

On Demand Quotation and Proposal Management



Improve Operations

QuoteASP provides the tools that improve the way sales organizations perform their most critical functions, including:

- Consistent, efficient generation of traditionally complex, multi-level quotations.
- Centralizing and coordinating pricing input from intra-organizational departments.
- Leveraging the marketing department's creative activities in proposal generation.
- Simplifying the approval and sign-off processes for accurate, fully costed quotations.
- Managing client interactions during the crucial financial stage of the sales process.

Manage by Metrics

QuoteASP provides managers and executives with precise, quantifiable, real-time insights into critical business metrics. All key data are centralized into one easily accessed system, so managers have instant answers to difficult business questions, such as:

- How profitable are different products, projects and clients?
- Are sales on track to meet production timelines and budgets?
- Does the value of quotations under consideration support revenue objectives?
- What is the average conversion rate by organization, department or by sales professional?
- Am I estimating purchase timelines and budgets accurately?
- Who are my star performers?

QuoteASP - On Demand Quotation and Proposal Management

QuoteASP empowers businesses with the combined power of graphic rich, multimedia corporate proposals with intricate, multi-level quotation generation. Delivered via the Web, QuoteASP can be accessed by your entire sales and marketing teams anywhere they have access to the Internet. By seamlessly integrating QuoteASP with your corporate site, invite your customers to login and view their proposal and quotation online. Your customers receive the benefit of being able to tailor component substitutes and optional items in real-time, while your sales professionals receive behavioural information that they can use to tailor follow up activities. Once your customer is happy with their final configuration they can download it in various document formats.

Save time by creating common quotation templates so that users can effortlessly standardize your pricing best-practices.

Using the secure login credentials you provide, your customer's can login, view their quotation and customize component selections to suit

QuoteASP - Microsoft Internet Explorer

User: June Jones Yourtown Electrical Help Support Log Off

Build a Quote

Save Save As Preview Approval Convert to Order: Under Construction

Quotes Components Substitutes Optional Terms Analysis Tasks (1)

Details

Quote ID: 000262 Add Owner: June Jones

Account: Johnson & Associates Contact: Ian Johnson

Type: Quotation Date Required: 7/30/2004

Date Quoted: 7/24/2004

Quote Description: Home Theatre System

AV Receiver: Advanced Multi-Channel Audio Visual Receiver \$499.00 each 1 \$499.00

Surround Sound Speakers: Wall Mounted Speakers [-\$55.00] each, Floor Standing Speakers \$245.00 each 4 \$980.00

Sub Woofer: RMS 50/100 watt max Sub Woofer \$295.00 each 1 \$295.00, RMS 70/140 watt max Sub Woofer [+(\$45.00)] each

Professional Home Installation (Recommended) [+(\$160.00)]

1. Validity: 1.1 This quote is valid for 45 days.

2. Terms and Conditions: 2.1 Payment shall be on a COD basis unless the supplier has agreed to give credit to the customer. 2.2 Ownership of the goods will remain with the supplier until payment has been received.

Quote Total (ex Tax): \$1,774.00
Tax: \$188.70
Quote Total (inc Tax): \$1,962.70

QuoteASP takes maximum advantage of the Internet's seamless interconnectivity and anytime-anywhere access to enable the delivery of real-time business intelligence in a way never before possible with standalone client/server or packaged software solutions.

Powerful Quotation and Proposal Management

Feature	Function
• Quotation Building	Generate detailed, multi-level quotations with unprecedented efficiency. Include component drill downs, optional items, substitutions and quantity flow on effects.
• Quotation Templates	Store unlimited quotation templates with standard pricing information or create new quotations using ones issued previously.
• Relationship Builder	Take the guesswork out of traditionally complex, multi-level component pricing by creating 'relationships' that help determine the quantity to apply to a quotation based on a given formula.
• Order and Invoice Management	Manage under construction, current and outstanding quotations, convert to order or lost sale and group by date, product type, sales professional, region or division. Export orders to your accounting package or generate an invoice directly from within QuoteASP.
• Proposal Generation	Build comprehensive, graphically enhanced proposals via the inbuilt WYSIWYG editor complete with images, Flash® components, hyperlinks to stored documents, or even link back to pages on your own website. Advanced users can enhance already powerful functionality by developing proposals using the in-built HTML editor.
• Contact Management	Store detailed contact information for quotation and proposal personalization. Assign discount profiles, and retain full quotation, order and invoice history.
• Online Quotation/Proposal Delivery	Issue e-mail notifications of new quotations and/or proposals to your customers and grant them online access to view, modify and download their final solution, in various document formats - all in a secure environment.
• Live Chat	Chat live with your customers while they are viewing their proposal and quotation. Your sales professionals are alerted by audio and screen prompts when a customer initiates a conversation.
• Content Monitoring	Monitor your customer's online activities such as login date/time, time spent viewing and modifying a quotation, as well as areas of interest about your proposal and organization.
• Quotation Routing/Collaboration	Assign tasks to other members of your organization for input into quotations. Receive automatic status updates from users of assigned tasks.
• Quotation Approvals	Set approval authority limits based on position, threshold value or maximum discount. Then submit quotations to 'approvers' to digitally sign-off prior to sending to your customer.
• Budgets and Quotas	Set budgets including minimum conversion rates, average total gross margin/markup, and total value ordered or invoiced over a given period. In addition, set individual product quotas that each of your sales professionals need to achieve over a given period.
• Document and Image Library	Embed component, product and company documents and images in proposals, and determine their availability for downloading by your customers.
• Custom Views and Security	Configure QuoteASP such that individual sales professionals cannot see product costs, make modifications to overall margins, or discount thresholds.
• Reporting and Forecasting	Detailed quotation, order and invoice history, margin analysis, win/loss rates and individual performance can easily be reported. Report drill-downs to hone in on areas of interest.
• Importing and Exporting	Import product component information from other sources. Export accepted quotation information for use in production planning or component purchasing.
• Integration	Built on the Microsoft.NET framework, QuoteASP's Web Services API enables you to push and pull data remotely. In addition, QuoteASP can be fully integrated into the most popular CRM solutions, including Salesforce.com, Salesnet and Microsoft® CRM for full opportunity management.

For more information about QuoteASP, go to:

www.quoteasp.com

