



QUOTING - VENDAVO | DOCUSIGN

January 2022

Quote to Order

1. Quote is configured in CPQ
2. Download the proposal to a word doc. selecting the correct proposal template (see slide 3 for template descriptions)
3. Save to your desktop and rename the file using the correct file naming convention
 1. Perennial – Customer Name – Quote ID – Date
4. Sales rep to login to their specific instance of DocuSign, send new envelope and upload the file
5. Add the recipients for execution (Stage 1: Customer; Stage 2 Alison; Stage 3 Legal signedcontracts@evercommerce.com; Stage 4 Aaron Sandager)
6. Once executed save the document to our desktop
7. Upload the doc to the opportunity record.
8. Close out the opportunity

Step by Step Process Outlined in this Document

Proposal Templates

Bold CPQ Template Financial Add-on Modules.docx | Use for all expansion revenue opps for existing SedonaOffice and AlarmBiller customers

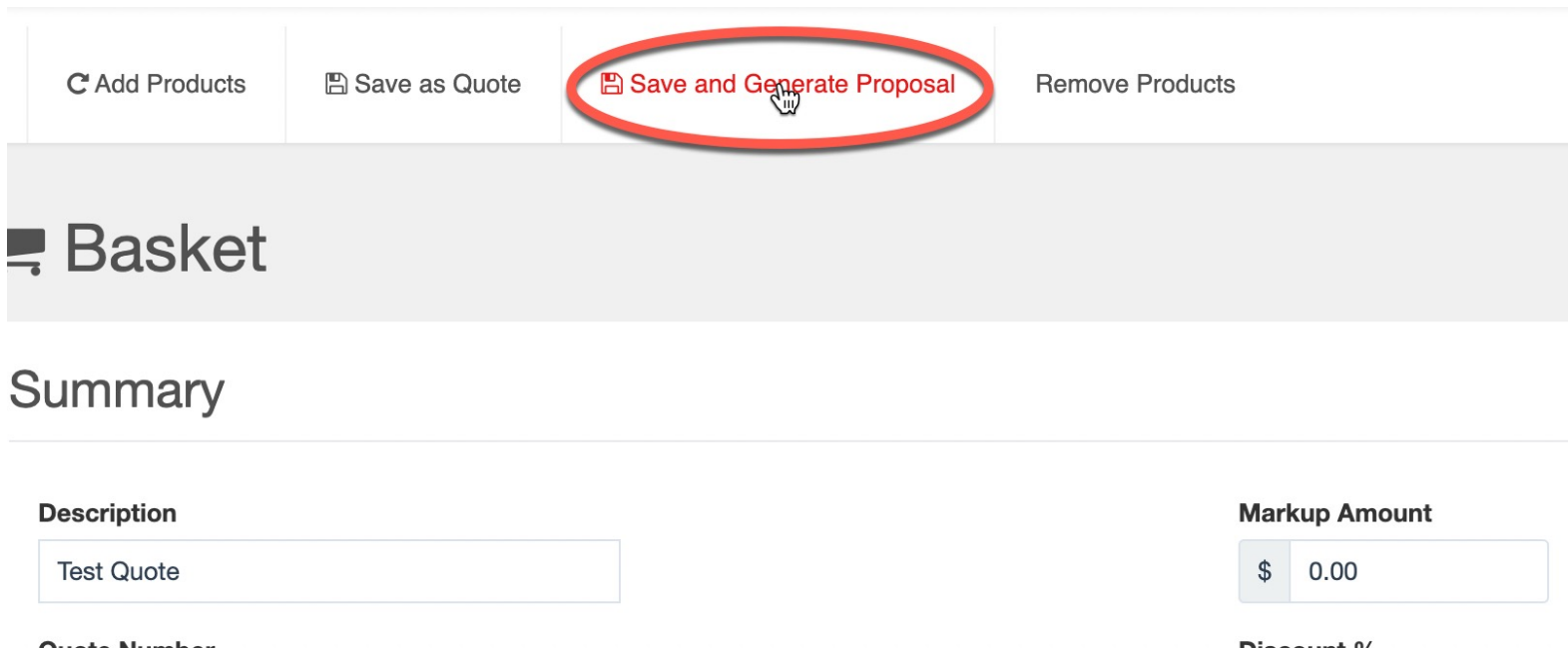
Bold CPQ Template SedonaOffice.docx | Use for only Net New SedonaOffice On-Prem Contracts

Bold CPQ Template SedonaOffice Cloud.docx | Use for only Net New SedonaOffice Cloud Services (SedonaOffice Hosted) Contracts

Bold CPQ Template AlarmBiller.docx | Use for only Net New AlarmBiller Contracts

Quote Configured in CPQ

1. Configure the quote in CPQ and select **Save and Generate Proposal**



The screenshot displays the CPQ interface. At the top, there is a horizontal bar with four buttons: 'Add Products', 'Save as Quote', 'Save and Generate Proposal', and 'Remove Products'. The 'Save and Generate Proposal' button is highlighted with a red circle and a mouse cursor. Below this bar is a 'Basket' section, followed by a 'Summary' section. The 'Summary' section contains two input fields: 'Description' with the value 'Test Quote' and 'Markup Amount' with the value '\$ 0.00'. Below these fields, the labels 'Quote Number' and 'Discount %' are partially visible.

Description	Markup Amount
Test Quote	\$ 0.00

Quote Configured in CPQ

Select the correct proposal template and select **Open Proposal**

Document : BOLD Proposal Export

Name : Test Quote

Format : English (United States)

Content :

- ☐ Bold CPQ Template Manitou.docx
- ☐ Bold CPQ Template Manitou Add-On.docx
- ☐ Bold CPQ Template SedonaOffice.docx
- ☒ Bold CPQ Template Financial Add-on Modules.docx
- ☐ Bold CPQ Template SedonaOffice Cloud.docx
- ☐ Bold CPQ Template SGS.docx
- ☐ Bold CPQ Template SGS-SI.docx
- ☐ Bold CPQ Template AlarmBiller.docx

1 →

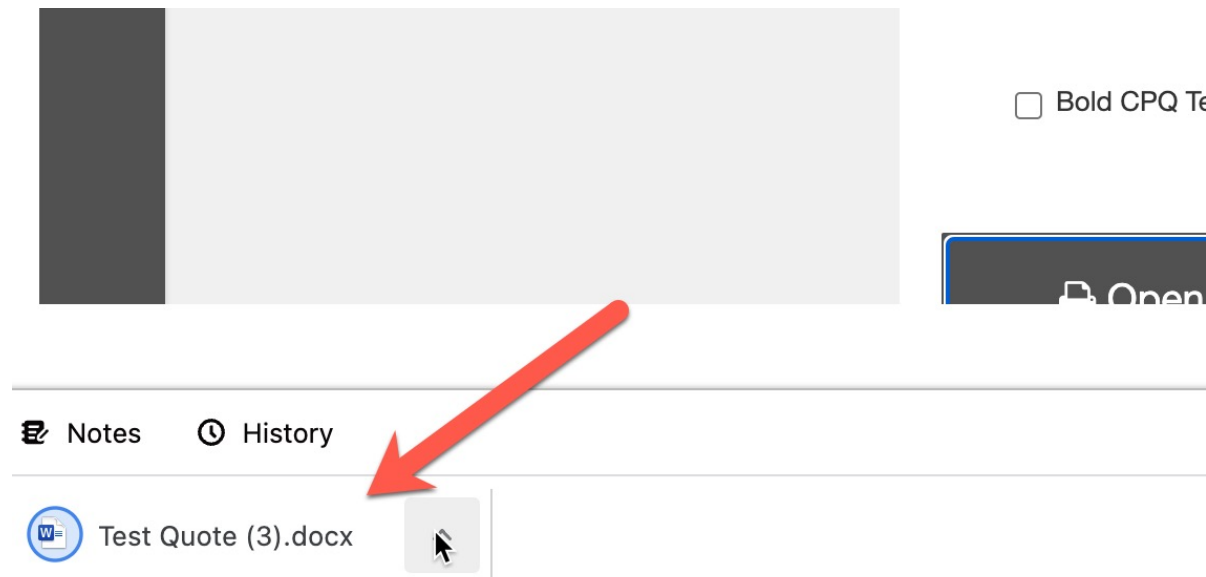
→ **2**

Open Proposal

DocuSign

Quote Configured in CPQ

A word document of the configured quote is created; save to your desktop and rename the document using the naming convention on the new page



Contract Naming Convention

Naming Convention: Perennial – Customer Name – Quote ID – Date

Key Note: Quote ID can be found on the top right corner of the contract and in the Opportunity record

D
P

QUO-39223-2QCIZ4

up System
& Purchase Agreement

And

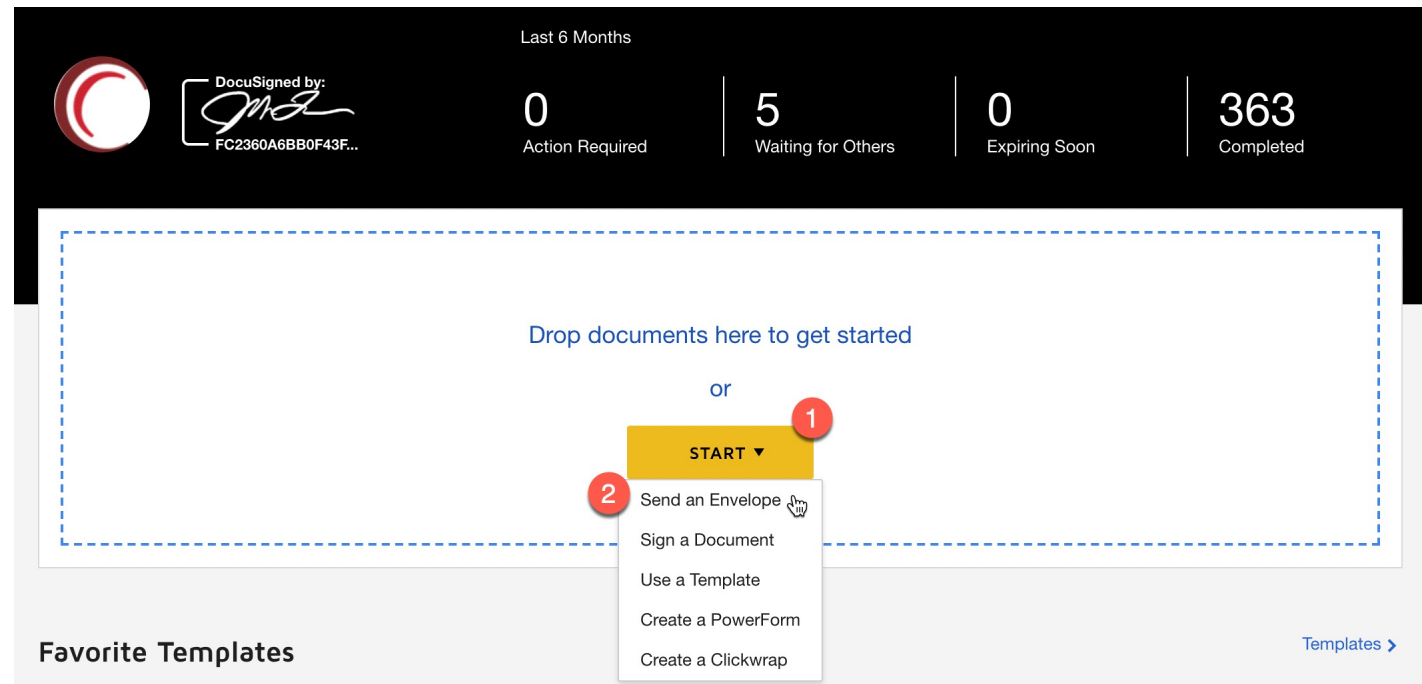
CPQ Information - Necessary To Complete a Quote

Primary Contact	Matt Trader	Billing Street	923 North Belt West,
Contact Name	Matt Trader	Billing City	Swansea
Customer Name	Barcom Security	Billing State	IL
Title	Vice President	Billing Zip	62226
Valid From	11/5/2021	Billing Country	United States
Valid To	11/19/2021	Quote ID	QUO-39223-2QCIZ4
Special Conditions			

Barcom	Jan 14, 2022
~\$ - Barcom Security - SedonaOffice V1.docx	Nov 18, 2021
SO - Barcom Security - Q...-39223-2QCIZ4 - 1.19.22	Nov 15, 2021
SO - Barcom Security - SedonaOffice V2	Nov 17, 2021

DocuSign

Login to your personal DocuSign account and select Send and Envelope or drag and drop the document from your desktop



DocuSign | Upload Document

Select upload and select the contract or drag and drop from your desktop

< | Upload a Document and Add Envelope Recipients

Add Documents to the Envelope



UPLOAD

USE A TEMPLATE

GET FROM CLOUD ▾

Add Recipients to the Envelope

As the sender, you automatically receive a copy of the completed envelope.

Annotation: A red speech bubble points to the 'UPLOAD' button with the text "Upload or drag and drop".

Add Documents to the Envelope



UPLOAD

USE A TEMPLATE

GET FROM CLOUD ▾

Add Recipients to the Envelope

As the sender, you automatically receive a copy of the completed envelope.

Annotation: A red speech bubble points to the 'UPLOAD' button with the text "You can upload multiple documents if required".

Signing Order

Set the signing order > Add the name of the customer signing > Select **Add Recipient** > Set Recipient Role (see next page DocuSign Stages and Recipient Roles)

Add Recipients to the Envelope

As the sender, you automatically receive a copy of the completed envelope.

IMPORT A BULK LIST. Send copies of this envelope to many people at once. ⓘ

1 ☒ Set signing order

2 Name *

1

Email *

4 NEEDS TO SIGN ▼

3 ADD RECIPIENT

1

2

3

Name *

Justin DeBaggis

NEEDS TO SIGN ▼ CUSTOMIZE ▼

Email *

justin.debaggis@boldgroup.com

Name *

Alison Forsythe

NEEDS TO SIGN ▼ CUSTOMIZE ▼

Email *

alison.forsythe@boldgroup.com

Name *

EC legal

NEEDS TO SIGN ▼ CUSTOMIZE ▼

Email *

signedcontracts@evercommerce.com

CC RECEIVES A COPY ▼

- Needs to Sign
- In Person Signer
- ✓ CC Receives a Copy
- Needs to View
- Specify Recipients

ADD RECIPIENT

Docusign Stages & Recipient Roles

Stage 1: Customer Name and Email

Role: Needs to Sign

Stage 2: Alison Forsythe

Alison.forsythe@boldgroup.com

Role: Needs to Sign

Stage 3: EC Legal

Signedcontracts@evercommerce.com

Role: CC Receives a Copy

Stage 4: Aaron Sandager

Aaron.sandager@boldgroup.com

Role: CC Receives a Copy

The screenshot displays the Docusign recipient list interface. On the left, a vertical sidebar contains four numbered boxes (1, 2, 3, 4) enclosed in a red rectangle. The main area shows four recipient entries, each with a 'Name' field, an 'Email' field, and a role dropdown menu. The first two entries (Justin DeBaggis and Alison Forsythe) have the role 'NEEDS TO SIGN'. The third and fourth entries (EC legal and Aaron Sandager) have the role 'CC RECEIVES A COPY', which is circled in red. Each entry also has a 'CUSTOMIZE' dropdown and a trash icon.

Stage	Name	Email	Role
1	Justin DeBaggis	justin.debaggis@boldgroup.com	NEEDS TO SIGN
2	Alison Forsythe	alison.forsythe@boldgroup.com	NEEDS TO SIGN
3	EC legal	signedcontracts@evercommerce.com	CC RECEIVES A COPY
4	Aaron Sandager	Aaron.sandager@boldgroup.com	CC RECEIVES A COPY

Upload Fully Executed Contracts

After the contract is fully executed, navigate to the opportunity and upload under files

