

FREQUENTLY ASKED QUESTIONS



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# FREQUENTLY ASKED QUESTIONS



## 1 What is Quote Connect?

Quote Connect is an SAP Configure Price Quote (CPQ) solution that simplifies the creation of customer quotes. This new platform will improve the new equipment quoting experience for all dealer sales teams.

## 2 Will Quote Connect replace CRM?

Quote Connect will replace the new equipment quoting functionality that currently resides in CRM. SAP CRM will still exist and will handle account management activities, updating of involved parties, and TSDR entry. TSDR initiation will occur in CPQ.

## 3 Will I still be able to complete quotes in CRM?

Existing quotes will still exist in CRM and there will be approximately a 30-day window available after launch to complete them. After that window closes, any active quotes will need to be recreated in Quote Connect. Quotes not closed out will still be available for reference, but will not be editable. These quotes will eventually all move to inactive status in CRM.

## 4 Will users be trained on how to use Quote Connect?

Mandatory Quote Connect training will be provided over the course of six live sessions. The first five sessions have been completed and the remaining refresher course will be provided the week of June 5. Additional Quote Connect Champion training for select users at each dealership will occur on June 7.

## 5 What happens if I cannot attend or miss a training session?

All previous training sessions have been recorded and are available in the Toyota Learning Management System. The additional refresher course provided in June will also be recorded and uploaded to the LMS. If you cannot attend a live session, the recorded session will be marked as mandatory for you in LMS. Please review all content prior to go-live on June 12.

## 6 When will Quote Connect go into effect?

Quote Connect will be live for all Toyota dealers and internal TMH users who support dealer sales at 8AM EST on Monday, June 12.

## 7 Will my current integrations with CRM still work when Quote Connect launches?

Yes, all existing integrations will continue to work when Quote Connect goes live. TMH will be testing this during user acceptance testing. No existing fields in CRM were modified or deleted. Data is synced back to these fields from Quote Connect.



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## 8 What support will be available once Quote Connect goes live?

Each dealership has an identified Quote Connect Champion who will be receiving additional training and communications to support their internal users. For information regarding who your champion is, please contact Corey Lynch at [Corey.Lynch@ToyotaTMH.com](mailto:Corey.Lynch@ToyotaTMH.com). TMH Dealer Support is also available to assist with troubleshooting related to CRM and Quote Connect. You can reach them by phone at 1.800.231.4489 or by email at [dealer.support@toyotatmh.com](mailto:dealer.support@toyotatmh.com). Service Now ticketing has been set up for internal users to request fixes and enhancements.

## 9 Is special access or sign in required for Quote Connect?

No, Quote Connect uses SSO which leverages your existing Portal/CRM login. Your access is governed by the current quoting access you have today so that you retain the same permissions for viewing and editing quotes based on your dealership and role. Select users may need to login manually for a short period of time after launch due to being assigned to multiple dealerships. We will be reaching out to these users directly with more information.

## 10 What is new and different with Quote Connect compared to CRM?

TMH leveraged feedback from nine dealerships and relevant internal stakeholders to develop a new quoting system with over 40 enhancements. These enhancements focus on improving the user experience by reducing the time it takes to produce a quote, eliminating Muda in various processes, and improving quoting accuracy. A few exciting new features include:

- Ability to save mods and products to the catalog
- Automated internal approval process
- Product support documents and option pages available during configuration
- DocuSign integration (available by Fall 2023)
- Configuration and quote auto save
- New guided selling feature
- Enhanced, visual product catalog with search and filtering
- Quote revisions

## 11 What are some important items to be aware of prior to working in Quote Connect?

Here are a few key points to be aware of prior to working in Quote Connect:

- Please ensure you are using the latest version of Chrome, Edge, or Firefox web browsers. The experience has been optimized and tested to work with these browsers and versions.
- When attempting to navigate from CRM to Quote Connect using the “Create CPQ Quote” button, check for any pop-up blockers that may be blocking the application from running. If navigation to Quote Connect is blocked, please adjust your pop-up blocker settings to allow the Quote Connect URL going forward.
- Always navigate to Quote Connect from the CRM opportunity in the Portal. Navigating to Quote Connect using the direct link or any other method will result in the user not being able to perform all quoting functions and the possibility of creating a quote that is not tied to an opportunity. Quotes not tied to opportunities cannot be ordered and will not tie to customer specific pricing.

