



Product Introduction Letter

2010 February 5<sup>th</sup>

Dear Potential Client:

Welcome to QuoteSoftware.com. Our mandate is to provide you with customized, cost-effective software. We make our product to reflect the way that you do business, fulfilling your quotation, invoicing, inventory and overall processing needs.

Through 20 years of developing customized software, we've been challenged and privileged to work with companies in an array of industries. We understand the quotation process. Our insight into streamlining and improving the generation, quality and management of quotes has historically translated into improved sales for our customers. Let our expertise do the same for you.

This letter introduces our base quotation product, our methodology and highlights aspects for you to consider in selecting a quote software system. For more detailed information please visit the Product Tours section of the QuoteSoftware.com website and peruse our two detailed PDF documents: non-mfg generic (*QSD-PT-non-mfg-generic.pdf*) and mfg Hoists (*QSD-PT-0011-HST.pdf*).

What's the QuoteSoftware.com methodology of working for your business? First, we research and understand your quotation / business process. We get to know the logistics of how you currently make quotes. Then, we deduce how to improve and streamline this process with software. We develop a software solution, based on our core product, that is customized to your business principles and practices and package the elements together for you.



QuoteSoftware.com's 20 years of industry experience means we understand where off-the-shelf packages don't measure up. We know how to succeed in our business and how to help you succeed in yours. Our goal is to create a system that works for you and makes you money. You're not an off-the-shelf business, so why settle for an off-the-shelf package? Our software allows you to do business your way, rather than having to reconfigure your business to a pre-established software package. You'll find the initial investment in QuoteSoftware.com material makes the long-run payoff come faster, as you work with a more productive, efficient, sales-oriented system that gives you better ROI.

Each account is unique to us and it therefore takes a unique amount of time to design and build a customized package. Our time frame ranges from a few weeks to several months. We build a strong relationship with our clients throughout this period, ensuring all aspects of your company needs are addressed in the final product.

Our core product and large repository of software modules from previous work affords significant experience-based material on which to draw as we build your package. Our modules are built recursively on top of more generic base modules. This allows us to produce complicated software expeditiously. Of course, there are exceptions and if you feel your company needs are more complicated than the average, rest assured we can handle it. In one case we relocated a staff member to Tennessee, USA for a two-year hoist quotation project.



Our systems are database oriented, with a focus on ease of management and clear organization and functionality. We centralize your repository of quotes in either an online or local network database. The system then provides functionality to sales staff and management to safely and effectively run quotes and reports. All staff members are able to access the same data simultaneously without conflicting with the work of others.

Our systems are not accounting systems, though some accounting features are available; QuoteSoftware.com's primary focus is the generation and management of quotes. Inventory and other business processes, such as product configuration and BOM generation, are also available within our systems. The quotes and their data can be exported as XML files to be imported into other systems such as ordering and accounting systems. A link to your corporate ERP system is also available via SQL-JDBC/ODBC.

### Software Functionality:

- Manage your quotes and inventory securely online with industrial grade security.
- Generate quotes with pricing.
- Generate invoices and purchase orders.
- Generate bill of materials (BOMs).
- Analyze your data and produce meaningful reports.
- Use Integrated contact management (CRM).



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### Aspects to consider in a quotation system are:

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1. **Who needs to access the system and for what purpose?** *Admin* will need access to get overview dashboard and summary information. *Sales staff* will need access to quickly generate new quotes and view previous quotes when dealing with clients. Ideally, a system should allow permitted staff to access data within seconds, enabling them to provide immediate answers to live questions.
2. **Reports.** The software should generate printable *summary* reports about the quotations, such as dollars and active status'. It should also provide *additional reports* with information about which models and parts are being ordered, how many and by whom. These reports provide real tangible business intelligence and are in addition to the printing of basic quotes, purchase orders and invoices.

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### Quotation & ERP

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What's the advantage of a quotation system in relation to an enterprise resource planning system? A quotation system provides critical information about sales potential. ERP systems provide information about sales you won based on the orders, but often fail to provide information about the business you are losing. Quotation systems track which clients consistently do not "go with you" and which ones do and what you are quoting. This is invaluable information for expanding your business; it illuminates immediate business opportunities.



Java and Windows: We Offer Both

We build two kinds of systems: Java based and Microsoft Windows based. We recommend the Java system, as it operates online and is more Internet savvy. It allows staff to securely access data from any web-enabled browser, both inside and outside the office, thus increasing flexibility in your own business dealings. Because of this increased flexibility, we see these Java systems as the future. However, we continue to offer Windows-based systems for those who prefer this route.

The screenshot shows a web browser window titled "QSS-HST - Mozilla Firefox". The address bar shows a local file path. The page features the "Hoist & Crane QUOTATION" logo and a "QSS encrypted" badge. The main content area is titled "Mechanical Properties:" and displays the following information:

- Product Type: Hoist
- Model Code: EC
- Capacity: 1000 lbs
- Model No.: EC1009-10
- Speed (rpm): 9
- Suspension/Trolley: Swivel Hook
- Lift (ft)\* max: 10
- Pushbutton Pendant: [dropdown]
- \* Stock lifts ship sooner. Stocks are: 10, 15, 20 ft.
- Push Button Station Required:
- ACL/T Pendant Throttle (accessory):
- Motor Ph.: 1
- Motor HP: 0.25
- Ship Wt.: 110
- Dim A: 16-7/8

At the bottom of the form, it says "Coffing Hoists" and "User Price: \$ 2,057.00 USD". Navigation buttons include "< Cancel", "Page 2.1 of 3", "< Previous", and "Next >". A status bar at the bottom left indicates "Applet HST started".

Typical product selection screen (Java web-based).



Please browse our website or contact us for more detailed samples of what our software looks like and how it can be made to function for you.

### Contact

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