



Agent Playbook

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Overview

Quickie™ is a proprietary and new web-based (SaaS) innovative application matching businesses looking to compare technology services with local and national providers who best meet their needs.

Think of us as the "Lendingtree" of technology. We make comparing, evaluating and purchasing technology quick and easy. There is no one out there like us and the platform is scalable to a wide variety of products and services. The benefits to you can dramatically save time when you are ready to compare for your clients.

Login

In order to login to the platform, you will need an account. Please contact nancy.cole@clarusco.com to get an account. Once you have a login and password, you will login into the system at <http://quickie.compareservicesonline.com>

Creating an Account

Once you have a login for Quickie™, you will need to create an account for each comparison. The steps to follow are listed below:

1. Create a new account - This is the master location for your client. Fill out all the appropriate contact information. This will allow you to start to create comparisons.

Creating a Comparison

1. Once the account information is entered you will be able to click the green box labeled, “Create New Comparison”.
2. Choose the appropriate comparison you need for your client.
3. Enter a project name. (This is something for your reference. We suggest putting in the location name - Comparison Type. Springfield, IL - Phone System)
4. Change the contact information for this comparison.
5. Click Save

Choosing Providers

1. Right below your location information for the comparison, click on the green “Assign Providers” button.
2. Choose three providers to compare. (If you would like to read more about the providers, you can hover your mouse over the providers for additional information.) If you would like to compare more than three providers, check three providers and then go back and add more providers if needed.
3. If you do not know what provider you need, you can leave this area blank and the experts at Compare Services Online will choose them for you.

Choosing Contract Options

1. Right below your provider section is the contract options. This is the section where the contract lengths are chosen.
2. You will need to choose between No Term, Month to Month, 12, 24, 36, 48, 60 and 72 month options.
3. You **must** complete this section in order to move forward with your comparison.

Complete Comparison Questions

1. After you have finished the contract options section, please complete all the questions listed.
2. The more questions you answer, the more likely you will find the best solution for your client.
3. Click Submit

My Comparisons

1. After you have finished entering in your information, you can review all of your comparisons by clicking the “My Comparisons” link
2. Within this section, you will see your comparisons. You can use the Search bar for anything. You can also sort the columns to find the comparisons as well.
3. **Important Note** - You might want to check this section to ensure your quote has been submitted. In the quote status column, it should state “Submitted”. This ensures the quote went out to the providers. If it is in “Draft” status, you will need to go back into the comparison and click the “Submit” button to ensure it goes to the providers.

Send Quote

If you would like to see all the comparisons at once and you have responses in the application, please click the “Send Quote” link in blue at the top of the page. This will produce a cut and paste option for you to send to your client. Follow the instructions on the page and if you want to go back there is a link back to your comparison.

Archive a Quote

If you would like to archive your quote, please click on the link at the top of your comparison and a pop-up box will appear to confirm. **Important note** - Once you archive a quote, you will not see it in the system any longer.

Discovery Documents

This section has been created to help you sell more products and services. Each downloadable document produces all the questions you need in order to uncover the best product for your client. **Important note** - These documents do not have our logo so we encourage you take them to your appointments with the clients.

Contact Support

This section has been created to help you in anyway possible. If you need some help within the application, please feel free to call us or send us a note. We encourage you to provide us with any ideas on how to create a better application to make you successful.