

Entering in Orders into the LGL System

Overview: Currently, Precept has one general login for the Quickbase CRM that Let's Go Learn uses to track trials, contracts, issues, and other customer data and information.

Main URL to Bookmark:

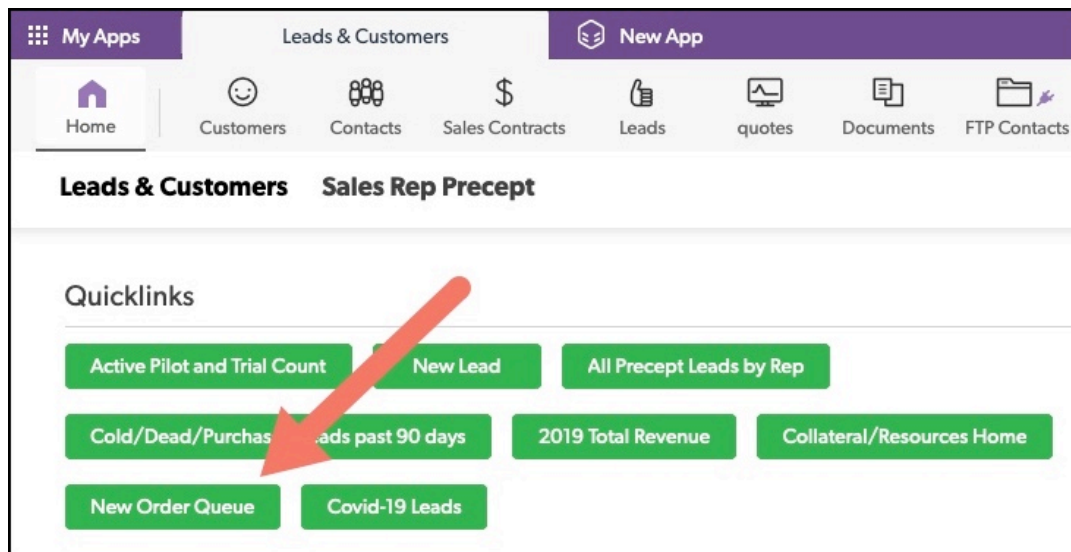
General Sales Demo Site: www.letsgolearn.com/demo < Click on **Precept Marketing** on left nav bar
From this site above you can get to all URLs. This site has sales demos, sample screenshots, links to files to distribute to customers, and more.

Other Important URLs:

letsgolearn.quickbase.com < CRM site to add/manage trials.

Login: nrohrer@preceptmarketing.com Pw: precept19520

Step One: Once Logged in click on the “New Order Queue” button under Quicklinks.



Filling Out the New Order...

Step Two: Fill out the top part of the order shown below...

Order Queue **Add Record**

Line item Processing and Account Checks

Organization Selling or Reselling
Precept Marketing 1

LGL Rep or Partner*
Nathan Rohrer 2

Partner's Sales Rep 3

Select "Nathan Rohrer" under "LGL Rep or Partner" field and then enter in the Precept's sales rep name under "Partner's Sales Rep" field.

Partner PO Information

LGL Quote # 4 **School's PO #** 5 **Total Order Value** 6

Attach PO below...

[Add Document](#)

Title	Related Customer	Customer - Organization	Customer - Primary Cust. Contact	File Attachment	Related Issue	Issue - Related Customer	Issue Type
No documents found							

Additional Line item Information

Special instructions or detailed license information.

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Acct Setup (licensing) Start Date 8 **Acct Setup (licensing) Finished** 9 **Days to expiration**

Did Customer Perform a Trial? 10 **Add Free Khan** 11

1. Update Organization to "Precept Marketing".
2. Set this to "Nathan Rohrer".
3. Enter the individual Precept Marketing rep's name.
4. Enter the quote number for the order.
5. If a PO is provided, add this PO number here and add the PO file to the "Add Document".
6. Enter order total here.
7. Enter any special instructions here. For example, change in order.
8. For Site License accounts, enter the start date of site license.
9. Enter end date of site license.
10. Fill in information about the trial.
11. Fill in information about Free Khan Academy Link.

Step Three: Fill in the account information ...

Account Information

PURCHASING ORGANIZATION: For schools or single site organizations, the purchasing organization will be the same as the school site.
If this is an existing customer, you can find them here.

Search and select 1

Address City State Zip

End-User Purchasing Organization School Site

Address General Phone 2

City State Zip

PRIMARY SITE CONTACT: This is the main person who is familiar with this accounts entire use of the software including end-user set up and site usage

First Name1 3 Last Name1 Title1

Phone1a Phone1b email1

LICENSING CONTACT: This is the main person who is responsible for site licensing and renewals.

First Name3 4 Last Name3 Title3

Phone3a Phone3b email3

SECONDARY SITE CONTACT: This is the backup person who is familiar with this accounts entire use of the software including end-user set up and site usage

First Name2 5 Last Name2 Title2

Phone2a Phone2b Email2

PRIMARY IT/LAB CONTACT: This person is familiar with this customer's use of the software and can coordinate network testing or do the testing themselves.

First NameIT 6 Last NameIT TitleIT

OrganizationalIT PhoneITa PhoneITb EmailIT

PhoneITa 7

Save & close Cancel

1. If this is an order for existing customer, link the customer in Quickbase here.

2. Enter Purchasing Organization information here.

3. thru 6. Enter in several key people's information here. Primary site contact, secondary site contact, and tech contact. Primary site contact will also be the licensing contact where as the user in (1) may be responsible for managing teachers and students.

Step Four: Click on "Save & Close" to save and submit your order to LGL Customer Support.