

Integrate:

Leverage Existing Customer Data with CRM/Contact Manager Integration



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

Integrates with popular Contact Management/CRM software

QuoteWerks integrates seamlessly with leading contact management software such as ACT, GoldMine, KnowTia, Maximizer, Outlook, Salesforce.com, SalesLogix, and TeleMagic. This integration allows you to instantly start quoting using your lead and customer information that is already in your existing contact management software. You will never have to re-type your customer information, and no importing is required! In addition to retrieving contact information from your contact manager, our innovative DataLink feature uses DDE to automatically pull almost any other information from your contact manager and place it into the quote. Using the optional QuickBooks link module, you can also retrieve lead and customer information from QuickBooks. If you do not use one of the above mentioned contact managers, you can use the built-in contact database that comes with QuoteWerks.

Quote Products and Services

QuoteWerks allows you to quote products and services. You can enter information directly into the quote "on-the-fly", and you can setup a list of products and services that you commonly use in our product databases. You can setup a separate product database for each vendor that you purchase from and organize the products and services within each database using multiple-level folders. If you already have lists of products and services, you can import them into the QuoteWerks product databases using the QuoteWerks Product Import Wizard.

Use Products and Services stored in other programs

The Professional and Corporate Edition of QuoteWerks has the ability to link to a variety of external product data sources including any ODBC compliant data source (such as MS SQL, MS Access, Oracle, etc.), Tech Data®, Ingram Micro®, QuickBooks®, and salesforce.com®. This enables you to build quotes by selecting products or services from these databases in addition to the QuoteWerks product/service databases.

Computer Resellers can link to Distributor product databases

If you are a computer reseller, we have a special edition of QuoteWerks called the Professional Edition. This Professional Edition links to the offline price guides of Ingram Micro and Tech Data. Linking to their databases, gives you full access to each of their 225,000+ products they carry. When you select items from their product databases, all the important information such as vendor part number, manufacturer part number, cost, suggest retail, etc is copied into the quote. You can even compare prices between the distributors with a single click!

Real-time web pricing and availability for Tech Data

Many companies in the PC Consulting and integration industry purchase products from PC industry distributors such as Tech Data. It is very important to these companies to receive up to date pricing and availability information so that they have all the tools they need to deliver product to their customer as fast as possible. Having access to real-time pricing gives the company the ability to deliver last minute price savings to their customer. Having access to real-time availability gives the company the ability to know if the product will ship today, or if it will be backordered. Since a backordered product cannot be shipped to a customer, knowing



that a product is backordered before placing an order will give you the tools you need to make a good purchasing decision. QuoteWerks offers a real-time web pricing and availability module.

Links to Accounting Software

QuoteWerks™ Links to QuickBooks and Peachtree accounting software. The QuickBooks link uses the newest QuickBooks API which means that you no longer have to import and export QuickBooks IIF files. We also have an Open Export Module that can be used to export QuoteWerks orders to other accounting software.

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.**

“The way **quoting** should be...”



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