

InterAcct

Stand Alone Quotation System



1. Customer File – standard InterAcct
 - Client Quotations – History (updates central Quotes Register)
 - Client Information – discount %, terms, delivery
 - Client Enquiry – view products quoted, sold, “lost”
 - Contact History – Follow Up Diary – send standard letters/emails
 - Contact Names – quote history by contact name (plus Notes)
 - Client Notes File
 - Prospect Report Generation

2. Quotations (does not require Job Costing or Sales Order Entry software modules)
 - Search on Quotes by Status (Open, Won, Lost, etc)
 - Quotes by (original) Origin of Lead
 - Quotes by Source (direct, phone-in, telesales, email, etc)
 - Quotes by Salesperson
 - Quotes by follow up date

 - Quote Product Line Items – discount % (not an Inventory system)
 - Free format standard text, plus additional notes
 - “Bullet” points – special features listed

 - Standard Terms & Conditions, Opening/Closing Paragraphs
 - Acceptance signature required by the client ?
 - Select to print optional quote clauses – select print sequence

 - Print/Fax/Email Quotation

3. Visual Search Enquiries (in addition to standard InterAcct Enquiries)
 - Daily Summary – quoted, won, lost (quantity & value)
 - Weekly Summary by Salesperson – quoted, won, lost
 - Monthly Summary by Salesperson – quoted, won, lost
 - Quote History by Product Item
 - Deals Won/Lost Register

4. Select for Letters, Emails, Labels (now standard in InterAcct)
 - Select Companies, and/or Contact Names within Companies
 - Select contacts (first name, all contacts), or by Title/Position or Mail Flag(s)
 - Select Companies – based on any classification field or date
 - Eg Status, rating, Origin, Salesperson, Date Input, Follow Up Date

 - Create an automatic contact history entry after sending
 - Attach files to a standard email being sent
 - View Pre-Listing of selected names before sending – okay to edit list

Live.BUSINESS NAMES DATABASE - display

File Record Edit View Go Macro Menu Graph Design Help

Action

Record Id	AARCHEDR	Type	B Business	1st Added	12-Oct-2006
Title	Mr	1st Name	Adam	Dear ?	ADAM
A/c Mgr	N/A	Surname	Sullivan	Last Date	18-Oct-2006
Position	Enviro Consultant			Next Date	19-Oct-2006
Business	Aargus Chemicals			Last Won	

Ph Area	02	Address	PO Box 398
Bus Ph	95889030	Suburb	DRUMMOYNE NSW P/C 1470
Fax No	47353111	Country	
Mobile			
After Hrs			

Status	CLIENT	Cust Type	CHEMICALS
Category	2.MEDIUM		
Origin	EXISTING		

Menu

1. Client Quotations
2. Client's Information
3. View - Products Quoted
4. Notes File
5. Delivery Addresses
6. Contact Names
7. Send Email
8. Contact History
9. Create Report Designs

Live. QUOTATION REGISTER list , Aargus Chemicals, Adam Sullivan

File Record Edit View Go Graph Design Help

Ref No	Date	Status	S/person	Contact	Suburb	Source	Won/Lost	Disc \$	Quote \$
1	100007	Wed 18-Oct-2006	QUOTE	NIND	Adam Sullivan	DRUMMOYNE	DIRECT	1,254.00	12,442.10
								1,254.00	12,442.10

WinPrint - East West Engineering - Quotation 100007 - 1/ 2 pages

File Edit Zoom Help

Print HP LaserJet 8100 Series PCL 6 Email Fax Exit

EAST WEST ENGINEERING

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18th, September, 2006 Page : 1
Quote No : 100007

Adam Sullivan
 Enviro Consultant
 Aargus Chemicals
 PO Box 398
 DRUMMOYNE NSW 1470 Fax : (02) 47353111

Dear ADAM,

We are pleased to submit this quotation for your approval.

Paper Roll Grab with Hydraulic Power Pack Product Code : PRG9/HPP

This is the general description for this product. It is a free format comments area where there is no limit to the amount of text you can enter (or cut & paste from elsewhere).

This is where you can add extra notes, about this quote line - just for this quotation.

- Hydraulic Pressure - Max 500 PSI
- Includes 12 Months Warranty
- Tear Strip, 800mm

Quantity : 1 Price : \$ 12,540.00 Discount : \$ 1,254.00 Quote : \$ 11,286.00

Live.QUOTATION REGISTER - display

File Record Edit View Go Macro Menu Graph Design Help

Action 1

Back	Forward	S/person	NINO	Ph Area	02	Ref No	100007
Add	Top	Text Date	18th, September, 2006	Phone	95889030	Date	Wed 18-Oct-2006
Delete	UnDel	Record Id	AARCHEDR	Mobile		Follow Up	Thu 19-Oct-2006
Esc	Search	Category	2.MEDIUM	Fax No	47353111	Won/Lost	18-Oct-2006
PageUp	PageDn	*Company	Aargus Chemicals	Change Contact	001	Input	CVR
NoList	Lookup	*Contact	Adam Sullivan	Dear ?		Status	WON
Inbox	Go	Title	Enviro Consultant				
Print	Printer	Address	PO Box 398				
Update	DesignG	Suburb	DRUMMOYNE	NSW	P/Code	1470	
Total	Batch	Email					
Export	Import	Origin	EXISTING	Gross \$	12,540.00		
OS	Codes	Source	DIRECT	Disc \$	1,254.00		
Last	Replace	Cust Ref		Net \$	11,286.00		
Help	Exit	Cust Type	CHEMICALS	Freight \$	25.00		
		Client Status	CLIENT	Ex Tax \$	11,311.00		
		Disc %	10.00	Accept ?	Y	GST \$	1,131.10
		Terms	30 Days from Month End	Quote \$	12,442.10		
		Carrier	Barnetts				
		Comments					

New-Prospect
New-Contact

Menu

- Quote Line Items
- Opening Paragraph
- Optional Clauses
- Closing Paragraph
- Quote Won/Lost
- Print : Quotation
- View : Client/Prospect

Live.PRODUCT LINES QUOTED list , Aargus Chemicals, Adam Sullivan

File Record Edit View Go Graph Design Help

Action	Product Code	Include ?	Description	Retail \$	Quantity #	Discount \$	Net Quote \$
1	PRG9/HPP	I	Paper Roll Grab wit	12,540.00	1	1,254.00	11,286.00
						1,254.00	11,286.00

Back Forward

Live.SALES ENQUIRY MENU - display

File Record Edit View Go Macro Menu Graph Design Help

Menu

- Daily Summary
- Weekly Summary
- Salesperson Summary
- Product Quote History
- Deals Won/Lost
- Names by Post Code
- Key Events Log
- To-Do Task Schedule
- Names by Status/Category
- Salesperson Hot Prospects
- Prospect Profile
- Prospect's Products
- Daily Activities
- Activity Summary
- Names by Origin
- Names by Mail Flag
- Birthday Reminders

Live.DAILY SUMMARY list

File Record Edit View Go Graph Design Help

Date	Quotes #	Quotes \$	Won #	Won \$	Lost #	Lost \$
18-Oct-2006	1	11,286.00	1	11,311.00	0	0.00
	1	11,286.00	1	11,311.00		0.00

Live.SELECT EMAIL/LETTER - display

File Record Edit View Go Macro Menu Graph Design Help

Action 1

Back	Forward
Add	Top
Delete	UnDel
Esc	Search
PageUp	PageDn
NoList	Lookup
Inbox	Go
Print	Printer
Update	DesignG
Total	Batch
Export	Import
OS	Codes
Last	Replace
Help	Exit

Purpose ? EMAIL EMail List Run No 100000
 Basis BOTH Select Company_Contact name Date Run Fri 25-Aug-200
 All Contacts ? SELECT Select Contacts Employee N/A

E-Mail Subject Re : New Web Site Announcement
 Opening Line why not have a look for yourself !

Comments New Web Site - All Clients & Prospects

Add letter as attachment Y

Menu

1. Select Names
2. Select Contacts
3. Create Contact History
4. E-Mail Text
5. Attach Files
6. Prepare Listing
7. Names Pre Listing
8. Run : EMail

Live.SELECT CONTACT NAMES list

File Record Edit View Go Graph Design Help

Action 2

	Select Field	Selections Value
1	TITLE	Director
2	FLAG	NEWS

Back Forward

Form help Field help Printer Details Field-Selections

