

Digital Quote Manager Installation Guide



Installing Digital Quote Manager

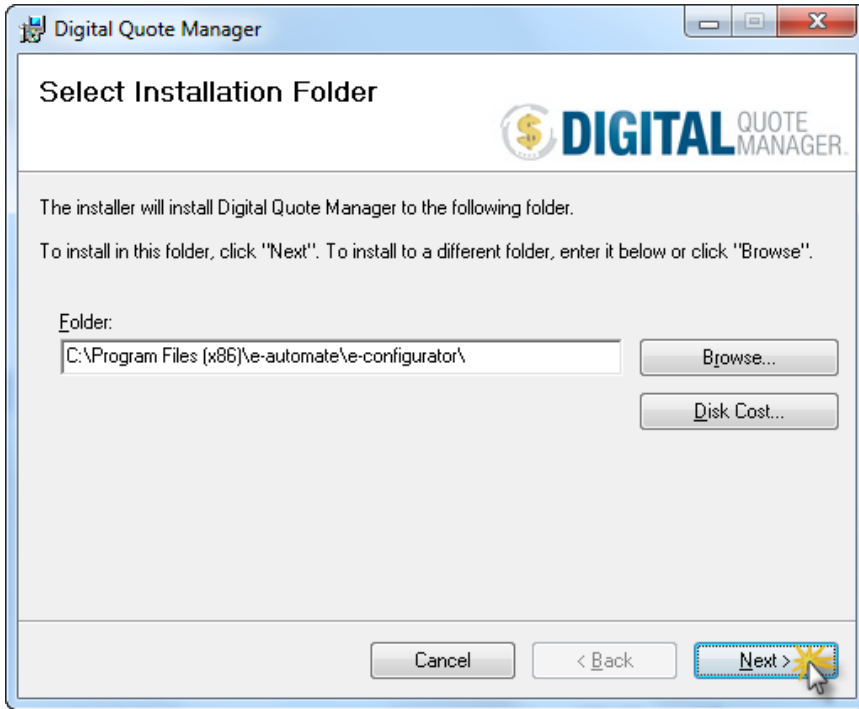
The Digital Quote Manager is a sales tool that works in conjunction with e-automate where sales reps can create sales quotes with correct equipment configurations eliminating entry error. The equipment configurations and rules, such as limits and defaults, are previously defined by the admin in the Digital Quote Manager Admin, the configuration component of the Digital Quote Manager. To install the Digital Quote Manager use the following instructions.

1. Navigate to the directory location where you have saved the files.
2. Double-click on the **DGI.SalesQuoteManager.exe** file to launch the Install.

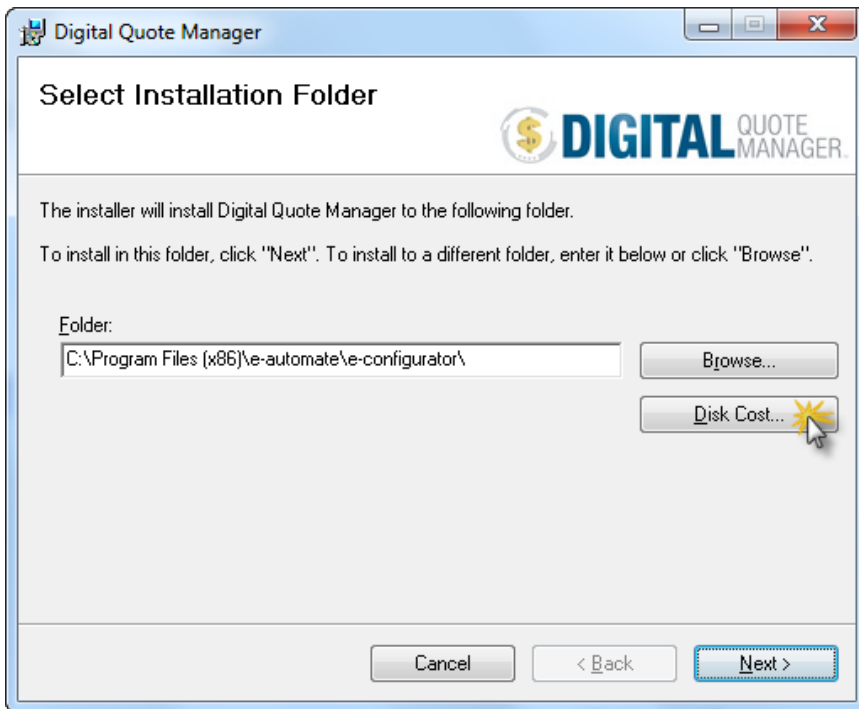


3. Click [**Next>**] to display the **Select Installation Folder** window.

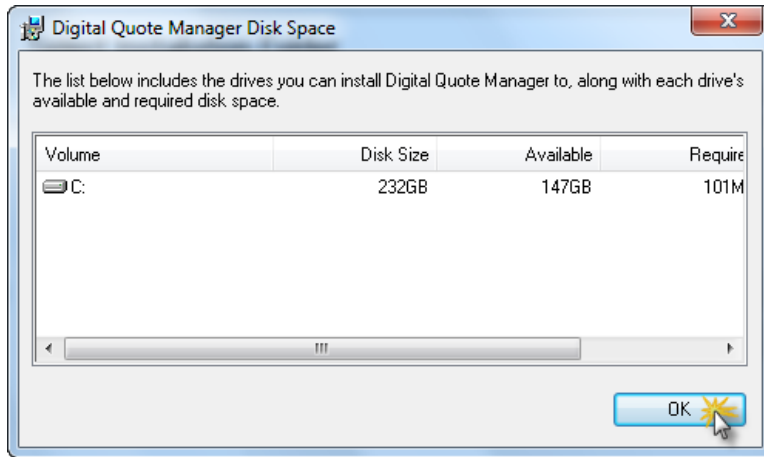




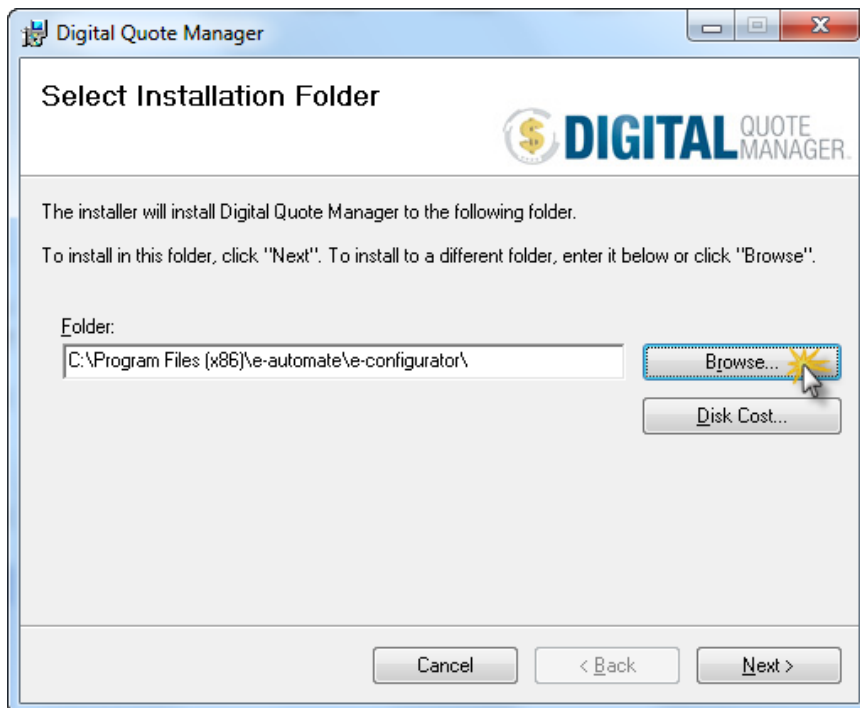
4. If you want to view the amount of space this application will use, click [**Disk Cost...**].



5. The **Disk Space** window displays with a list of drives and their available space.

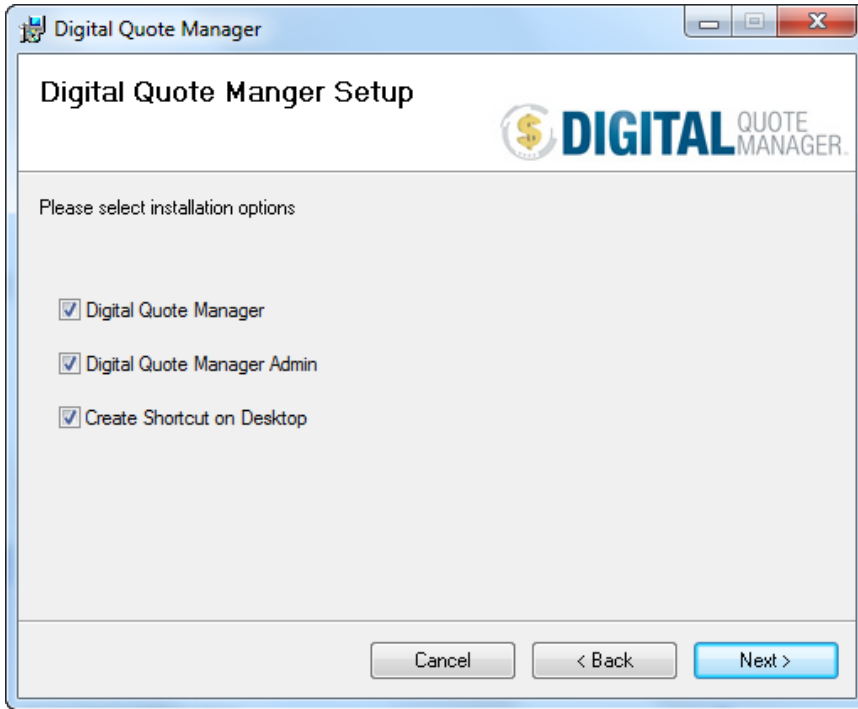


6. After you have decided where you want to save the application, click **[OK]** to close the **Disk Space** window and return to the **Select Installation Folder** window.
7. Click **[Browse...]** to select the location where you want to save DQM.



8. Click **[Next]**. The **Digital Quote Manager Setup** window displays.

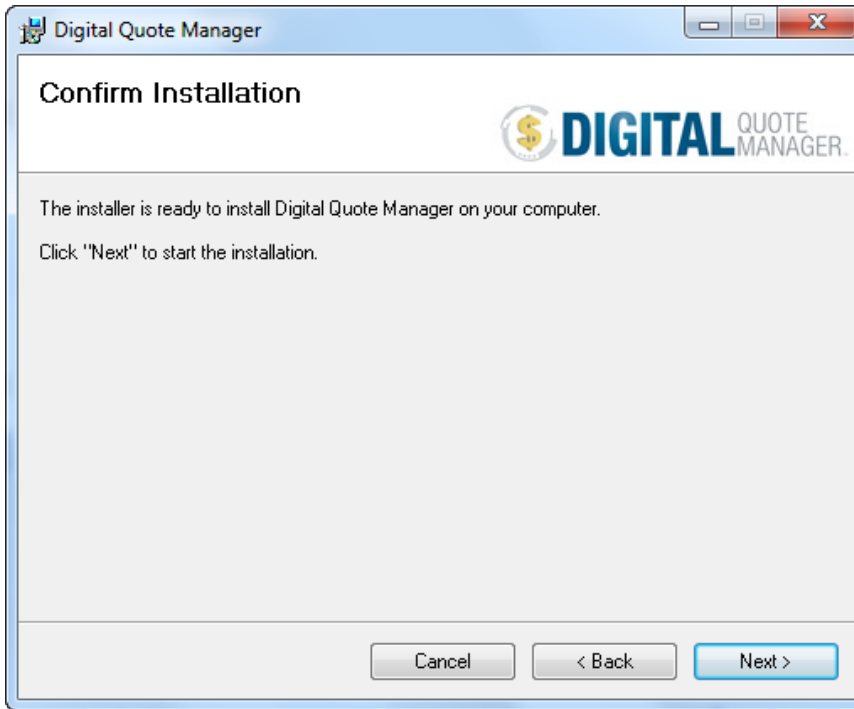




9. Check the checkboxes next to the following desired installation options.
- Digital Quote Manager:** When checked, the sales rep portion of the application installs.
 - Digital Quote Manager Admin:** When checked, the admin portion of the application installs.
 - Create Shortcut on Desktop:** When checked, a shortcut is placed on your desktop for the application portion(s) you have selected to install.

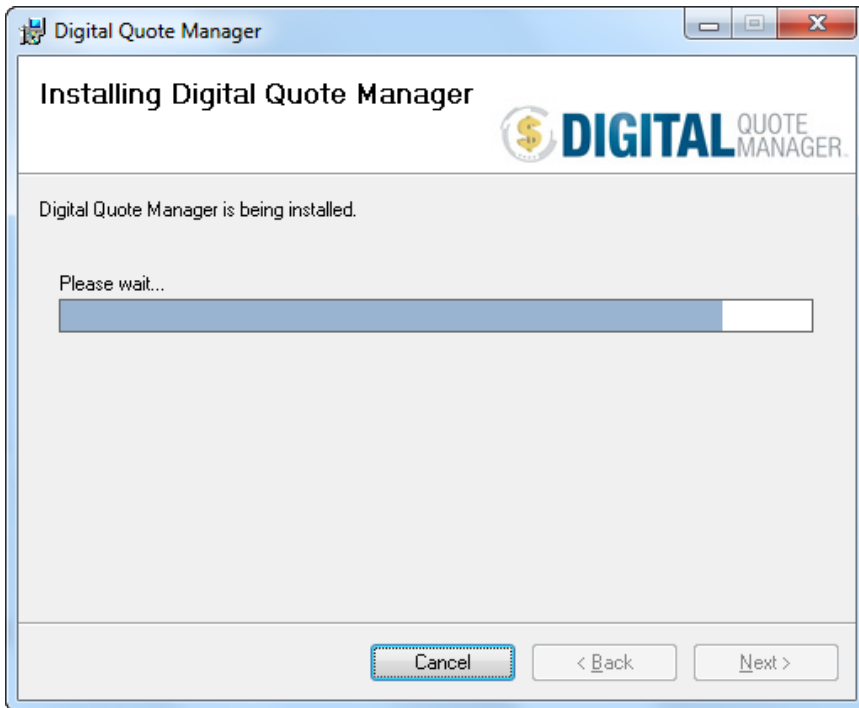


10. Click [**Next**]. The **Confirm Installation** window displays.

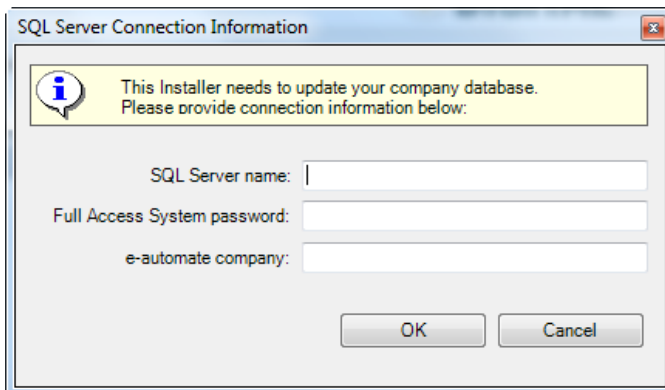


11. Click [**Next**]. The installation process begins and the **Installing e-automate Commissions** window displays.





The **SQL Server Connection Information** window displays.



12. Enter the appropriate information in the following fields.

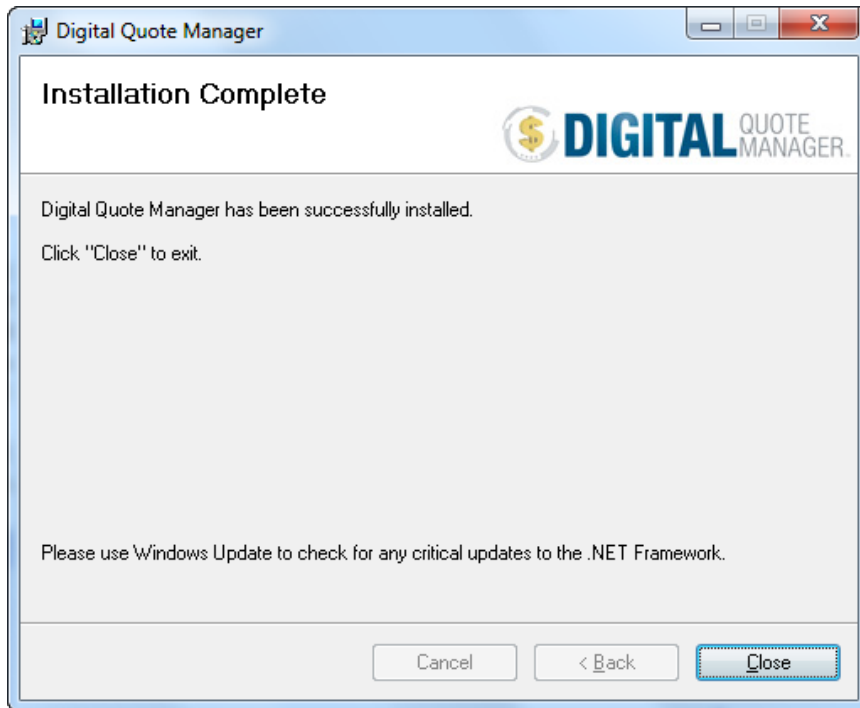
SQL Server name: The name of your SQL Server.

Full Access System password: The Full Access password setup in e-admin.

e-automate company: Company database to which you want the Digital Quote Manager linked.

13. Click [OK]. The **Installation Complete** window displays letting you know the installation was successful.





14. Click [**Close**] to exit.

Digital Quote Manager Licensing

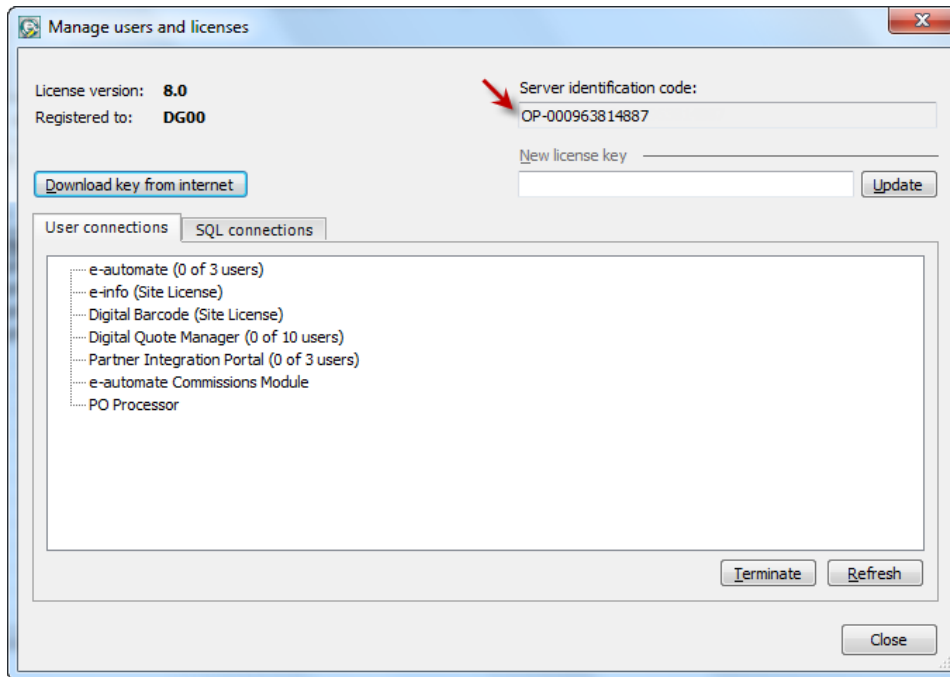
After you have installed your Digital Quote Manager software you must obtain and activate a license key in order to use DQM. DQM licenses work on a week lease basis. You must purchase a copy of DQM for each sales rep. The DQM licensing process does not allow your sales reps to share. Each copy of DQM is based on a week lease system. This means that each copy is good for 7 days from the last login. For example, if you login on Monday the copy is good for 7 days from Monday and then you log in on Tuesday the copy is good for 7 days from Tuesday, Wednesday, 7 days from Wednesday, and so on. If you do not log in to DQM within 7 days from the last time you logged in the copy is open for another user to use. If a different user logs in, that copy will be locked to that user for 7 days from the last day they logged in. As long as the sales rep logs in within 7 days from the first login, the copy will remain tied to that user. If you have a situation where a sales rep leaves the company and you need to tie their copy to a new sales rep before the 7 days has been reached, contact Digital Gateway Customer Care to reassign the copy.

The licensing for Digital Quote Manager is managed within your e-automate system, through your e-automate license key. Digital Gateway will need to generate a new e-automate license key for you to be able to use Digital Quote Manager. The e-automate license key is based on the Server Identification Code for your e-automate system.

To obtain a new e-automate license key to use your Digital Quote Manager software, do the following:



1. In e-admin, click [**License keys**] to open the **Manage users and licenses** window.
2. From the **Server identification code** field, copy the code.



3. Email the Server Identification Code to customercare@digitalgateway.com. A new license key will be sent to you as long as you are current on your e-automate and DQM maintenance.
4. Copy and paste the license key into the **New license key** field of the **Manage users and licenses** window and click [**Update**] to activate e-automate and Digital Quote Manager.



