

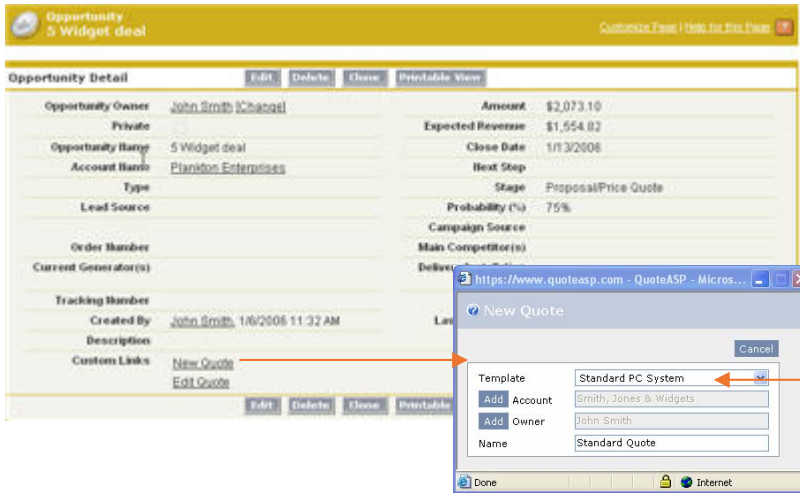


On demand quotation and proposal management

QuoteASP for AppExchange



How does QuoteASP work with Salesforce.com?

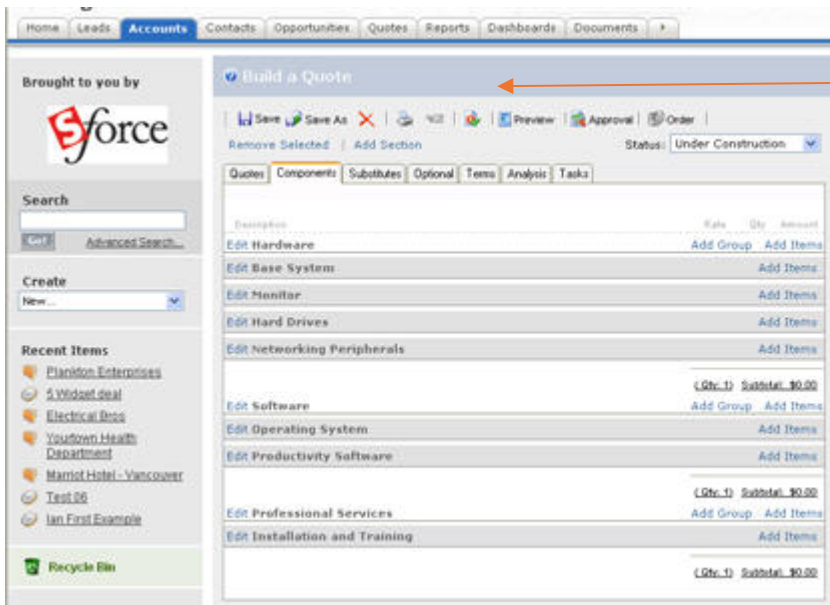


Quotes are created by simply clicking on the "New Quote" link in the opportunity screen.

Users can select the appropriate Quote Template they want to use. Templates can be created for different sets of products, currencies, configurations or layouts. There is simply no limit to the number of templates you can create.



QuoteASP automatically syncs all accounts and contacts, so there is no need to retype information.



QuoteASP supports single sign in. Users don't have to leave the familiar Salesforce.com environment to build and send quotes.

Building quotes with QuoteASP is a simple and easy to manage process. Users can add products, kits, and labor items to quotes. QuoteASP supports line item, section, volume based and total quote discounting.

For global organizations, QuoteASP supports multiple currencies and international taxation.



Users can create new quotes from an Account or Opportunity, or create a new Opportunity from a quote!


Users can add components to a quote, including pre-built kits, and can suggest substitute and optional items to their prospects. This shortens the back and forth process of quoting.

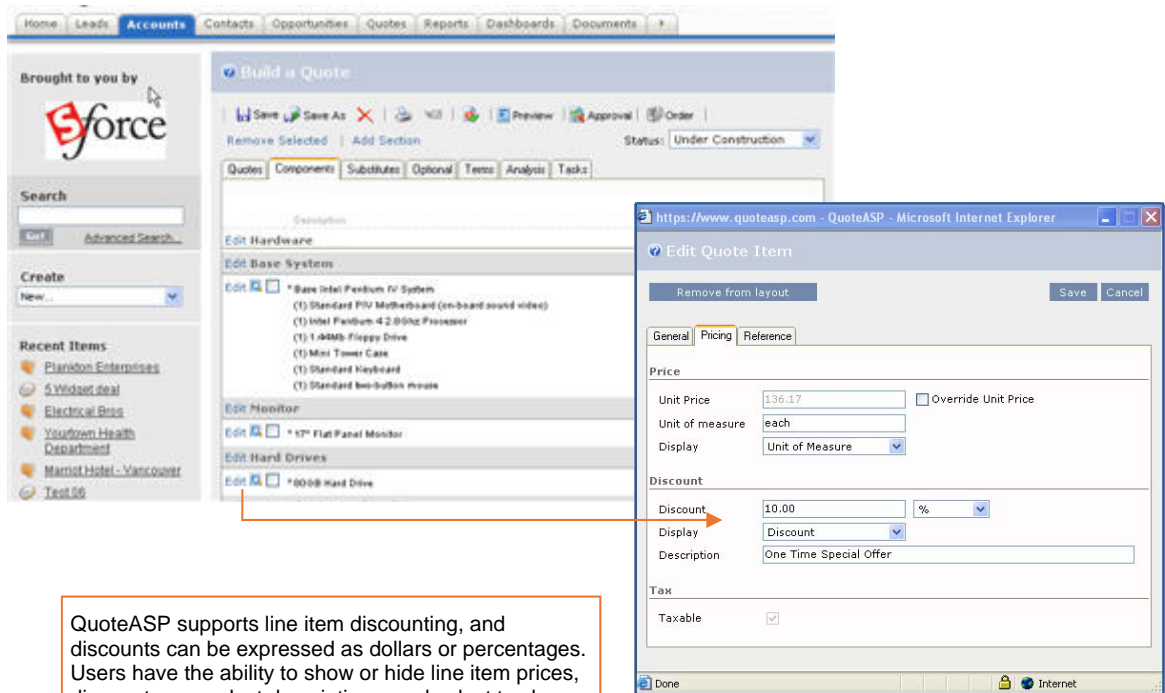
It's easy to add products to a quote, and your templates may already have products on them. Simply click on "Add Items" in a group, and pre-filtered products can be selected for inclusion in the quote.

Quotes based on templates can automatically have the terms attached. Users can have access to add or modify these terms if you grant them permission.

	Unit	Ext. Cost	GM	Ext. List
Components				
- Base Intel Pentium IV System	1	\$456.00	30.23%	\$653.60
- 80GB Hard Drive	1	\$95.00	25.00%	\$460.00
- 17" Flat Panel Monitor	1	\$345.00	25.00%	\$460.00
- less Discount				(\$13.62)
Labor				
- Installation and Training	6	\$450.00	25.00%	\$600.00
Cost Categories				
- Buy in Freight		\$22.00	50.00%	\$44.00
Total Costs/Price		\$1,368.00		\$1,870.65
Overall GM			26.87%	\$502.65

With the QuoteASP Profit Engine, every quote can be analyzed for profitability. This information can be used to allocate resources on the most profitable deals, or to help optimize pricing.

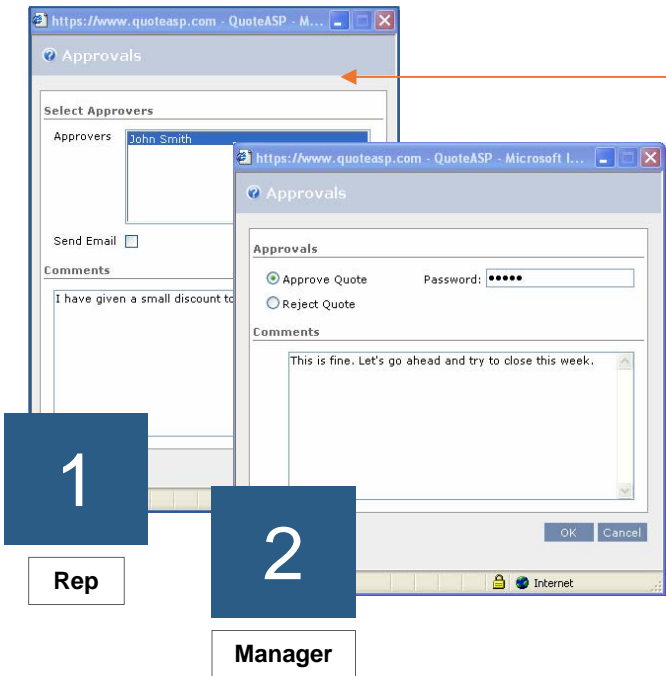
 Administrators can control user access to functionality and data.



QuoteASP supports line item discounting, and discounts can be expressed as dollars or percentages. Users have the ability to show or hide line item prices, discounts or product descriptions, and select to show only the total at the bottom of the quote.



If reps exceed their discount authority, or the size of the deal is over a certain amount, reps can be required to get an approval before being able to send out their quote.



With the QuoteASP Approval Engine, approval requests are routed to the appropriate manager. A full audit history of all approvals is maintained. Quotes can be sent out only after getting approved, and if a rep makes a change after the approval has been made, they are required to resubmit for approval.

Opportunity Detail Edit Delete Close Printable View

Opportunity Owner	John Smith (Change)	Amount	\$1,284.27
Private		Expected Revenue	\$963.20
Opportunity Name	5 Widget Deal	Close Date	2/9/2006
Account Name	Plankton Enterprises	Next Step	Call
Type	Existing Customer - Replacement	Stage	Proposal/Price Quote
Lead Source	Phone Inquiry	Probability (%)	75%
Order Number		Campaign Source	
Current Generator(s)		Main Competitor(s)	
Tracking Number		Delivery/Installation Status	
Created By	John Smith, 1/9/2006 3:04 PM	Last Modified By	John Smith, 1/9/2006 3:06 PM
Description			
Custom Links	New Quote	View Quote	
	Edit Quote	Delivery Status	

Edit Delete Close Printable View

When reps save their quotes, they are automatically tied back to the opportunity. Quote items are attached as products on the opportunity, and the opportunity amount is updated.

Products (Standard Price Book) Add Product Edit All Choose Price Book Sort Products (Standard Price Book) Help

Action	Product	Quantity	Sales Price	Date	Line Description	List Price
Edit Del	17" Flat Panel Monitor	1.00	\$494.50		17" Flat Panel Monitor	\$494.50
Edit Del	800B Hard Drive	1.00	\$136.17		800B Hard Drive	\$136.17
Edit Del	Base Intel Pentium IV System	1.00	\$653.60		Base Intel Pentium IV System	\$653.60

Build a Quote

Save Save As X Print Preview Approval Order Status: Open

Quotes Components Substitutes Optional Terms Analysis Tasks (1)

Details from template: Hardware, Software and Services

Quote ID: 0166JS Add Owner: John Smith

Account: Plankton Enterprises Contact: Wayne Smith

Type: Quotation

Date Quoted: 1/9/2006

Name: 5 Widget Deal

Description:

Add Image

Price Summary

Quantity: 1

Discount (\$): \$0.00

Shipping: \$0.00

Total (ex): \$1,284.27

When sending a quote, reps can choose between sending in MS Word, PDF or online formats. They can send the quote only, or attach a full proposal.

https://www.quoteasp.com - QuoteASP - Microsoft Internet Explorer

Send Quote

Details Proposal

Select Type

Quotation

Quotation and Proposal 0071JS

Select Delivery

Delivery Type: .pdf file and email

Edit Email: djones@smith.com

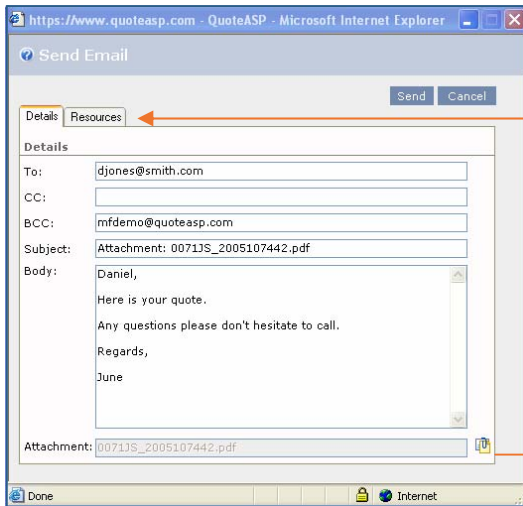
BCC Quote Owner

Sync to Opportunity

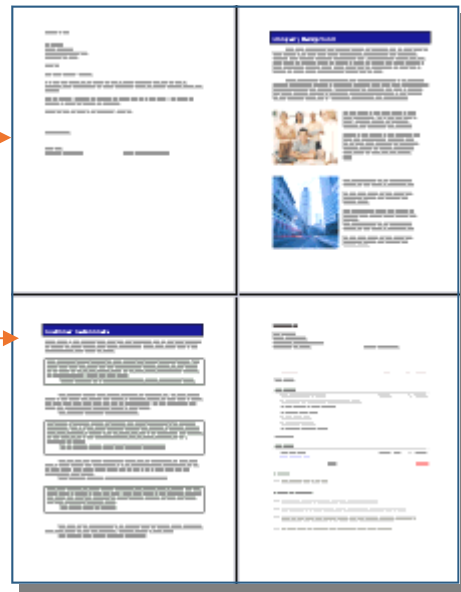
OK Cancel



Like quote templates, proposal templates can be created for a variety of products, content or languages.



If a rep decides to email the quote directly from the system, he can also attach supporting collateral and images.







The full proposal with the embedded quote is attached to the email and sent to the customer. Proposals can include cover letters, customer testimonials, company history, and other items. The line item quote is also incorporated seamlessly into the proposal.

Activity History						
Log A Call Mail Merge Send An Email View All Activity History Help						
Action	Subject	Name	Task	Date	Assigned To	Last Modified Date/Time
Edit Del	Quote and Proposal		✓		John Smith	1/9/2006 3:05 PM

Notes & Attachments			
New Note Attach File View All Notes & Attachments Help			
Action	Type	Title	Last Modified
Edit Del View	Attachment	QuoteASP: Monday, January 09, 2006 3:05 PM.pdf	1/9/2006 3:05 PM

When the quote is sent out, it is logged as a completed activity, and the quote is attached to the opportunity. Users can have multiple quotes attached to an opportunity, giving them the ability to track the quote history.

Key points:

Hosted, software-as-a-service delivery model	
Similar user interface, look and feel	
Per-user, per-month subscription with no long term contracts	
Reference-able joint customers	



QuoteASP, Inc
1255 Treat Boulevard, Suite 300
Walnut Creek, CA 94596

Tel: +1-925-472-0100
Fax: +1-925-476-0264

www.quoteasp.com



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