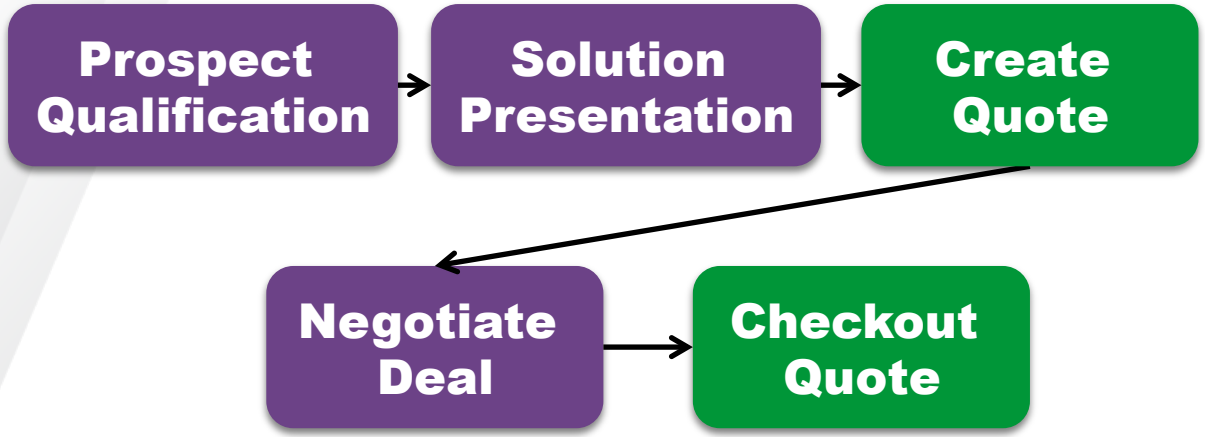
IS CUSTOMER HAPPY WITH THE QUOTE?

PROCESS FLOW WITH USERS



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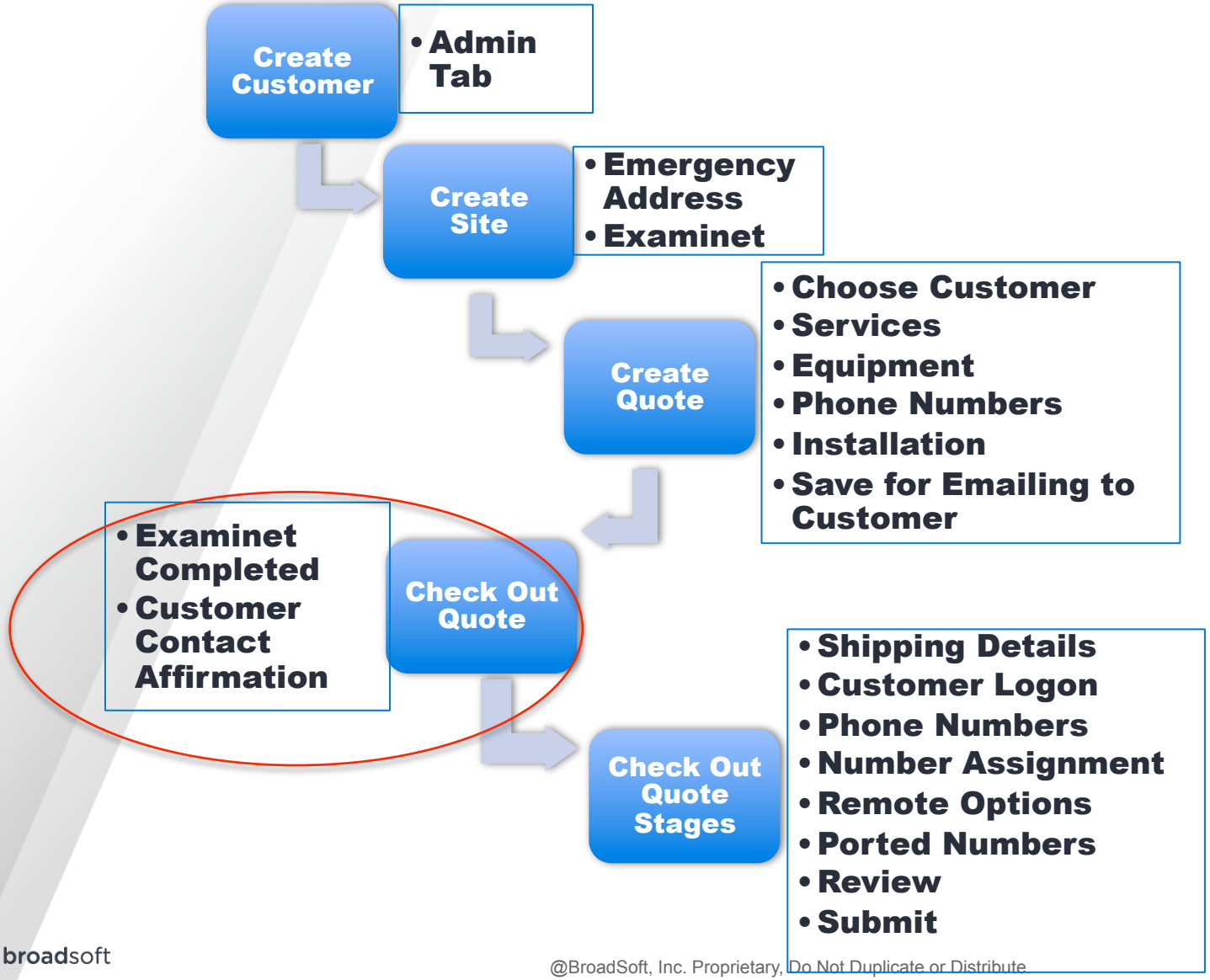
SALES PROCESS FLOW



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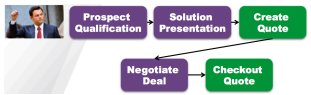
SEARCHING FOR THE QUOTE



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Service Provider Portal
Welcome Sales Executive1!
Logout

English (United States)

Admin
- Home
- Profile
- Create Customer
- View Customers
- Customer Service Tool

Order
- Create Quote
- Create Field Services Quote
- Pending PMS Interface Scheduled
- Search Quotes
- Search Orders
- Reports

Examinet
- Initiate Request
- View Requests

SipAdvantage®

Sales Action Queue

Orders
- High Priority note(s)
- Unread Note(s)

Quotes
- Click Here

Reporting a Technical Problem?
SipAdvantage: Support Page

Examinet Requests
- 1 Pending

Tools
- **Training**
- **Sales Collateral**
- **Documents**
  - Terms and Conditions
  - LOA
  - Toll Free LOA
- **Check Service Availability**

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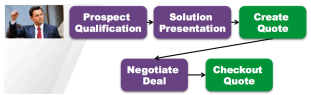
SEARCHING FOR THE QUOTE



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Service Provider Portal
Welcome Sales Executive1!
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English (United States)

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- Create Field Services Quote
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- Search Orders
- Reports

Examinet
- Initiate Request
- View Requests

Search Quotes

Customer
Billing Telephone Number
Quote Id
Type
Status
Start Date
End date

Search

Search Results

Displaying 1 - 1 of 1 **Export**

Quote Id	Type	Billing Telephone Number	Customer	Site Name	Quote Issue Date	Status	Last Modified By	
81540	New Order		Family Sporting Goods Ltd	Main Store	10/6/16	Created	Sales Executive1	Cancel

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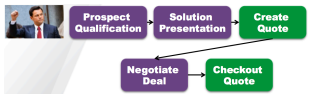
CHECKING OUT THE QUOTE



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Service Provider Portal
Welcome Sales Executive1!
Logout

English (United States)

Quote Confirmation

Send PDF(s)

Customer Information

Quote Id: 81540
Customer: Family Sporting Goods Ltd
Site Name: Main Store
Type: New Order
Shipping Address: 9737 Washingtonian Blvd Ste 350
Gaithersburg, MD 20878-7387 USA

Status: Created
Date: 10/6/16
Expiration Date: 11/5/16
Last Modified By: Sales Executive1
Shipment Method: Ground

Services

Product Name	Quantity	One-Time Fees Note 1	Monthly Fees Note 2
Voicemail Portal (sp-001) Voicemail Portal and Base Site Feature Set **Package includes:** **1 - Auto Attendant** (pbx-009) **1 - Music on Hold** (pbx-010) **1 - Call Queue** (pbx-019)	1	N/A	$5.00 (1 * $5.00)
Standard User Station (pbx-001) Individual station with one assigned DID number. **Package includes:** **7 - BroadTouch Mobile Client** (bw-001) **7 - BroadTouch PC Client** (bw-002) **7 - Call Queue Agent** (pbx-029)	7	$349.65 (7 * $49.95)	$209.65 (7 * $29.95)
Premium User Station (pbx-003) Individual station with one assigned DID number with enhanced call handling and routing, including Follow-Me functions. **Package includes:** **8 - BroadTouch Mobile Client** (bw-001) **8 - BroadTouch PC Client** (bw-002) **8 - Call Queue Agent** (pbx-029)	8	$399.60 (8 * $49.95)	$319.60 (8 * $39.95)
Hunt Group Package (pbx-011) Designated Stations logically grouped together to take incoming calls.	1	$9.95 (1 * $9.95)	N/A
Hunt Group (pbx-015) Designated Stations logically grouped together to take incoming calls.	2	N/A	$15.90 (2 * $7.95)

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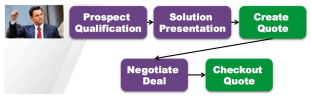
CHECKING OUT THE QUOTE



Receptionist Client (pbx-030) The Receptionist Client is a web-based console providing functionality for those who screen inbound calls for businesses.	1	$14.95 (1 * $14.95)	$9.95 (1 * $9.95)
Group Paging (pbx-032) Group Paging	1	$14.95 (1 * $14.95)	$9.95 (1 * $9.95)
Call Center (pbx-035) Call Center	5	$375.00 (5 * $75.00)	$124.75 (5 * $24.95)
UC-One Collaborate Bundle (pbx-046) UC-One Collaborate Bundle	4	N/A	$20.00 (4 * $5.00)
Ported Local Number (pn-001) Port existing local numbers from an existing provider to SIP Advantage®.	10	$99.50 (10 * $9.95)	N/A
Remote User (cl-002) Remote User Station	2	$3.90 (2 * $1.95)	N/A
Pro Install - Business Hours (ins-003)	4	$600.00 (4 * $150.00)	N/A
	Services Sub Total:	$1,867.50	$714.80

Equipment

Product Name	Quantity	One-Time Fees[Note 1]	Monthly Fees[Note 2]
BroadTouch Mobile Client (bw-001)	8	$240.00 (8 * $30.00)	N/A
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	Equipment Sub Total:	$748.50	$149.25
	Quote Total:	$2,616.00	$864.05

ExamiNet Assessment

Initiate Request/View Requests

Last ExamiNet Result: Pending

ExamiNet Completed? ☐

Notes

Customer Contact Affirmation

Are you able to legally execute an order on behalf of the company you are representing? ☐

Home Pdf Copy Edit

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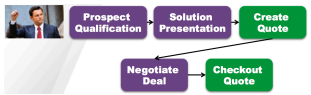
CHECKING OUT THE QUOTE



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Equipment

Product Name	Quantity	One-Time Fees[Note 1]	Monthly Fees[Note 2]
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ExamiNet Assessment

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Notes

Customer Contact Affirmation

Are you able to legally execute an order on behalf of the company you are representing? ☑

Home | Pdf | Copy | Edit | Check out

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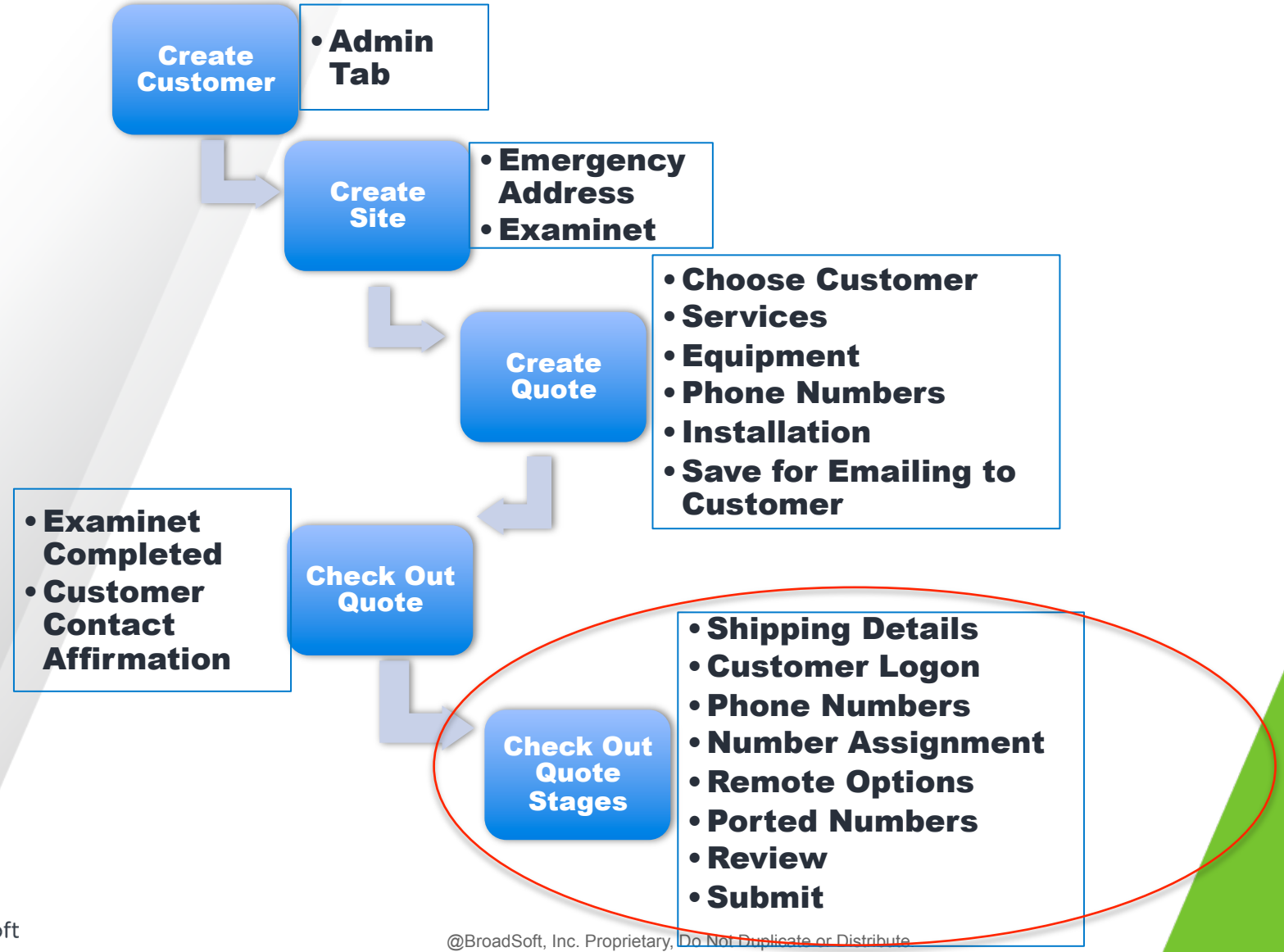
SALES PROCESS FLOW



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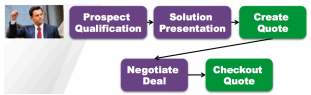
CHECKING OUT THE QUOTE



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Service Provider Portal
Welcome Sales Executive1!
Logout

English (United States)

Shipping Information | Login Information | Phone Numbers | Assignment | Remote Options | Ported Number(s) | Review

Check Service Availability

Create New Shipping Address
9737 Washingtonian Blvd Ste 350 Gaithersburg, MD 20878-7387 USA

Cancel Continue

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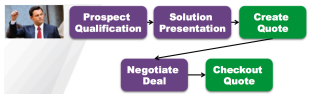
CHECKING OUT THE QUOTE



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Service Provider Portal
Welcome Sales Executive1!
Logout

English (United States)

Shipping Information | Login Information | Phone Numbers | Assignment | Remote Options | Ported Number(s) | Review

Check Service Availability

Login Information

User Name: Family.Sporting *

Back Cancel Continue

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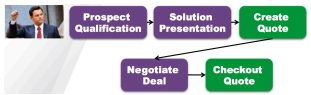
CHECKING OUT THE QUOTE



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Service Provider Portal
Welcome Sales Executive1!
Logout

English (United States)

Shipping Information | Phone Numbers | Assignment | Remote Options | Ported Number(s) | Review

Check Service Availability

Caller Id Name Family Sporting *

Please select 10 number(s) to port.

Upload What is This?
Choose File no file selected
View Example

Phone Numbers
(Please use a Comma Separated Format)

Number Range
Start: 3019779440
Number: 10

>>
<<

Ported Number(s):
3019779440
3019779441
3019779442
3019779443
3019779444
3019779445
3019779446
3019779447
3019779448
3019779449

0 left

You have chosen 16 number(s) to order. Please select the phone number prefix.
Requested Phone Number Prefix: 301977 *
How many numbers do you want?
Add Cancel

Phone Number Prefix	How Many?	
301977	16	(Remove)

Service Activation Date
As soon as possible OR

Back Cancel Continue

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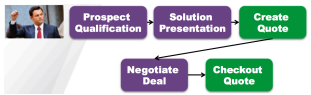
CHECKING OUT THE QUOTE



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Service Provider Portal
Welcome Sales Executive1!
Logout

English (United States)

Shipping Information | Phone Numbers | Assignment | Remote Options | Ported Number(s) | Review

Check Service Availability

Please select a Main Number - : 3019779440

Directory Listing

Select Directory Listing: Create New

Directory Listing / Directory Category: Do Not List

Please select a number(s) for your Voicemail Portal: 301977xxxx

Please select a number(s) for your Auto Attendant: 3019779449

Please select a number(s) for your Call Queue: 3019779440

Please select a number(s) for your Hunt Group: 301977xxxx

301977xxxx

Please select a number(s) for your Group Paging: 301977xxxx

Back | Cancel | Continue

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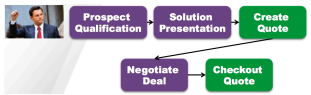
CHECKING OUT THE QUOTE



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Service Provider Portal
Welcome Sales Executive1!
Logout

English (United States)

Shipping Information | Phone Numbers | Assignment | Remote Options | Ported Number(s) | Review

Check Service Availability

Please select a number(s) for your Remote User: 301977xxxx

Address: 9737 Washingtonian Blvd Ste 350 Gaithersburg, MD USA

3019779441

Address: 9737 Washingtonian Blvd Ste 350 Gaithersburg, MD USA

Back | Cancel | Continue

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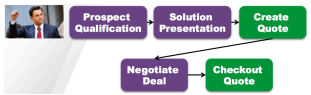
CHECKING OUT THE QUOTE



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Service Provider Portal
Welcome Sales Executive1!
Logout

English (United States)

Shipping Information | Phone Numbers | Assignment | Remote Options | Ported Number(s) | Review

Check Service Availability

You have entered 10 ported numbers. You must associate a Billing Telephone Number for each of your ported numbers.

Ported Number	Current BTN
3019779440	3019779440 Apply To All
3019779441	3019779440
3019779442	3019779440
3019779443	3019779440
3019779444	3019779440
3019779445	3019779440
3019779446	3019779440
3019779447	3019779440

Back Cancel Continue

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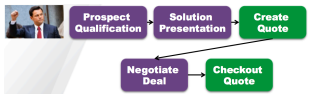
FINAL REVIEW



broadsoft businesscloud

Service Provider Portal
Welcome Sales Executive1!
Logout

English (United States)

Shipping Information | Phone Numbers | Assignment | Remote Options | Ported Number(s) | Review

Check Service Availability

Quote Id:	81540
Customer:	Family Sporting Goods Ltd
Site Name:	Main Store
Billing Telephone Number:	
Global ID Number:	
test:	
Date:	10/7/16
Status:	Not Yet Ordered
Service Activation Date:	Not scheduled. As soon as possible

Shipping Information

Destination:	9737 Washingtonian Blvd Ste 350 Gaithersburg, MD 20878-7387 USA
Phone Number / Fax Number:	3019779440 / None
Email Address:	Jane.Doe@familysporting.com
Method:	Ground

Phone Numbers

Phone Numbers: 16
Ported Number(s): 3019779440, 3019779441, 3019779442, 3019779443, 3019779444, 3019779445, 3019779446, 3019779447, 3019779448, 3019779449

Services

Product Name	Quantity	One-Time Fees[Note 1]	Monthly Fees[Note 2]
Voicemail Portal (sp-001) Phone # 1: 301977xxxx Voicemail Portal and Base Site Feature Set **Package includes:** **1 - Auto Attendant** (pbx-009) Phone # 1: 3019779449 **1 - Music on Hold** (pbx-010) **1 - Call Queue** (pbx-019) Phone # 1: 3019779440	1	N/A	$5.00 (1 * $5.00)
Standard User Station (pbx-001) Individual station with one assigned DID number. **Package includes:** **7 - BroadTouch Mobile Client** (bw-001)	7	$349.65 (7 * $49.95)	$209.65 (7 * $29.95)

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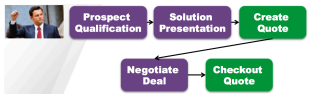
FINAL REVIEW



Group Paging (pbx-032) Phone # 1: 301977xxxx Group Paging	1	$14.95 (1 * $14.95)	$9.95 (1 * $9.95)
UC-One Collaborate Bundle (pbx-046) UC-One Collaborate Bundle	4	N/A	$20.00 (4 * $5.00)
Additional Phone Number (pn-002) Order additional un-used telephone numbers to keep in inventory to use for expansion or growth. These numbers come with unlimited inbound calling.	5	$9.75 (5 * $1.95)	N/A
Ported Local Number (pn-001) Port existing local numbers from an existing provider to **SIP Advantage®**.	10	$99.50 (10 * $9.95)	N/A
Remote User (cl-002) Phone # 1: 301977xxxx Address: 9737 Washingtonian Blvd Ste 350 Gaithersburg, MD 20878-7387 USA Phone # 2: 3019779441 Address: 9737 Washingtonian Blvd Ste 350 Gaithersburg, MD 20878-7387 USA Remote User Station	2	$3.90 (2 * $1.95)	N/A
Pro Install - Business Hours (ins-003)	4	$600.00 (4 * $150.00)	N/A
	Services Sub Total	$1,752.00	$714.80

Equipment

Product Name	**Quantity**	**One-Time Fees**[Note 1]	**Monthly Fees**[Note 2]
BroadTouch Mobile Client (bw-001)	8	$240.00 (8 * $30.00)	N/A
BroadTouch PC Client (bw-002)	15	$224.25 (15 * $14.95)	$149.25 (15 * $9.95)
Polycom VVX 500 12-line Desktop Phone with HD Voice with POE (at-pc-vvxp500)	1	$284.25 (1 * $284.25)	N/A
	Equipment Sub Total	$748.50	$149.25
	Sub Total	$2,500.50	$864.05
	Grand Total	$2,500.50	$864.05

Back Cancel Submit Order

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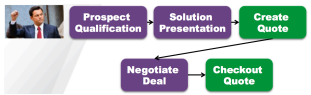
CHECKING THE ORDER



broadsoft businesscloud

Service Provider Portal
Welcome Sales Executive1!
Logout

English (United States)

Admin
- Home
- Profile
- Create Customer
- View Customers
- Customer Service Tool

Order
- Create Quote
- Create Field Services Quote
- Pending PMS Interface Scheduled
- Search Quotes
- Search Orders
- Reports

Examinet
- Initiate Request
- View Requests

Search Orders

Customer
Billing Telephone Number
Order #
Type
Status
Mac Address
Toll Free Number/Phone Number
Start Date
End date
Unread Notes?
High Priority?

Search

Search Results

Displaying 1 - 1 of 1 Export

Unread Notes?	Order Id	Type	Billing Telephone Number	Customer	Site Name	Order Date	Status	Service Activation Date	Docs
	WS56434	New Order		Family Sporting Goods Ltd	Main Store	10/7/16	Order Pending BAN	Not scheduled.	0

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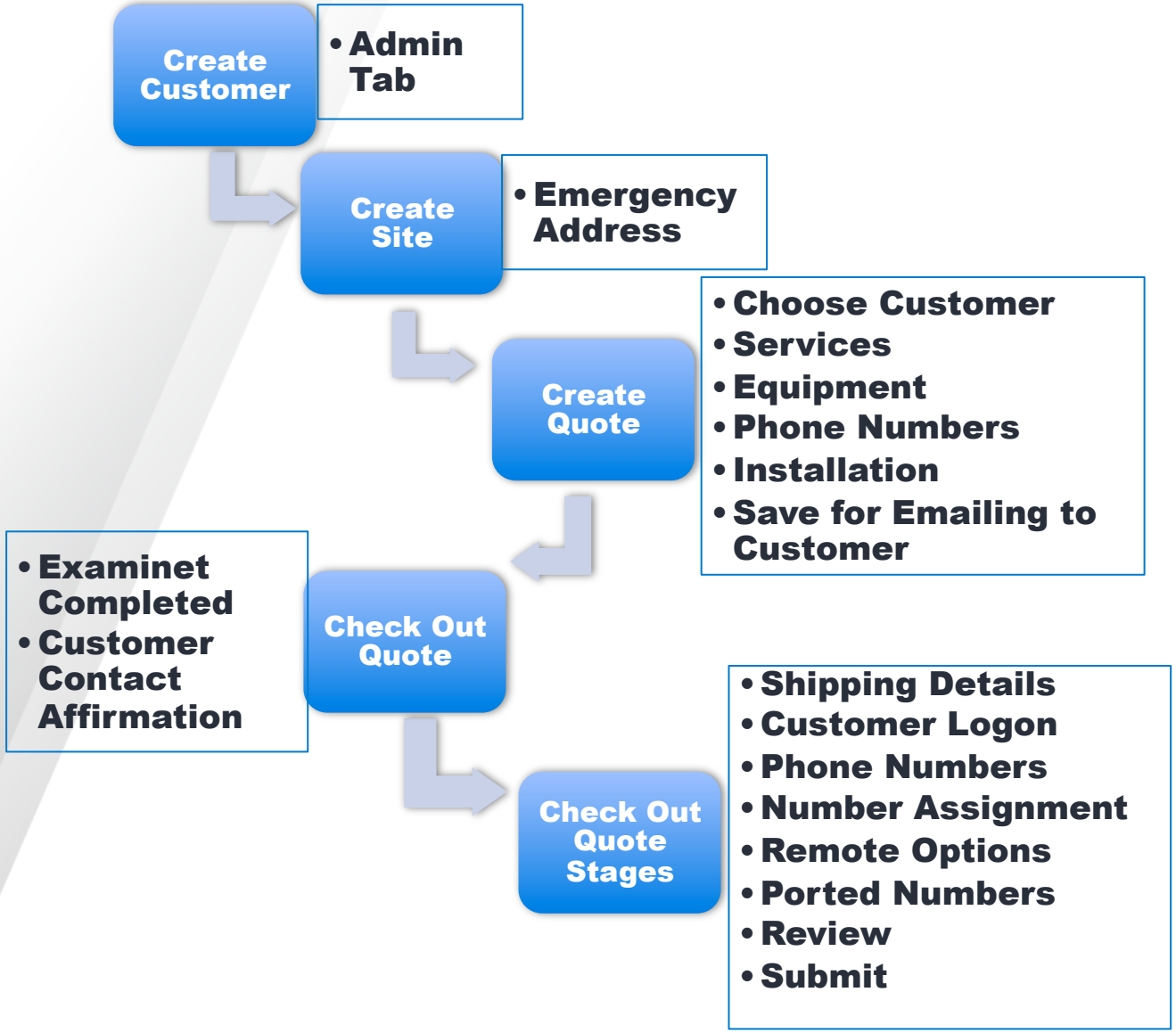
SALES PROCESS FLOW REVIEW



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REVIEW QUESTION

- What stages do you move through when Checking out a quote?
  - Shipping Details
  - Customer Logon
  - Phone Numbers
  - Number Assignment
  - Remote Options
  - Ported Numbers
  - Review
  - Submit

- Can I checkout a quote without running ExamiNet?
  - Yes

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LAB 2

BroadCloud Administration Professional

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MODULE OBJECTIVES WRAP

- Understand the Process Flow for a BroadCloud Order
- Be able to Start, modify and process a Quote
- State the basic use of Examinet and be able to generate a request

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THANK YOU!

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