User Log onto Data Extractor Tool
User selects Form Type
Writes info to db
User determine Single or Batch
Single
Batch
User select a single document
User points to a single file that contains list of documentsd
Writes info to db
Application – selects first acceptable document type from list of documents
Application displays current file in field: Current file name & displays document in preview window
Page 5
Application – Link Opportunity selector is now available for the user
User clicks on the Opportunity record look up button
Application – Opportunity Search form opens
User searches and selects Opportunity
Application – Opportunity is linked and Opportunity Name/ID is displayed in Link Opportunity field
Writes info to db
Page 2

Page 2
Application – Extract Quote Data button is now available for the user
User clicks on the Extract Quote Data Button
Application: Excel or PDF
PDF
Excel
Application – Initiate the data extraction functions
Application – Initiate the data extraction functions
Application – Convert PDF to Excel
Writes info to db
Application – Search function
Application – Quote function
Writes info to db
Application – Asset function
Writes info to db
Application – Asset check boxes, Remove Selected Asset(s) button, Manually Add Asset Line button, Information Validation button become available for the user to select
User validates Quote details and manually adjusts fields as necessary
Writes info to db
Page 3

Page 2
User validates Assets details and manually adjusts fields as necessary
Writes info to db
Remove Asset
Yes
No
User clicks check box for asset(s) that need to be removed
Writes info to db
User clicks Remove Selected Asset(s) buttong
Application – Removes selected assets from Asset Level Details section
Writes info to db
Add Asset
Yes
No
Yes
User clicks manually Add Asset Line Button
Application – Asset form window opens
User manually enters asset details
User clicks Add Asset Button in the Asset Form window
Page 4
Page 4

Page 3
Page 3
Application – Adds the new asset line to the Asset Level Details section
Writes info to db
Add more Assets
Yes
No
User clicks Information Validation Button
Application – Validates required fields for quote and asset details contain data
Pass Validation
No
Yes
Application – Provides the necessary error message informing user required fields are missing data
Application – Upload to CRM button becomes available for the user
User corrects errors as necessary
User clicks Upload to CRM button
Application – Performs data element validation against CRM
Pass Validation
No
Yes
Application – Returns the necessary error message
Application – Quote Creation function
CRM
Page 5
Page 5
Page 5

Page 4
Page 4
User corrects errors
Page 4
Application – Quote Attachment function
CRM
Application – Asset creation function
CRM
Application – Provide appropriate completion message
Application – Clear current details from application
Batch Files
Yes
No
End of files in folder
No
Yes
Page 1
Application – Select next available document in folder
End