



OfficeQuote

For SuperOffice CRM



OfficeQuote is the missing link between SuperOffice CRM and your ERP system

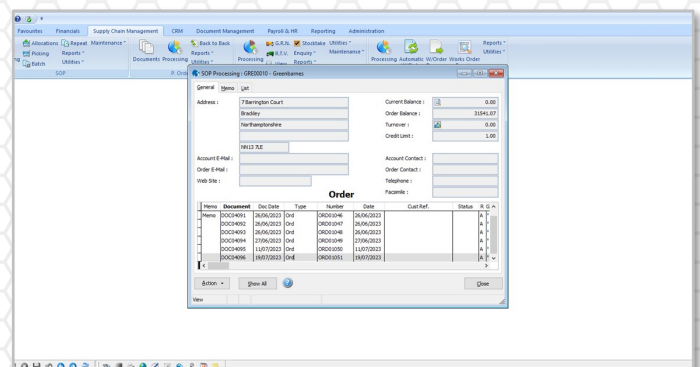
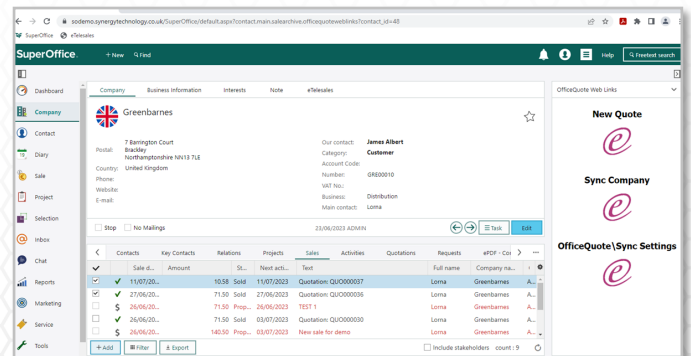
OfficeQuote enables your sales team to create sales quotations using live stock and accounting data seamlessly within SuperOffice CRM. Product and pricing information is obtained directly from your accounts package and can be linked to elements within the CRM to provide a fully integrated solution.

Full Integration with your Accounts Software

OfficeQuote integrates with Access Dimensions, Exchequer, Orderwise, Pegasus Opera 2 & 3, Sage 50, and Xero. So, no matter what accounts package you use, OfficeQuote can help you create accurate quotes, allowing greater transparency whilst minimising human error.

Bi-directional Sync with SuperOffice and your ERP system

OfficeQuote is fully integrated into SuperOffice CRM, providing lookup facilities for customers, contacts and projects. You can create sale activities and follow-up appointments enabling your team to analyse and manage their sales pipeline. OfficeQuote provides a 2-way synchronisation between SuperOffice and your Accounting Software, meaning if you update a linked field in the CRM, it will update in your accounts software and vice-versa. This keeps your systems in sync and eliminates errors due to re-keying information.



Live Stock and Price Visibility

OfficeQuote allows a live view of available stock from your accounting software including what's on the shelf, and what's on order, so the sales team always have an accurate view of what's available to sell. The stock search includes predictive product code searching, reducing the time needed to build a quote.

In addition to this, customer-specific pricing can be accessed automatically from the accounts system ensuring you'll always have the right price for the right customer. Once the sale has been made, quotations can be progressed into live orders using the accounts system link, speeding up the quote-to-cash process.

OfficeQuote for SuperOffice CRM (8.5.2022.0830)

Sales Quotation Quotation Number: <NEW> Company: Greenbarnes
Order Number: N/A Contact: Lorna
Status: Active Customer Code: GRE00010 Project: <None>

Master Quotations: Quotation Line

Header Line

Line Product Description

Free Stock Shortfall

Quotation Line Quotation Number: <NEW>
Line Number: <NEW>

Product Details

Product: car mat

Description:

| | | |
|---------------|-------------------|-------------|
| Quantity: 12 | Sale Price: 15.00 | Value: 0.00 |
| Free Stock: 8 | Discount %: 0.00 | VAT: 3.00 |
| Shortfall: 4 | Cost Price: 12.00 | Unit: |
| Markup: 0.00 | Markup %: 0.00 | |

Line Discount: Overall Discount: Settlement Discount:

+ Add - Delete Values Save Cancel

Documents Overall Discount: Percentage: 0.00 Net Value: 0.00
VAT: 0.00
Total Value: 0.00

Archive quotation document to SuperOffice?

Process Quotation... Copy Quote Values Save Cancel

', 'Overall Discount: ', and 'Settlement Discount: '. Buttons for 'Values', 'Save', and 'Cancel' are visible."/>

Quotation Line

Quotation Line Quotation Number: <NEW>
Line Number: <NEW>

Product Details

Product: car mat

Description:

| | | |
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Line Discount: Overall Discount: Settlement Discount:

Values Save Cancel

Fully Customisable Quotation Layouts

Quote layouts in OfficeQuote are fully customisable, allowing you to maintain consistency with your standard company layouts and branding. Quotes are produced as PDFs and can be sent directly by email, using the data in SuperOffice, improving speed of delivery, and allowing you to get the required information in front of your customers as soon as possible.

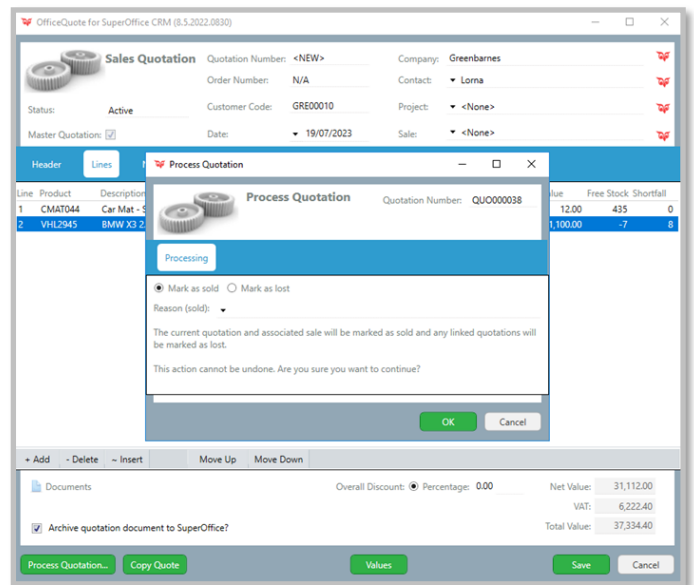
Price List and Special Price list Integration

OfficeQuote integrates live with your ERP price lists and special price lists where your supplier offers integration. This gives live price updates, reducing the need for manual data entry, saving you time. The reduced need for manual entry also reduces the risk of errors.

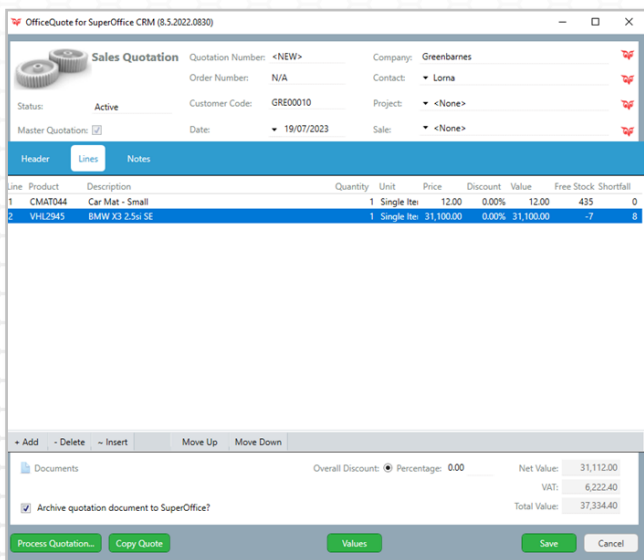


Multi-Tender and Revision Handling

Multi-tender and revision handling facilities are provided within the system using a master-child relationship. This means that multiple quotes can be produced for the same job to different prospects, speeding up the time needed to rewrite quotes. The master will be the lead quote and while others will be available to view, only the master will be added to the sales pipeline, allowing more accurate reporting. Quotes can also be marked as lost or sold from within OfficeQuote and a reason selected from the SuperOffice list.



Line, Group & Overall Discount Facilities



When preparing your quote within OfficeQuote, you can apply overall discounts, individual discounts by line, or obtain totals for specific sets of quote lines by organising them into groups. This gives you full flexibility to organise your quotes the way you want them and customise the price you offer to your customers. You have complete control over prices whilst allowing salespeople to offer preauthorised discounts.

Multilingual & Multi-Currency Options

OfficeQuote can handle multiple currencies, ideal for companies who import goods from different countries, but sell within the UK.



Why Choose Synergy Technology?

We seek a long-term partnership with our clients and work alongside them to help them get the best use of their solutions, to help attract, win and retain clients.

Since 1997 we have implemented hundreds of ERP and CRM solutions of differing complexity that have helped improve business performance by identifying opportunities for improvement and growth.

We have the scalability, knowledge and experience to offer the most relevant software solutions for your business needs and our highly responsive technical helpdesk works pro-actively to ensure any queries you have are resolved efficiently and effectively.



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