



# CRMTrak

Making Sales Quotes Easy!

- 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



- 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

## Quote Format Option: Single Price & Quantity

#### QuoteBuilder

**Contact** [Jack Johnson - Company](#)

**Quote Number** 4573

**View/PDF** [View Quote/Create PDF](#)

**Quote Name**

**Number of Lines**  40 Maximum

Delete	Item Number/ID	Description	Quantity	Price	Taxable
×	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
×	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
×	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
×	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
×	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
×	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
×	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
×	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
×	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
×	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
×	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

\$ 0.00

## Quote Format Option: List/Discount/Net

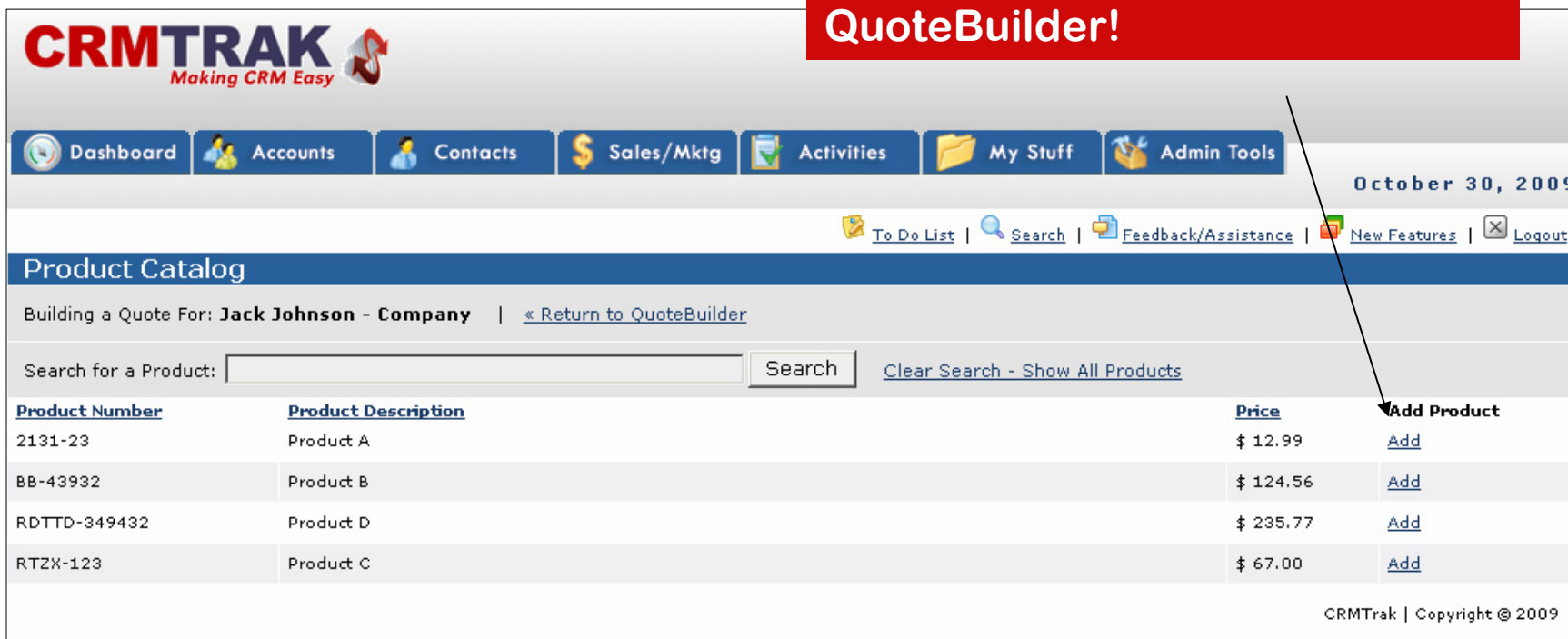
### QuoteBuilder

**Contact** [Jack Johnson - Company](#)  
**Quote Number** 4574  
**View/PDF** [View Quote/Create PDF](#)  
**Quote Name**   
**Number of Lines**  40 Maximum

Delete	Item Number/ID	Description	Quantity	List	Discount %	Net	Taxable
✗						\$ 0.00	<input type="checkbox"/>
✗						\$ 0.00	<input type="checkbox"/>
✗						\$ 0.00	<input type="checkbox"/>
✗						\$ 0.00	<input type="checkbox"/>
✗						\$ 0.00	<input type="checkbox"/>
✗						\$ 0.00	<input type="checkbox"/>
✗						\$ 0.00	<input type="checkbox"/>
✗						\$ 0.00	<input type="checkbox"/>
✗						\$ 0.00	<input type="checkbox"/>

## Integrated Product Catalog

Just click "Add" link and  
Product is added to  
QuoteBuilder!



The screenshot shows the CRMTrak Product Catalog interface. At the top, there is a navigation bar with icons for Dashboard, Accounts, Contacts, Sales/Mktg, Activities, My Stuff, and Admin Tools. The date October 30, 2009 is displayed on the right. Below the navigation bar, there are links for To Do List, Search, Feedback/Assistance, New Features, and Logout. The main content area is titled "Product Catalog" and shows a search bar with the text "Search for a Product:" and a "Search" button. Below the search bar, there is a table with four columns: Product Number, Product Description, Price, and Add Product. The table contains four rows of product data. At the bottom right of the page, there is a copyright notice: "CRMTrak | Copyright © 2009".

Building a Quote For: **Jack Johnson - Company** | [Return to QuoteBuilder](#)

Search for a Product:   [Clear Search - Show All Products](#)

<u>Product Number</u>	<u>Product Description</u>	<u>Price</u>	<u>Add Product</u>
2131-23	Product A	\$ 12.99	<a href="#">Add</a>
BB-43932	Product B	\$ 124.56	<a href="#">Add</a>
RDTTD-349432	Product D	\$ 235.77	<a href="#">Add</a>
RTZX-123	Product C	\$ 67.00	<a href="#">Add</a>

CRMTrak | Copyright © 2009

## Price and Tax Calculations

You decide what is taxable and add Comments and Terms.

### QuoteBuilder

<b>Contact</b>	<a href="#">Jack Johnson - Company</a>
<b>Quote Number</b>	4575
<b>View/PDF</b>	<a href="#">View Quote/Create PDF</a>
<b>Quote Name</b>	<input type="text" value="Quote for Products"/>
<b>Number of Lines</b>	<input type="text" value="5"/> 40 Maximum

Add Products from Catalog

Delete	Item Number/ID	Description	Quantity	Price	Taxable
✗	<input type="text" value="2131-23"/>	<input type="text" value="Product A"/>	<input type="text" value="4"/>	<input type="text" value="12.99"/>	<input type="checkbox"/>
✗	<input type="text" value="BB-43932"/>	<input type="text" value="Product B"/>	<input type="text" value="5"/>	<input type="text" value="124.56"/>	<input type="checkbox"/>
✗	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
✗	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
✗	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
				\$ 674.76	

Comments	<input type="text" value="Add your comments"/>
----------	--

Terms	<input type="text" value="Add your terms"/>
-------	---

## 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](mailto: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	



## Quote Tracking

Have visibility into all open quotes for follow-up!



October 30, 2009

[To Do List](#) | 
 [Search](#) | 
 [Feedback/Assistance](#) | 
 [New Features](#) | 
 [Logout](#)

**Open Quotes**

Quote Number:

Quote Number	Quote Name	Amount	Create Date	Company/Contact	Delete
John Smith (2)					
4575	<a href="#">Quote for Products</a>	\$ 674.76	10-30-2009	<a href="#">Company - Jack Johnson</a>	✘
4576	<a href="#">Quote for add on products</a>	\$ 2,882.64	10-30-2009	<a href="#">Company - Jack Johnson</a>	✘
<b>John Smith - Total</b>	<b>\$ 3,557.40</b>				
<b>Grand Total</b>	<b>\$ 3,557.40</b>				

Filter by Created Date Range:

Start Date   End Date

CRMTrak | Copyright © 2009



- Product catalog data migration and upload services available
- Full QuoteBuilder customization services available
- Setup your FREE Trial Account at:  
[www.crmtrak.com](http://www.crmtrak.com)