

# impac ProQuote Software

...energize sales, boost margins and enhance customer service

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NEW RELEASE

## ProQuote on-line

Call today to schedule a free web demo. Its all about helping you make more sales!

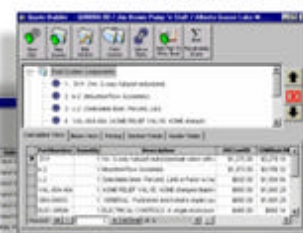


2359 Royal Windsor Dr., Unit 202  
Mississauga, ON L6J 4S9  
Ph: 905-403-1198, Fx: 905-403-1446  
[www.proquote-solutions.com](http://www.proquote-solutions.com)

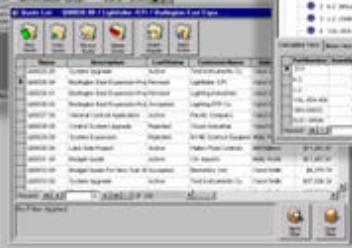
Price Book



Quote Builder



Quote List



Welcome to ProQuote! ProQuote is a powerful and flexible Sales Quotation and Price List Management program built around Microsoft's Access and SQL Server databases. Using a modular and scalable design, ProQuote easily adapts to a wide range of industries and user requirements.

IMPAC has specialized in quotation management software for over nine years and has a proven track record helping businesses to improve their price list and sale quotation management process.

## Introduction

ProQuote is ideal for businesses that issue sales quotations as part of their revenue generating activity. ProQuote contains all the necessary modules and commands to streamline the process of generating, tracking and closing sales quotations.



ProQuote's editing features and on-line price book let you generate professional-looking quotations quickly and efficiently. As each quote is initiated, ProQuote tracks the quote revisions, when the customer expects to buy and a probability of winning. No more shuffling through wads of paper to find a price, part number, quotation or account name. It's all at your fingertips when using ProQuote.

What's more, you have the option to use the internal customer module or link the program to ACT, Goldmine or other customer and contact management systems.

Whether you are an expert or novice user, you will find ProQuote easy to use and will appreciate the full range of features that make ProQuote the most comprehensive quotation management program on the market today.

Built using the latest in client server technology, ProQuote comes in two configurations. ProQuote Professional is a Microsoft Access based system. ProQuote Enterprise is an SQL Server based system.

## Featured Highlights

**Microsoft Windows Interface** incorporates the standard Windows features (tool bars, icon buttons and pull down menus)

**Integrated Price Book** is an on-line catalogue of all your products and services. Like an index, the Price Book lets you quickly find any part, even when the database contains thousands of items.

**Quote Builder** lets you quickly assemble quotes, apply discounts and set minimum profit levels. To build a quote you pick items from the on-line price book, from past quotes or you can type directly from the keyboard.

**Filter Quotes & Track Status** by customer, quote status, sales rep, region and many other criteria.

**Set Multiple Pricing** levels for sku's and set formulas to calculate costs and sell price.

**User Defined Fields (UDF's)** let you attach any number of custom data fields to your quote and price book database.

**Flexible Import Module** lets you import data from many standard formats including ASCII, fixed format, dbf, Excel and more.

**Standard Reports** include quote profit summary, won/lost report, part activity, price book catalogue, quote status and more. Custom reports are also available through Microsoft Access or other third party tools.

**Ease of Use** makes ProQuote program of choice for both advance and novice users.

## Key Benefits

ProQuote will save you valuable time, reduce errors and speed up quote turnaround. For managers, ProQuote provides instant access to information on sales performance, won/lost ratios, margins, profit, customer activity and much more. With ProQuote you get:

- Consistent and professional quote presentation
- Better tracking and quote follow-up
- Improved customer service
- Standard quoting procedures for all staff
- Increased productivity
- Faster quote updates and revisions
- A single source of product, customer and quote information
- Customize quoted pricing
- Improved business forecasts and analysis
- More accurate quotes with fewer errors
- Better account continuity and improved communication between sales reps, customers and management
- Improved price book management and control
- MS-Office Integration - Email quotes
- Generate quotes in different currencies
- Group and analyse quote history by product, customer, sales agent region and many other criteria
- Produce quotes in either English, French or other language

## General Features

- Easy data entry and maintenance
- Network and "Terminal Server" ready
- Popup windows & quick pick lists to eliminate repetitive typing
- User & administrator password security
- Group & filter quotes by user set criteria
- Track quote status and add comments
- Forecast probability of acceptance
- Print previewing
- Desktop, networked or mobile configurations
- Roll-up data from remote locations
- Assign formulas for landed costs and selling price
- Manage different currencies & exchange rates
- Calculate freight, brokerage, duty and any other business variables
- Direct faxing & email capabilities

## Price Book

The price book is an on-line catalogue of all your products and services that you can browse to select items. Similar to a file directory in Windows Explorer, the price book is divided into sections and sub-sections. Each section contains part information for one product family. There is no limit on the number of sections, sub-sections or parts in the price book. Price book features include:

- Electronic importing of data from suppliers or other sources
- Multiple price books by supplier, language or country
- Multiple pricing levels
- Unlimited sections, categories and items in the price book
- Maintain costs, margins, pricing and part numbers
- Automatic audit trail of price changes (date, by who, previous price)
- Maintain standard assemblies or build assemblies on-the-fly
- Option to link related products (e.g. motor to mounting bracket)
- Find any item with a few mouse clicks
- Variable length product descriptions
- Display part or product images
- "Quick Search" method for finding items in the price book or quote list of previously issued quotes

## Quote Builder

The Quote Builder module provides all the tools required to quickly assemble, modify and issue professional looking quotes with optional cover page and terms and conditions attached.

After adding parts to the body of your quote you can adjust the pricing, margins or discount rates. Changes to quote pricing can be made at the item, section or grand total level. Packed with features, the Quote Builder module lets you:

- Quick pick items with mouse from on-line price book
- Copy information from previous quotations
- Maintain quote revisions
- Set-up templates for frequently quoted items
- Format quote into sections
- Type custom or non-standard items directly from the keyboard
- Interactively adjust margins or apply discounts
- Maintain quote revisions
- Include cover letter, terms and conditions and warranty information
- Mark quotes as active, accepted, rejected or cancelled
- Edit product descriptions
- Over-ride total price
- Assign quote level UDF's

# Customer Information

The Customer Editor module maintains a database of all your contacts. When generating a new quote you can quickly find and pick a customer from the contact list and ProQuote will automatically copy all relevant information (e.g. name, company address, phone and fax) to your quote. The Customer Editor also has basic management functions for adding, deleting and copying contacts.

You can also add your own data fields to maintain additional information and categorize customers and prospects including; names, addresses, phone numbers, industry type, region, account codes and other relevant data.

ProQuote also provides optional links to read contact data from ACT or Goldmine. Call for availability of links to other contact managers.

# Sample Quote

Quote Cover



Single Page Quote



Multi-Page Quote



Terms & Conditions



## Management Reports

ProQuote contains a number of standard user and management reports including;

- Quote status at the summary or item detail level
- Sales rep, customer or supplier activity reports
- Sales forecast
- Price book/Catalogue listing
- Win/Loss by product category
- Customer quote
- Internal quote profit summary report with costs, margins & profit
- Part activity report

Reports can be previewed, printed, faxed or Emailed.

## ProQuote Goldmine Interface

The ProQuote Goldmine interface seamlessly shares information between ProQuote and Goldmine. The interface works with both Goldmine 5.0 and Goldmine Sales and Marketing and provides a single source of customer and contact information. Features include;

- ProQuote reads contact information from Goldmine
- Ability to filter records to find the desired contact
- ProQuote writes a note to Goldmine that the quote was created
- Each time the quote status changes a new note is written to Goldmine
- A note maybe written at anytime to a contact
- User have the option to set an alarm with a note to follow-up on quote

## ProQuote On-line

ProQuote On-line is the next generation quote solution that ties together customers, distributors, sales reps and inside customer service staff into one integrated sales system. ProQuote On-line gives customers the ability to prepare Request for Quotes (RFQ's), view their priced quotes and place orders against these quotes on-line.

With ProQuote On-line your customer's are able to search and browse the product catalogue and select items to add to an RFQ. Once a customer submits a request for special pricing, an alarm notifies inside customer service staff that a request has been submitted. The inside staff then processes the request and issues a quote by email or fax. The priced quote is also viewable to the customer on the web, where they can accept the quote by turning it into an order. Sales reps have access to the same information and can view quotes and orders submitted for their accounts.

ProQuote On-line is a true B2B application that empowers your customers and makes it easy for them to do business with you.