QuoteValet

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

Rather than attaching a PDF file to the quote and emailing it to your customer (where spam filters strip it out), QuoteValet will create a personalized web page to present the quote on quotevalet.com

The advantage of using QuoteValet is that you actually know when your customer has received the quote. You will know when they have viewed the quote and how often they review the quote.

Your customer will be able to change quote options dynamically and ask you questions through the customized quote page – keeping all communications together. Most importantly, they will also be able to electronically accept and sign the quote!

You can then collect credit card payments from the customer that is directly deposited into your checking account.

Modern Quote Delivery™…. And more:

■ Know when Quotes are Viewed & Accepted

Know every time your customer views the quote, selects options, has questions and when they electronically sign and make payment

■ Approval & Peer Review

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. In QuoteWerks, you can set approval requirements for your sales reps that require them to obtain approval before a quote can be sent.

■ Collect Credit Card Payments from Customers

The QuoteValet subscription also allows you to collect deposits, progress payments, balances and even export payments to Quickbooks. It supports over 80 gateways including PayPal, QuickBooks Merchants & Authorize.net.

■ QuoteValet Web

Gain insight and have mobile access to your QuoteValet Executive Dashboard, Leaderboard, Inbox, Peer Reviews & Approvals, anywhere, anytime from any web device like your phone, tablet or pc.

■ QuoteValet Mobile

QuoteValet Mobile enables you to create Quote-on-the-Go with your iPad or any HTML5 compatible tablet or browser.

Deliver, Collaborate, Close with QuoteValet!

Deliver

- Know when your quotes are actually received and viewed
- Avoid spam filters tripping out your proposal PDF attachments
- Avoid email servers rejecting large PDF proposal attachments
- Extend your company brand with a specialized quote delivery webpage

Collaborate

- Interactively refine the elements in your quote with the customer through QuoteValet's collaboration features
- Customers can view the quote, select options and ask questions
- Your peers can review your quote offering valuable feedback
- Managers can approve quote before they are submitted to the customer

Close

- Get customers signatures electronically – no more signing and faxing
- Capture your customers' signature graphical or text based signature
- Customers can view and accept your quotes from their mobile devices
- Receive SMS text notifications on your phone when large quotes are accepted
- Automatically receive an email notification when your customer accepts the quote

QuoteValet is Template Driven & Customizable

Extend your company brand and image. QuoteValet is a turn-key solution that enables you to be up and running within 3 minutes. You can also customize QuoteValet website templates so that QuoteValet can look like it is part of your website.

A QuoteValet Quote can include both the interactive elements (like selecting options) on the webpage and/or a PDF quote/proposal attachment.

If you prefer, the template can simply show a non-interactive image of each page in your PDF file allowing the customer to review and electronically sign.
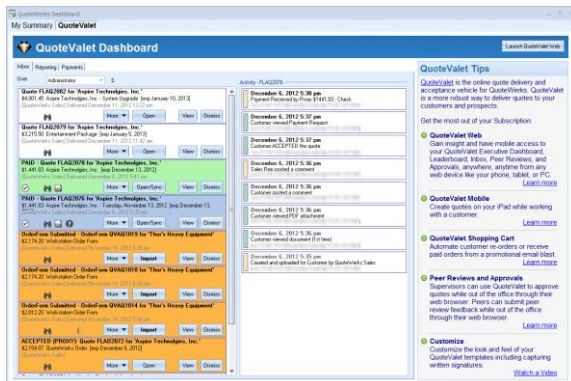

View an enlarged screenshot of an interactive QuoteValet Quote.

QuoteValet is Cross Browser Compatible

QuoteValet works in all web browsers (including mobile devices) ensuring your customers have a smooth and pleasant experience.

The QuoteValet Dashboard

The QuoteValet dashboard is designed to help you stay on the top of all your pending quotes by providing one place to see all new notifications. The QuoteValet dashboard is divided into the Inbox, Reporting & payments