

Configure:

Simplify the Quoting Process

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

Stand alone configuration software can literally cost thousands of dollars; but the QuoteWerks advantage is that the "Configurator" functionality is simply built right into the product. From right within QuoteWerks, you will be presented with a list of products to choose from in a step by step format. The list of products displayed for you to select at each step is based on your previous selection. The configurator can maximize your sales forces productivity, efficiency, and accuracy by walking them through the process of building a quote, ensuring that the sales rep remembers to include all the items they need to in the quote.

The configurator **simplifies** building a quote by presenting the sales rep with a list of products to choose from step-by-step. The list of products displayed at each step will be based on the previous selection.

The lists of products and number of steps are specified when the configuration is setup. One of the main advantages of using the configurator is that once it has been setup, the sales rep can very easily pick products from the lists presented to them, ensuring that the sales rep will not forget to add products they should. Thus, **reducing training costs** and **mistakes**.

Configuration for (Entertainment System)

STEP 5 SPEAKERS

Part Number	Description	Price	Qty
KP-RC3	Center speaker (high)	230.00	1
KP-KSw12	12" Subwoofer	295.00	1
KP-KSw15	15" Subwoofer	460.00	1
KP-RCW3	6.5" In-wall Rseries - Pair	328.75	1
KP-RCR3	6.5" Round Ceiling Spkr Pair	262.50	1
JB-650C	6.5" Ceiling Speaker	131.25	1
KP-KSw10	10" Subwoofer	236.25	1
JB-NCTR	Center Speaker	116.25	1
FSC-SSPAC...	Surround Sound Package	942.81	1
MI1-N65	Indoor Speaker	38.95	1

Selected Items

Part Number	Qty	Description	Step
	0	Branch to Plasma	1
PDP505HD	1	50" PLASMA	2

Configuration Setup

Settings: Flowchart

```
graph TD
    TV[Type of TV] -- "(Navigation-Only Branch)" --> Flat[Pure Flat]
    TV -- "(Navigation-Only Branch)" --> HDTV[HDTV]
    TV -- "(Navigation-Only Branch)" --> Plasma[Plasma]
    Flat -- "(Default Branch)" --> FlatAcc[Accessories for Pure Flat]
    HDTV -- "(Default Branch)" --> HDTVAcc[Accessories for HDTV]
    Plasma -- "(Default Branch)" --> PlasmaAcc[Accessories for Plasma]
```

Note: Right click to create each selection container in the configuration. Then right-click over each selection container and select properties from the popup menu to add the items to each step. To connect the selection containers together, select the Source container, then click over the center sizing node and drag over to the Destination container.



Paste Special Feature

Our Paste Special feature allows you to paste part number information created using other price list programs such as Hewlett Packard's configuration software. Another application for this feature is for PDAs. You could create a list of part numbers and quantities of products/services on your PDA, copy that information into the Windows clipboard, and then use the Paste Special feature to have QuoteWerks retrieve the part numbers, complete with description, and pricing into your QuoteWerks quote!

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...”



Aspire Technologies, Inc.

7680 Universal Blvd., Suite 360 • Orlando, FL 32819
Phone: 407.248.1481 • Fax: 407.248.1482

www.quotewerks.com