

Quotation Software Genesis

How the need for creating quotes has evolved



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

History of quoting needs

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.

Quoting Solution

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.

QuoteWerks an Innovative Solution – “The way quoting should be...”

Aspire Technologies, Inc. pioneered the QuoteWerks sales quoting software solution to integrate a business' sales quoting processes with contact relationship management/CRM and accounting software systems. QuoteWerks specifically addresses the pressing needs of the small to medium businesses by automating the entire sales quoting process from beginning to end with a comprehensive feature set of integrated tools that are easily scalable for a single-user or for hundreds of users within an enterprise environment. QuoteWerks provides a value-driven out-of-the-box solution that is the perfect for use across any size business or industry, paving the way for how quoting should be.

Qty	Description	Cost Modifier	Unit Cost	Price Modifier	Unit Price	Tax Code	Unit List	Ext Price	
1	Entertainment Package includes 27" TV,		\$1,086.21	05	\$1,269.87	N	\$1,575.00	\$1,269.87	
1	27" PURE FLAT TV		\$490.00		\$612.50	Y	\$710.50	\$612.50	
1	Center Speaker		\$93.00		\$116.25	Y	\$134.66	\$116.25	
1	Surround Rear Speakers		\$389.00		\$380.00	Y	\$417.60	\$380.00	
1	Component Video Cable		\$92.00		\$115.00	Y	\$133.40	\$115.00	
1	Structural Wiring Series 300		\$123.21		\$154.01	Y	\$178.66	\$154.01	
1	STAND FOR 27" TV		\$123.00		\$153.75	Y	\$178.36	\$153.75	
	SubTotal							\$1,449.99	
	3-Year Service Contract (15% of sale)					N		\$216.54	
	SubTotal Including Service							\$1,666.53	
	Optional Item:								
1	CD Changer		\$111.23		\$139.04	Y	\$161.28	\$139.04	
1	400 DISC DVD		\$796.00		\$995.00	Y	\$1,154.20	\$995.00	
SubTotal: \$1,868.16							Tax: \$93.84	Shipping: \$5.00	Total: \$1,967.00

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



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