

iQuote Highlights



Version: 2015.1



Frank

PASSWORD

DEMO1 ▼

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Testimonials

Improved Quote Turnaround, Pricing Controls, Visibility and more!



"The iQuote platform enables us to connect to QAD EA and other external pricing tools which significantly improved collaboration and quote turn-around time..."



"With iQuote we finally have control over pricing for our sales quoting... We have reduced our sales quote turnaround time from weeks to days..."



"iQuote provides our Sales folks the ability to perform real-time, accurate quoting from virtually anywhere ...reducing the time to close a sale!"

Real-time Integrated with QAD

Master Data is stored in QAD, Sales Orders and Customer Price Lists are created real-time in QAD upon Customer Approval of Quote



100% Web-based Solution

Requires only a browser on Desktop, iPad or Mobile Device



Create Quote

Fast/Intuitive Customer/Contact search to begin Quote creation

The screenshot shows a 'Create Quote' form with two main sections: Customer and Contact. The 'Customer' section is on the left, and the 'Contact' section is on the right. The form has a top navigation bar with tabs: Customer, Contacts, Custom, Other, and Approval History. The 'Customer' tab is selected. The 'Customer' section contains fields for Cust Nbr, Customer Name, Address, City, State / Zip, Country, Salesperson, and Originator. The 'Contact' section contains fields for Contact Name, Title, Work Phone, Mobile / Fax, Email, Site, Currency, Credit Terms, Ship Via, and FOB Point. Red asterisks (*) indicate required fields. Two red circles highlight the 'Customer Name' and 'Contact Name' fields. Two red arrows point from the text 'Fast/Intuitive Customer/Contact search to begin Quote creation' to the 'Customer Name' and 'Contact Name' fields respectively.

Customer	Contacts	Custom	Other	Approval History
Cust Nbr: 01000000				
Customer Name: Colossal Conglomerates LTD1 *				
Address: Suite 1000 Colossal Building				
Address: Colossal Industrial Park				
Address: 15000 Production Drive				
City: Evanston				
State / Zip: Illinois, USA ▼ 090876				
Country: United States of America ▼				
Salesperson: Willy Loman Incorporated ▼ *				
Originator: Frank Salesi ▼ *				
Contact Name: Frank Salesi				
Title: Assistant				
Work Phone: 9738504428 *				
Mobile / Fax: 9738504428 9738504428				
Email: fsalesi@gmail.com *				
Site: 10000 - San Diego Main Plant ▼ *				
Currency: United States Dollar ▼ *				
Credit Terms: Net 30 ▼ *				
Ship Via: United Parcel Service ▼				
FOB Point: Our Company ▼				

Save Delete Copy Print Order Taxes Notes Audit

Create Quote

Add Unlimited Notes, Attachments and QAD Master Comments

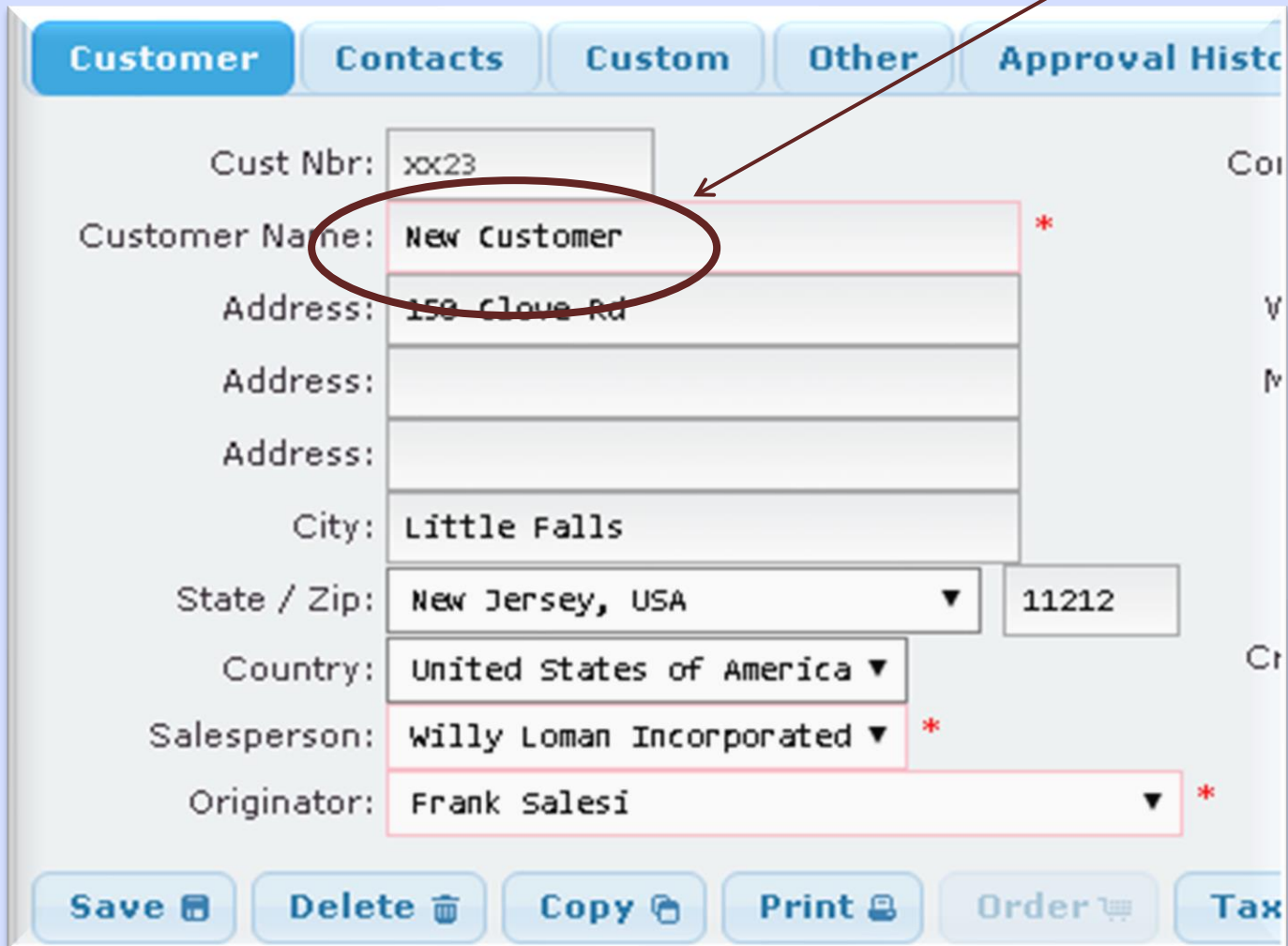
The screenshot shows a 'Notes and Attachments' dialog box with the following elements and annotations:

- Enter new note:** A text input field at the top, circled in red.
- Choose File** button and **No file chosen** text: Located below the text input field.
- Internal Only?** checkbox (checked) and **Share With:** dropdown menu (set to *): Located below the file selection area.
- Choose** button with a lock icon: Located to the right of the 'Share With' dropdown.
- Save** button with a floppy disk icon: Located at the bottom center.
- Clear** button with a trash icon: Located to the right of the 'Save' button.
- Master Comments** button with a document icon: Located to the right of the 'Clear' button, circled in red.
- Entered by frank on Mon Dec 14 2015 15:16:10 GMT-0500 (Eastern Standard Time) (External)**: A header for the note content.
- This is a note with an attachments**: The main text of the note.
- terms.pdf** attachment: A file icon and name at the bottom, circled in red.
- trash icon**: A small trash can icon next to the attachment name, circled in red.

Three red arrows point from the top text 'Add Unlimited Notes, Attachments and QAD Master Comments' to the 'Enter new note:' field, the 'Master Comments' button, and the 'terms.pdf' attachment area.

Create Quote

Create Quotes for Existing Customers or New Customers



The screenshot shows a web-based form for creating a quote. At the top, there are five tabs: 'Customer' (selected), 'Contacts', 'Custom', 'Other', and 'Approval History'. The form contains several input fields and dropdown menus. A red circle highlights the 'Customer Name' field, which contains the text 'New Customer'. A red arrow points from the 'Create Quote' title to this field. Other fields include 'Cust Nbr' (xx23), 'Address' (150 Clove Rd), 'City' (Little Falls), 'State / Zip' (New Jersey, USA / 11212), 'Country' (United States of America), 'Salesperson' (Willy Loman Incorporated), and 'Originator' (Frank Salesi). Red asterisks (*) are placed next to the 'Customer Name', 'Salesperson', and 'Originator' fields. At the bottom, there are buttons for 'Save', 'Delete', 'Copy', 'Print', 'Order', and 'Tax'.

Field	Value	Required
Cust Nbr	xx23	No
Customer Name	New Customer	Yes
Address	150 Clove Rd	No
Address		No
Address		No
City	Little Falls	No
State / Zip	New Jersey, USA / 11212	No
Country	United States of America	No
Salesperson	Willy Loman Incorporated	Yes
Originator	Frank Salesi	Yes

Buttons: Save, Delete, Copy, Print, Order, Tax

Create Quote

Copy old Quotes to create modifiable new Quotes

The screenshot shows a 'Create Quote' form with the following fields and values:

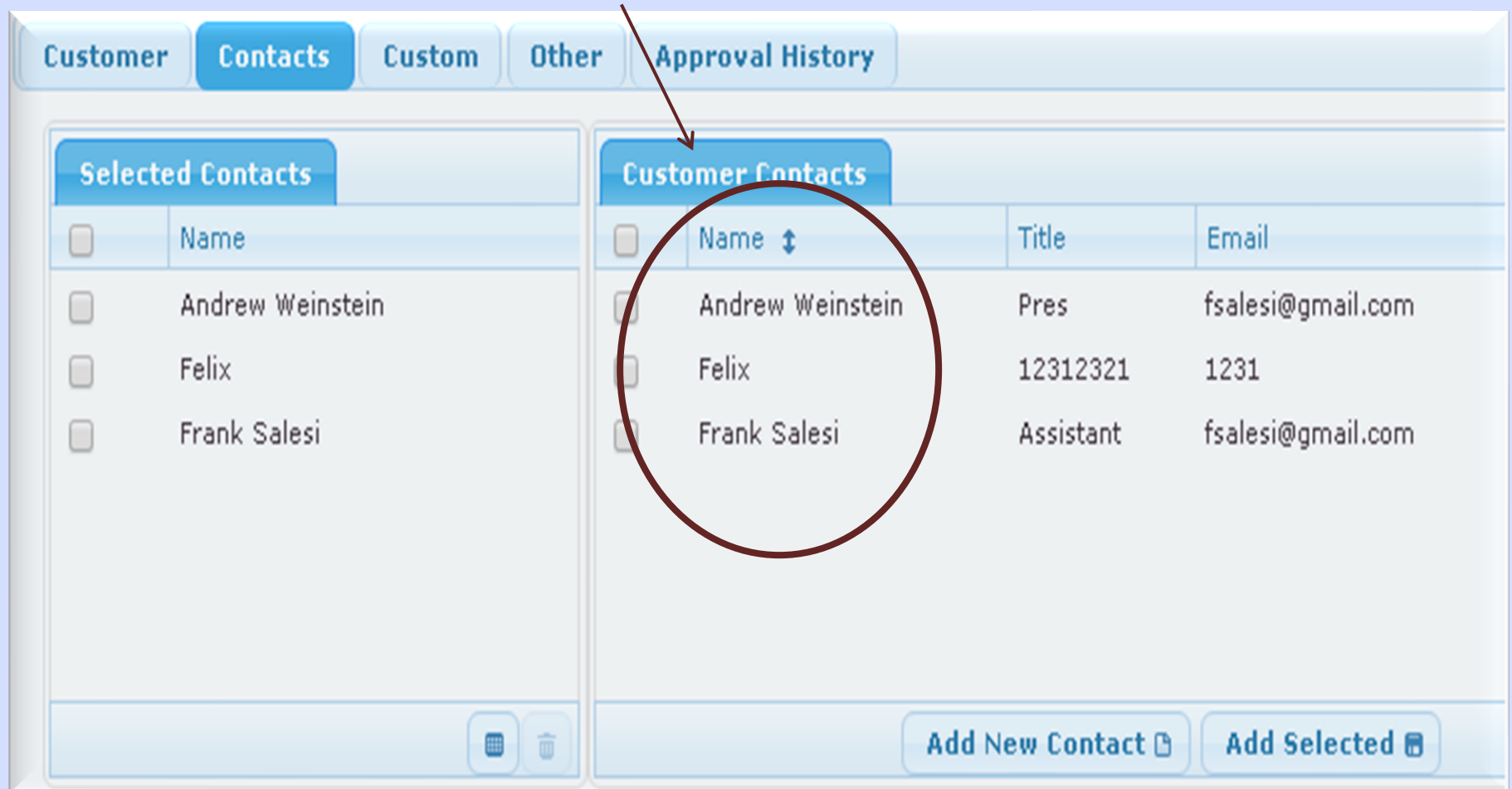
- Customer Nbr:** xx23
- Customer Name:** New Customer *
- Address:** 150 Clove Rd
- Address:** (empty)
- Address:** (empty)
- City:** Little Falls
- State / Zip:** New Jersey, USA ▼ 11212
- Country:** United States of America ▼
- Salesperson:** Willy Loman Incorporated ▼ *
- Originator:** Frank Salesi ▼ *

The 'Copy' button is circled in red, and a red arrow points from the 'Copy' button to the 'Originator' field.

Buttons at the bottom: Save, Delete, Copy, Print, Order, Tax.

Create Quote

Send Quotes to Multiple Contacts at a Customer,
Import Contacts from CRM application

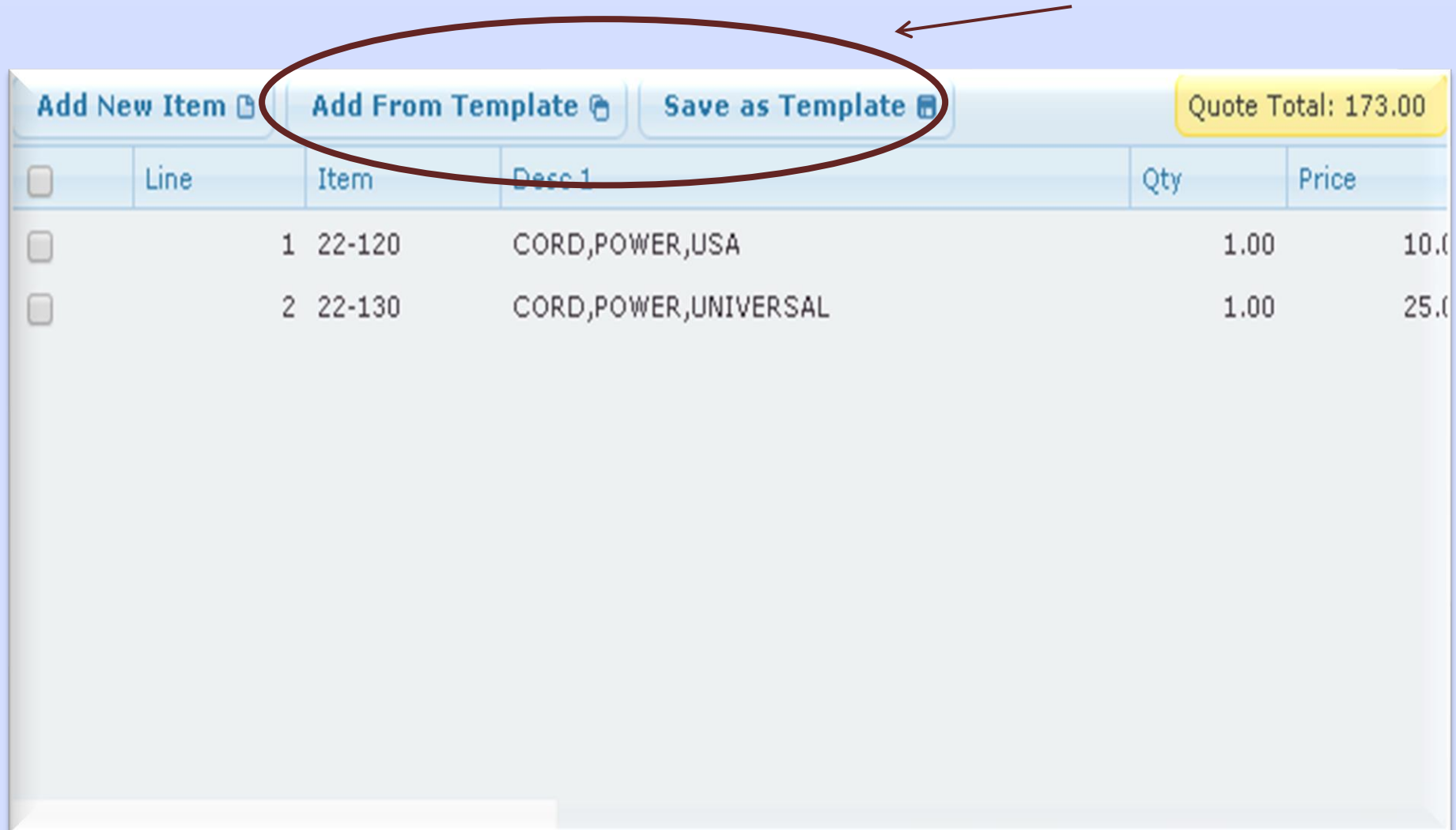


The interface displays two panels for contact management. The left panel, titled 'Selected Contacts', shows a list of three contacts: Andrew Weinstein, Felix, and Frank Salesi. The right panel, titled 'Customer Contacts', shows a table with the same three contacts, including their titles and email addresses. A red circle highlights the 'Customer Contacts' table, and a red arrow points to it from above.

Customer				
Contacts				
Custom				
Other				
Approval History				
Selected Contacts				
<input type="checkbox"/>	Name			
<input type="checkbox"/>	Andrew Weinstein			
<input type="checkbox"/>	Felix			
<input type="checkbox"/>	Frank Salesi			
Customer Contacts				
<input type="checkbox"/>	Name ↑	Title	Email	
<input type="checkbox"/>	Andrew Weinstein	Pres	fsalesi@gmail.com	
<input type="checkbox"/>	Felix	12312321	1231	
<input type="checkbox"/>	Frank Salesi	Assistant	fsalesi@gmail.com	

Create Quote

Add Line Items from Pre-defined Templates

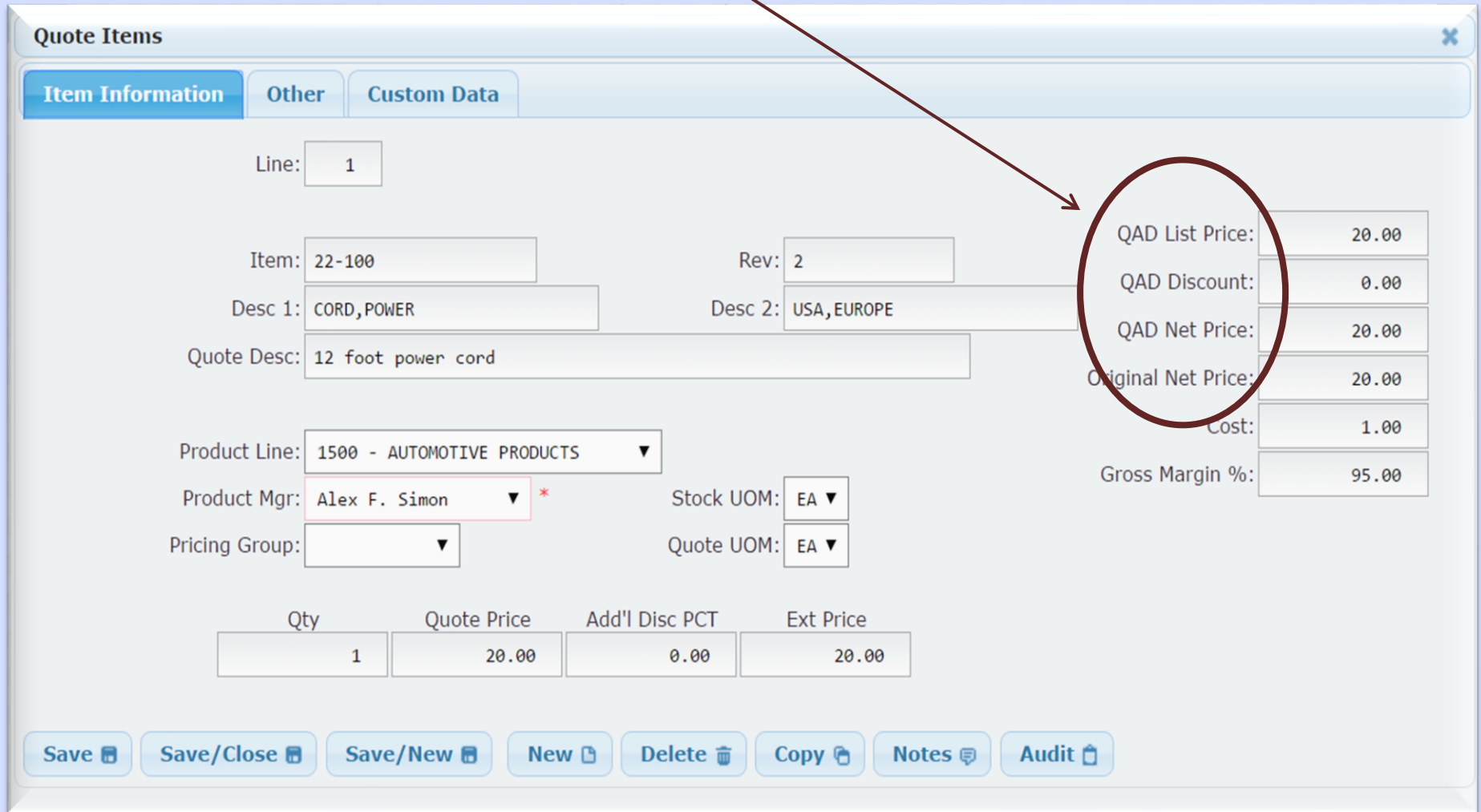


The screenshot displays a software interface for creating a quote. At the top, there are three buttons: 'Add New Item', 'Add From Template', and 'Save as Template'. The 'Add From Template' button is circled in red, and a red arrow points to it from the text 'Add Line Items from Pre-defined Templates'. To the right of these buttons, a yellow box displays 'Quote Total: 173.00'. Below the buttons is a table with the following columns: Line, Item, Desc 1, Qty, and Price. The table contains two rows of data.

Line	Item	Desc 1	Qty	Price
1	22-120	CORD,POWER,USA	1.00	10.0
2	22-130	CORD,POWER,UNIVERSAL	1.00	25.0

Create Quote

QAD Customer Best Pricing and Volume Discounting



Quote Items

Item Information | Other | Custom Data

Line: 1

Item: 22-100 Rev: 2

Desc 1: CORD,POWER Desc 2: USA,EUROPE

Quote Desc: 12 foot power cord

Product Line: 1500 - AUTOMOTIVE PRODUCTS ▼

Product Mgr: Alex F. Simon ▼ *

Pricing Group: ▼ Stock UOM: EA ▼

Quote UOM: EA ▼

Qty	Quote Price	Add'l Disc PCT	Ext Price
1	20.00	0.00	20.00

Pricing Summary:

QAD List Price:	20.00
QAD Discount:	0.00
QAD Net Price:	20.00
Original Net Price:	20.00
Cost:	1.00
Gross Margin %:	95.00

Buttons: Save, Save/Close, Save/New, New, Delete, Copy, Notes, Audit

Create Quote



Route Quote throughout Organization for Collaboration and Approval

Quote Nbr: Q0404501.008

Status: **PENDING** Requestor: **FRANK** Entry Date: 12/23/15 10:40:48.505-05:00

Customer Contacts Custom Other **Approval History**

Show Approval Attempt 1 ▼

Activated Date	Seq ↑	Status	Approver
05/04/16 19:36:34 PM	50.00		Supervisor/Manager
	100.00		Scott Carpenter
	100.00		Finance Group
			Glenn Weinstein 
			Scott Carpenter
			Kelly Anderson
	200.00		Alex F Simon

Create Quote

Ability to Approve, Reject, or Return Quote to a previous Approver

Entry Date: 12/23/15 10:40:48.505-05:00

Other Approval History

Approve ✓ Reject ✕ Return ↶

q ↑	Status	Approver	Actual Approver	Approval Date	Notes	Instructions
50.00	●	Supervisor/Manager	Supervisor/Manager	05/05/16 06:47:36 AM		
100.00	●	Scott Carpenter				
100.00	●	Finance Group				
		Glenn Weinstein				
		Scott Carpenter				
		Kelly Anderson				
200.00		Alex F Simon				

Create Quote

Approve or Reject Quote directly from your eMail notification

File Message

Ignore X Reply Reply All Forward More

Financials To Manager Rutgers Spring ... Done Reply & Delete Create New

Move OneNote Actions

Mark Unread Categorize Follow Up

Translate Find Related Select Zoom

This message was sent with High importance.
If there are problems with how this message is displayed, click here to view it in a web browser.

From: Frank Salesi Sent: Thu 5/5/2016 1:43 PM
To: Andrew Weinstein
Cc:
Subject: Approval Required - Quote Maintenance

iQuote

Scott Carpenter,

Your approval is required for the below request.

Actions: [View](#) [Approve](#) [Reject](#)

Quote	Customer	Salesperson	Total \$	Total + F/T	Margin
Q0404501.008	01000000 Colossal Conglomerates LTD1	Willy Loman Incorporated	35.00	173.00	94.0%

Line	Item	Desc	UOM	Qty	Price	QAD Price	Disc %	Ext	Margin
1	22-120	CORD,POWER,USA	EA	1.0	10.00	20.00 12/02/15	50%	10.00	90.0%
2	22-130	CORD,POWER,UNIVERSAL	EA	1.0	25.00	100.00 12/02/15	75%	25.00	96.0%

Requestor	Request Date
Frank Salesi	12/23/15 10:40 am

Activated On	Seq	Status	Approver	Actual Approver	Approval Date
05/04/2016 19:36:34.699-04:00	50	APPROVED	Supervisor/Manager	Supervisor/Manager	05/05/2016 06:47:36.699-04:00
05/05/2016 06:47:36.711-04:00	100	PENDING	Scott Carpenter		
05/05/2016 06:47:36.711-04:00	100	PENDING	Finance Group		
	200		Alex F Simon		

Create Quote

Capture Customers Signature on Quote Print



The screenshot shows a software window titled "Print Quote" with a close button in the top right corner. A yellow rectangular box within the window is labeled "Customer Signature Below" and is circled in red. A red arrow points from this box to the "Print Quote" title bar. Below the yellow box is a large white area containing a blue handwritten signature that reads "John Hancock". At the bottom of the window, there are three buttons: "Clear Signature", "Delete Signature", and "Save Signature". Below these buttons is a "Use Form:" label followed by a dropdown menu currently set to "US Print". Underneath the dropdown are two checked checkboxes: "Print Customer's Signature:" and "Mark as delivered:". At the very bottom right of the window are two buttons: "Print" and "Close".

Print Quote

Customer Signature Below

John Hancock

Clear Signature Delete Signature Save Signature

Use Form: US Print ▼


Print Customer's Signature: ☒

Mark as delivered: ☒

Print Close


Create Quote

Quote Print with captured Customer Signature



Somero Enterprises Inc.
46980 HWY M26
Houghton, MI 49931
United States of America
Phone : 239-210-6540
Fax : 239-437-4214

Sold To Lincoln Contractors
Supply, Inc.
11111 West Hayes Avenue
Milwaukee, WI 53227
United States of America

QUOTE NUMBER	
Q0000061	
	
ORDER DATE	CUSTOMER NUMBER
03/30/2016	00103466
EXPIRE DATE	CUSTOMER PO NR
04/29/2016	

***** DRAFT *****

Customer	Ship Via	FOB Point	Credit Terms	Purchase Order	Salesperson(s)	Sales Phone
00103466		originpp&add	Payment in Advance		Killock, Myron	906-346-5000

Line	Item Number	Quantity	Price	Price EA	Extended Price
1	0622E Somero S-22E Laser Screed	1.00 EA	408,200.00	408,200.00 0.00 %	408,200.00
2	700301448-00 Extra Storage, S-22E	1.00 EA	1,068.55	801.41 0.00 %	801.41
3	20105 CONTROL VALVE, SELF LVL SYS. MANUAL OVERRIDE	1.00 EA	585.77	585.77 0.00 %	585.77

Thanks and have a nice day

Subtotal: 409,587.18

Sales Freight: 4,500.00

:

:

:

Tax Estimate: 0.00

Net Due (USD): 414,087.18

Dear Somero Enterprises:


Please accept this signed proposal as a Purchase Order and acceptance of the price, terms and conditions on the following page.

Name (Please Print): Sean C. Brown

Title: _____

Company: Lincoln Contractors

Date: _____

Signature: 

The purchaser is responsible for any taxes, duty, customs clearance, delivery or any other charges not specified in this quotation. Tax will be added to the invoice when applicable. Correct Taxes will be calculated at the time of shipment.

May 5, 2016
1 of 3
11:57:42 AM

Quote Inquiry

Search for Quotes using multiple Filters and configure Columns

Quotes

Saved Search:

Quote Nbr:

Quote Status:

Approver:

App Status:

Entered By: Frank

Customer:

Item:

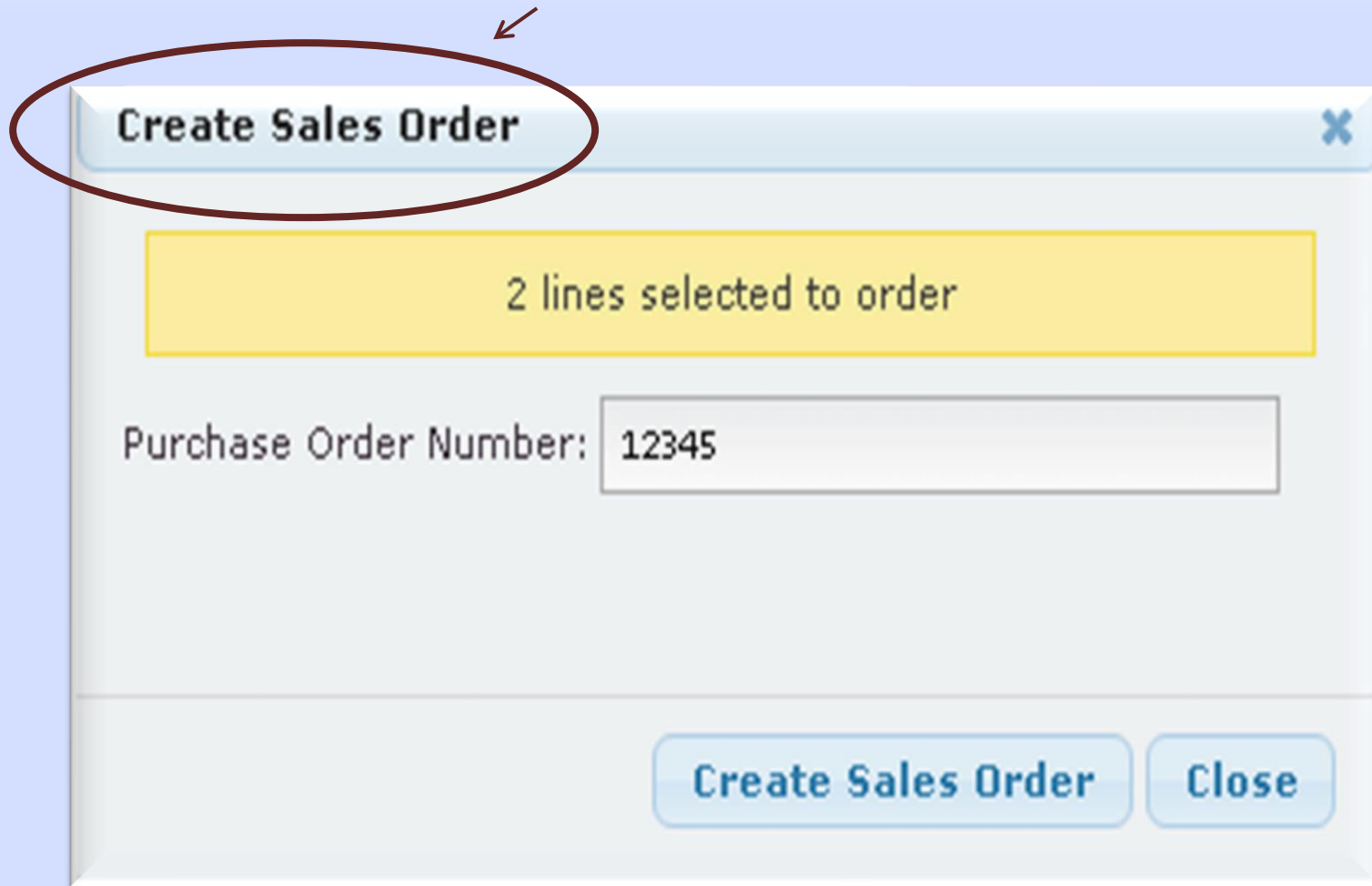
Salesperson:

Quote Browse

Quote# ↑	Last Sales Order	User ↑	Status ↑	Cust Name	Date ↑
Q0404501.008		FRANK	PENDING	Colossal Conglomerates LTD1	12/23/15 10
Q0404501.009		FRANK	PENDING	Colossal Conglomerates LTD1	12/23/15 14
Q0404569		FRANK	NOT SUBMITTED	test new customer	01/18/16 16
Q0404570		FRANK	NOT SUBMITTED	test new customer	01/18/16 16
Q0404573		FRANK	NOT SUBMITTED	Colossal Conglomerates LTD1	01/19/16 16
Q0404574		FRANK	NOT SUBMITTED	Colossal Conglomerates LTD1	01/19/16 16
Q0404576		FRANK	NOT SUBMITTED	Colossal Conglomerates LTD1	01/19/16 16

Create Sales Order

Create QAD Sales Order from Customer Approved Quote



Create Sales Order [X]

2 lines selected to order

Purchase Order Number: 12345

Create Sales Order Close

Create Sales Order

Actual QAD Sales Order Print

Details

Quality Products Inc.
Manufacturing Division
One World Way
Consolidated Business Plaza
San Diego, CA 92130
United States of America

SALES ORDER
SIMULATION
Order Number: S010424 Revision: 0
Order Date: 05/04/16 Page: 1
Print Date: 05/04/16

Sold-To: 01000000

Ship-To: 01000000

Colossal Conglomerates LTD1
Suite 1000 Colossal Building
Colossal Industrial Park
15000 Production Drive
Evanston, IL 090876
United States of America

Colossal Conglomerates LTD1
Suite 1000 Colossal Building
Colossal Industrial Park
15000 Production Drive
Evanston, IL 090876
United States of America

Attention: Bertha Blaise
Telephone: 1-800-333-9000

Attention: Bertha Blaise
Telephone: 1-800-333-9000

Salesperson 1: WL.INC JJP

Purchase Order: 12345
Ship Via: GROUND
FOB Point: iss

Credit Terms: 30
DUE 30 DAYS FROM INVOICE

Resale: P313768

Remarks: ALL SHIPMENTS PER CORP CONTRACT A-009091

Ln	Item Number	Due Date	Qty	Open	UM	Price	Extended Price
1	22-100 CORD, POWER USA, EUROPE	05/05/16	10.0	ea		15.84	158.40
2	newitem Memo Item	05/05/16	1.0	ea		20.00	20.00

Sales Order Inquiry

Sales Order Inquiry with PO #, Sales Order, and Invoice Drill Down

Order Status

Customer: Sales Order: Purchase Order: Invoice Date: [Search](#) [Clear](#)

Open Orders

Customer	Purchase Order	Sales Order	Order Date	Partial	Status	Ship Via
01000000		1234 Print		✓		AIR SRI LANKA
01000000	12345	SO10424 Print	05-04-2016		HD	GROUND
01000000	PODEMO1	SO10423 Print	04-18-2016		HD	GROUND
01000000	20160414	SO10422 Print	04-14-2016		HD	GROUND
01000000	211231	SO10421 Print	02-04-2016		HD	ups
01000000	dummyspo	SO10420 Print	01-25-2016		HD	GROUND
01000000	ANDY01	SO10418 Print	12-22-2015		HD	GROUND
01000000	dummyspo	SO10415 Print	12-21-2015		HD	GROUND

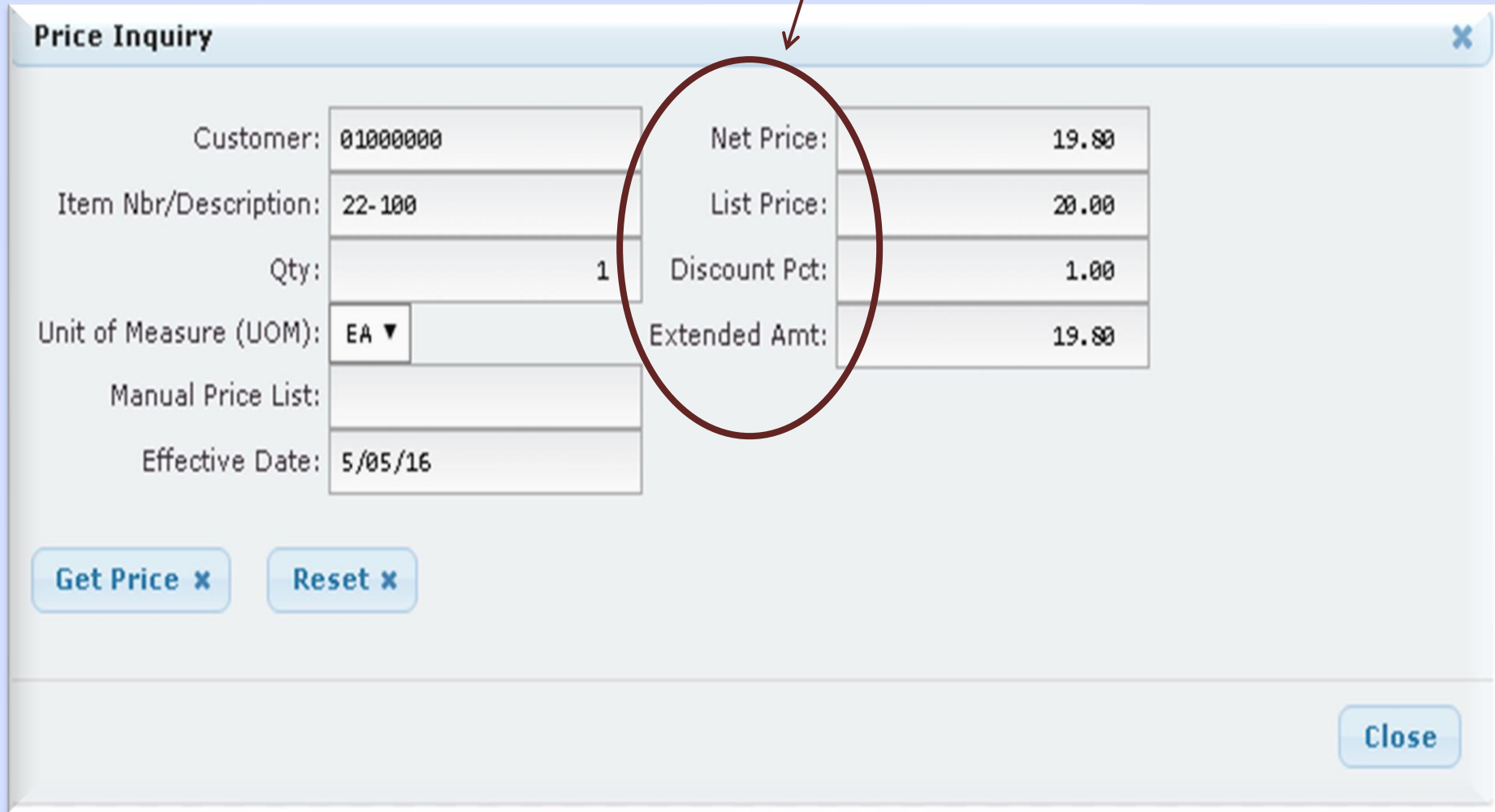
Page Size: 50

Shipped Orders

Customer	Purchase Order	Sales Order	Order Date	Ship Date	Partial	Tracking Number	Invoice Number	Ship Via
01000000		1234		03-07-1994	✓		IV300008 Print	AIR SRI LANKA
01000000	PO-1000	10000	06-12-1992	06-12-1992	✓	P313768	10001 Print	AIR SRI LANKA
01000000	po-1000	10002	06-12-1992	06-12-1992	✓	p313768	10002 Print	AIR SRI LANKA
01000000		10004	06-12-1992	06-12-1992	✓		10004 Print	AIR SRI LANKA
01000000	po-1000	10006	05-01-1992	06-01-1992	✓	RPT-992A1	10006 Print	AIR SRI LANKA

Pricing Inquiry

QAD Customer Best Pricing Inquiry



Price Inquiry [X]

Customer:	01000000	Net Price:	19.80
Item Nbr/Description:	22-100	List Price:	20.00
Qty:	1	Discount Pct:	1.00
Unit of Measure (UOM):	EA ▼	Extended Amt:	19.80
Manual Price List:			
Effective Date:	5/05/16		

Get Price [X] **Reset** [X]

Close

Contact Information

Please visit our website for more information about ISS Group
and feel free to request a detailed demonstration

www.ISSGroup.com

