

# QuoteWerks and ACT!



QuoteWerks is an award winning solution that enables companies in every industry to create detailed quotes with speed and efficiency. If you want to save time and money when quoting, selling, ordering, and purchasing products and services you need QuoteWerks. QuoteWerks is available in three editions:

## **Standard Edition**

The Standard Edition of QuoteWerks includes the links to contact management software such as ACT!™, Outlook®, and others. (Starts at \$199 per license)

## **Professional Edition**

The Professional Edition adds the ability to link to any external ODBC compliant data source and QuickBooks® for product data. Additionally, the Professional Edition includes the accounting links to QuickBooks®, Peachtree®, and the Open Export Module. (Starts at \$239 per license)

## **Corporate Edition**

The Corporate Edition of QuoteWerks includes all the features of the Standard and Professional Editions and adds supports for Microsoft® SQL 7.0 or 2000 backend database. Corporate Edition pricing does not include Microsoft SQL licensing. (Starts at \$329 per license)

Compatibility: QuoteWerks integrates with ACT! versions  
4.0, 2000/5.0, 6.0, 2005 and 2006.

## **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! 2000/5.0 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 pulls ACT! user defined Ship To contact information into the quote**

For versions of ACT! prior to ACT! 2005, you could not store secondary contacts in an ACT! contact record. This was very limiting. Many ACT! users would create user defined fields to store shipping location or alternate contact information in the ACT! contact record. QuoteWerks enables you to define which fields in ACT! should be used for the Ship To contact information.

## **QuoteWerks lets your 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 and 2006 only)

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**Free Demo can be downloaded from:**

<http://www.quotewerks.com/reqdemo.htm>

**Knowledgebase:  
Newsgroup:**

<http://support.quotewerks.com/kbase/>

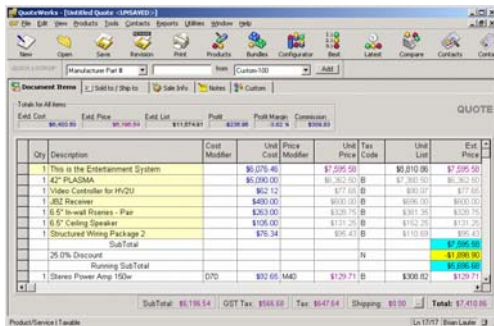
<http://support.quotewerks.com/newsgrp/>

## 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.


## 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.



The screenshot shows the QuoteWerks software interface with a quote document open. The document is titled "QUOTE" and contains a table of items. The table has columns for Qty, Description, Cost Modifier, Unit Price, Unit Code, Unit List, and Est. Price. The items listed include a Plasma TV, Video Controller for HDTV, JVC Receiver, 6.5" In-wall Receiver - Flat, 6.5" Ceiling Speaker, Structured Wiring Package 2, and Stereo Power Amp 100w. The total price is \$17,418.95.

Qty	Description	Cost Modifier	Unit Price	Unit Code	Unit List	Est. Price	
1	This is the Entertainment System						
1	42" PLASMA	\$6,070.40	\$7,595.50		\$6,070.00	\$7,595.50	
1	Video Controller for HDTV	\$62.12	\$77.00	B	\$62.00	\$77.00	
1	JVC Receiver	\$480.00	\$630.00	B	\$480.00	\$630.00	
1	6.5" In-wall Receiver - Flat	\$263.00	\$338.75	B	\$263.00	\$338.75	
1	6.5" Ceiling Speaker	\$105.00	\$131.25	B	\$105.00	\$131.25	
1	Structured Wiring Package 2	\$75.34	\$95.47	B	\$75.00	\$95.47	
	25.0% Discount					\$1,688.90	
	Running SubTotal					\$17,998.90	
1	Stereo Power Amp 100w	DVD	\$52.65	M43	\$79.71	B	\$52.65
	SubTotal		\$6,198.54				
	GST Tax		\$93.69				
	Tax		\$647.64				
	Shipping		\$1.50				
	Total					\$17,418.95	



The screenshot shows the Product Lookup software interface. It displays a list of products with columns for Vendor Part #, Manufacturer, Description, Cost, Price, and List. The products listed include various plasma TVs, receivers, and speakers from manufacturers like JVC and Alpine.

Vendor Part #	Manufacturer	Description	Cost	Price	List
3C3029PK	JVC Stereo	42" PLASMA	\$1,080.00	\$6,362.50	\$7,500.00
3C3049PK	JVC Stereo	47" PLASMA	\$6,732.00	\$8,415.00	\$9,767.40
3C3061PK	JVC Stereo	50" PLASMA	\$9,680.00	\$12,112.50	\$14,050.50
3C3152PK	JVC Stereo	61" TV PIP	\$1,310.00	\$1,637.50	\$1,899.50
3C3448	JVC Stereo	61" PLASMA	\$15,300.00	\$19,125.00	\$22,185.00
3C3208D	JVC Stereo	Thin Wall Bracket for 50" Plasma	\$25.00	\$36.75	\$31.75
3C3202PK	JVC Stereo	FLUSH WALL MOUNT	\$255.00	\$318.75	\$363.75
3C3096C	JVC Stereo	Speakers for Plasma	\$53.00	\$68.75	\$78.95
3C3106	JVC Stereo	STAND FOR PLASMA	\$265.00	\$318.75	\$378.75
3C3290	JVC Stereo	18 bracket for 50"	\$288.00	\$357.50	\$414.70
3C3106S3	JVC Stereo	TILT WALL BRACKET	\$288.00	\$357.50	\$414.70
3C3106AS3	JVC Stereo	Video Controller for HDTV	\$62.12	\$77.00	\$80.07

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

QuoteWerks has a built-in email 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 ACT! contact information, and after the e-mail has been sent the e-mail is logged in ACT! history under the *Notes/History* tab.

## 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.

## 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 higher)

## QuoteWerks has additional integration with ACT!

When saving a quote, QuoteWerks offers to schedule a follow up call, Meetings, and To-dos for you in ACT!. By scheduling these actions, you increase your chances of closing the sale! (ACT! 2000/5.0 and higher)



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