

Brian Laufer

Vice President, QuoteWerks

THIRD ANNUAL

QUOTEWERKS

March 2 - 4, 2020

| Train.Quote.Grow

| Orlando, FL

USER SUMMIT



QuoteWerks



Distributor Real-Time Pricing
& Availability



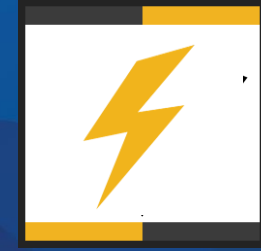
FedEx & UPS Shipping
Integration



Tax Rate Lookup



Leasing



Real-Time Module

QuoteWerks



Online Purchase Orders





No more importing products



Upsell / Cross Sell



Amazon Search



Product Content Subscription (Etilize)

QuoteWerks



intuit
quickbooks®

QuoteWerks®



QuoteValet

QuoteWerks

QuoteValet Insight

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Dashboard → StatusBoard

Priority Notifications (Showing 8 of 8)

Quote FLAQ2147 for Your Company

Brian Laufer

October 7, 2013 11:00 AM (25 days ago)

Accepted

Paid \$3,376.97
25 days old

Quote FLAQ2146 for Professional IT Company

Brian Laufer

October 7, 2013 10:43 AM (25 days ago)

Accepted

Accepted \$31,247.21
25 days old

Quote FLAQ2140 for ACME Corporation

John Lewie

September 30, 2013 4:42 PM (32 days ago)

Accepted

Paid \$2,117.97
32 days old

Quote FLAQ2139 for Your IT Company

Joshua Buzzard

September 30, 2013 4:10 PM (32 days ago)

QuestionPostedByCustomer

Open \$4,831.40
32 days old

Quote FLAQ2138 for XYZ Company

Brian Laufer

September 30, 2013 4:10 PM (32 days ago)

QuestionPostedByCustomer

Open \$3,474.68
31 days old

Quote FLAQ2136 for ABC Company

Brian Laufer

September 30, 2013 12:24 PM (32 days ago)

QuestionPostedByCustomer

Open \$3,011.52
32 days old

Quote FLAQ2135 for Laufer Labs

QuoteWerks Sales

September 30, 2013 12:20 PM (32 days ago)

Accepted

Accepted \$1,886.38
32 days old

Quote FLAQ2134 for Laufer Labs

Joshua Buzzard

September 30, 2013 12:13 PM (32 days ago)

QuestionPostedByCustomer

Open \$5,559.79
30 days old

Today

Quotes Sent 0
Quotes Accepted 0
Customer Views 0

Inbox (10)

Administrator 1
Brandon 1
Brian Laufer 4
Evan Dobkin 0
Guest 0
Jen Juneau 0
Joe Sales 0
John Lewie 2
John Smith 0
Joshua Buzzard 2
Mike Krzenski 0
Norm Hebert 0
QuoteWerks Sales 0
StandardUser 0
Test 0

Top (\$) Accepted Quotes This Year

Accepted \$31,247.21
25 days old

Accepted October 7, 2013 10:43 AM
Delivered October 7, 2013 10:41 AM

Quote FLAQ2146 for Professional IT Compa...

Platinum Server Package

Brian Laufer Delivered October 7, 2013 10:41 AM

Paid \$3,376.97
25 days old

Paid October 7, 2013
Accepted October 7, 2013 11:00 AM
Delivered October 7, 2013 10:59 AM

Quote FLAQ2147 for Your Company

Quote for renewal

Brian Laufer Delivered October 7, 2013 10:59 AM

Paid \$2,117.97
32 days old

Paid September 30, 2013
Accepted September 30, 2013 4:42 PM
Delivered September 30, 2013 4:41 PM

Quote FLAQ2140 for ACME Corporation

ACME Corporation - Silver Renewal Package

John Lewie Delivered September 30, 2013 4:41 PM

QuoteValet Mobile

New ▾ QuoteValet Mobile Submit

Aspire Technologies, Inc. - Tripp Lite Package


Gold Renewal Package

New QV Mobile Template

Quote Template - Workstation Bundle

Services List

Phone Number

More 

Back QuoteValet Mobile

Email*

Name

Company Name

Address

City

State




























Postal Code

Phone Number

Introduction Notes

Document Name

New ▾ QuoteValet Mobile Submit

	Seagate Constellation ES 3.1 TB 3.5" Internal Hard Drive - SATA - 7200rpm - 128 MB Buffer	\$175.00	 1 	\$175.00	
	Cisco Catalyst Ethernet Switch - 8 Ports - Manageable - 8 x PoE - 2 x PoE+ - 10/100/1000Base-T - PoE Ports - Desktop, Wall Mountable	\$1,142.93	 1 	\$1,142.93	
	Cisco Cisco SMARTnet Extended Service	\$92.00	 1 	\$92.00	
	Cisco Layer 3 Switch - Manageable - Stack Port - 13 x Expansion Slots	\$7,057.60	 1 	\$7,057.60	
	Cisco 888E Security Router - 5 Ports - SlotsSHDSL - Desktop, Wall Mountable	\$1,041.79	 1 	\$1,041.79	
	Cisco IOS SSL VPN - License	\$214.43	 1 	\$214.43	
	Installation Fee	\$150.00	 3 	\$450.00	

SubTotal

\$10,173.75

Sales Tax

\$777.90

Grand Total

\$10,951.65

QuoteWerks

QuoteValet Shopping Cart

QuoteWerks

<http://www.quotewerks.com>

407-248-1481

7680 Universal Blvd, Suite 360, Orlando, Florida 32819







Order Form

QVAQ1023

QTY	Description	Picture	Unit Price	Ext Price
Choose your TV				
<input checked="" type="radio"/> 1	NEC Display MultiSync MD301C4 30" LCD Monitor - 16:10 - 7 ms - Adjustable Display Angle - 2560 x 1600 - 1.07 Billion Colors - 350 Nit - 1,000:1 - DVI - VGA - USB - WEEE, RoHS, MPR II, MPR III, Energy Star		\$1,230.00	\$1,230.00
<input type="radio"/> 1	LG 32LD345H 32" 720p LCD TV - 16:9 - ATSC - NTSC - 1366 x 768 - Surround Sound - USB - Ethernet		\$430.00	\$430.00
<input type="radio"/> 1	LG 42PW450 42" 3D 720p Plasma TV - 16:9 - HDTV - 100 Hz - NTSC, PAL, SECAM - 1024 x 768 - Surround Sound, Dolby Digital - 3 x HDMI - USB		\$334.00	\$334.00
Choose a Wireless Router				
<input checked="" type="radio"/> 1	Cisco 886GW Wireless Integrated Services Router - IEEE 802.11n - ISM Band - 54 Mbps Wireless Speed - 4 x Network Port - USB		\$90.00	\$90.00
<input type="radio"/> 1	Asus SuperSpeedN RT-N12 Wireless Router - IEEE 802.11n - 2 x Antenna - ISM Band - 300 Mbps Wireless Speed - 4 x Network Port - 1 x Broadband Port Desktop, Wall Mountable		\$130.00	\$130.00
<input type="radio"/> 1	Netgear WNDR3800 Wireless Router - IEEE 802.11n - ISM Band - UNII Band - 300 Mbps Wireless Speed - 4 x Network Port - 1 x Broadband Port - USB Desktop		\$43.00	\$43.00
<input type="radio"/> 1	Zyxel P663HN-51 Wireless Router - IEEE 802.11n - 2 x Antenna - ISM Band - 300 Mbps Wireless Speed - 4 x Network Port Desktop		\$68.00	\$68.00
Choose your Game(s)				

Approvals & Peer Reviews

Home Mobile Dashboard Find Admin Logout			
Dashboard → Approvals			
State Approval Pending			
	<p>Quote FLAQ2145 for ACME Corporation ACME Corporation - Silver Renewal Package John Lew Approval Requested on Today 9:53 AM</p> <p>View Approval Page Activity History Send Note</p>	<p>Open \$2,117.97 0 days old</p> <p>ApprovalReq Today 9:53 AM PeerReviewReq Today 9:53 AM</p>	
	<p>Quote FLAQ2144 for ABC Company ABC Company- Server Package Brian Laufer Approval Requested on Today 9:51 AM</p> <p>View Approval Page Activity History Send Note</p>	<p>Open \$3,011.52 0 days old</p> <p>ApprovalReq Today 9:51 AM PeerReviewReq Today 9:51 AM</p>	
	<p>Quote FLAQ2143 for Laufer Labs Cisco SMARTNet Package Joshua Buzzard Approval Requested on Today 9:36 AM</p> <p>View Approval Page Activity History Send Note</p>	<p>Open \$5,957.23 0 days old</p> <p>ApprovalReq Today 9:36 AM PeerReviewReq Today 9:54 AM</p>	
	<p>Quote FLAQ2142 for ABC Company ABC Company- Server Package Brandon Grant Approval Requested on Yesterday 12:01 PM</p> <p>View Approval Page Activity History Send Note</p>	<p>Open \$3,011.52 1 day old</p> <p>ApprovalReq Yesterday 12:01 PM PeerReviewReq Yesterday 11:59 AM</p>	
Page 1 of 1 (4 Total Records)			

Quote FLAQ2330

Prepared For:

Aspire Technologies, Inc
 Brian Laufer
 Phone: (407) 248-1481
 7680 Universal Blvd
 Suite 360
 Orlando, FL 32819
 brian.laufer@quotewerks.com

Prepared By:

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 Sales Associate
 Phone: (407) 248-1481
 Fax: (407) 248-1482
 Email: brandonquotewerks@gmail.com


Signature


Why QuoteWerks?



Webinar



QuoteWerks Year in Re...



Save time with Quote...



For the full presentation proposal, [click here](#) to view or download the PDF version of this quote. You can sign and fax this in, or you can save time by simply electronically accepting this quote below.

Line Item Detail

QTY	Description	Picture	Video	Unit Price	Ext Price
1	Seagate Constellation ES.3 ST1000NM0033 1 TB 3.5" Internal Hard Drive - SATA - 7200 rpm - 128 MB Buffer			\$175.00	\$175.00
1	Cisco Catalyst Ethernet Switch - 8 Ports - Manageable - 8 x POE - 2 x POE+ - 10/100/1000Base-T - PoE Ports - Desktop, Wall Mountable			\$1,142.93	\$1,142.93
1	Cisco Cisco SMARTnet Extended Service			\$92.00	\$92.00

QuoteValet Videos

QuoteWerks

QuoteValet Questions

✦ Have Questions?

Not Ready To Accept? Have Questions?

Submit

(Note, you will receive a copy of your message by email.)

QuoteWerks Sales said December 4, 2015 @ 3:23 pm

Hi John! No problem I'll update your quote immediately.

John Smith said December 4, 2015 @ 3:21 pm

I don't think I will need the warranty. Can you please remove that from the quote?

Time expressed in Eastern Standard Time UTC-05:00

QuoteValet Notifications

QuoteWerks Dashboard

My Summary | **QuoteValet**

QuoteValet Dashboard

Launch QuoteValet Insight

Inbox | Reporting | Payments

User: Administrator | Dismiss All

LOST - Quote FLAQ2236 for 'Aspire Technologies, Inc.'

\$4,385.70 Aspire Technologies, Inc. - Silver Package [exp January 3, 2016]

[QuoteWerks Sales] Delivered Today 3:35 pm

More

Open

View

Dismiss

Open (EXPIRED) - Quote FLAQ2235 for 'Aspire Technologies, Inc.'

\$4,385.70 Aspire Technologies, Inc. - Gold Package [exp Yesterday]

[QuoteWerks Sales] Delivered Today 4:08 pm

More

Open

View

Dismiss

PAID - Quote FLAQ2078 for 'Aspire Technologies, Inc.'

\$1,441.83 Aspire Technologies, Inc. [exp December 13, 2012]

[QuoteWerks Sales] Delivered December 6, 2012 5:41 pm

More

Open

View

Dismiss

PAID - Quote FLAQ2076 for 'Aspire Technologies, Inc.'

\$1,441.83 Aspire Technologies, Inc. - Tuesday, November 13, 2012 [exp December 13, 2012]

[QuoteWerks Sales] Delivered December 6, 2012 5:35 pm

More

Open

View

Dismiss

OrderForm Submitted - OrderForm QVAQ1019 for 'Thor's Heavy Equipment'

\$2,174.20 Workitation Order Form

[QuoteWerks Sales] Delivered November 14, 2012 8:26 pm

More

Open/Sync

View

Dismiss

OrderForm Submitted - OrderForm QVAQ1018 for 'Thor's Heavy Equipment'

\$2,174.20 Workitation Order Form

[QuoteWerks Sales] Delivered November 14, 2012 6:00 pm

More

Open/Sync

View

Dismiss

OrderForm Submitted - OrderForm QVAQ1014 for 'Thor's Heavy Equipment'

\$2,012.20 Workitation Order Form

[QuoteWerks Sales] Delivered November 14, 2012 5:54 pm

More

Open/Sync

View

Dismiss

ACCEPTED (PROXY) - Quote FLAQ2072 for 'Aspire Technologies, Inc.'

\$2,154.07 QuoteWerks Order [exp December 8, 2012]

[QuoteWerks Sales]

More

Open/Sync

View

Dismiss

December 6, 2012 5:38 pm

Payment Received by Proxy \$1441.83 - Check

December 6, 2012 5:37 pm

Customer viewed Payment Request

December 6, 2012 5:37 pm

Customer ACCEPTED the quote

December 6, 2012 5:36 pm

Sales Rep posted a comment

December 6, 2012 5:36 pm

Customer posted a comment

December 6, 2012 5:36 pm

Customer viewed PDF attachment

December 6, 2012 5:36 pm

Customer viewed document [1 at time]

December 6, 2012 5:35 pm

Created and uploaded for Customer by QuoteWerks Sales

Show activity for FLAQ2076

QuoteValet Tips

QuoteValet is the online quote delivery and acceptance vehicle for QuoteWerks. QuoteValet is a more robust way to deliver quotes to your customers and prospects.

Get the most out of your Subscription:

- QuoteValet Web**
Gain insight and have mobile access to your QuoteValet Executive Dashboard, Leaderboard, Inbox, Peer Reviews, and Approvals, anywhere, anytime from any web device like your phone, tablet, or PC. [Learn more](#)
- QuoteValet Mobile**
Create quotes on your iPad while working with a customer. [Learn more](#)
- QuoteValet Shopping Cart**
Automate customer re-orders or receive paid orders from a promotional email blast. [Learn more](#)
- Peer Reviews and Approvals**
Supervisors can use QuoteValet to approve quotes while out of the office through their web browser. Peers can submit peer review feedback while out of the office through their web browser. [Learn more](#)
- Customize**
Customize the look and feel of your QuoteValet templates including capturing written signatures. [Watch a Video](#)

QuoteWerks

QuoteValet Assistant

QuoteValet Auto-Reminders

Recipient Reminders

☒ Remind Recipient if document NOT VIEWED within 2 days

☒ Remind Recipient when document is EXPIRING in 3 days

☐ Remind Recipient when document is accepted but NOT PAID after 7 days

SalesRep Reminders

☒ Remind SalesRep if document NOT VIEWED within 3 days

☒ Remind SalesRep when document is EXPIRING in 3 days

☐ Remind SalesRep when document is accepted but NOT PAID after 7 days

Ok Cancel

QuoteValet **Acceptance**

Ready to Accept?

Order Confirmation

We reserve the right to cancel orders arising from errors, inaccuracies, or omissions.

☒ I agree to the terms and conditions of the above document and PDF attachment with an electronic signature below.

IP Address

0.0.0.0

PO Number

(Optional: Enter PO Number as your reference only.)


Comments

Email Address

Printed Name

Signature

Clear


John Smith

Click to Accept

(Note: After accepting you will have the opportunity to provide payment.)

QuoteWerks

QuoteValet Payment

QuoteWerks®

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407-248-1481

7680 Universal Blvd, Suite 360, Orlando, FL 32819

Make a Payment

RE: FLAQ2346 - Project ABC ([View](#))

<input checked="" type="radio"/> Credit Card	\$16,150.61 Amount	\$523.28 Surcharge	\$16,673.89 Total
--	------------------------------	------------------------------	-----------------------------



Credit Card Details

Card type

Name on card

Card number

Expiration date

Security Code

Billing Address

Country

Street Address

City

State

Postal Code

Notes for Sales Rep

<input type="radio"/> Check	\$16,150.61 Amount		\$16,150.61 Total
<input type="radio"/> eCheck/ACH	\$16,150.61 Amount		\$16,150.61 Total

Amount

\$16,673.89

Full Amount

Note: We will never ask for your Social Security Number, birth date, Login ID or password.

Payment History

Total payments made to date: \$0.00 (\$16,150.61 balance remaining)



The image features a stylized house-shaped graphic centered on a dark blue background with a geometric, low-poly pattern. The house has a white triangular roof and a white rectangular base. The roof contains the 'QuoteWerks' logo, with 'Quote' in orange and 'Werks' in black. The main body of the house is divided into six vertical sections by yellow borders. The first, third, fifth, and sixth sections are yellow and contain the words 'PRICE', 'SUPPORT', 'FEATURES', and 'INTEGRATIONS' respectively, written vertically in black. The second and fourth sections are dark blue and are empty. The entire graphic is set against the blue geometric background.

QuoteWerks

PRICE

SUPPORT

FEATURES

INTEGRATIONS

QuoteWerks

QuoteWerks Pillars

Price

- Flexible Pricing
- Concurrent Users
- Subscription Options
- No Commitments

QuoteWerks Pillars **Support**



QuoteWerks Pillars **Features**

Will it benefit the
community rather
than the individual?

Are we making it
easier for you to
create **professional**
looking **quotes**?

Will it help you
reduce errors or
save time?

55+ integrations

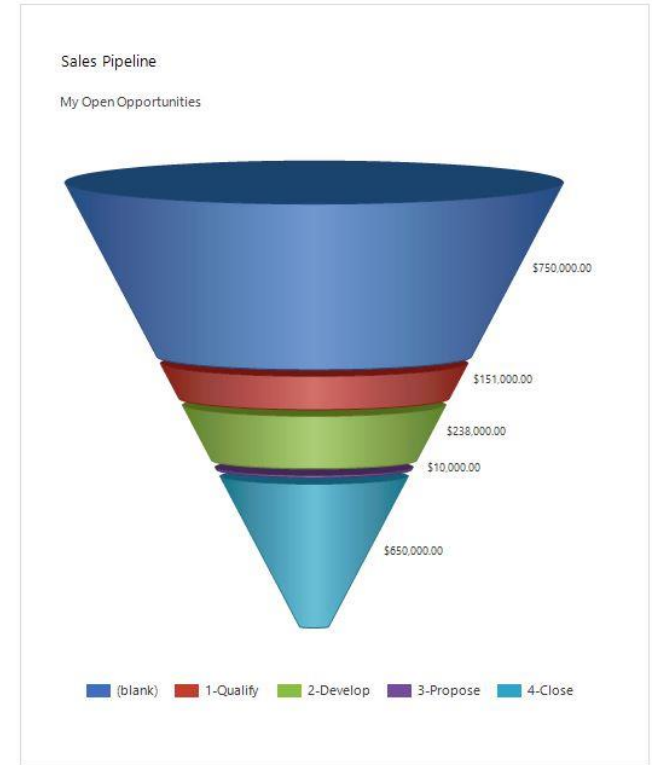


QuoteWerks Pillars Integrations

QuoteWerks

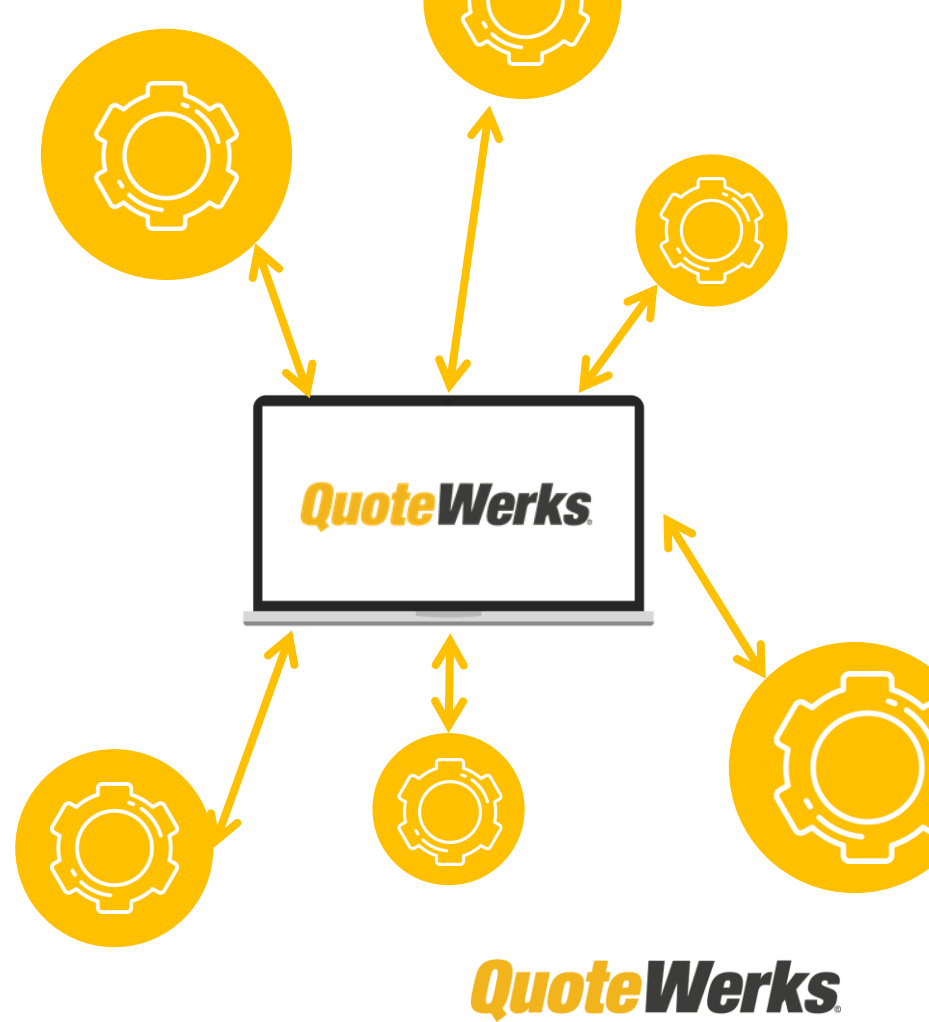
Opportunities

Sales Activity Social Dashboard ▾



QuoteWerks

Development Partners





Development Partners

QuoteWerks



⊘ No Roadmap

✓ New Opportunities



New API Endpoints

Product API

- Custom Fields
- Recurring Data
- And more!

QuoteWerks

Leasing

Credit Application
Line Items



GreatAmerica[®]

FINANCIAL SERVICES

HARD WORK • INTEGRITY • EXCELLENCE

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New Integration?



New Integration

- We Control Development
- Supported by QuoteWerks
- Integrate directly with BMS
- QuoteWerks Web + Kaseya BMS
- Many Integration Points
 - Account, Contact, Location, Employees,
 - Opportunities, Activities, Quotes, Quote Items,
 - Products, Services, Attachments, Lists, Custom
 - Fields, and more...

QuoteWerks

Feedback

