



# JOB AID

E-QUOTE TOOL FRONTIER ANYWARE

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# JOB AID

## E-QUOTE TOOL FRONTIER ANYWARE



### IN A NUTSHELL...



#### SIMPLIFIED QUOTING

- Accessible from within Salesforce
- A quick product quote configuration wizard
- Auto-creates a quote
- Auto-populates contracts & products in Salesforce
- Attaches the required documentation to your opportunity records

### GETTING STARTED

#### LAUNCHING E-QUOTE TOOL IN SALES FORCE

1. When creating an opportunity – choose Equote in the record type.

Home Libraries Chatter Files Reports Companies Opportunities Dashboards Leads Products C2F Brainshark Portal

New Opportunity  
**Select Opportunity Record Type**

Select a record type for the new opportunity. To skip this page in the future, change your record type settings on your personal setup page.

**Select Opportunity Record Type** 1

Record Type of new record Equote

Continue Cancel

Available Opportunity Record Types

Record Type Name	Description
Equote	
Memo Read only	Used when creating a CPQ / Sterling or SFA Quote via Salesforce Classic

2. Once you've created an opportunity, click on the Equote Tool

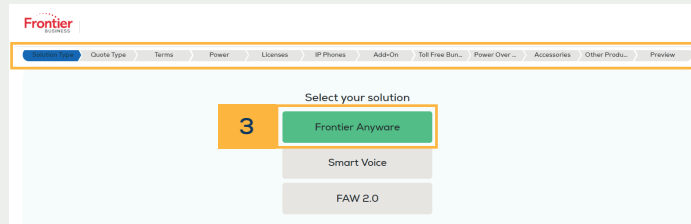
**Opportunity Detail** Edit Delete Equote Tool Generate Quote Equote Attachments Equote Email View Product

Opportunity Name	Test	Opportunity Owner	Susan Higgins (C)
Opportunity Record Type	Equote [Change]	Territory	[Change]
Account Name	Test Company 10	Price Book	PriceBook_1
Sales Stage	Defining	Opportunity Type	New
Reason Won/Lost		Opportunity Disposition	
Is Opportunity for Ethernet Services?	No	Forecast Category	Pipeline
Is this Cloud Solution (IaaS, DRaaS)?	No	Next Step	
Lead Product List	FAW UCaaS	Close Date	5/20/2020
Opportunities*	1	Other Reason Lost Details	
Contact	Susan Higgins	Take The Lead ID	
Contract Term Years	3		
Company size	1		
Types of Product	Frontier Anyware		

E-QUOTE TOOL LAUNCH

The top toolbar will walk you through the precise sequence of steps you'll need to complete to get your quote done

3. Choose **Frontier AnyWare** from the following options





## SITE INFORMATION

### 1. Choose Your Quote Type

- 1. Rental – With Frontier Internet
- 2. Purchase – With Frontier Internet

These two options will show the discounted license pricing we offer for current broadband/EIA customers

- 3. Rental – Non-Frontier Internet
- 4. Purchase – Non-Frontier Internet

These options will add standard rates for customers using BYOB

### 2. Add Customer Information

- 2a. Input Customer Information
- 2b. Choose the Contract Term
- 2c. Enter the number of locations
- 2d. Click Next

1. Choose your preferred Power Option for the site
  - Customer provided POE Switch
  - Frontier provided POE Switch
  - Frontier provided Power Cords
2. Click Next

A site information window will open.

By default, the main account address will be shown on the site address field. You should change it to reflect the current site.

1. Choose if this is the primary address. It's important that you specify the City and State
2. Click Next



## PRODUCT INFORMATION

### THE FRONTIER ANYWARE LICENSE OPTION TAB WILL OPEN NEXT

1. Choose your licenses:

- Elite License
- Premier License
- Essentials License
- Outbound Only

2. Specify the number of licenses you'll need for the site for each license

3. Click Next

Licenses	MRC / NRC	Unit Price	Qty	SubTotal
<input type="checkbox"/> Essential User 3 Yr(g)	MRC	\$12.99		
<input type="checkbox"/> Premier User 3 Yr(g)	MRC	\$15.99		
<input type="checkbox"/> Elite User 3 Yr(g)	MRC	\$19.99		
<input type="checkbox"/> Outbound User 3 Yr(g)	MRC	\$12.50		

### THE IP PHONES TAB WILL OPEN NEXT

1. Choose the right Phones and Devices for the site

- 6940 IP Phone
- 6930 IP Phone
- 6920 IP Phone
- Analog Terminal Adapter
- Paging Adapter

2. Specify how many of each phone you will need - pay close attention to your options, as there are power options combined.

3. Click Next.

IP Phones	MRC / NRC	Unit Price	Qty	SubTotal
<input type="checkbox"/> 6920 IP Phone Power @	MRC	\$7.40		
<input type="checkbox"/> 6920 IP Phone Std(g)	MRC	\$6.00		
<input type="checkbox"/> 6930 IP Phone Power @	MRC	\$9.75		
<input type="checkbox"/> 6930 IP Phone Std(g)	MRC	\$8.35		
<input type="checkbox"/> 6940 IP Phone Power @	MRC	\$12.50		
<input type="checkbox"/> 6940 IP Phone Std(g)	MRC	\$11.10		
<input type="checkbox"/> 112 DECT Phone Additional Handset(g)	MRC	\$7.00		

## THE ADD-ON FEATURES TAB WILL OPEN

- Choose any additional features required by your customer
  - Toll Free Number
  - Caller ID Name
  - Directory Listing
  - E911 (One included with service)
  - Additional Domestic DID
  - Extended Market Number
  - Additional Auto Attendants (One included with service)
- Specify the quantities
- Click Next

Add-On	MRC / NRC	Unit Price	Qty	SubTotal
<input type="checkbox"/> Additional Auto Attendant @	MRC	\$25.00		
<input type="checkbox"/> Toll Free Numbers License @	MRC	\$2.50		
<input type="checkbox"/> Caller ID Name Delivery (Included N/C) @	NRC	\$0.00		
<input type="checkbox"/> E911 (Per Listing) @	MRC	\$5.00		
<input type="checkbox"/> Directory Service Listing @	MRC	\$5.00		
<input type="checkbox"/> Additional Domestic DID @	MRC	\$2.00		
<input type="checkbox"/> Extended Market Number @	MRC	\$5.00		

## THE TOLL-FREE BUNDLES TAB WILL OPEN

- Choose your Toll-Free Minute Bundle. (you must have added a Toll-Free number from the previous page to add these bundles)
- Specify how many of each bundle will be needed
- Click Next

Toll-Free Bundle Minutes	MRC / NRC	Unit Price	Qty	SubTotal
<input type="checkbox"/> Toll Free Domestic Us Block - 1,000 Minutes @	MRC	\$29.99		
<input type="checkbox"/> Toll Free Domestic Us Block - 2,500 Minutes @	MRC	\$70.00		
<input type="checkbox"/> Toll Free Domestic Us Block - 5,000 Minutes @	MRC	\$135.00		
<input type="checkbox"/> Toll Free Domestic Us Block - 7,500 Minutes @	MRC	\$195.00		
<input type="checkbox"/> Toll Free Domestic Us Block - 10,000 Minutes @	MRC	\$250.00		
<input type="checkbox"/> Toll Free Domestic Us Block - 25,000 Minutes @	MRC	\$625.00		
<input type="checkbox"/> Toll Free Domestic Us Block - 50,000 Minutes @	MRC	\$1,000.00		

## THE POWER OF ETHERNET SWITCHES TAB WILL OPEN

- Choose all necessary Switches for the site
  - Power Over Ethernet Switch Option (8, 24 and 48 Port Options Available)
  - Streamline Device Converts CAT3 to CAT5 Cable (8, 24 and 48 Port Options Available/ Streamline only available for Purchase)
- Specify the quantities
- Click Next

Power Ethernet Switches	MRC / NRC	Unit Price	Qty	SubTotal
<input type="checkbox"/> 8 Port Gig PoE Bundle @	MRC	\$20.25		
<input type="checkbox"/> 24 Port Gig PoE Bundle @	MRC	\$55.25		
<input type="checkbox"/> 48 Port Gig PoE Bundle @	MRC	\$101.00		
<input type="checkbox"/> Flashdrive Dongle Streamline II 8 Pack - Bundle @	NRC	\$427.14		
<input type="checkbox"/> StreamLine Unit Bundle - 8 port @	NRC	\$397.43		
<input type="checkbox"/> StreamLine Unit Bundle - 24 port @	NRC	\$1,880.35		
<input type="checkbox"/> StreamLine Unit Bundle - 48 port @	NRC	\$5,204.14		

## THE ACCESSORIES TAB WILL OPEN

1. Pick any Additional Hardware needed for the site
2. Click Next

1

2

	MRC / NRC	Unit Price	Qty	SubTotal
<input type="checkbox"/> 680x Series Plug	NRC	\$173.43		
<input type="checkbox"/> 48Vdc Power Cord IP Phone Bundle	NRC	\$36.00		
<input type="checkbox"/> 680x Series Wallmount Kit	NRC	\$214.29		
<input type="checkbox"/> 6830 Bluetooth Handset - g	NRC	\$128.57		
<input type="checkbox"/> 6830/6840 Dect Headset	NRC	\$278.57		

## THE OTHER PRODUCTS TAB WILL OPEN

1. Manually add items to the proposal

**Note:** This is for quoting purposes only. It will not auto-create any other required fields in Salesforce for the other products

1

2

Products	MRC/NRC	Price	Qty	Total	Add Column
	None			\$0.00	+

2. Click Next

After you submit all your inputs, a preview tab will open. You will then be able to edit anything you need there.  
When you are finished, **Click complete.**

Site 1 / 1

Preview

Product	MRC / NRC	MRC Price	Qty	Total MRC Price	Action
<input type="checkbox"/> Essential User 3 Yr	MRC	\$12.99	1	\$12.99	<a href="#">✎</a> <a href="#">✖</a>
<input type="checkbox"/> 6820 IP Phone Power	MRC	\$7.40	1	\$7.40	<a href="#">✎</a> <a href="#">✖</a>



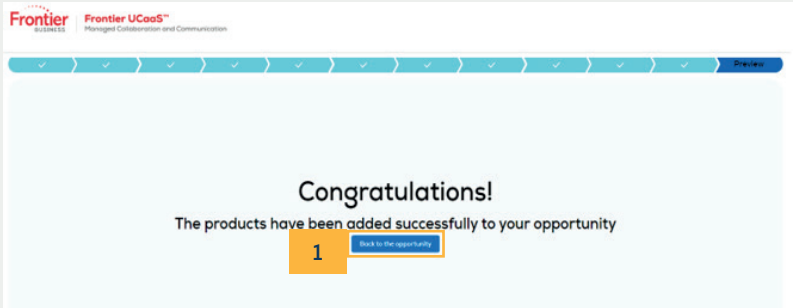
## CONFIGURING ADDITIONAL SITES

1. Once all the information for Site 1 has been submitted, you'll have to specify the details for all your remaining sites. Follow all the previous steps for each site.

The screenshot shows the 'Frontier UCoaS' configuration interface. At the top, there's a progress bar with 12 steps, where the first step is highlighted with a blue arrow and a yellow box containing the number '1'. Below the progress bar, it says 'Site 2 / 2'. There are three radio buttons for service options: 'Customer is providing POE', 'Frontier is providing POE Switch', and 'Frontier is providing IP Phones with Power' (which is selected). To the right, there are fields for 'Site Address' including 'Street', 'City', 'State' (a dropdown menu), 'PostalCode', and 'Country'. There are also 'Back', 'Cancel', and 'Next' buttons at the top right, and a 'Make as Primary' checkbox at the bottom.

### ONCE DONE, YOU'LL RECEIVE A CONGRATULATIONS MESSAGE

1. Click on the 'Back to the opportunity' button.





## DOCUMENTATION

### GENERATING A QUOTE

1. Go back to the opportunity record
2. Click on Generate Quote button. This will open a PDF Quote for Review

**Opportunity Detail**

Opportunity Name: Equite Tool April 2020  
 Opportunity Record Type: Memo Read only [22a09c]  
 Account Name: CEX MEDIA INC.  
 Sales Stage: Investigating  
 Probability (%): 10%  
 Reason Won/Lost: Campaign No  
 Customer Contacted: No  
 In Opportunity for Ethernet Services?: No  
 In this Cloud Solution (ark, ORaaS?): No  
 Lead Product List: FAH UCaaS  
 Opportunities: 1

**2** Generate Quote

Opportunity Owner: Tanya Duck [22a09c]  
 Territory: [22a09c]  
 LDR Assigned: [22a09c]  
 Price Book: PriceBook\_1  
 Opportunity Type: New  
 Opportunity Disposition: Pipeline  
 Forecast Category: Pipeline  
 Next Step: 4/30/2020  
 Close Date: 4/30/2020  
 Won/Lost Date & Time: [22a09c]  
 Other Reason Lost Details: [22a09c]  
 Approval Status: [22a09c]

### THIS IS HOW THE QUOTE WILL LOOK

**Frontier BUSINESS** | **Frontier UCaaS™**  
 Managed Collaboration and Communication

**Product and Service Quote**

**Quote Information**

Company Name: CEX MEDIA, INC.  
 Main Address: PO BOX 619810, DFW AIRPORT, Texas, 75261-9810  
 Main Contact Person: Tanya Duck  
 Contact Email: tanya.duck@ftr.com  
 Contact Phone: 6622805076  
 Type of Quote: Requested Frontier Internet Customer  
 Contract Terms: 3  
 Number of sites: 2

Account Executive Name: Tanya Duck  
 Quote ID: [22a09c]  
 Date: 04/04/2020

CATEGORIES	MRC	NBC
Licenses	\$ 302.79	\$ 0.00
IP Phones	\$ 178.90	\$ 0.00
Add-on	\$ 5.00	\$ 0.00
Toll Free Minutes	\$ 0.00	\$ 0.00
Switches and Pull	\$ 0.00	\$ 0.00
Accessories	\$ 0.00	\$ 0.00
Activation Charges	\$ 0.00	\$ 0.00
Installation	\$ 0.00	\$ 690.87
<b>Totals</b>	<b>\$ 486.69</b>	<b>\$ 690.87</b>
Other Products	\$ 100.00	\$ 200.00

\*Other products are not included in the Totals

**Frontier BUSINESS** | **Frontier UCaaS™**  
 Managed Collaboration and Communication

Site Number: 1/2  
 Site Address: 123 Main Street, Long Beach, CA, 90808

Product Categories	QTY	Unit Price	Total	Unit Price	Total
<b>LICENSES</b>					
Essentials User 3 Yr	10	\$ 12.99	\$ 129.90		
Premium User 3 Yr	10	\$ 15.99	\$ 159.90		
<b>IP PHONES</b>					
6920 IP Phone Power	10	\$ 7.40	\$ 74.00		
6930 IP Phone Power	10	\$ 9.75	\$ 97.50		
<b>INSTALLATION</b>					
Installation					\$ 679.10
<b>SITE TOTAL</b>					
				MRC	NBC
				\$ 461.30	\$ 679.10
<b>OTHER PRODUCT</b>					
Other MRC	1	\$ 100.00	\$ 100.00		
Other NBC	1			\$ 200.00	\$ 200.00

**Frontier BUSINESS** | **Frontier UCaaS™**  
 Managed Collaboration and Communication

Site Number: 2/2  
 Site Name: Long Beach-2

Product Categories	QTY	Unit Price	Total	Unit Price	Total
<b>LICENSES</b>					
Essentials User 3 Yr	1	\$ 12.99	\$ 12.99		
<b>IP PHONES</b>					
6920 IP Phone Power	1	\$ 7.40	\$ 7.40		
<b>ADD-ON</b>					
E911 (Per Listing)	1	\$ 5.00	\$ 5.00		
<b>INSTALLATION</b>					
Installation					\$ 31.77
<b>SITE TOTAL</b>					
				MRC	NBC
				\$ 25.39	\$ 31.77
<b>TOTAL FOR ALL SITES</b>					
				MRC	NBC
				\$ 486.69	\$ 690.87

E-QUOTE TOOL LAUNCH

## GETTING THE DOCUMENTS READY

### GENERATING THE ATTACHMENTS

1. Click On Equote Attachments

All required documents will be generated in the opportunity

**Opportunity Detail**

1 [Edit](#) [Delete](#) [Clone](#) [Sharing](#) [Submit for Approval](#) [Calculate Finance Payment](#) [Check Finance App Status](#) [Submit Finance Credit App](#) [Equote Tool](#)

[Equote Attachments](#) [Equote Email](#) [Generate Quote](#) [Generate Quote for Smart Voice](#) [View Product](#)

Opportunity Name	Equote Tool April 2020	Opportunity Owner	Tanya Duck (Change)
Opportunity Record Type	Memo Read only (Change)	Territory	(Change)
Account Name	DEX MEDIA INC.	LDR Assigned	
Sales Stage	Investigating	Price Book	PriceBook_1
Probability (%)	10%	Opportunity Type	New
Reason Won/Lost		Opportunity Disposition	
Campaign	No	Forecast Category	Pipeline
Customer Contact		Next Step	
Is Opportunity for Ethernet Services?	No	Close Date	4/30/2020
Is this Cloud Solution (PaaS, SaaS)?	No	Work/Lost Date & Time	
Lead Product List	FAW UCaaS	Other Reason Lost Details	
Opportunities	1	Approval Status	

### MARKETING COLLATERAL

1. Scroll down to Marketing documents and click on it

This will open a new window

All marketing collateral will now be generated for inclusion with email to the client

**Marketing Documents** [New Marketing Document](#)

[Action](#) [Marketing Document Name](#)

[Edit](#) | [Del](#) [marketing.doc-000296](#) 1

**Marketing Document Detail**

Marketing Document Name: marketing.doc-000296 [Edit](#) [Delete](#) [Clone](#) [Sharing](#) [Owner](#) Tanya Duck (Change)

Opportunity: Equote Tool April 2020 [Edit](#) [Delete](#) [Clone](#) [Sharing](#) [Last Modified By](#) Tanya Duck, 4/9/2020 10:22 PM

**Notes & Attachments** [New Note](#) [Upload Files](#) [View All](#) [Notes & Attachments Help](#)

Action	Type	Title	Last Modified	Created By
<a href="#">Edit</a>   <a href="#">View</a>   <a href="#">Del</a>	Attachment	FAW UCaaS - Sell Sheet - 2 pages.pdf	4/9/2020 11:12 PM	Tanya Duck
<a href="#">Edit</a>   <a href="#">View</a>   <a href="#">Del</a>	Attachment	6800 Series IP Phones - Customer Facing PDF.pdf	4/9/2020 11:12 PM	Tanya Duck
<a href="#">Edit</a>   <a href="#">View</a>   <a href="#">Del</a>	Attachment	FAW UCaaS - Sell Sheet - 2 pages with Accordion Pricing.pdf	4/9/2020 11:12 PM	Tanya Duck
<a href="#">Edit</a>   <a href="#">View</a>   <a href="#">Del</a>	Attachment	FAW UCaaS - Solution Brief - 6 pages.pdf	4/9/2020 11:12 PM	Tanya Duck

### CONTRACTS

1. All Contracts will be available in the legal documents section

LOA is required when importing numbers

TF is always required when a TF Number is being imported or moved from analog or PRI services

**Legal Documents** [New Legal Documents](#)

[Action](#) [Legals Name](#)

[Edit](#) | [Del](#) [legal-00231](#) 1

**Legal Documents Detail**

Legal Name: legal-00231 [Edit](#) [Delete](#) [Clone](#) [Sharing](#) [Owner](#) Tanya Duck (Change)

Opportunity: Equote Tool April 2020 [Edit](#) [Delete](#) [Clone](#) [Sharing](#) [Last Modified By](#) Tanya Duck, 4/9/2020 10:22 PM

**Notes & Attachments** [New Note](#) [Upload Files](#) [View All](#) [Notes & Attachments Help](#)

Action	Type	Title	Last Modified	Created By
<a href="#">Edit</a>   <a href="#">View</a>   <a href="#">Del</a>	Attachment	Frontier Anyware UCaaS_Market Version 10/2019.docx	4/9/2020 11:12 PM	Tanya Duck
<a href="#">Edit</a>   <a href="#">View</a>   <a href="#">Del</a>	Attachment	CPE Purchase Install Mgmt Schedule 03/12/2019.docx	4/9/2020 11:12 PM	Tanya Duck
<a href="#">Edit</a>   <a href="#">View</a>   <a href="#">Del</a>	Attachment	Frontier Anyware UCaaS_Market Version 09/26/2019.docx	4/9/2020 11:12 PM	Tanya Duck

## SCHEDULE

The information will be pre-populated on your inputs:

1. You will still be able to add special circumstance T&C

You still have the following responsibilities:

2. **Generate** a contract in Spring CM
3. **Download** the schedule
4. **Add** Schedule ID, FSA Date and any special Terms
5. **Check** the updated documents back into SpringCM
6. **Send** for Signature

<b>Frontier COMMUNICATIONS</b>		<b>FRONTIER ANYWARE UCaaS (FAW UCaaS) and Rental SCHEDULE</b>	
to the Frontier Service Agreement dated 08/04/2020 ("FSA") by and between DEK MEDIA, INC. ("Customer") and Frontier Communications of America, Inc. on behalf of itself and its affiliates ("Frontier"). Customer orders and Frontier agrees to provide the Services identified in the Schedule below.		FAW UCaaS Equipment Purchase (only) Frontier Confidential	
Primary Service Location	PO BOX 619810 DFW AIRPORT Texas 75261-0810	Schedule Date	08/04/2020
Schedule Type/Purpose	Order for New Services	Service Term	3
Additional Service Locations may be provisioned. Addresses and location-specific Service details will be as outlined in the Frontier data collection sheet, and additional E-911 location charges apply, as outlined in the table below.			
<b>Frontier AnyWare UCaaS Service</b>		<b>QTY</b>	<b>MRC</b>
<b>Elite User Seat Package:</b> • DID iX chat and presence; up to 4 simultaneous devices; voicemail; MCollab web client; MTerm application; unlimited* local calling; unlimited* US & Canadian long distance calling; mobile training; mobile client & softphone; desktop client & softphone; Outlook calendar integration		0	\$ 0.00
<b>Premier User Seat Package:</b> • DID iX chat and presence; up to 3 simultaneous devices; Voice mail; MCollab web client; Outlook calendar integration; unlimited* local calling; unlimited* US & Canadian long distance calling; mobile training; desktop client & softphone		10	\$ 159.00
<b>Essentials User Seat Package:</b> • DID iX & 1 device; unlimited* local calling; unlimited* US & Canadian long distance calling; voice mail		11	\$ 142.89
<b>Outbound Only User Seat Package:</b> • unlimited* local calling; US domestic long distance (\$ 0.05/min) * "unlimited" is subject to FUP (see Section 3C below) International LD rates are found at <a href="http://frontier.com/frontier-anyware-ucaaS-international-long-distance-rates">http://frontier.com/frontier-anyware-ucaaS-international-long-distance-rates</a> Rates may be modified without notice.		0	\$ 0.00
<b>Frontier AnyWare UCaaS Add-ons</b>		<b>QTY</b>	<b>MRC</b>
<b>Additional DID Numbers</b>		0	\$ 0.00
<b>WebFax</b>		0	\$ 0.00
<b>Caller ID Name Delivery</b>			
<b>Directory Listings</b>			
<b>Extended Market Number</b>			
<b>Toll Free Number</b>		0	\$ 0.00
<b>Toll Free Domestic Block of Time</b>		0	\$ 0.00
<b>Toll Free Domestic US Overage Rate Per Minute (\$0.0000)</b>			
<b>Business Console</b>			
<b>Additional Managed Auto Attendants (up to 50 sites total)</b>			
<b>E-911 (per additional locations)</b>		1	\$ 5.00
<b>Real Time Business Analytics</b>			

## LOAs

LOA and TF LOA Documents

New LOAs

Action

LOAs Name

Edit | Del

LOA-0172

1

LOAs

LOA-0172

Back to List: Opportunities

Notes & Attachments (2)

LOAs Detail

LOAs Name

LOA-0172

Owner

Opportunity

Quote Tool April 2020

Last Modified By

Created By

Tanya Duck

4/8/2020 10:22 PM

Edit

Delete

Clone

Sharing

Notes & Attachments

New Note

Upload Files

View All

Action	Type	Title	Last Modified
Edit   View   Del	Attachment	LOA (1).pdf	4/8/2020 11:12 PM
Edit   View   Del	Attachment	Mini Vietfax LOA.pdf	4/8/2020 11:12 PM
Edit   View   Del	Attachment	Toll Free LOA-Responp (1).pdf	4/8/2020 11:12 PM

Back To Top

Always show me more records per related list

## ORDER DOCUMENTS

The Order documents section includes documents required to submit your order

- Site Readiness Form
- Customer Data Collection Form

Order Documents

New Order Document

Action

Order Document Name

Edit | Del

ORD-0171

1

Order Document

ORD-0171

Back to List: Opportunities

Notes & Attachments (2)

Order Document Detail

Order Document Name

ORD-0171

Owner

Opportunity

Quote Tool April 2020

Last Modified By

Created By

Tanya Duck

4/8/2020 10:22 PM

Edit

Delete

Clone

Sharing

Notes & Attachments

New Note

Upload Files

View All

Action	Type	Title	Last Modified
Edit   View   Del	Attachment	FAW UCaaS - Site Readiness Questionnaire (1).xlsx	
Edit   View   Del	Attachment	FAW UCaaS Customer Data collection Form (4).xlsx	

Back To Top

Always show me more records per related list



## SENDING EMAIL

### HOW TO EMAIL QUOTE AND DOCUMENTS

To have the option to email these new documents directly to your customer from Salesforce

1. You'll get a template email, that you can edit before sending by clicking 'Equote Email'
2. You can attach any and all of the generated documents from the previous step as well as manually upload additional documents that you may wish to include

### ONCE DONE, YOU'LL RECEIVE A CONGRATULATIONS MESSAGE

1. To attach the pre-generated documents, scroll down on the window and pick the ones you need
2. Once Complete – Click Send