

Share:

Sync & Share quotes between offices

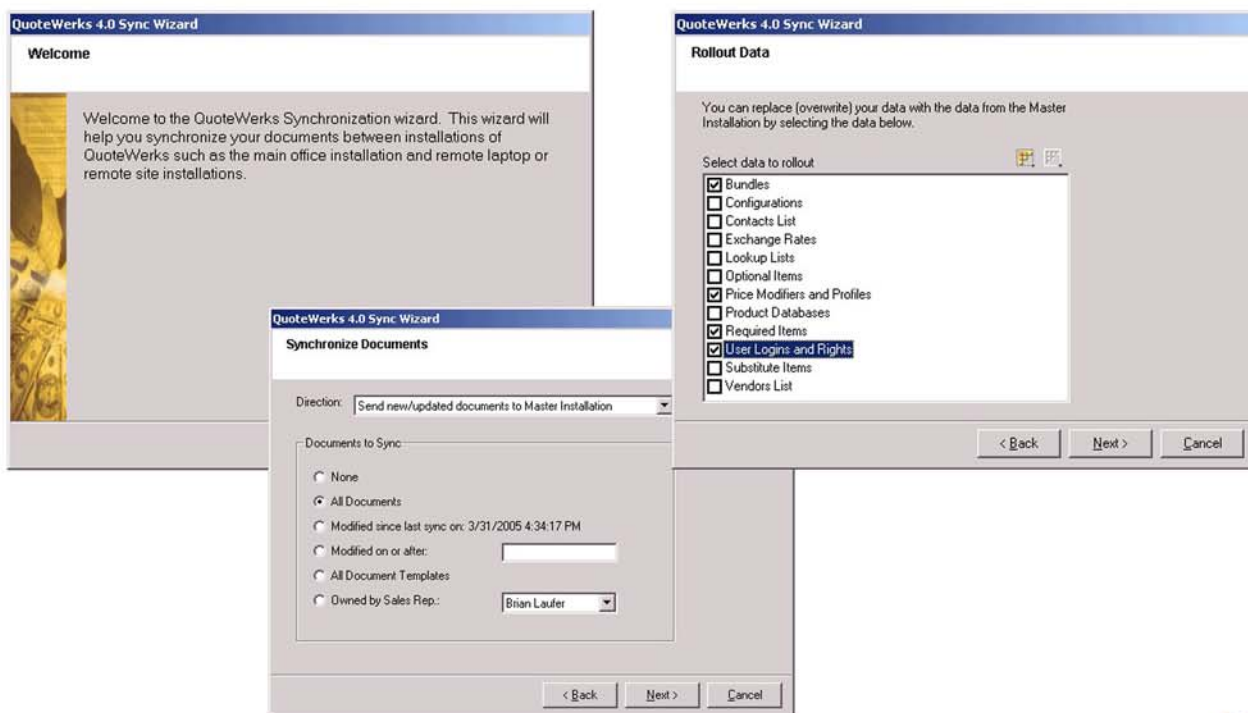
Share/Synchronize Quotes Between Offices

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 salesreps 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, 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 locations 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 locations 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 the information each time

About Aspire Technologies, Inc.

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.**

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