

MS Word or Excel Vs. QuoteWerks

Reasons to use QuoteWerks for quoting and ordering instead of your word processing or spreadsheet software



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

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.

Shortcomings of using spreadsheet software for creating sales quotes

When most business professionals are first asked to create a sales quote for a customer, naturally they use the tools that they are already familiar with such as a spreadsheet (like Microsoft Excel) or a word processor (like Microsoft Word). Using a spreadsheet program or word processor program at first glance is a quick way to create a quote. After they have been creating quotes on spreadsheets for a while they quickly become aware of its shortcomings.

- Errors can very easily be introduced into the quote when using a spreadsheet to create quotes. All it takes is a user to change a totaling formula by accident, or move a cell in the spreadsheet, and now you have a calculation error which may be difficult to track down.
- Using a spreadsheet, you do not have an easy way to lookup and add a product or service to the quote.
- Using a spreadsheet makes it difficult to give all of your quotes the same consistent look and feel. As the quote spans across pages, etc you will need to spend time cutting and pasting descriptions, and re-applying border lines, etc.
- Using a spreadsheet, you will need to manually keep track of a unique quote number sequence, and if you make a mistake, you will then have two quotes with the same quote number. This shortcoming is especially prominent in an office where there is more than one sales person creating quotes.
- Using a spreadsheet, makes it impossible to do a search for an existing quote unless you know the name of the file you saved it as.
- Using a spreadsheet, makes it impossible to generate a list of the quotes that you have done for any one customer.
- Using a spreadsheet, makes it impossible to create reports based on all of the information in the quotes. For example, you have no way to report on how many quotes each salesperson is creating each month, how much potential income these quotes represent, how many of the quotes are getting converted to orders, how many of XYZ product are quoted, and how many have you sold, what prices has the XYZ product been sold for over the last 4 months, etc.

Quoting Solution

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.

The screenshot displays the QuoteWerks software interface with several key components:

- Configuration Setup:** A flowchart titled "Type of TV" with three main branches: "Pure Flat", "HDTV", and "Plasma". Each branch has a "(Navigation-Only Branch)" label above it and a "(Default Branch)" label below it. Below the flowchart is a table listing various TV models and their descriptions.
- Product Lookup:** A tree view on the left showing a hierarchy of product categories such as "Manufacturers", "CD", "DVD", "Center", "Miscellaneous", "Outdoor", "Peripherals", "Projector", "Rear", "Remote Controls", "Subwoofers", "Surround Sound", "TV", "HDTV", "Plasma", "Pure Flat", "Standard", "Video Connector", and "Receivers".
- Real-time Data:** A window showing item details for "E50-4 15IN 13.8V/S .28MM 10x7...". It includes fields for Vendor, Vendor Part #, Tech Data, Pricing (Cost: 132.12, List: 149.00), and Availability (1.25). A table below shows warehouse stock levels for various locations.
- Quote Print Preview:** A window showing a professional quote layout. It includes the Aspire Technologies logo, contact information for both the client and the company, a table of items with columns for Line #, Qty, Description, Unit Price, and Ext. Price, and a "Thank you" message.

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.



Aspire Technologies, Inc.
 7680 Universal Blvd., Suite 360 • Orlando, FL 32819
 Phone: 407.248.1481 • Fax: 407.248.1482
www.quotewerks.com