



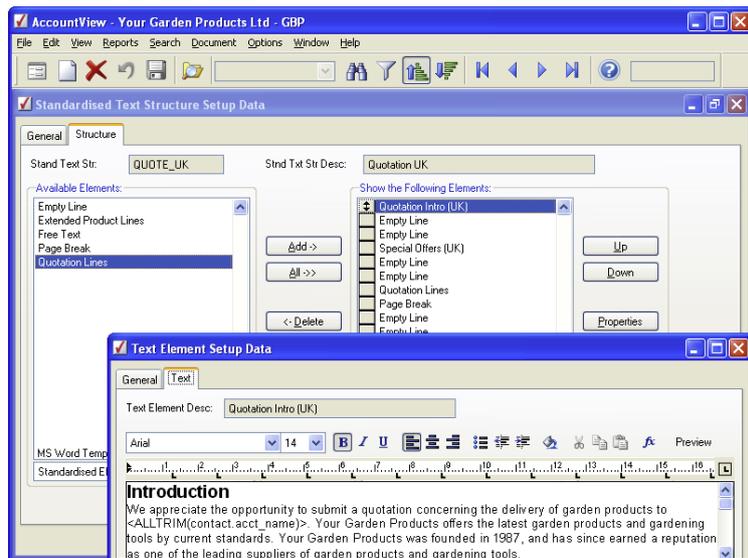
## QUOTATIONS

How would you like to be able to compose professional-looking quotations that are designed to appeal to your customers, without having to devote a lot of time to the task? With the *Quotations* module, you can compose quotations that speak your customers' own language!



### FOR WHOM?

For everyone who wants to keep control over the sales process and wants to increase the chance of sales success by using personalised, professional quotations.



With the *Quotations* module, you have the flexible functionality to compose personalised and professional quotations. Would you like to start every quotation with a standard introduction? All you have to do is create a standardised text element and every quotation will automatically carry your introduction.

\* Extension of the *Sales Order Processing I* module.

### PERSONALISED QUOTATIONS

Use the handy standardised text elements (a form of salutation and your delivery conditions, for example) for your quotations. You can even create different quotation layouts for your domestic and foreign customers. This allows you to take into account the specific situations and wishes of your customers and increases your chance of success without having to put in more time.

### ERROR-FREE

Avoid duplicated entries and expensive mistakes during the sales process. Simply copy the customer and product data from your order processing system to your quotations. In this way, you can be sure to always apply the right price agreements.

### COMPLETE QUOTATION HISTORY

Record the complete history of the quotation process so that you always know which of your sales staff are getting the best quotation results and

## QUOTATIONS



The screenshot shows the 'AccountView - Your Garden Products Ltd - GBP' application. The 'Quotation History' window displays a table with the following columns: Quotation Number, Version, Quotation Business, Desp Business, Quotation Date, Quotation Status, Rejection Reason, and Amount. The 'Rejection Analysis' dialog box is open, showing options for 'Main Sorting Order' (Rejection Reason, Business, Sales Rep) and a checked option for 'Only Accepted and Rejected Quotations'.

Quotation Number	Version	Quotation Business	Desp Business	Quotation Date	Quotation Status	Rejection Reason	Amount
200830001		20016	20016	14-01-2008	Rejected	QUALITY	16,609.45
200830002	1	20018	20018	25-01-2008	Rejected	QUALITY	18,501.56
200830003	1	20019	20019	30-01-2008	Rejected	LIQUID	19,738.83
200830004	1	20016	20016	18-01-2008	Rejected	LIQUID	10,454.57
200830005	1	20023	20023	26-02-2008	Rejected	PRICE	23,354.89
200830006	1	20027	20027	15-02-2008	Rejected	PRICE	7,560.18
200830007	1	20028	20028	17-02-2008	Rejected	TIME	901.27
200830008	1	20032	20032	28-02-2008	Rejected	TIME	10,903.26

Do you wonder why some quotations are always rejected? The *Quotations* module can provide the answer. Not only does it enable you to record the complete history of your quotations, it also enables you to perform in-depth rejection analyses. From now on, you will always know the reason why any of your quotations are rejected and you can always react alertly.

whose quotations are frequently rejected. You can use this information to improve the streamlining of your sales process: respond faster to customer reactions and take action promptly if results are disappointing.

### SALES INFORMATION SYSTEM

Improve your control of the activities in the quotation process, thanks to the possibilities for perfect integration with the Sales Information System module. Simply create an activity automatically

for each change to a quotation. In that way, you can see straightaway how much effort a quotation procedure has cost.

### BIG TIME SAVINGS

Save time and keep the quality of your quotations up to scratch, as even less experienced employees can create professional quotations. This means that your top sales staff can reserve their time for important client contacts.

### ADVANTAGES

- Perfect integration with Word, giving you excellent, user-friendly functionality for creating professional quotations.
- Automatic saving of quotations in line with a preset file name, including automatic numbering.
- Clear overview of all ongoing quotations, including status.
- Extensive standard reports on quotations, including number of quotations per customer and salesperson, success rates per customer and salesperson and reasons for rejection per quotation.