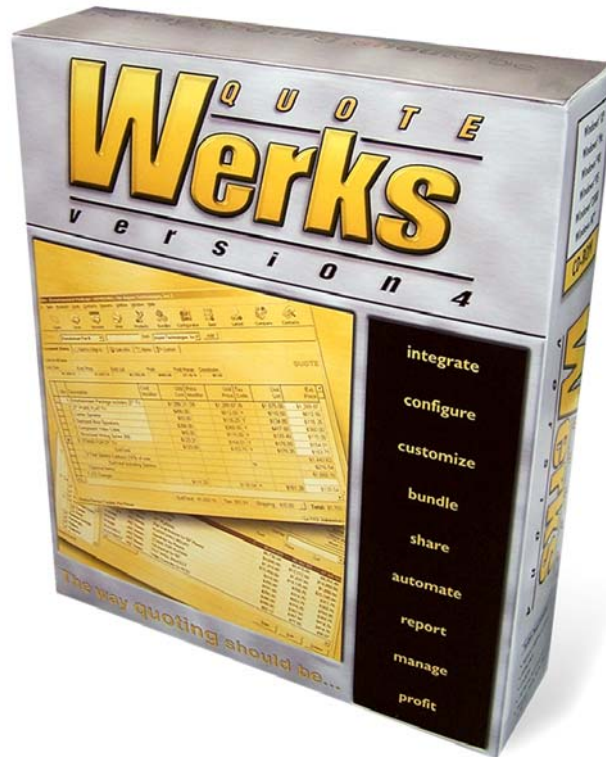


The Out-of-the-Box sales quoting software solution for leading CRM & Contact Managers!



Quote Werks

"The way **quoting** should be..."

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## Reviewer's Guide

*Revised: January 2006*



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**For screenshots, evaluation copies or further product information,  
please visit our Press Kit section on our web site at:**

**<http://www.quotewerks.com/presskit/index.asp>**



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**For screenshots, evaluation copies or further product information,  
please visit our Press Kit section on our web site at:**

**<http://www.quotewerks.com/presskit/index.asp>**



## EXECUTIVE SUMMARY

Aspire Technologies, Inc. was founded in 1993 by Mr. John Lewe, under the name Creative Software. Aspire Technologies, Inc. is a privately held company with its corporate headquarters located in Orlando, Florida.

### **Mission Statement**

Aspire Technologies, Inc. is the leading developer of a sales quoting software solution that strategically addresses the pressing needs of the SME (Small to Medium Enterprise), providing a scalable, integrated and customizable solution that increases productivity to unmatched levels from a single-user environment all the way up to the enterprise environment.

### **Vision Statement**

Behind Aspire Technologies, Inc. is the belief that software designed that is intuitive to the user, provides the user with exactly what they need and exactly when they need it, will ensure the success of the software in today's market. From this simple belief, QuoteWerks™, a sophisticated quoting software application, was created to promote sales efficiency and productivity for small to large organizations. Aspire Technologies, Inc. has focused on the development of a robust solution and has become a revolutionary product in its market space by offering a leading-edge quoting tool that integrates easily to contact management and CRM software such as ACT!, GoldMine, KnowTia, Maximizer, Microsoft CRM, Outlook, salesforce.com, SalesLogix, and TeleMagic. With over 30,000 users of the QuoteWerks solution, Aspire has developed its software with an out-of-the-box unique niche of workgroup enabled tools that are easily scalable for use across any size business or industry.

Aspire Technologies, Inc. is a ***Customer Centric, Value-Driven*** and ***Innovative Leader*** in the quoting software industry; which continually strives to be forward thinking in its development of new features to address the specific needs of our customers. With this established foundation, we aspire to continue our success, as well as increase the momentum towards becoming the ONLY out-of-the box quoting software tool for the SME.



# PRODUCT SUMMARY

INTEGRATE ▪ CONFIGURE ▪ CUSTOMIZE ▪ BUNDLE ▪ SHARE ▪ REPORT ▪ MANAGE ▪ PROFIT

The screenshot displays the QuoteWerks software interface. At the top, there is a menu bar with icons for New, Open, Save, Revision, Print, Products, Bundles, Configurator, Best, Latest, Compare, Contacts, Contact, and QuickBooks. Below the menu bar is a 'QUICK LOOKUP' section with a dropdown for 'Manufacturer Part #' and a search field. The main area is titled 'Document Items' and includes tabs for 'Sold to / Ship to', 'Sale Info', 'Notes', and 'Custom'. A summary table shows 'Totals for All Items' with columns for Ext'd. Cost, Ext'd. Price, Ext'd. List, Profit, Profit Margin, and Commission. The main table lists items with columns for Qty, Days, Description, Cost Modifier, Unit Cost, Price Modifier, Unit Price, Tax Code, Unit List, Ext. Price, Vendor Part #, Vendor, and Manufacturer. The items include an Entertainment Package, 27" PURE FLAT TV, Center Speaker, Surround Rear Speakers, Component Video Cable, Structured Wiring Series 300, and STAND FOR 27" TV. A 3-Year Service Contract is also included. The bottom of the interface shows a summary of SubTotal, Tax, Shipping, and Total.

Qty	Days	Description	Cost Modifier	Unit Cost	Price Modifier	Unit Price	Tax Code	Unit List	Ext. Price	Vendor Part #	Vendor	Manufacturer
1	1	Entertainment Package includes 27" TV,		\$1,086.21	D5	\$1,289.87	N	\$1,575.00	\$1,289.87			
1	1	27" PURE FLAT TV		\$490.00		\$612.50	Y	\$710.50	\$612.50	3C900COM	Our Products	JBZ Stereo
1	1	Center Speaker		\$93.00		\$116.25	Y	\$134.85	\$116.25	3C8201B	Our Products	JBZ Stereo
1	1	Surround Rear Speakers		\$288.00		\$360.00	Y	\$417.60	\$360.00	3C8637N	Our Products	JBZ Stereo
1	1	Component Video Cable		\$92.00		\$115.00	Y	\$133.40	\$115.00	3C905NM5	Our Products	JBZ Stereo
1	1	Structured Wiring Series 300		\$123.21		\$154.01	Y	\$178.65	\$154.01	2D9543	Our Products	JBZ Stereo
1	1	STAND FOR 27" TV		\$123.00		\$153.75	Y	\$178.35	\$153.75	3CM3COPK	Our Products	JBZ Stereo
SubTotal									\$1,443.62			
3-Year Service Contract (15% of sale)									\$216.54			
SubTotal Including Service									\$1,660.16			
Optional Items:												
1	1	CD Changer		\$111.23		\$139.04	Y	\$161.28	\$139.04	3C16073	Our Products	JBZ Stereo
1	1	400 DISC DVD		\$796.00		\$995.00	Y	\$1,154.20	\$995.00	3C1625-0	Our Products	JBZ Stereo

SubTotal: \$1,660.16 Tax: \$93.84 Shipping: \$35.00 Total: \$1,789.00

## What is it that makes QuoteWerks different?

QuoteWerks™ is designed to meet and exceed the needs of sales people who create sales quotes as a regular part of their daily routine. QuoteWerks is a comprehensive sales quoting application that automates the sales process from beginning to end.

The QuoteWerks comprehensive feature set meets the needs of a single-user, and scales to the needs of hundreds of users in an enterprise environment. QuoteWerks is effective in most industries and the multi-purpose design makes it a valuable tool in most markets. Therefore, QuoteWerks™ usefulness is not limited to niche markets.

QuoteWerks is used by/for manufacturer reps, manufacturers, printers, medical equipment sales, office supplies sales, computer related sales, and many more industries/vertical markets. If you create quotes or orders that consist of line items and you would like to track your cost, profit, and customer price along with part numbers etc, QuoteWerks is the choice for you. Our comprehensiveness starts with the integration to many leading contact managers and CRM solutions. Right out of the box, QuoteWerks™ will leverage your existing list of customers and prospects. With this integration, you do not have to retrain your employees on some new contact list that is built into the new product. They can still use the contact management software that they are already trained to use in the same way they are already using it, and then with QuoteWerks, build quoting capabilities on top of it. Our built-in contact database can be utilized even when the mentioned contact management software packages is not being used.

Our innovative datalink feature can retrieve information in addition to the contact information for use in the quote. Customer pricing profiles, terms, sales tax rates, etc can be retrieved from the customer's contact record in the contact management software. Customer pricing profiles retrieved from the customer's contact record will automatically drive the price the customer receives when products and services are added to the quote. Our integration with leading contact management software is full featured and comprehensive, distinguishing QuoteWerks in this area.

The integration with the offline price guides of PC Industry distributors Ingram Micro and Tech Data, saves considerable time since the data does not have to be imported routinely. The real-time web pricing and availability module for Tech Data provides real-time inventory numbers and pricing.

QuoteWerks supports up to 9 different pricing models with the more advanced pricing model supplying a different price to the customer based on the product/service being sold and the price profile to which the customer belongs to. With 9 different pricing models, QuoteWerks covers the pricing model needs of a diverse set of industries.

Flexible line item functionality allows the user to quote in styles that they are familiar with such as adding percent discounts, percent charges, subtotaling line items, adding running subtotals, adding line items with prices based on other line items prices, etc. Line items can be flagged as optional, or flagged to not print, or flagged to not show the customer the prices of individual items. This is designed to meet today's demanding business needs which are sometimes complex!

Support for multiple product databases organized using a folder methodology enables users to easily store and retrieve products/services for use in their quotes.

The built-in email integration enables users to quickly and efficiently email their quotes to customers in industry standard formats such as RTF and Adobe® PDF.

QuoteWerks stores its data in Access 2002/2003 or MS SQL 7.0/2000 databases which allows users and developers to read and write information from and to our data tables allowing for the further integration of QuoteWerks into companies' existing infrastructure.

Over the past 10 years, we have developed QuoteWerks into a tool that makes the user highly efficient and productive at creating sales quotes. We have molded the needs and suggestions provided to us by our customers and prospects into features that increase productivity and efficiency all for a very cost effective price. One of our trademarks is the rapid development of new features. Every few months we release new updates that include many new significant features.

Aspire Technologies, Inc. provides a well rounded feature set in QuoteWerks, and has developed a sales and support infrastructure with our dealer channel, web site, and training offerings.

### **QuoteWerks User Profile**

QuoteWerks is used by a variety of professionals throughout many industries. An ideal package for any sales force, customer service departments, purchasing departments, and accounting departments. Small and large organizations can benefit from QuoteWerks' ability to automate the entire sales process.



## QuoteWerks Awards & Accolades



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### USERS CHOICE AWARDS

2002 BEST IN CLASS WINNER  
2003 BEST PROPOSAL MGT  
2004 BEST PROPOSAL MGT

QuoteWerks has won several users choice awards. QuoteWerks won the 2002 Best-in-Class Users Choice Award and 2003, 2004 for Proposal Management. This award is special because people who actually use the software get to vote and our QuoteWerks users voted QuoteWerks as the "Best-in-Class."

Read the press release:

<http://www.quotewerks.com/pressreleases/2004userchoiceaward.asp>

<http://www.quotewerks.com/pressreleases/2003userchoiceaward.asp>

<http://www.quotewerks.com/pressreleases/2002userchoiceaward.asp>



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### FRONTRANGE SOLUTIONS GoldMine Awards

QuoteWerks has won the FrontRange Solutions 2003 Platinum Winner for Best Integration to GoldMine and the 2002 Global Developer of the Year Award. These awards honor the Technology Partner that exhibits strong product innovation, while being highly respected and admired by customers, partners, and peers. Also recognized is the value of the product innovation in providing a complete solution for end users.

Read press release:

<http://www.quotewerks.com/pressreleases/frspartnernewsrelease.asp>

<http://www.quotewerks.com/pressreleases/2002frdevofyear.asp>



## MARKET POSITIONING

QuoteWerks is positioned in the market between word processing/spreadsheet software; and low-end accounting software and high-end SAP and custom applications. At the low end, the market is using many different types of applications as a platform for price quote creation. Spreadsheet and word processing software such as Microsoft Excel and Word with their inherent flexibility are being used to create price quotes. Also used at the low end is entry level accounting software such as QuickBooks and Peachtree.

The high-end solutions are either custom applications written specifically for customers, or are part of SAP, SFA, or groupware programs all of which require a large investment in both the initial cost and the ongoing maintenance and support.

QuoteWerks has built its positioning in the marketplace as a small to middle market leader by providing a line item based quoting solution that has the ease of use of spreadsheet software, with the feature set, power, and flexibility of high end custom solutions without the associated costs and complexities. The primary market strength of QuoteWerks is attributed to its ability to be a useful tool for any industry that has a need to create price quotes containing itemized products or services.

It is important to point out that the generation of price quotes can generally be divided into two markets: line item quoting software and proposal software. Proposal software typically generates a document with many pages describing the needs of a customer followed by an implementation plan and then a single non-itemized price at the bottom. QuoteWerks is designed for the market of selling itemized products or services.

QuoteWerks is designed for use world wide, and as such, QuoteWerks can create price quotes in both the local base currency and an alternate currency simultaneously, and can also price products based on foreign prices.

QuoteWerks is the global solution that bridges the gap between traditional spreadsheet/word processor approach to creating price quotes, and high-end custom and accounting software based solutions.

### **How to Choose a Quoting Software Tool**

When spreadsheet software such as Lotus 123 and Microsoft® Excel® made its appearance in the late 80s, these spreadsheet packages became the tool of choice...for every task. Spreadsheet programs allowed you to track customer lists, product lists, just about anything you would need to create price quotes.

But, these spreadsheets were being used as simple static data repositories -- not price quote or customer management tools. Spreadsheets were unable to provide users and organizations with the ability to effectively provide price quotes to their customers and track the price quote through the entire life cycle from initially presenting the quote, to taking and then fulfilling the order. Instead users had to rely on an inefficient mix of day planners, notes, and/or memo pads to track all the relational details regarding the customer, the products quoted to the customer, and the pricing. This inefficient "system" was allowing many small yet important details to fall through the cracks resulting in lost sales and lost customers.

In addition, sales people were responsible for reporting back to their management and for communicating with accounting, customer service, and the rest of the organization about their sales accounts, but lacked a system that would help them with these tasks.

As time passed, technology improved. By the early 90s, a new category of products was developing: quoting software. These early quoting software applications combined very basic contact management, product list, and printing features into a single package.

The primary distinction between the early quoting applications was very primitive in their feature set and very narrowly focused on producing a simple price quote. They supported very few pricing models, were not very customizable, did not include management reporting, email features, connectivity features, relational database functionality, etc.

While functional, these early solutions did not offer the salesperson, the primary audience for quoting software technology, any distinct "sales tools" such as sales forecasting, profit projections, close ratios, etc. Most significantly, these applications focused only on the needs of a stand-alone user. These products did not allow a team of salespeople to share critical customer, prospect, quote, and sales information.

With the emergence of networks and distributed environments (LANs/WANs) came the need for a true workgroup quoting software solution. Local area networks and the newly emerging high-speed modems provided the path along

which information about customers and prospects would travel. But, there were no workgroup quoting applications available to leverage this growing communications infrastructure. Applications were still stand-alone by nature, even if they could be *installed* on a network.

At the same time, organizations were looking to streamline information processes and leverage customer communications.

Creating price quotes is the initial step towards making a sale. Yet, this necessary step can be tedious and time consuming; researching product, pricing, and details from multiple vendors. You may even need to create several different quotes for one specific client. And, after all the time used to create the perfect quote, the customer may decide not to place an order. Since the creation of price quotes requires an investment of time, and since not all quotes are converted into orders, it quickly becomes important for users to streamline the quoting process in order to realize a tremendous time savings.

Before QuoteWerks, users would have to use a spreadsheet or similar software to put together all the aspects of a quote such as part numbers, their cost, markup, the customers' price, the vendors they will purchase from, etc. Manually tracking all of these elements and performing calculations manually leaves much room for error, and wastes much of the users' valuable time. Plus, there was little or no consistency in the design of the quote that was delivered to your customers and prospects.

### **Shortcomings of spreadsheet / word processing software**

When most business professionals are first asked to create a sales quote for a customer, naturally they use the tools that they are already familiar with such as a spreadsheet (like Microsoft® Excel®) or a word processor (like Microsoft® Word). Using a spreadsheet program or word processor program at first glance is a quick way to create a quote. After they have been creating quotes on spreadsheets for a while, they quickly become aware of its shortcomings. Errors can very easily be introduced into the quote when using a spreadsheet to create quotes. All it takes is a user to change a totaling formula by accident, or move a cell in the spreadsheet, and now you have a calculation error, which may be difficult to pinpoint (that is assuming that you noticed the error). Using a spreadsheet, you do not have an easy way to lookup and add a product or service to the quote. Using a spreadsheet makes it difficult to give all of your quotes the same consistent look and feel. As the quote spans across pages, you will need to spend time cutting and pasting descriptions, and re-applying border lines, etc. Using a spreadsheet, you will need to manually keep track of a unique quote number sequence, and if you make a mistake, you will then have two quotes with the same quote number. This shortcoming is especially prominent in an office where there is more than one sales person creating quotes. Using a spreadsheet makes it impossible to do a search for an existing quote unless you know the quote number. Using a spreadsheet makes it impossible to generate a list of the quotes that you have done for any one customer. Using a spreadsheet

makes it impossible to create reports based on all of the information in the quotes. For example, you have no way to report on how many quotes each salesperson is creating each month, how much potential income these quotes represent, how many of the quotes are getting converted to orders, how many of XYZ product are quoted, and how many have you sold, what prices has the XYZ product been sold for over the last 4 months, etc.

### **Shortcomings of Accounting Software**

Quotes can be created in some accounting software packages. There are some shortcomings involved with using your accounting software to do your quoting. Most accounting software requires that the part numbers that you are quoting are already setup in your accounting software. This is a problem for several reasons. Whenever you need to quote a part that is not already in your accounting software you will need to create an entry for it including description, cost, price, GL accounts, etc. Then, you can add the part number to your quote. Not all quotes result in orders, so you will end up with a lot of part numbers in your accounting software that have never actually been sold. To make matters worse, many accounting packages do not allow you to delete items once they have been entered into the accounting software, so that part number that you have never used will be stuck in your accounting software forever. Also, who is going to create this part number in the accounting software? Are all the salespeople in the company going to have the security rights to add part numbers to your accounting software? Of course, you could have your accounting person add these part numbers for your salespeople every time they create a new quote, but that would be a tremendous waste of your accountant's time. Using accounting software to create quotes for larger offices that have many sales people, poses even more challenges. First, accounting software licenses are typically more expensive than quoting software licenses. Secondly, requiring sales reps to have access to your accounting software raises many security related issues. Your accounting software should only be used by the people who are well trained in accounting and the use of your accounting software. Not all accounting software packages can track commissions. Quoting software is more flexible in terms of customizing profit margin, pricing models, links to other software such as contact managers etc. Quoting software also includes much more flexibility in your ability to create reports to retrieve information about your quoting and ordering. QuoteWerks stores it's data in an industry standard database format that you can use any software (including QuoteWerks) to retrieve information from, whereas accounting software usually stores their data in proprietary database formats that only the accounting software can read. If you have remote salesreps in the field, accounting software does not have the ability to let the salesrep create a quote on the accounting software installed on a laptop, and then send it back to the main office where it can be imported into the office installation of the accounting software.

An application must do more than just store data. It must provide a business and its users with a solution that delivers information on demand, that produces labor savings, and that improves customer service. QuoteWerks does just that.

Aspire Technologies, Inc. pioneered a solution to integrate a business' sales quoting needs with contact relationship management and accounting systems integration. QuoteWerks addressed individuals both within the business, as well as outside the business, allowing everyone to share quoting and customer information, sales forecasts/histories, etc.

When businesses use QuoteWerks, they turn what used to be a difficult and resource intensive task into a simple task that enables the businesses to provide top notch customer service and in the process generate more sales resulting from customer satisfaction.

QuoteWerks automates the entire sales process and provides all the information required during the process to the user in a logical and efficient manner. This enables the business to increase their productivity, efficiency, and customer service.

QuoteWerks is a powerful, flexible, and easy to use product that works in any industry saving you time and money.

## QUOTEWERKS 4.0 FEATURES & BENEFITS



**INTEGRATE • CONFIGURE • CUSTOMIZE • BUNDLE • SHARE • REPORT • MANAGE • PROFIT**

### Introducing QuoteWerks 4.0

QuoteWerks™ revolutionary sales quoting software enables users to create professional price quotes for their customers using contact information retrieved from leading contact management and customer relationship management software. The presentation of the quote can be customized, and emailed to customers. Once the quote becomes an order, the order can be exported to accounting software such as QuickBooks® and Peachtree®. QuoteWerks is network capable desktop software that runs on Microsoft® Windows® 95/98/Me/XP/NT/2000.

Qty	Days	Description	Cost Modifier	Unit Cost	Price Modifier	Unit Price	Tax Code	Unit List	Ext. Price	Vendor Part #
Totals for All Items										
		Est. Cost		\$1,209.21		Est. Price		\$1,860.18		
		Est. List		\$1,753.35		Profit		\$460.05		
		Profit Margin		27.16 %		Commission		\$0.00		
1		Entertainment Package includes 27" TV,		\$1,086.21	D5	\$1,289.07	N	\$1,676.00	\$1,289.07	
1		27" PURE FLAT TV		\$490.00		\$612.50	Y	\$710.50	\$612.50	3C900COM
1		Center Speaker		\$93.00		\$116.25	Y	\$134.85	\$116.25	3C8201B
1		Surround Rear Speakers		\$288.00		\$360.00	Y	\$417.60	\$360.00	3C8637N
1		Component Video Cable		\$92.00		\$115.00	Y	\$133.40	\$115.00	3C9698MS
1		Structured Wiring Series 300		\$123.21		\$154.01	Y	\$178.65	\$154.01	2D3543
1		STAND FOR 27" TV		\$123.00		\$153.75	Y	\$178.35	\$153.75	3CAM30PK
		SubTotal							\$1,443.62	
		3-Year Service Contract (15% of sale)					N		\$216.54	
		SubTotal Including Service							\$1,660.16	
Optional Items:										
1		CD Changer		\$111.23		\$139.04	Y	\$161.20	\$139.04	3C16073
1		400 DISC DVD		\$796.00		\$996.00	Y	\$1,154.20	\$996.00	3C1625-D

QuoteWerks was originally released as "Quote Pro" 1.0 in 1993. Since then, Aspire Technologies, Inc. has released Quote Pro 1.1, Quote Pro 1.2, Quote Pro 1.3, Quote Pro 1.5, Quote Pro 2.0, Quote Pro 2.1, Quote Pro 2.5.

QuoteWerks 3.0 was re-written from the ground up. The design goals for QuoteWerks 4.0 included porting the previous version (Quote Pro 2.5) code from 16-bit Microsoft Visual Basic 3.0, to 32-bit Microsoft Visual Basic 6.0, and migrating the database to the newest version of the Microsoft Access database. QuoteWerks 4.0 built on its strengths and added new levels of productivity.

Our latest software release, QuoteWerks 4.0 has added over 135 new efficient product features since its release, to meet the specific needs of current customers in an ever evolving business environment. The latest version offers a full featured infrastructure and was the first sales quoting tool to introduce a MS Access 2002/2003 backend, MS SQL 7.0/2000 backend, document revisions, linking to external databases for product pricing, linking directly to the QuickBooks Item List, and salesforce.com product list.

QuoteWerks 4.0 includes an integrated visual print layout designer, folder organized product databases, email features to send quotes as Adobe PDF or RTF attachments, document automation center that allows you to easily select and attach a cover page, and additional literature information when sending the quote, built-in management reporting capabilities, commission tracking, grouped bundles allowing you to roll up the cost of individual items into a bundle and only show that bundled price, security features, improved line item functionality features, our innovative datalink feature, the ability to import and export quotes from remote locations, FaxRush support, real-time web pricing and availability for Tech Data and more.

The Professional Edition of QuoteWerks 4.0 also retains its popular integration with Ingram Micro and Tech Data distributors' offline price databases.

QuoteWerks automates the entire process of quote/order generation starting with the initial building of the quote on to the presentation format of the quote, and finally ending with the delivery of the quote to your customer.

To facilitate this process, QuoteWerks has integrated cover page and literature support. You can create a list of customized cover pages (using a word processor to create them and save them in RTF format) and then easily select from your list of cover pages when printing/emailing the quote. So, QuoteWerks will do everything you need in order to get the quote to the customer.

QuoteWerks also has integrated literature support. This feature allows you to build a list of literature such as warranty information, support information, directions to your company, specials of the month, letters of acceptance, or essentially any additional information that you would like to include with the quote. Once you



have your list of literature put together, you can easily select the literature pages that you would like send along with the quote. Literature pages can be in RTF format or PDF format.

QuoteWerks also supports product/service spec sheets. You can setup product/service spec sheets for all or some of the products in your product database. While the QuoteWerks product/service description can be up to 32,000 characters long, the spec sheet allows you to create a separate page of information and can also include a picture of the product. Then, when you print your quote, QuoteWerks will automatically include (at the end of the quote) the product/service spec sheets for each of the products that you have quoted. You do not need to create a spec sheet for the product in order to print a picture for the line item; however, the spec sheet feature gives you an additional flexibility over how and where you would like to display details about the items on the quote. Spec sheets can be in RTF format or PDF format.

QuoteWerks displays all your products and services in the familiar Windows explorer format. You can organize your products and services in different product databases, and in different folders making it easy to visually organize and find your products when quoting them. Our powerful search features also make it a breeze to do searches using partial descriptions, part numbers, etc.

QuoteWerks is designed to meet the needs of companies in most industries. We have many flexible features such as Unit of Pricing functionality (This lets you quote a "box of 10" at the per unit price as an example), and quantity multiplier columns (This lets you quote 5 feet wide X 4 feet deep X unit price = extended price).

QuoteWerks has an API (Application Programming Interface) that enables software developers to write custom software applications that interact with QuoteWerks. The API exposes events like BeforeSaveDocument, AfterSaveDocument, BeforePrintDocument, BeforeContactSelection, AfterContactSelection, etc. This enables the application to verify and/or change data, or even cancel the event. There are many different types of custom applications that can be written to integrate with QuoteWerks. Developers can even write applications that seamlessly integrate other CRM or SAP packages with QuoteWerks.

QuoteWerks data is stored in Microsoft Access 2002/2003 databases in the Standard and Professional Editions and Microsoft SQL 7.0 or 2000 in the Corporate Edition. It is important to mention that you *do not need* to have Microsoft Access installed on your computers to use QuoteWerks. Because QuoteWerks data is stored in this industry standard format, other applications can read and write data to our databases making QuoteWerks part of your entire solution.

## **Key Product Features & Benefits of QuoteWerks 4.0**

- Link to Contact Managers
- Link to Product Database
- Real-Time Data
- Link to Accounting Software
- Share Quotes Between Offices
- Know Your Profit Margins
- Create Quotes, Invoices and Purchase Orders
- Customize Quote Layouts
- Get the Best Prices
- Bundle Your Products
- Email Your Quotes Configure Your Products
- Required Items Support
- Create Sales Reports
- Security Features
- Scalable
- Track Revisions
- Document Automation
- International Features
- Define Price Strategies
- See Product Price History
- Find Products Quickly



### **Integrates with popular contact management software**

QuoteWerks integrates seamlessly with leading contact management software such as ACT, GoldMine, KnowTia, Maximizer, Microsoft CRM, Outlook, Salesforce.com, SalesLogix, and TeleMagic. This integration allows you to instantly start quoting using your lead and customer information that is already in your existing contact management software. You will *never* have to re-type your customer information, and no importing is required! In addition to retrieving contact information from your contact manager, our innovative *DataLink* feature uses DDE to automatically pull almost any other information from your contact manager and place it into the quote. Using the optional QuickBooks link module, you can also retrieve lead and customer information from QuickBooks. If you do not use one of the above mentioned contact managers, you can use the built-in contact database that comes with QuoteWerks.

### **Quote Products and Services**

QuoteWerks allows you to quote products and services. You can enter information directly into the quote "on-the-fly", and you can setup a list of products and services that you commonly use in our product databases. You can setup a separate product database for each vendor that you purchase from and organize the products and services within each database using multiple-level folders. If you already have lists of products and services, you can import them into the QuoteWerks product databases using the QuoteWerks Product Import Wizard.

### **Use Products and Services stored in other programs**

The Professional and Corporate Edition of QuoteWerks has the ability to link to a variety of external product data sources including any ODBC compliant data source (such as MS SQL, MS Access, Oracle, etc.), Tech Data®, Ingram Micro®, QuickBooks®, and salesforce.com®. This enables you to build quotes by selecting products or services from these databases in addition to the QuoteWerks product/service databases.

### **Computer Resellers can link to Distributor product databases**

If you are a computer reseller, we have a special edition of QuoteWerks called the Professional Edition. This Professional Edition links to the offline price guides of Ingram Micro and Tech Data. Linking to their databases, gives you full access to each of their 225,000+ products they carry. When you select items from their product databases, all the important information such as vendor part number,

manufacturer part number, cost, suggest retail, etc is copied into the quote. You can even compare prices between the distributors with a single click!

### **Real-time web pricing and availability for Tech Data**

Many companies in the PC Consulting and integration industry purchase products from PC industry distributors such as Tech Data. It is very important to these companies to receive up to date pricing and availability information so that they have all the tools they need to deliver product to their customer as fast as possible. Having access to real-time pricing gives the company the ability to deliver last minute price savings to their customer. Having access to real-time availability gives the company the ability to know if the product will ship today, or if it will be backordered. Since a backordered product cannot be shipped to a customer, knowing that a product is backordered before placing an order will give you the tools you need to make a good purchasing decision. QuoteWerks offers a real-time web pricing and availability module.

### **Links to Accounting Software**

QuoteWerks™ Links to **QuickBooks** and **Peachtree** accounting software. The QuickBooks link uses the newest QuickBooks API which means that you no longer have to import and export QuickBooks iif files. We also have an Open Export Module that can be used to export QuoteWerks orders to other accounting software.

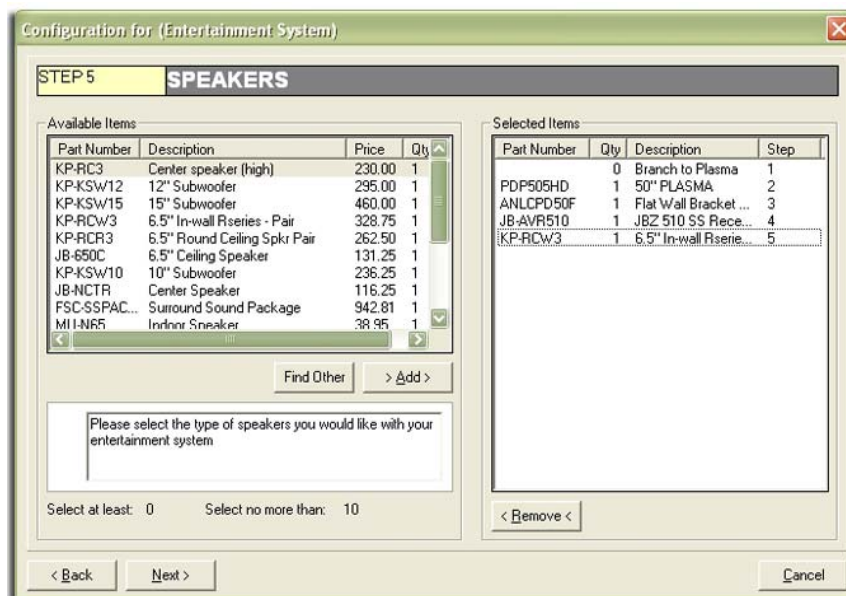


## The Configurator: Simplify the Quoting Process

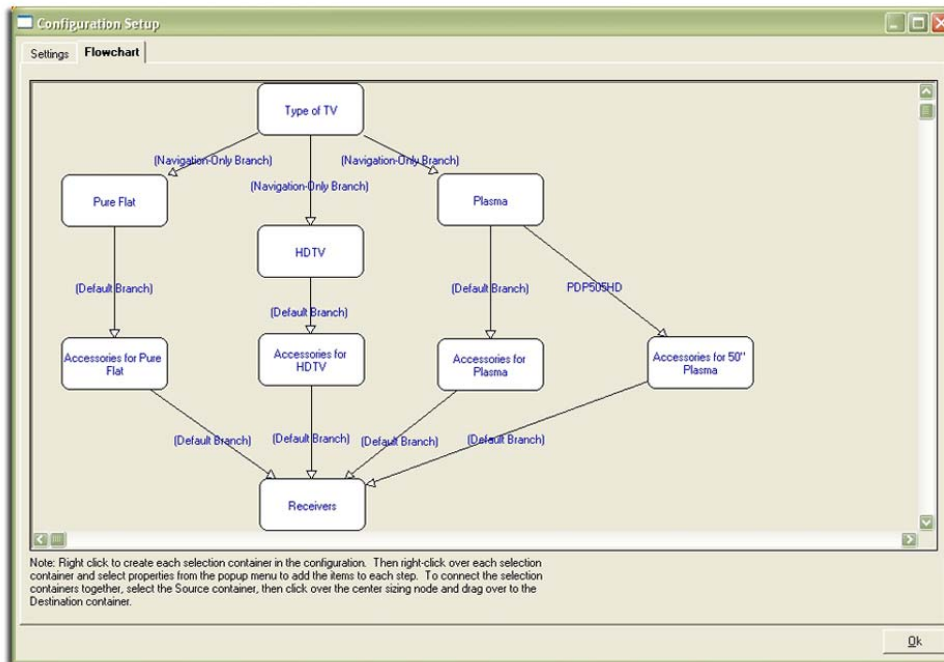
Most configure functionality in other quoting packages can literally cost thousands of dollars; but the QuoteWerks advantage is that the "Configurator" functionality is simply built right into the product. From right within QuoteWerks, you will be presented with a list of products to choose from in a step by step format. The list of products displayed for you to select at each step is based on your previous selection. The configurator can maximize your sales forces productivity, efficiency, and accuracy by walking them through the process of building a quote, ensuring that the sales rep remembers to include all the items they need to in the quote.

The configurator **simplifies** building a quote by presenting the sales rep with a list of products to choose from **step-by-step**. The list of products displayed at each step will be based on the previous selection.

The lists of products and number of steps are specified when the configuration is setup. One of the main advantages of using the configurator is that once it has been setup, the sales rep can very easily pick products from the lists presented to them, ensuring that the sales rep will not forget to add products they should. Thus, **reducing training costs** and **mistakes**.



The Configurator is designed using an easy to use flow chart interface.



### Paste Special Feature

Our Paste Special feature allows you to paste part number information created using other price list programs such as Hewlett Packard's configuration software. Another application for this feature is for PDAs. You could create a list of part numbers and quantities of products/services on your PDA, copy that information into the Windows clipboard, and then use the Paste Special feature to have QuoteWerks retrieve the part numbers, complete with description, and pricing into your QuoteWerks quote!



## Customize Quote Layouts

Use the QuoteWerks visual layout designer to format the layout of your quotes. All companies have different formats that they prefer to present the quote to their customer in. The built-in QuoteWerks visual layout designer gives you complete flexibility in designing the look of your printed quote. You can choose which information you would like to include in the quote, and which information you would like to not include in the quote. You can insert company logos, pictures, lines and boxes. You can set background colors, font colors, fonts, alignment or pretty much anything that needs to be customized! If you prefer to include a picture of each line item in the quote, you can use the layout designer to control where the picture will be located, what size the picture will be, etc. On top of all this functionality, the QuoteWerks print layout designer also supports the creation of custom formulas. You can create formulas that calculate lease payments based on a number of months, and the total sale amount of the quote. You can create formulas that print a special message like "You are a valued customer." if the sale amount is over \$1000. You can create formulas that calculate a 50% down payment amount to display on the quote. You can create almost any solution using this formula functionality! The layout designer is very powerful, flexible and easy to use.

Date		Quote #	
10/20/03		ASPO1001	

<b>Sold To:</b> Aspire Technologies, Inc Brian Laufer 7680 Universal Blvd Suite 360 Orlando, FL 32819  <b>Phone:</b> 407-248-1481 <b>Fax:</b> 407-248-1482	<b>Ship To:</b> Aspire Technologies, Inc. John Lewie 7680 Universal Blvd. Suite 360 Orlando, FL 32819 United States  <b>Phone:</b> (407) 248-1481 <b>Fax:</b> (407) 248-1482
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Thank you for allowing me to provide you this quotation.

Terms	Rep	P.O. Number	Ship Via
Credit Card	Demo User		FedEx

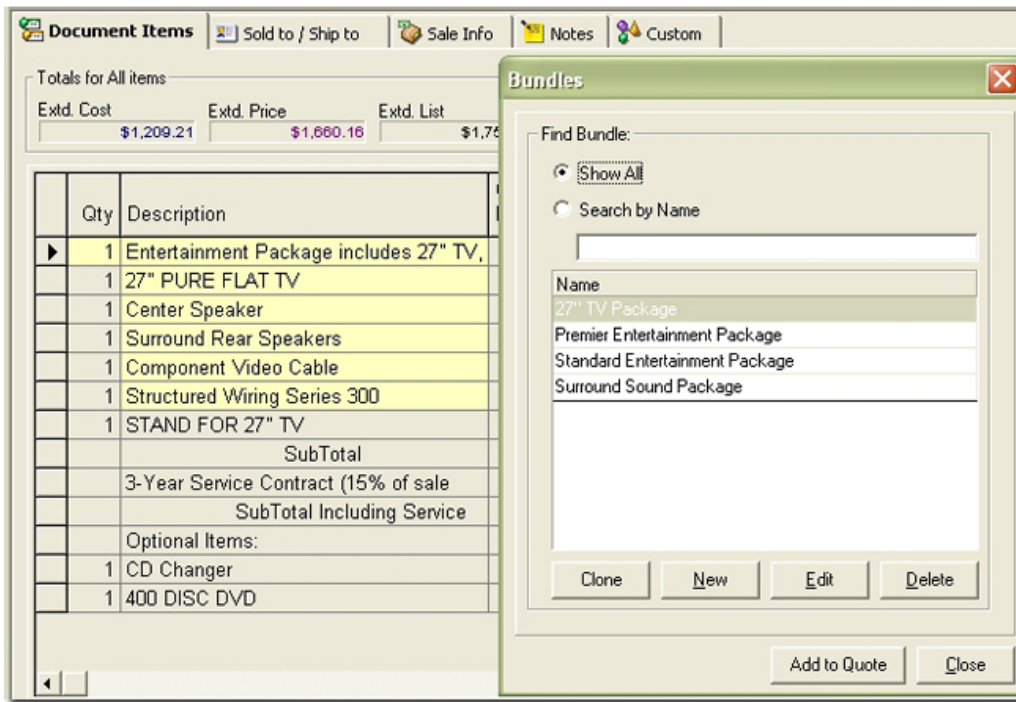
Ln #	Qty	Description	Unit Price	Ext. Price
1	1	Entertainment Package includes 27" TV, Surround Sound, Speakers, Wiring, Remote, and Warranty	\$1,289.87	\$1,289.87
2		27" PURE FLAT TV	\$612.50	\$612.50
3		Center Speaker	\$116.25	\$116.25
4		Surround Rear Speakers	\$360.00	\$360.00
5		Component Video Cable	\$115.00	\$115.00
6		Structured Wiring Series 300	\$154.01	\$154.01
7	1	STAND FOR 27" TV	\$153.75	\$153.75
8		SubTotal		\$1,443.62

QuoteWerks comes with a default print layout for quotes, orders, invoices, sales orders, and purchase orders. You can modify these existing print layouts, and/or create any print layout format you would like, such as a work orders, packing slips, etc. There is no limit to the number of different print layouts you can create. Again, you have full control over what the end result will look like!



## Bundle Your Products/Services

The powerful bundling feature adds groups of products to your quote with a single click. If you quote groups of products/services often, the bundling features in QuoteWerks will save you a tremendous amount of time. With bundles, you can specify which products/services are included in a bundle. Then, you can add that bundle to the quote and all the items that are in the bundle are automatically added to the quote. Using bundles also ensures that you will never forget to include an item in the quote. QuoteWerks has two types of bundles: A Simple Bundle, and Grouped Bundle. With a Simple Bundle, the list of products/services that you specified in the bundle will simply be added to the quote when you select the bundle. With a Grouped Bundle, the list of products/services specified in the bundle will be "rolled up" into a single grouped line item. All the individual item prices will be hidden and automatically totaled and displayed in the single grouped line item. The individual item descriptions can optionally be displayed or hidden.







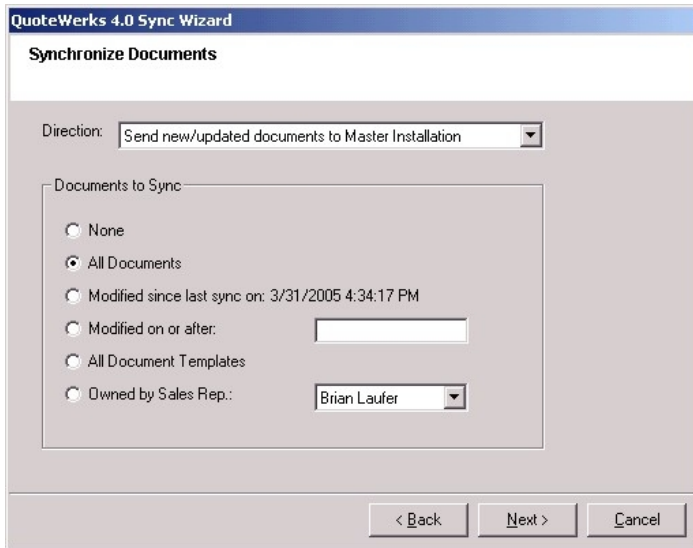
## Share/Synchronize Quotes Between Offices

Do you have sales people on the road, or do you work from home at times? QuoteWerks can synchronize quotes between different locations. QuoteWerks can be installed at the main office and then also installed on laptops and other office locations. Then while sales reps. are out on the road creating quotes on their laptop with QuoteWerks, they can export their quote and use the built-in e-mail feature to e-mail the quote back to their main office where it can be imported! QuoteWerks manages the unique quote numbers across all the installations of QuoteWerks, so you do not have to worry about conflicting quote numbers! If you use contact management software, some of the contact managers have attachment synchronization features. In which case, QuoteWerks quotes can be automatically synchronized by the contact management software! The QuoteWerks direct synchronization and rollout features also synchronize quote and other information.

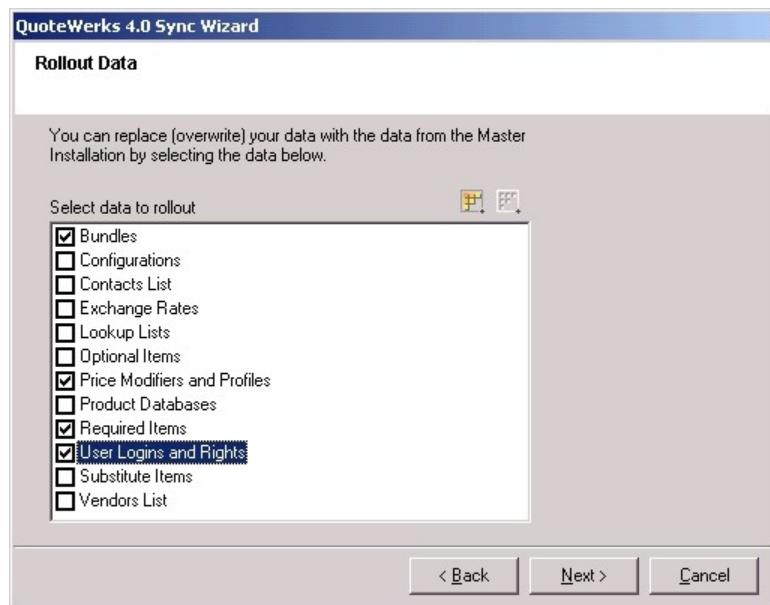


## Direct synchronization and rollout

In today's business environment there is a great need for software applications that are flexible and mobile. QuoteWerks can be installed at the main location's network and also at remote offices and on remote laptops. With QuoteWerks installed at these various locations, there is a need for synchronization.



The Professional and Corporate Editions of QuoteWerks have a Sync Wizard that synchronizes documents simultaneously between offices as well as with laptop users when connected via a WAN or direct network connection with the main installation of QuoteWerks. The Sync Wizard allows you to select the direction of the sync and which documents to be synced by a date range, last sync, as well as by a particular sales rep.



With all Editions of QuoteWerks, the document transport features enable the users to exchange documents (quotes/orders/invoices) between multiple locations such as laptops, and other office locations. After you create a document transport file, you can send it to another QuoteWerks location via e-mail, WAN, LAN, Disk. Also, your CRM software like GoldMine, ACT! 2005/6, Microsoft CRM, SalesLogix, or salesforce.com has synchronization features that synchronize these document transport files.

This other location could be your office if you are using a laptop computer or another office location if your company has multiple offices. Once the file reaches the other location, it can be imported into that location's database using the "Import document transport file" facility. If using your CRM software's synchronization features, these quote exchange files are automatically imported into your location's database when you open the linked document transport file.

### **Synchronize product databases: Corporate Edition synchronization**

The Corporate Edition of QuoteWerks using SQL the backend makes it easy to rollout product databases, Bundles, Configurations, User Rights, and more to remote users. The Sync Wizard process of "rollout" replaces the data on the remote installation with the data from the master installation, thereby erasing any change the sales rep may have made to the product database while he/she was away from the office. This works well in the scenario where the main office is where the product database is maintained, and then distributed outward.

### **Synchronize product databases: Standard and Professional Edition synchronization**

With the Standard and Professional Editions, typically the solution to synchronize the product databases is to maintain the product database at the main office location, and then just copy the database out to the notebooks whenever the notebooks need to have updated pricing.

This works well in the scenario where the main office is where the product database is maintained, and then distributed outward. The only drawback to this solution is that when you copy the product database from the main copy to the notebook, you replace the version of the product database that is on the notebook, thereby erasing any change the sales rep may have made to the product database while he/she was away from the office.

Each product database is only a single file, so it is relatively easy to copy that file to the notebook.

### **Import/Export XML formatted data**

XML is quickly becoming the new standard for data transfer and exchange. QuoteWerks can import quotes/orders/invoices that are formatted in XML (following our XML document specifications). This functionality is very useful for exporting data from web applications to an XML format that can then easily be imported into QuoteWerks. Our Open Export Module has an option that enables you to export quotes/orders/invoices from QuoteWerks to an XML file.

### **E-Mail Your Quotes**

QuoteWerks enables you to e-mail quotes directly from within QuoteWerks using the built-in SMTP e-mail or Microsoft Outlook. Your quotes are e-mailed as an attached .RTF file (Word Processor compatible like Microsoft Word) or .PDF file

(Adobe Acrobat compatible). The e-mail setup options let you choose which format you want to have your quotes to be emailed in. RTF files can be opened, and printed by all word processing applications. Your customer will receive the quote formatted exactly in the format that you sent it in and your customer can simply double-click on the attached quote. It will be opened by their word processor (RTF files) or the free Adobe Acrobat Reader software (PDF files).

**Use WinFax® to fax your quotes**


QuoteWerks integrates with WinFax making it easy to fax quotes from QuoteWerks by passing the customer's fax number automatically to WinFax so that you do not have to manually enter it.



## Create Sales Reports and Product Catalogs

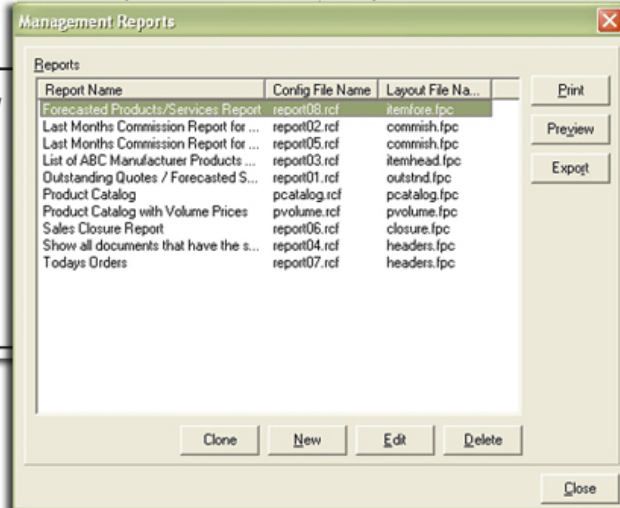
In addition to the standard reports that come with QuoteWerks, the built-in visual reporting tool allows you to easily modify and even create new reports to report on just about any data you would want. You can create outstanding quote reports, forecasted sales reports, commission reports, sales closure reports and more. You can find out who your most productive sales person is, what your most profitable product is, which is your highest selling product/service, etc. Create reports based on regions or territories, etc. The flexibility of our report designer allows you to create just about any report you can imagine. You can also create product/price catalogs for your customers (which can include customer specific pricing), and detail reports on your product lines, inventory, etc. Reports and documents can even be copied and then pasted into Microsoft Word.

### Product Catalog Report

<b>Mfg Part #</b>	DVC500M	<b>Availability</b>	2	
<b>Manufacturer</b>	JBZ Stereo	<b>Price</b>	\$995.00	
<b>Item Type</b>	DVD	<b>List Price</b>	\$1,154.20	
<b>Category</b>	Stock Item			
<b>Notes</b>				
<b>Description</b>	400 DISC DVD			

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<b>Mfg Part #</b>	DVC503	<b>Availability</b>	
<b>Manufacturer</b>	JBZ Stereo	<b>Price</b>	
<b>Item Type</b>	DVD	<b>List Price</b>	
<b>Category</b>	Stock Item		
<b>Notes</b>			
<b>Description</b>	5 DISC CDR/CDRW		



Report Name	Config File Name	Layout File Name
Forecasted Products/Services Report	report08.rcf	itemfore.fpc
Last Months Commission Report for ...	report02.rcf	commish.fpc
Last Months Commission Report for ...	report05.rcf	commish.fpc
List of ABC Manufacturer Products ...	report03.rcf	itemhead.fpc
Outstanding Quotes / Forecasted S...	report01.rcf	outstrnd.fpc
Product Catalog	pcatalog.rcf	pcatalog.fpc
Product Catalog with Volume Prices	pvolume.rcf	pvolume.fpc
Sales Closure Report	report06.rcf	closure.fpc
Show all documents that have the s...	report04.rcf	headers.fpc
Todays Orders	report07.rcf	headers.fpc



## Security Features

The QuoteWerks Administrator can set the security settings for each user. You can specify which menu options each user has access to. You can specify which users can view/modify/delete each user's quotes. You can specify individual access rights for each user to limit their ability to perform tasks like deleting products from the product database, modifying print layouts, and many more. These security rights are centrally maintained and can also be enforced on laptop installations of QuoteWerks.

## Create and manage quote revisions

QuoteWerks supports "revising". This feature enables you to open a saved quote, make changes, and then save it as the next revision. QuoteWerks will then automatically save the quote with a new quote number that has either a numeric or an alpha suffix (like -01 or -A), and will update the contact management software links to refer to the most recent revision. When converting quotes to orders, all revisions are now automatically flagged as superseded. You can easily view the history of all revisions giving you a complete overview and control over all the revisions.

## Define your Pricing Strategies

In all, QuoteWerks supports 9 different ways to price your products and services!

1. **Enter Price Manually** - Use this when you have a fixed price for all customers
2. **Gross Margin** - Use this when you calculate your customer price by applying a percentage of gross margin to your cost.
3. **Markup from Cost** - Use this when you calculate your customer price by adding a percentage of your cost to the cost of the product.
4. **Discount from List** - Use this when you calculate your customer price by discounting from the list price.
5. **Same as List** - Use this when in most cases you charge your customers the list price of a product.
6. **Volume Based** - Use this when your customer gets a different price depending upon how many of the item they are purchasing.
7. **Customer Based Price Levels** - Use this to have QuoteWerks automatically assign your customer a fixed price depending upon what type of customer this customer is. So, if your customer is a RETAIL customer, they get price X, and if they are a WHOLESALE customer, they get price Y.

8. **Based on Customer/Product profile** - Use this to have QuoteWerks automatically assign your customer a calculated price based on markup, margin, discount, or list depending upon the type of customer AND the type of product you are selling. So, one example is, if your customer is a RETAIL customer, they get a 10% discount, and if they are a WHOLESale customer, they get a 30% discount. Another example is, if your customer is a RETAIL customer, they get a 40% marked up price, and if they are a WHOLESale customer, they get a 10% marked up price.
9. **Formula Based** - Use this to have QuoteWerks calculate the price of the product as a percentage of the price of another product.

### **Calculate your Costs**

QuoteWerks supports 3 different ways to determine the cost of your products and services:

1. **Enter Cost Manually** - Use this when you have a fixed cost.
2. **Discount from List** - Use this when you calculate your cost as a discount from List price.
3. **Volume Based Costing** - Use this when the cost of the item you are selling is different based on how many you are selling.



### **Get the Best Prices**

When you select the product that you want to add to the quote, you can right click to immediately see the cost of this product from each vendor that you have setup in QuoteWerks. In a flash, you know which vendor has the lowest price, and you can choose to purchase that item from that vendor.

### **Refresh quote with latest or best prices**

Often customers request a quote, and then for a variety of reasons, the project gets put on hold. Then, one day the customer calls back and says they would like a new quote. No problem for QuoteWerks. Simply select all the line items on the quote, and choose the Refresh with Latest price feature. Immediately, your quote has been updated. In fact, if your cost has now lowered, QuoteWerks will ask you if you would like to keep the profit for yourself, or pass on the lower cost to your customer!

Vendor prices fluctuate often. The QuoteWerks Refresh with Best price feature will automatically find the vendor with the lowest cost for each item on the quote, and update the quote with that information.



## Additional Features

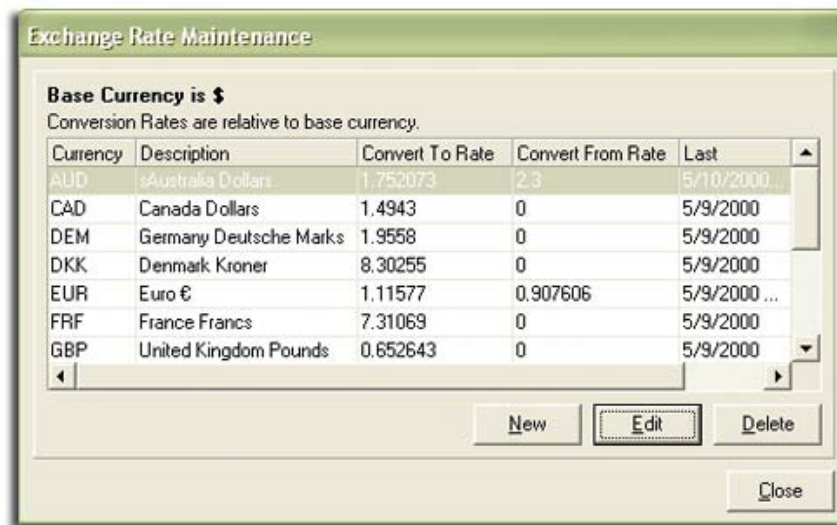
QuoteWerks also has integrated spell checking and can export information to Microsoft Excel and Microsoft Word.

## Foreign Currency Support

QuoteWerks enables you to display quote pricing in both your local currency AND another alternate currency. So, if you are in the United States and create quotes for some customers in Canada, by default QuoteWerks, can automatically generate the quote in United States dollars, and in Canadian dollars. If you then want to present that same quote in British pounds (GBP), all you have to do is click on GBP, and your alternate pricing is instantly recalculated to British pounds!

- Canadian GST/PST taxes supported (including compounded taxes).
- QuoteWerks supports the Australian GST tax scheme.
- Foreign date and currency formats also supported.

If you purchase some or all of your products in a foreign currency, you can enter that foreign price for the product in the product definition, and then QuoteWerks will automatically calculate the price of the product in your local currency!





## **QUOTEWERKS INTEGRATION WITH LEADING CONTACT MANAGERS / CRM (CUSTOMER RELATIONSHIP MANAGEMENT) SOLUTIONS**

### **QuoteWerks integration with ACT! – The ONLY Recognized Quoting Solution that Integrates with ACT! 2005!**

**Compatibility:** QuoteWerks integrates with ACT! versions 4.0, 2000/5.0, 6.0, and 2005/7.0.

#### **QuoteWerks creates ACT! toolbar buttons**

QuoteWerks creates ACT! toolbar buttons inside ACT! that make it easy for you to start QuoteWerks, and create a new quote, order, or invoice by simply clicking on the toolbar item (ACT! 5.0 and 6.0 only).

#### **QuoteWerks pulls ACT! contact information into the quote**

From our Sold To / Ship To tab of the QuoteWerks quote workbook, with a simple click of a button, QuoteWerks will fill in the contact information in the quote by pulling the contact information from the contact that is currently selected in ACT!. You will never have to re-type your customer information. QuoteWerks also allows you to define which fields in ACT! should be used for the Ship To contact information (All supported versions of ACT!).

#### **QuoteWerks pulls other ACT! contact information into the quote**

When you select the ACT! contact to use in the quote, our innovative DataLink feature can automatically pull other information from ACT! into the quote such as customer terms, customer sales tax rate, customer profile etc. Customer profiles can be used by QuoteWerks to determine the appropriate pricing a particular customer should receive (All supported versions of ACT!).

## QuoteWerks allows you to search the ACT! database for a contact to use in the quote

From our Sold To / Ship To tab of the QuoteWerks quote workbook, you can search the ACT! database for a contact by name, company name, last name or phone number. QuoteWerks will fill in the contact information in the quote by pulling the contact information from the contact that you searched for. You will never have to re-type your customer information. Additionally, any secondary contacts listed under the Secondary Contacts tab will be retrieved and available for selection. (ACT 2005/7.0 only)



## QuoteWerks prints information pulled from other ACT! fields

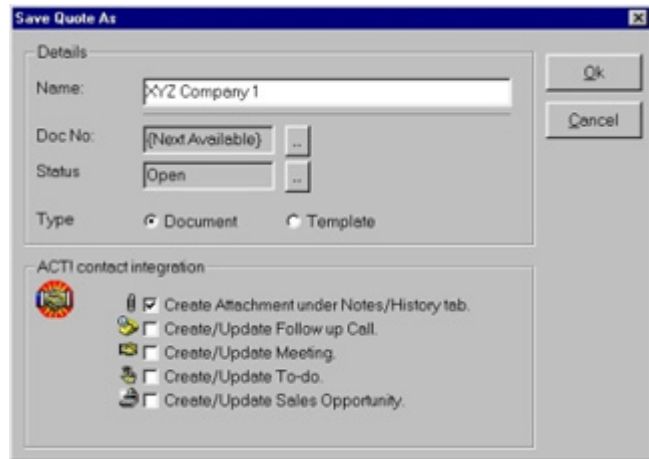
QuoteWerks has a built-in print layout designer that allows you to customize the look of your quote. The print layout designer also allows you to easily insert data fields from ACT! into the QuoteWerks print layout. Then, when you print the quote, QuoteWerks will pull data from the ACT! contact fields that you inserted into the print layout resulting in a printed quote that includes information from your ACT! contact record. This feature is different from the DataLink feature (described above) in that this extra data is pulled from ACT! and printed, but not saved with the quote. When you need to save the information pulled from ACT! into the quote, you would use the DataLink feature. So, for example, if you are using a field in ACT! to store the contact's assistant's name, you can insert that ACT! field into the print layout so that when the quote is printed, the assistant's name will be printed on the quote, but not saved with the quote (All supported versions of ACT!).

## QuoteWerks Creates Notes/History attachment in ACT!

When saving a quote, QuoteWerks automatically creates an attachment under the Notes/History tab in ACT! that links to the quote you are saving.

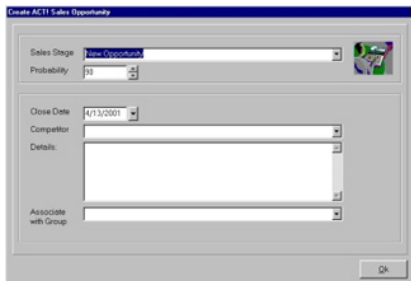
Note, in ACT! 2005/7.0 the QuoteWerks link is listed under the Documents tab.

When you are in ACT! and select the Notes/History tab, you will see all the quotes that you have done for this ACT! contact. For ACT! 2000 users, the name of the quote is displayed in the Regarding column in addition to the quote number. You can even double-click on the attachment, and QuoteWerks will open and display the quote the attachment refers to. This feature is very useful for organizing and finding your quotes from within ACT! (All supported versions of ACT!).



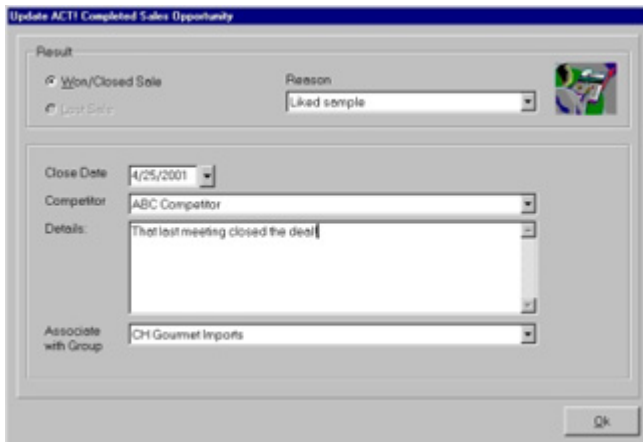
### QuoteWerks Creates/Updates Sales Opportunities in ACT!

When saving a quote, QuoteWerks automatically creates a Sales/Opportunity under the Sales/Opportunities tab in ACT!. When you are in ACT! and select the Sales/Opportunities tab, you will see the sales opportunities and their sale amounts for each quote you have created for this ACT! contact. The Sales/Opportunity feature is very useful in determining your projected cash flow. In ACT!, you can run forecasted sale reports that tell you how much income will possibly be generated from all the quotes you have generated. These reports also let you know when these quotes are estimated to become orders which again helps you estimate your cash flow. If you need to forecast your sales for each individual product you are selling in the quote, QuoteWerks has a built-in reporting module that can create such a report. (ACT! 2000/5.0 and 6.0 only)



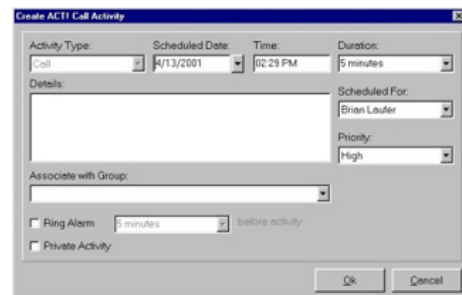
### QuoteWerks Creates/Updates updates completed Sales Opportunities in ACT!

We create quotes in the hopes that the quotes will become orders. When the customer accepts the quote, QuoteWerks will convert the quote to an order and also convert your existing ACT! Sales Opportunity into a completed sale. If no Sales Opportunity exists in ACT! (This would be the case if a customer called to place an order without requesting a quote first), QuoteWerks will simply create a new completed Sales Opportunity in ACT!. The Sales Opportunity will be marked as completed and listed under the Sales/Opportunities tab in ACT!. In ACT!, you can run reports that tell you how much income was generated from the orders you have received. QuoteWerks also has a built-in reporting module that can create similar reports. (ACT! 2000/5.0 and 6.0 only)



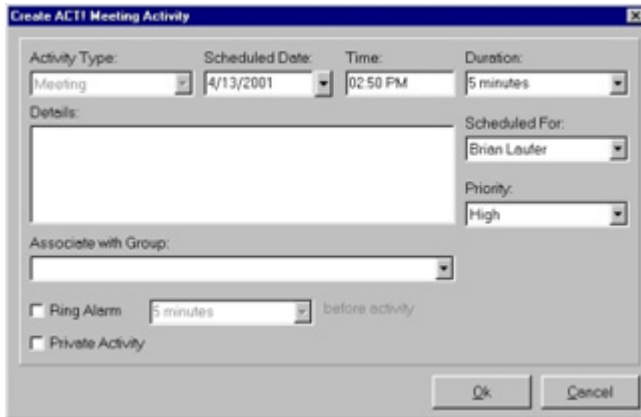
### QuoteWerks schedules Follow up calls in ACT!

When saving a quote, QuoteWerks offers to schedule a follow up call for you in ACT!. By scheduling follow up calls, you increase your chances of closing the sale! The follow up call will be listed under the Activities tab in ACT!. (ACT! 2000/5.0 and 6.0 only)



### QuoteWerks schedules Meetings in ACT!

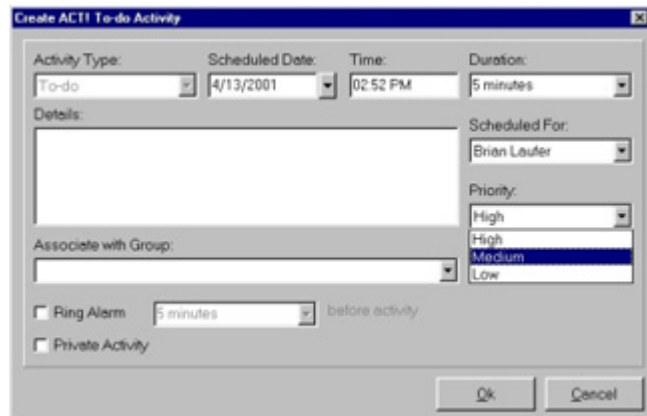
When saving a quote, QuoteWerks offers to schedule a meeting for you in ACT! that is related to the quote. By scheduling meetings at the time you create the quote or order, you won't ever forget to take care of all the details related to your quote or sale. The meeting will be listed under the Activities tab in ACT!. (ACT! 2000/5.0 and 6.0 only).



The screenshot shows the 'Create ACT! Meeting Activity' dialog box. It has a title bar with a close button. The main area is divided into several sections: 'Activity Type' with a dropdown menu set to 'Meeting'; 'Scheduled Date' with a date picker set to '4/13/2001'; 'Time' with a time picker set to '02:50 PM'; and 'Duration' with a dropdown menu set to '5 minutes'. Below these are 'Details' (a large empty text area) and 'Scheduled For' with a dropdown menu set to 'Brian Laufer'. There is also a 'Priority' dropdown menu set to 'High'. An 'Associate with Group' dropdown menu is empty. At the bottom, there are two checkboxes: 'Ring Alarm' (unchecked) with a dropdown set to '5 minutes' and the text 'before activity', and 'Private Activity' (unchecked). 'Ok' and 'Cancel' buttons are at the bottom right.

### QuoteWerks schedules To-do items in ACT!

When saving a quote, QuoteWerks offers to schedule a To-do item for you in ACT! that is related to the quote. By scheduling to-do items at the time you create the quote or order, you won't ever forget to take care of all the details related to your quote or sale. The to-do item will be listed under the Activities tab in ACT!. (ACT! 2000/5.0 and 6.0 only)



The screenshot shows the 'Create ACT! To-do Activity' dialog box. It has a title bar with a close button. The main area is divided into several sections: 'Activity Type' with a dropdown menu set to 'To-do'; 'Scheduled Date' with a date picker set to '4/13/2001'; 'Time' with a time picker set to '02:52 PM'; and 'Duration' with a dropdown menu set to '5 minutes'. Below these are 'Details' (a large empty text area) and 'Scheduled For' with a dropdown menu set to 'Brian Laufer'. There is also a 'Priority' dropdown menu with 'High', 'Medium', and 'Low' options, where 'Medium' is currently selected. An 'Associate with Group' dropdown menu is empty. At the bottom, there are two checkboxes: 'Ring Alarm' (unchecked) with a dropdown set to '5 minutes' and the text 'before activity', and 'Private Activity' (unchecked). 'Ok' and 'Cancel' buttons are at the bottom right.

### Logs e-mails sent from QuoteWerks in ACT! history

QuoteWerks has a built-in e-mail client allowing you to e-mail the quote to your customer with a single-click. Your customers e-mail address is automatically pulled from the ACT! contact information, and after the e-mail has been sent the e-mail is logged in ACT! history under the Notes/History tab. (Not available for ACT! 2005/7.0 at this time but coming soon)

**QuoteWerks can pull lookup list information from ACT!**

Many of the fields in QuoteWerks have a lookup list option. When you press the F2 key while in one of these fields, QuoteWerks will display a list of values that you can choose for the field. You can create a macro value that pulls information from a field in ACT!. For example, if you press the F2 key while in the terms field in QuoteWerks, QuoteWerks will display a list of terms options that you have previously entered. You can create a new option that retrieves a value from a field in ACT! where you normally store your terms (All supported versions of ACT!).

## QuoteWerks integration with GoldMine

**Compatibility:** *QuoteWerks integrates with GoldMine versions: Version 4.0, Versions 5.0, 5.5, 5.7, FrontOffice 2000, Versions 6.0, 6.5, 6.6, 6.7, 7.0 BCM / Corporate*

QuoteWerks works with both the dBASE and SQL editions of all the versions of GoldMine listed above. Through the various years, GoldMine has changed the name of their SQL edition. Currently their SQL edition is named the "Corporate Edition" and their dBASE edition is named "Business Contact Manager" (BCM for short).

### **QuoteWerks creates GoldMine taskbar items**

QuoteWerks creates GoldMine taskbar items inside GoldMine that make it easy for you to start QuoteWerks and create a new quote, order, or invoice and pull in the customer information automatically by simply clicking on the taskbar item (GoldMine 5.7, 6.x).

### **QuoteWerks pulls GoldMine contact information into the quote**

From our Sold To / Ship To tab of the QuoteWerks quote workbook, with a simple click of a button, QuoteWerks will fill in the contact information in the quote by pulling the contact information from the contact that is currently selected in GoldMine. You will never have to re-type your customer information. QuoteWerks can also search your entire GoldMine database to find the contact that you want to use in the quote. When you have found the contact, QuoteWerks will list the GoldMine primary and secondary contacts (secondary contacts are listed under the Contacts tab in GoldMine, and usually contain ship to addresses) allowing you to easily use primary and secondary contacts in your quote.

### **QuoteWerks pulls other GoldMine contact information into the quote**

When you select the GoldMine contact to use in the quote, our innovative DataLink feature can automatically pull other information from GoldMine into the quote such as customer terms, customer sales tax rate, customer profile etc. Customer profiles can be used by QuoteWerks to determine the appropriate pricing a particular customer should receive.

### **QuoteWerks prints information pulled from other GoldMine fields**

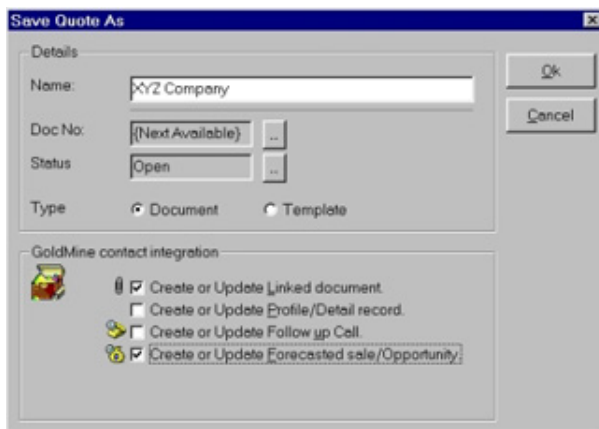
QuoteWerks has a built-in print layout designer that allows you to customize the look of your quote. The print layout designer also allows you to easily insert data fields from GoldMine into the QuoteWerks print layout. Then, when you print the quote, QuoteWerks will pull data from the GoldMine contact fields that you inserted into the print layout resulting in a printed quote that includes information from your GoldMine contact record. This feature is different from the DataLink feature (described above) in that this extra data is pulled from GoldMine and printed, but not saved with the quote. When you need to save the information



pulled from GoldMine into the quote, you would use the DataLink feature. So, for example, if you are using a field in GoldMine to store the contact's assistant's name, you can insert that GoldMine field into the print layout so that when the quote is printed, the assistant's name will be printed on the quote, but not saved with the quote.

### **QuoteWerks Creates/Updates linked documents in GoldMine**

When saving a quote, QuoteWerks automatically creates a linked document under the Links tab in GoldMine that links to the quote you are saving. When you are in GoldMine and select the Links tab, you will see all the quotes that you have done for this GoldMine contact. You can even double-click on the linked document, and QuoteWerks will open and display the quote the link refers to. This feature is very useful for organizing and finding your quotes from within GoldMine.



### **QuoteWerks Creates/Updates forecasted sales/opportunities in GoldMine**

When saving a quote, QuoteWerks automatically creates a forecasted sale / opportunity under the Pending tab in GoldMine. When you are in GoldMine and select the Pending tab, you will see the forecasted sale amounts for each quote you have created for this GoldMine contact. The forecasted sale feature is very useful in determining your projected cash flow. In GoldMine, you can run forecasted sale reports that tell you how much income will possibly be generated from all the quotes you have generated. These reports also let you know when these quotes are estimated to become orders which again helps you estimate your cash flow. If you need to forecast your sales for each individual product you are selling in the quote, QuoteWerks has a built-in reporting module that can create such a report.



**Create GoldMine forecasted sale**

Opportunity: (None)

Close Date: 9/5/2001

Activity Code: QTE

User: GUEST

Probability: 90

Alarm:

Date: 9/5/2001

Time: 2:11 pm

RSVP:

### **QuoteWerks Creates/Updates completed sales in GoldMine**

We create quotes in the hopes that the quotes will become orders. When the customer accepts the quote, QuoteWerks will convert the quote to an order and also convert your existing GoldMine forecasted sale into a completed sale. If no forecasted sale exists in GoldMine (This would be the case if a customer called to place an order without requesting a quote first), then QuoteWerks will simply create a new completed sale in GoldMine. The completed sale record will be created under the History tab in GoldMine. In GoldMine, you can run reports that tell you how much income was generated from the orders you have received. QuoteWerks also has a built-in reporting module that can create similar reports.



### **QuoteWerks Schedules Follow up calls in GoldMine**

When saving a quote QuoteWerks offers to schedule a follow up call for you in GoldMine. By scheduling follow up calls you increase your chances of closing the sale! The follow up call will be listed under the Pending tab in GoldMine.



### **QuoteWerks Creates profile/detail records in GoldMine**

When saving a quote QuoteWerks offers to create a "QuoteWerksDocument" profile/detail record in GoldMine that contains the QuoteWerks quote number. This allows you to search for a QuoteWerks quote number from within GoldMine using the GoldMine Query menu

### **QuoteWerks Logs e-mails sent from QuoteWerks in GoldMine**

in [e-mail client](#) allowing you to e-mail the quote to your customer with a single-click. Your customer's e-mail address is automatically pulled from the GoldMine contact information, and after the e-mail has been sent the e-mail is logged under the GoldMine History tab as if you had sent the e-mail from within GoldMine itself.

### **QuoteWerks can pull lookup list information from GoldMine**

Many of the fields in QuoteWerks have a lookup list option. When you press the F2 key while in one of these fields, QuoteWerks will display a list of values that you can choose for the field. You can create a macro value that pulls information

from a field in GoldMine. For example, if you press the F2 key while in the terms field in QuoteWerks, QuoteWerks will display a list of terms options that you have previously entered. You can create a new option that retrieves a value from a field in GoldMine where you normally store your terms.

### **QuoteWerks links directly to ZFirm's FaxRush/OmniRush GoldMine integrated faxing software**

FaxRush/OmniRush is faxing software that integrates with GoldMine contact management software. The contact's fax number listed in the GoldMine contact record is used to send the fax, so there is no need to keep a separate database of phone numbers. Once the fax has been sent, it will be logged under the History tab in GoldMine. QuoteWerks' unique integration with FaxRush/OmniRush submits faxes directly to the FaxRush/OmniRush fax server, where the fax server takes care of sending the fax which leaves your workstation ready to be used for other tasks. [www.faxrush.com](http://www.faxrush.com)

### **QuoteWerks synchronizes using GoldMine's synchronization features**

GoldMine has synchronization features that synchronize the contact data between different installations of GoldMine. Let's say that you have two offices one in Los Angeles and the other in New York and you have GoldMine installed at each office. When you add a new contact to your New York office installation of GoldMine, and then run the synchronization process, that new contact will appear in the contact database at the Los Angeles office installation of GoldMine.

The GoldMine synchronization features synchronize all linked documents, including QuoteWerks linked documents. So when you create a quote at the Los Angeles office, and then run the GoldMine synchronization process, someone in the New York office can double-click on the QuoteWerks linked document that has now appeared in their GoldMine installation. When they double-click on the linked document, QuoteWerks will detect that that quote is not in the New York office QuoteWerks database, and will proceed to add the quote to the New York office QuoteWerks database. Additionally, after the GoldMine synchronization process has completed, you can run QuoteWerks' batch merge utility which updates the local office quote database with all the synchronization changes at once instead of one at a time.

## QuoteWerks integration with KnowTia

**Compatibility:** *QuoteWerks integrates with KnowTia 4.0, 5.0, and 6.0.*

### **QuoteWerks pulls KnowTia contact information into the quote**

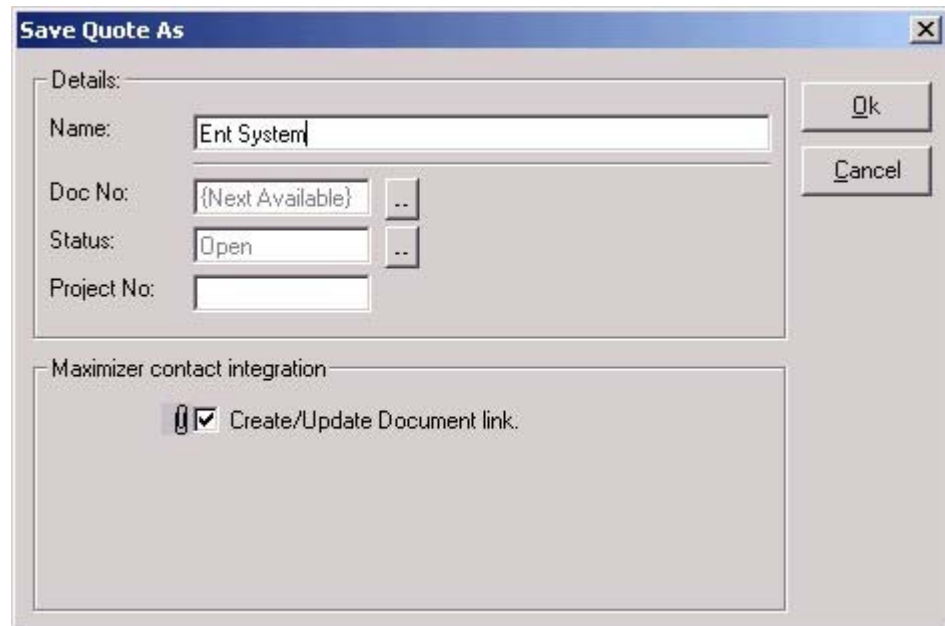
From our Sold To / Ship To tab of the QuoteWerks quote workbook, with a simple click of a button, QuoteWerks will fill in the contact information in the quote by pulling the contact information from the contact that is currently open in KnowTia. You will never have to re-type your customer information.

## QuoteWerks integration with Maximizer

**Compatibility:** *QuoteWerks integrates with Maximizer / Maximizer Enterprise versions 97, 5.0, 2000, 6.0, 7.0 and 8.0.*

### QuoteWerks pulls Maximizer contact information into the quote

From our Sold To / Ship To tab of the QuoteWerks quote workbook, with a simple click of a button, QuoteWerks will fill in the contact information in the quote by pulling the contact information from the contact that is currently selected in Maximizer. You will never have to re-type your customer information.



The image shows a 'Save Quote As' dialog box with the following fields and options:

- Details:**
  - Name: Ent System
  - Doc No: {Next Available} ..
  - Status: Open ..
  - Project No: [Empty field]
- Maximizer contact integration:**
  - Create/Update Document link.
- Buttons: Ok, Cancel

### QuoteWerks pulls other Maximizer contact information into the quote

When you select the Maximizer contact to use in the quote, our innovative DataLink feature can automatically pull other information from Maximizer into the quote such as customer terms, customer sales tax rate, customer profile etc. Customer profiles can be used by QuoteWerks to determine the appropriate pricing a particular customer should receive.

### QuoteWerks prints information pulled from other Maximizer fields

QuoteWerks has a built-in print layout designer that allows you to customize the look of your quote. The print layout designer also allows you to easily insert data fields from Maximizer into the QuoteWerks print layout. Then, when you print the quote, QuoteWerks will pull data from the Maximizer contact fields that you inserted into the print layout resulting in a printed quote that includes information from your Maximizer contact record. This feature is different from the DataLink

feature (described above) in that this extra data is pulled from Maximizer and printed, but not saved with the quote. When you need to save the information pulled from Maximizer into the quote, you would use the DataLink feature. So, for example, if you are using a field in Maximizer to store the contact's assistant's name, you can insert that Maximizer field into the print layout so that when the quote is printed, the assistant's name will be printed on the quote, but not saved with the quote.

### **QuoteWerks Creates Document Link in Maximizer**

When saving a quote QuoteWerks automatically creates a document link under the Documents tab in Maximizer that links to the quote you are saving. When you are in Maximizer and select the Documents tab, you will see all the quotes that you have done for this Maximizer contact. You can even double-click on the document links, and QuoteWerks will open and display the quote the link refers to. This feature is very useful for organizing and finding your quotes from within Maximizer.

### **Logs e-mails sent from QuoteWerks in Maximizer history**

QuoteWerks has a built-in e-mail client allowing you to e-mail the quote to your customer with a single-click. Your customer's e-mail address is automatically pulled from the Maximizer contact information, and after the e-mail has been sent the e-mail is logged in Maximizer history under the Notes tab.

## QuoteWerks integration with Microsoft CRM

**Compatibility:** *QuoteWerks integrates with Microsoft CRM versions: 1.2 and 3.0.*

### QuoteWerks lets you search the MS CRM database for a Contact or Account to use in the quote

From the Sold To / Ship To tab of the QuoteWerks quote workbook, you can search the MS CRM database for a contact by name or phone number. You can also search for an Account by company name or phone number. QuoteWerks will fill in the contact information in the quote by pulling the contact information from the contact that you searched for. You will never have to re-type your customer information. Additionally, any Contacts associated with an Account can be returned with the search results.



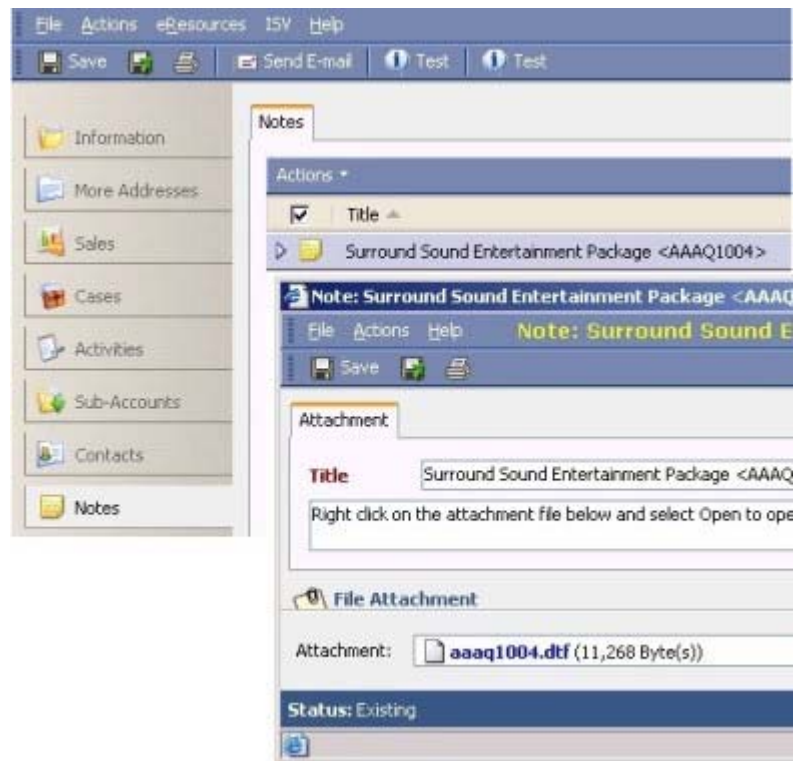


## QuoteWerks Creates Note attachments in MS CRM

When saving a quote, QuoteWerks automatically creates a Note record for the contact and will attach a linked document as an attachment in the note.

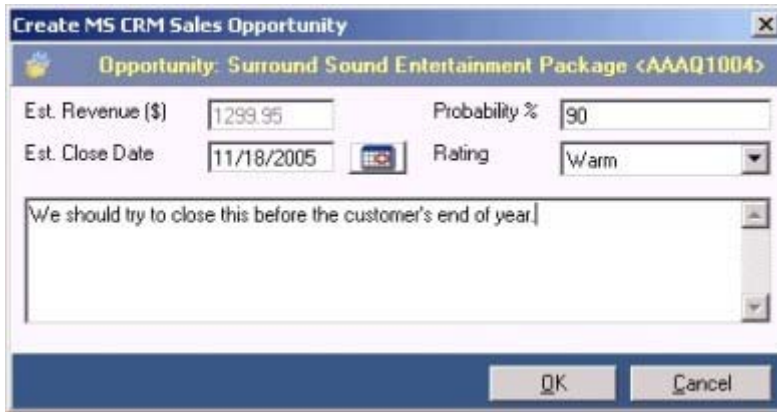


When you are in MS CRM you will see the Note for each quote that you have created for this contact. When you view the note, you can right click and choose 'Open' to launch QuoteWerks and open that quote. This feature is very useful for organizing and finding your quotes from within MS CRM.



## QuoteWerks Creates/Updates Sales Opportunities in MS CRM

When saving a quote, QuoteWerks automatically creates a Sales Opportunity under the Sales tab for the Contact in MS CRM. When you are in MS CRM and select the Sales tab for this contact you will see the sales opportunities and their sale amounts for each quote you have created for this MS CRM contact. The Sales Opportunity feature is very useful in determining your projected cash flow.



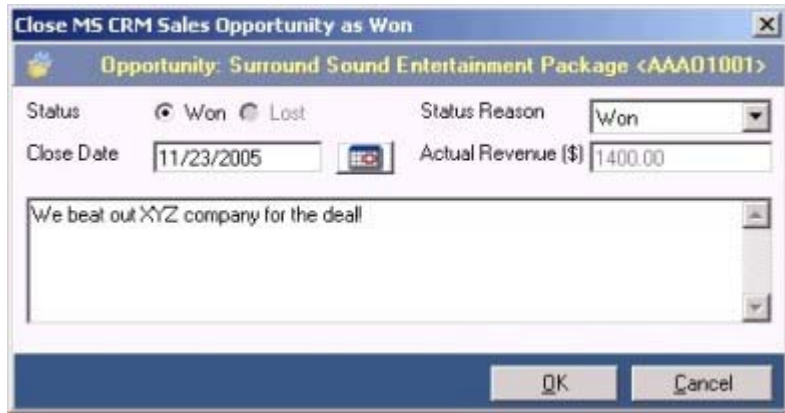
By creating sales opportunities in MS CRM you can generate reports in MS CRM that give you insight into your sales pipeline. If you already have a sales opportunity for this quote, it will automatically update the existing one to reflect changes you have made to the quote. If you need to forecast your sales for each individual product you are selling in the quote, QuoteWerks has a built-in reporting module that can create such a report.



Topic	Est. Revenue	Stat...	Est. Close Date
Surround Sound Entertainment Package <AAAQ1004>	\$1,299.95	In Pr...	11/18/2005

## QuoteWerks closes sales opportunities in MS CRM

We create quotes with the expectation that the quotes will become orders. When the customer accepts the quote, QuoteWerks will convert the quote to an order and also convert your existing MS CRM Sales Opportunity into a "Closed as Won" sale. If no Sales Opportunity exists in MS CRM (This would be the case if a customer called to place an order without requesting a quote first), QuoteWerks will simply create a new "Closed as Won" Sales Opportunity in MS CRM.

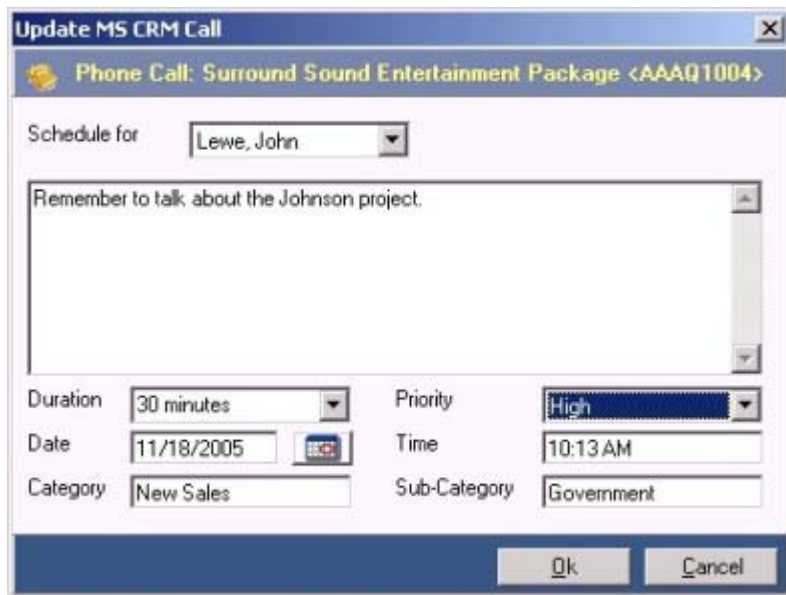


In MS CRM, you can run reports that tell you how much income was generated from the orders you have received. QuoteWerks also has a built-in reporting module that can create similar reports.



### QuoteWerks schedules Follow up calls in MS CRM

When saving a quote, QuoteWerks offers to schedule a follow up call for you in MS CRM.



By scheduling follow up calls, you increase your chances of closing the sale! The follow up call will be listed under the Activities tab for the Contact in MS CRM.



### **QuoteWerks pulls other MS CRM information into the quote**

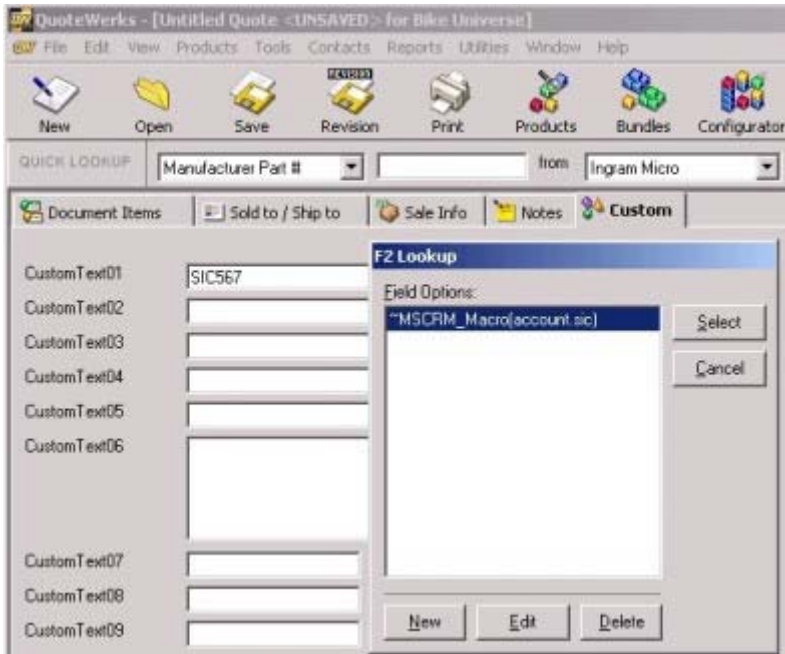
When you select the MS CRM contact to use in the quote, our innovative DataLink feature can automatically pull other information from MS CRM into the quote such as customer terms, customer sales tax rate, customer profile etc. Customer profiles can be used by QuoteWerks to determine the appropriate pricing a particular customer should receive.

### **QuoteWerks prints information pulled from other MS CRM fields**

QuoteWerks has a built-in print layout designer that allows you to customize the look of your quote. The print layout designer also allows you to easily insert data fields from MS CRM into the QuoteWerks print layout. Then, when you print the quote, QuoteWerks will pull data from the MS CRM contact fields that you inserted into the print layout resulting in a printed quote that includes information from your MS CRM contact record. This feature is different from the DataLink feature (described above) in that this extra data is pulled from MS CRM and printed, but not saved with the quote. When you need to save the information pulled from MS CRM into the quote, you would use the DataLink feature. So, for example, if you are using a field in MS CRM to store the contact's assistant's name, you can insert that MS CRM field into the print layout so that when the quote is printed, the assistant's name will be printed on the quote, but not saved with the quote.

## QuoteWerks can pull lookup list information from MS CRM

Many of the fields in QuoteWerks have a lookup list option. When you press the F2 key while in one of these fields, QuoteWerks will display a list of values that you can choose for the field. You can create a macro value that pulls information from a field in MS CRM. For example, if you press the F2 key while in the terms field in QuoteWerks, QuoteWerks will display a list of terms options that you have previously entered. You can create a new option that retrieves a value from a field in MS CRM that you use to store your terms.

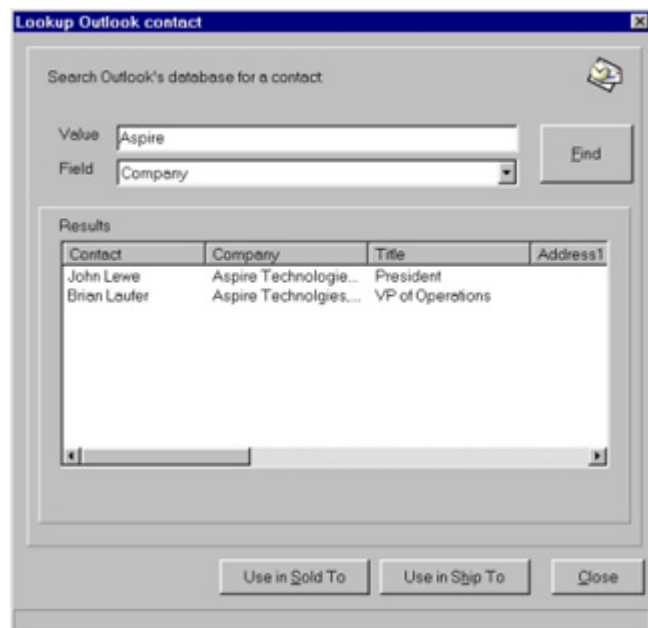


## QuoteWerks integration with Outlook

**Compatibility:** *QuoteWerks integrates with Outlook 97, 98, 2000, XP, and 2003.*

### QuoteWerks pulls Outlook contact information into the quote

From our Sold To / Ship To tab of the QuoteWerks quote workbook, with a simple click of a button, QuoteWerks will fill in the contact information in the quote by pulling the contact information from the contact that is currently open in Outlook. You will never have to re-type your customer information. QuoteWerks can also search your entire Outlook database to find the contact that you want to use in the quote.



### QuoteWerks supports Outlook Public Shared Contacts Folder

QuoteWerks has an option to allow you to use your personal Outlook contact database on your local machine or you can use the Shared Public Contacts folder on your network allowing you to use the Outlook contact database that everyone in your office is sharing.

## QuoteWerks integration with salesforce.com

**Compatibility:** *QuoteWerks integrates with the Professional and Enterprise editions of salesforce.com.*

### **QuoteWerks pulls salesforce.com Account information into the quote**

From our Sold To / Ship To tab of the QuoteWerks quote workbook, QuoteWerks can search your entire salesforce.com database to find the account or contact that you want to use in the quote.

Lookup Salesforce.com contact

What would you like to find?  
cnb

Account Name  
 Last Name  
 Phone Number

Find  
Reset

Results

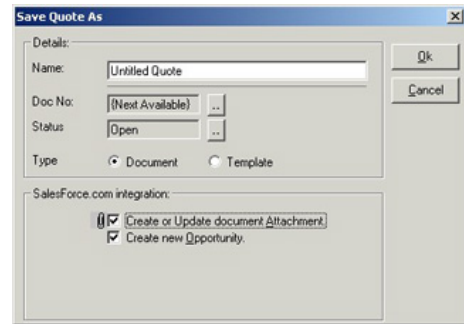
Account	Contact	Title	Address1
CNBC Test Rec	Bruce Lee	Bruce	123 street
CNBC Test Rec	Chris Hodgins	Chris	9049 Balmore

Select as Sold To    Select as Ship To    Close

1 Account result(s) found.

### **QuoteWerks Creates/Updates attachments for salesforce.com opportunities**

When saving a quote, QuoteWerks automatically creates an attachment listing for the quote under the salesforce.com opportunity. When you are in salesforce.com, you can see the quote, and you can open it from within salesforce.com. Since the quote is uploaded as an attachment, any salesforce.com user including remote users can click in salesforce.com to open the quote, and the quote will be downloaded into QuoteWerks if the quote is not already in the users QuoteWerks installation.



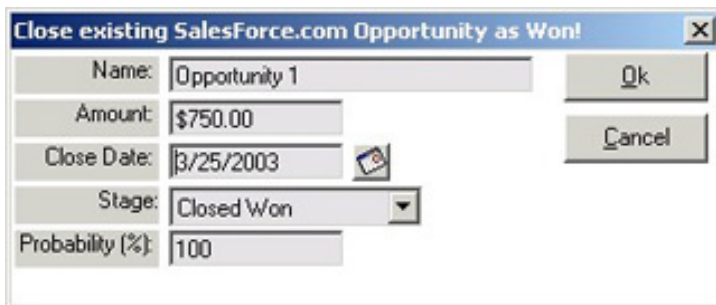
### QuoteWerks Creates/Updates opportunities in salesforce.com

When saving a quote, QuoteWerks automatically creates an opportunity for the account. When you are in salesforce.com and select the opportunity, you will see the quote attached to the opportunity, and will see the history of the stages the quote has progressed through during the life of the opportunity.



### QuoteWerks Creates/Updates "Closed Won" or "Closed Lost" opportunities in salesforce.com

From within QuoteWerks you can close the opportunity as "Closed Won" or "Closed Lost" providing a very seamless integration.





## Initiate new quotes from within salesforce.com

If you have an existing opportunity that was created within salesforce.com, you can initiate the creation of a new QuoteWerks quote for this opportunity by clicking on the "New Quote" hyperlink found under the "Web Integration Link" section located on the opportunity screen.

**\$ Opportunity: Opportunity 1**

[Edit](#) [Delete](#)

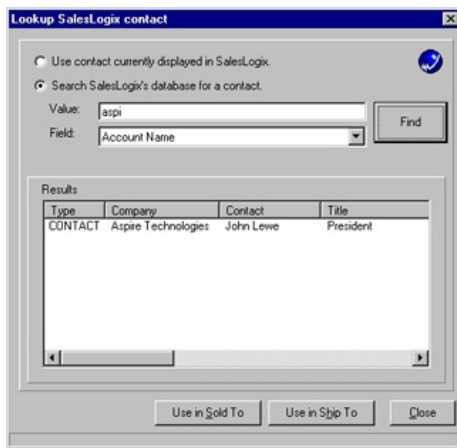
Opportunity Owner:	<b>John Lewe [Change]</b>
Private:	
Opportunity Name:	<b>Opportunity 1</b>
Account Name:	<b>Aspire Technologies, Inc.</b>
Type:	
Lead Source:	
Created By:	<b>John Lewe, 3/25/2003 10:07 AM</b>
Description:	
Useful Links:	<b><u><a href="#">New Quote</a></u></b>

## QuoteWerks integration with SalesLogix

**Compatibility:** *QuoteWerks integrates with SalesLogix 5.0, 5.2, 6.0, 6.1, 6.2.*

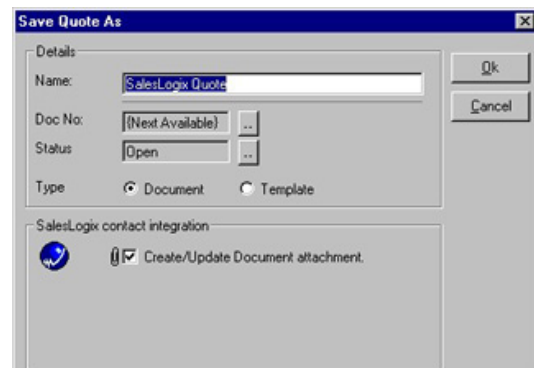
### **QuoteWerks pulls SalesLogix contact information into the quote**

From our Sold To / Ship To tab of the QuoteWerks quote workbook, with a simple click of a button, QuoteWerks will fill in the contact information in the quote by pulling the contact information from the contact that is currently selected in SalesLogix. You will never have to re-type your customer information. QuoteWerks can also search your entire SalesLogix database to find the contact that you want to use in the quote.



### **QuoteWerks Creates/Updates attachment links in SalesLogix**

When saving a quote, QuoteWerks automatically creates an attachment under the SalesLogix contact's Attachments tab. When you are in SalesLogix and select the Attachments tab, you will see all the quotes that you have done for this SalesLogix contact. You can even double-click on the attachment link, and QuoteWerks will open and display the quote the attachment link refers to. This feature is very useful for organizing and finding your quotes from within SalesLogix.



## QuoteWerks integration with TeleMagic

**Compatibility:** *QuoteWerks integrates with TeleMagic 5.0*

### QuoteWerks pulls TeleMagic contact information into the quote

From our Sold To / Ship To tab of the QuoteWerks quote workbook, with a simple click of a button, QuoteWerks will fill in the contact information in the quote by pulling the contact information from the contact that is currently selected in TeleMagic. You will never have to re-type your customer information. QuoteWerks can also search your entire TeleMagic database to find the contact that you want to use in the quote. When you have found the contact, QuoteWerks will list the TeleMagic Level 1 and Level 2 contacts allowing you to easily use Level 1 and Level 2 contacts in your quote.

Lookup TeleMagic contact

Use Contact currently displayed in TeleMagic.

Search TeleMagic's database for a contact.

Level: 1 - Company

Index: Company

Find: national

Find

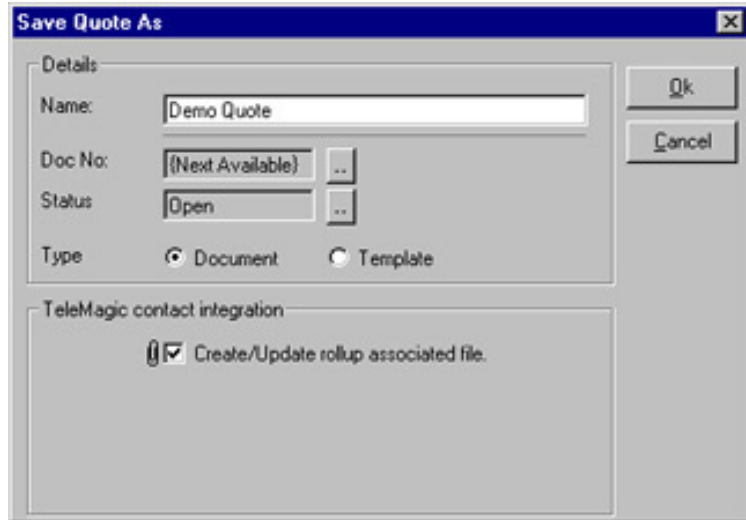
Results

Level	Company	Contact	Title
Level 1	National Paper Sup...		
Level 2	National Paper Sup...	Louis Cambell	General Manager
Level 2	National Paper Sup...	Carol Bennett	Local Sales Rep

Use in Sold To Use in Ship To Close

### QuoteWerks Creates/Updates Rollup Associated File links in TeleMagic

When saving a quote, QuoteWerks automatically creates an associated file link under the TeleMagic Current Record | Rollups | Associated Files menu which links to the quote you are saving. When you are in TeleMagic and select the Current Record | Rollups | Associated Files menu, you will see all the quotes that you have done for this TeleMagic contact. You can even double-click on the associated file link, and QuoteWerks will open and display the quote the link refers to. This feature is very useful for organizing and finding your quotes from within TeleMagic.





## PRICING

*QuoteWerks*<sup>™</sup> is currently sold worldwide directly through **Aspire Technologies, Inc.**, as well as through authorized resellers and global distributors in the United Kingdom and Australia. Comprehensive training, service, and support are available through **Aspire Technologies, Inc.**

The value-driven QuoteWerks solution is offered in three editions: **Standard**, **Professional**, and **Corporate**.

### QuoteWerks Standard Edition

The Standard Edition of QuoteWerks is a great sales tool that is used by customers in almost every industry and is the base QuoteWerks package that includes the links to contact management software such as ACT!<sup>™</sup>, GoldMine<sup>®</sup>, KnowTia<sup>®</sup>, Maximizer, Outlook<sup>®</sup>, salesforce.com<sup>®</sup>, SalesLogix<sup>®</sup>, and TeleMagic<sup>®</sup>.

LICENSES	END USER LIST (ea.)	QW PART#
1	\$199.00	QW40STD01
2 TO 4	\$182.00	QW40STD02-04
5 TO 9	\$175.00	QW40STD05-09
10 TO 24	\$151.00	QW40STD10-24
25 TO 49	\$140.00	QW40STD25-49
50+	CALL FOR PRICING	

### **QuoteWerks Professional Edition**

In addition to the features of the Standard Edition package, the Professional Edition adds the ability to link to a variety of external product data sources including any ODBC compliant data source (such as MS SQL, MS Access, Oracle, etc.), Tech Data®, Ingram Micro®, QuickBooks®, and salesforce.com®. Additionally, the Professional Edition includes the accounting links to QuickBooks®, Peachtree®, and the Open Export Module. This Edition also includes quote synchronization functionality.

LICENSES	END USER LIST (ea.)	QW PART#
1	\$239.00	QW40PRO01
2 TO 4	\$220.00	QW40PRO02-04
5 TO 9	\$204.00	QW40PRO05-09
10 TO 24	\$175.00	QW40PRO10-24
25 TO 49	\$164.00	QW40PRO25-49
50 TO 74	\$159.00	QW40PRO50-74
75 TO 99	\$157.00	QW40PRO75-99
100+	CALL FOR PRICING	QW40PRO100

### **QuoteWerks Corporate Edition**

The Corporate Edition of QuoteWerks includes all the features of the Standard and Professional Editions and adds support for hosting the data on a Microsoft® SQL 7.0 or 2000 backend database. The Corporate Edition includes the ability to integrate with MS CRM contact management software in addition to the other contact management software. Additionally, the Corporate Edition includes the "Rollout" functionality that rolls out product and other non-quote related information to remote installations such as laptops. Corporate Edition pricing does not include Microsoft SQL Server licensing.

LICENSES	END USER LIST (ea.)	QW PART#
1	\$329.00	QW40COR01
2 TO 4	\$314.00	QW40COR02-04
5 TO 9	\$299.00	QW40COR05-09
10 TO 24	\$284.00	QW40COR10-24
25 TO 49	\$269.00	QW40COR25-49
50 TO 74	\$254.00	QW40COR50-74
75 TO 99	\$239.00	QW40COR75-99
100+	CALL FOR PRICING	QW40COR100



## CONCLUSION

No matter what industry you are in or the size of your business, QuoteWerks offers a truly superior sales quoting tool that bridges the gap between sales processes, automation and productivity. QuoteWerks is the only scalable out-of-the box quoting software, strategically developed to exceed the ever changing needs of the SME with its ***Award Winning, Customer Centric*** and ***Value-Driven*** solution!

That's the QuoteWerks advantage!

### Resource Links

Demonstration Videos: <http://www.quotewerks.com/video.asp>

News & Events: <http://www.quotewerks.com/news.asp>

Press Releases: <http://www.quotewerks.com/pressreleases/index.asp>

For further detailed information regarding QuoteWerks™ please visit  
[www.quotewerks.com](http://www.quotewerks.com)