

Security Features

The QuoteWerks Administrator can set the security settings for each user. You can specify which menu options each user has access to. You can specify which users can view/modify/delete each user's quotes. You can specify individual access rights for each user to limit their ability to perform tasks like deleting products from the product database, modifying print layouts, and many more. These security rights are centrally maintained and can also be enforced on laptop installations of QuoteWerks.

Create and manage quote revisions

QuoteWerks supports "revisioning". This feature enables you to open a saved quote, make changes, and then save it as the next revision. QuoteWerks will then automatically save the quote with a new quote number that has either a numeric or an alpha suffix (like -01 or -A), and will update the contact management software links to refer to the most recent revision. When converting quotes to orders, all revisions are now automatically flagged as superseded. You can easily view the history of all revisions giving you a complete overview and control over all the revisions.

Define your Pricing Strategies

In all, QuoteWerks supports 9 different ways to price your products and services!

1. Enter Price Manually - Use this when you have a fixed price for all customers
2. Gross Margin - Use this when you calculate your customer price by applying a percentage of gross margin to your cost.
3. Markup from Cost - Use this when you calculate your customer price by adding a percentage of your cost to the cost of the product.
4. Discount from List - Use this when you calculate your customer price by discounting from the list price.
5. Same as List - Use this when in most cases you charge your customers the list price of a product.
6. Volume Based - Use this when your customer gets a different price depending upon how many of the item they are purchasing.
7. Customer Based Price Levels - Use this to have QuoteWerks automatically assign your customer a fixed price depending upon what type of customer this customer is. So, if your customer is a RETAIL customer, they get price X, and if they are a WHOLESAL customer, they get price Y.
8. Based on Customer/Product profile - Use this to have QuoteWerks automatically assign your customer a calculated price based on markup, margin, discount, or list depending upon the type of customer AND the type of product you are selling. So, one example is, if your customer is a RETAIL customer, they get a 10% discount, and if they are a WHOLESAL customer, they get a 30% discount. Another example is, if your customer is a RETAIL customer, they get a 40% marked up price, and if they are a WHOLESAL customer, they get a 10% marked up price.
9. Formula Based - Use this to have QuoteWerks calculate the price of the product as a percentage of the price of another product.



Manage

Calculate your Costs

QuoteWerks supports 3 different ways to determine the cost of your products and services:

1. Enter Cost Manually - Use this when you have a fixed cost.
2. Discount from List - Use this when you calculate your cost as a discount from List price.
3. Volume Based Costing - Use this when the cost of the item you are selling is different based on how many you are selling.

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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