CRMTRAK
CRM that makes sense

CRMTrak

Making Sales Quotes Easy!

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- Usual Sales Quote Challenges
  - Inconsistent product descriptions
  - No central data repository
  - Improper calculations
  - Too time intensive to prepare
  - No visibility regarding open quotes
  - Disconnected contact and quote management

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- CRMTrak Solution
  - Integrated Contact Management
  - Integrated Product Catalog
  - Add products to QuoteBuilder with a click
  - Produce branded PDF quotes
  - Email PDFs directly to customers
  - Show single price or list/discount/net
  - All math is calculated on-the-fly
  - Track all open quotes

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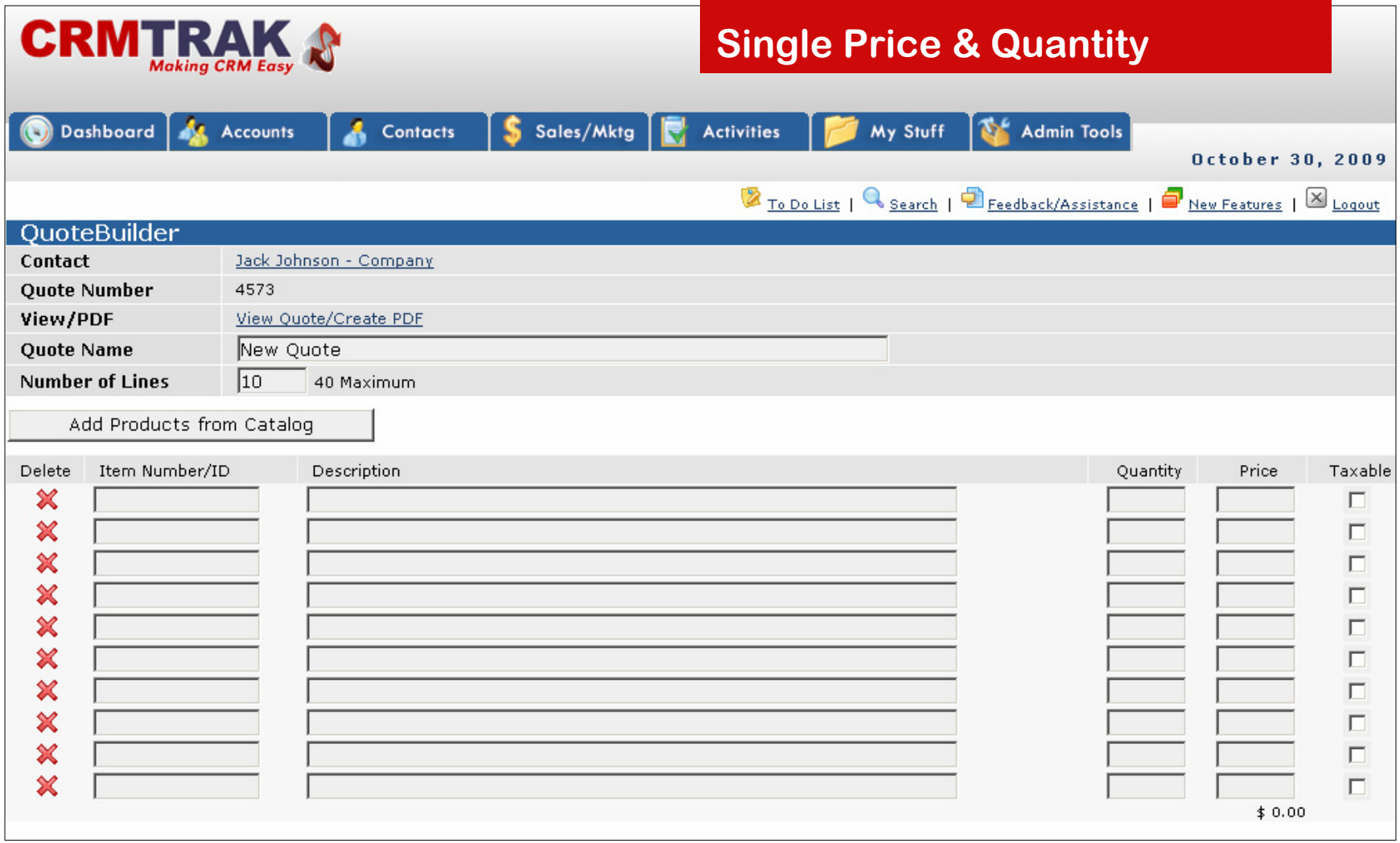
Quote Format Option:
Single Price & Quantity



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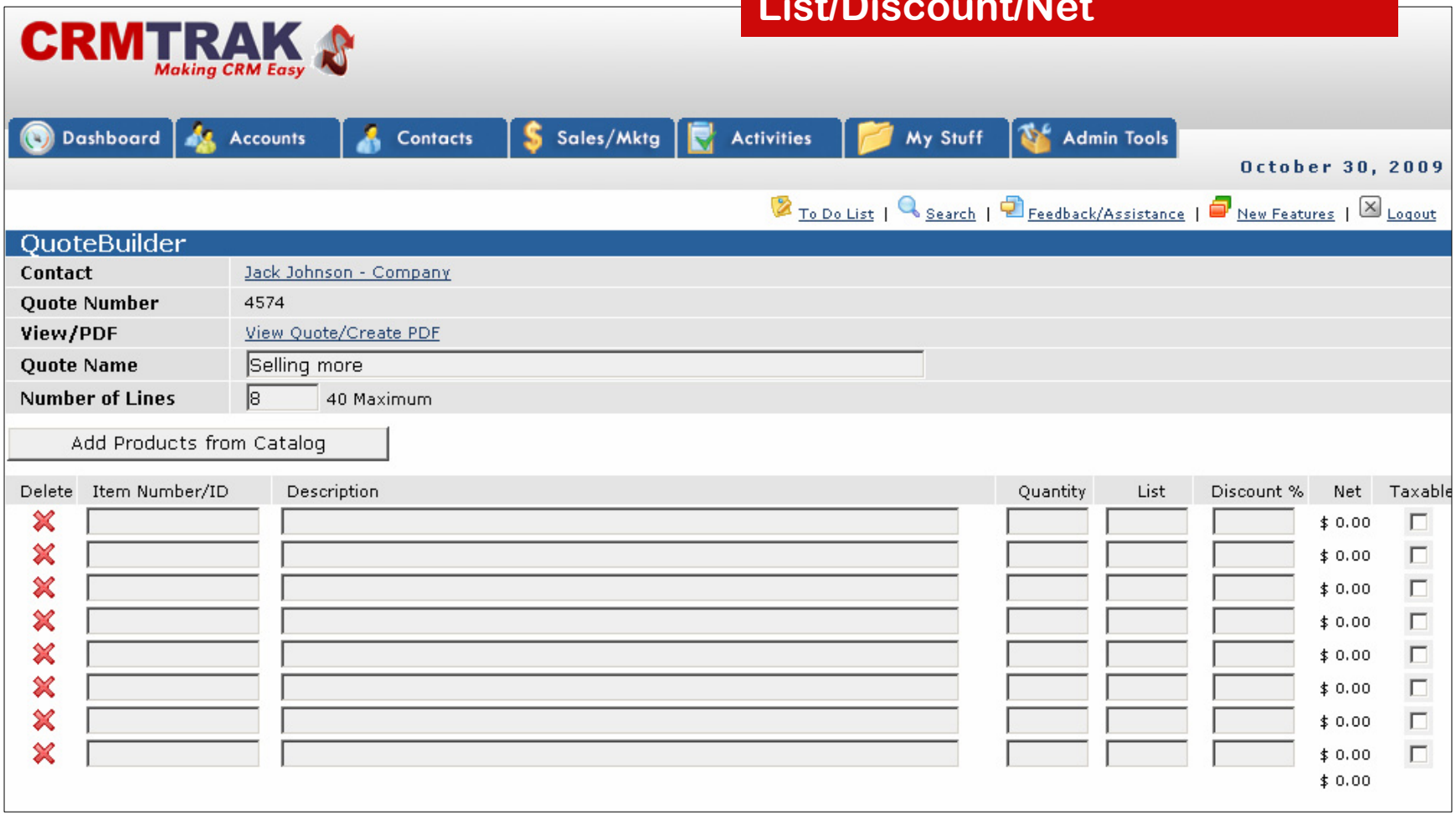
Quote Format Option: List/Discount/Net



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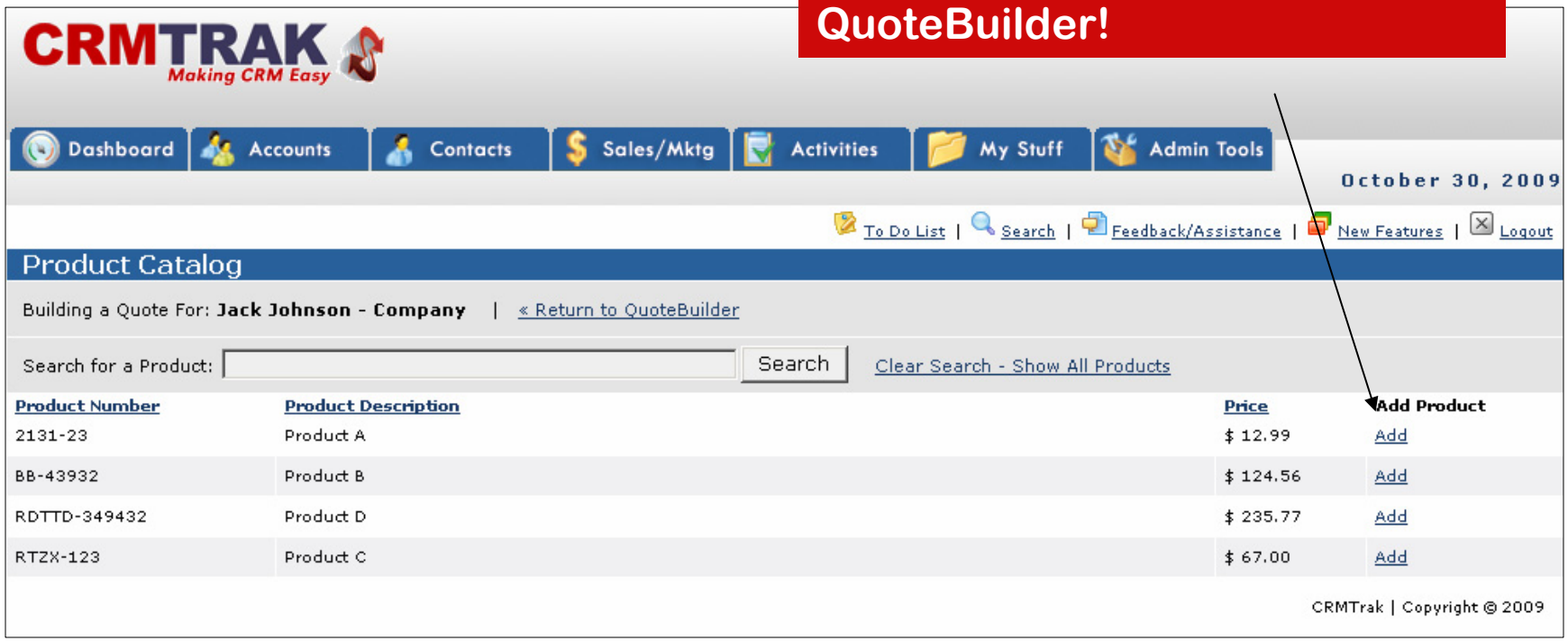
Integrated Product Catalog

Just click “Add” link and Product is added to QuoteBuilder!



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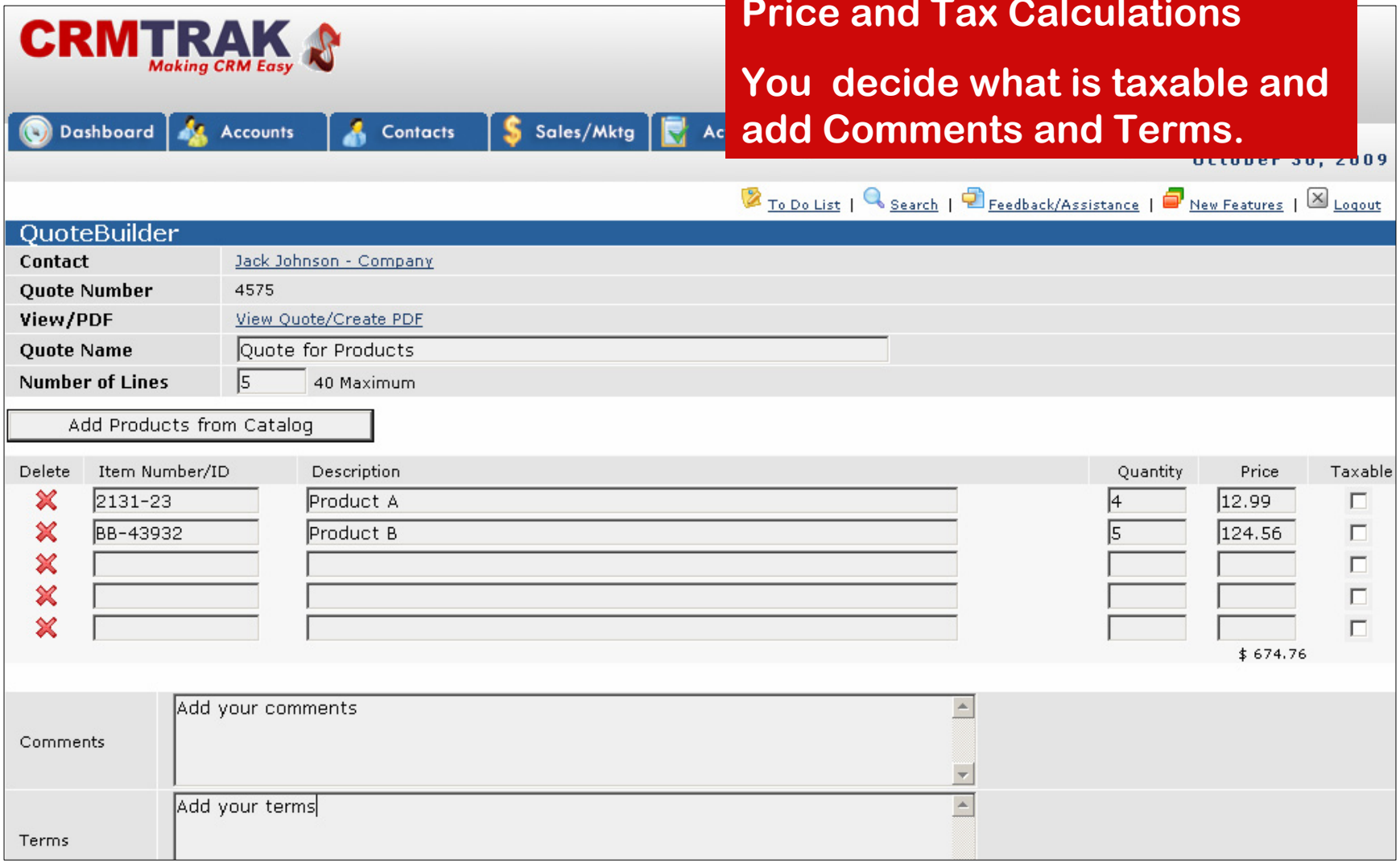
Price and Tax Calculations

You decide what is taxable and add Comments and Terms.



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Branded Quotes

Add your logo and create branded PDFs!

Your Company
1122 Smith Street
Anywhere, USA

Jack Johnson
Company
234 b st
Collierville TN 38017
555-555-5555

Your Account Manager: John Smith • demo@crmtrak.com • 1234567899

Create PDF | Create PDF & Email | Edit Quote

Quote Number: 4575 **Quote Name: Quote for Products** **Quote Date: 10-30-2009**

Part Number/ID	Description	Qty	Price	Tax	Extended
2131-23	Product A	4	12.99		$ 51.96
BB-43932	Product B	5	124.56		$ 622.80
					$ 0.00
					$ 0.00
					$ 0.00
				Sub Total	$ 674.76
				Sales Tax	$ 0.00
				Total	$ 674.76

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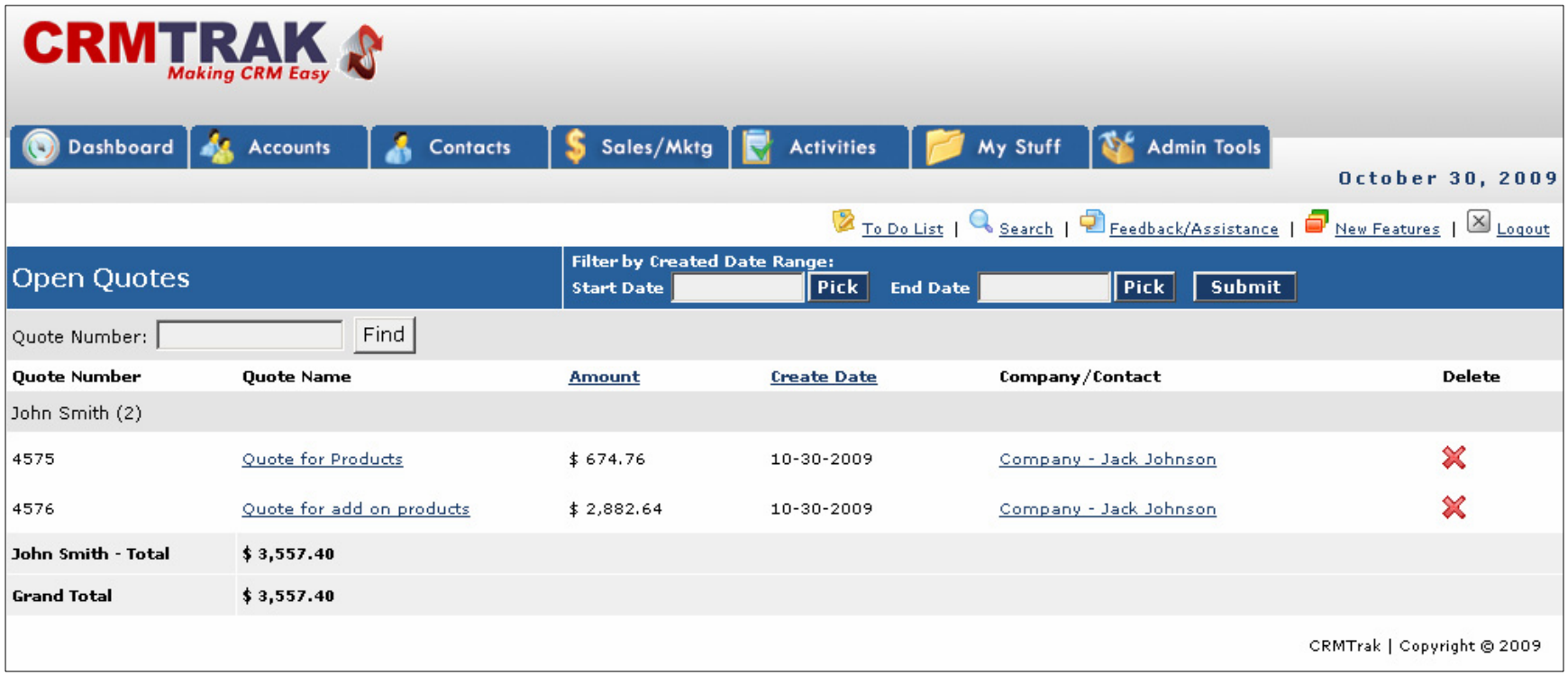
Quote Tracking

Have visibility into all open quotes for follow-up!



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- Product catalog data migration and upload services available
- Full QuoteBuilder customization services available
- Setup your FREE Trial Account at: www.crmtrak.com