

# ACT!

QwikQuote communicates with ACT better than other quoting programs. Let's see how:

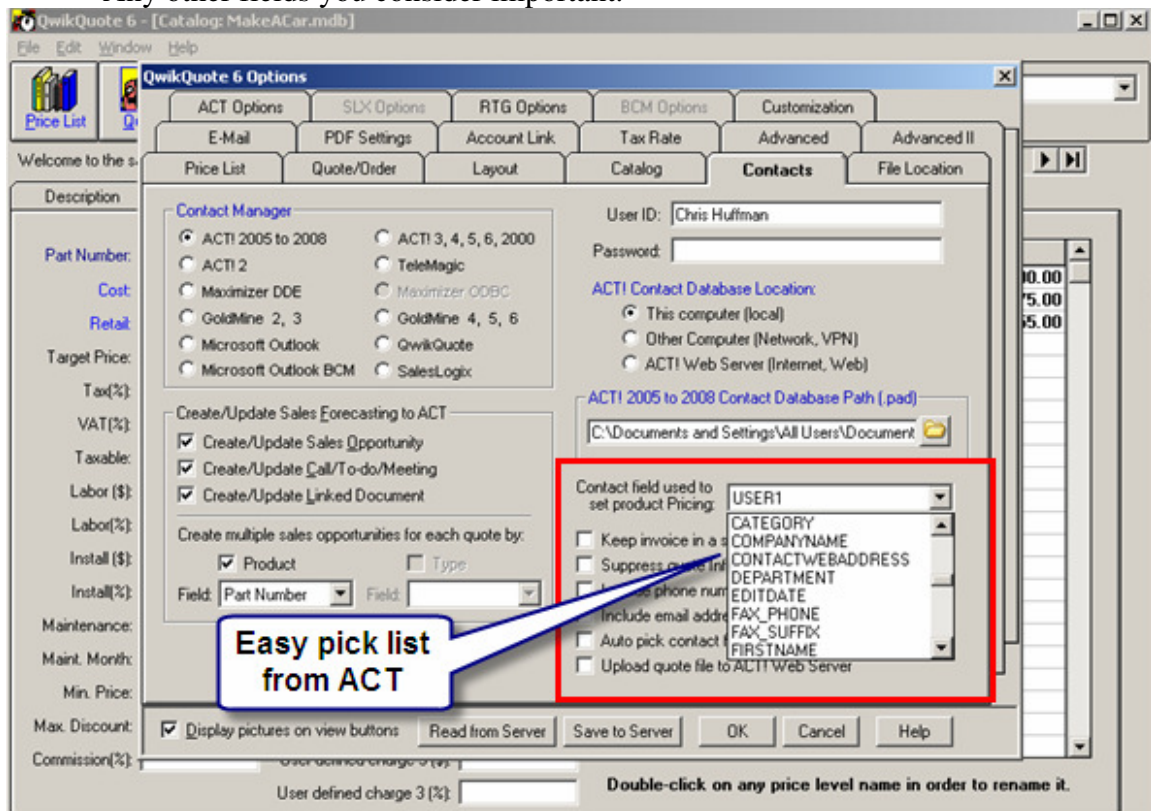
## QwikQuote Links

To versions 4.0, 2000/5.0, 6.0, 2005/7.0, 2006/8.0, 2007/9.0, 2008/10.0, and 2009/11.0  
**(with no limitations like other quoting software)**

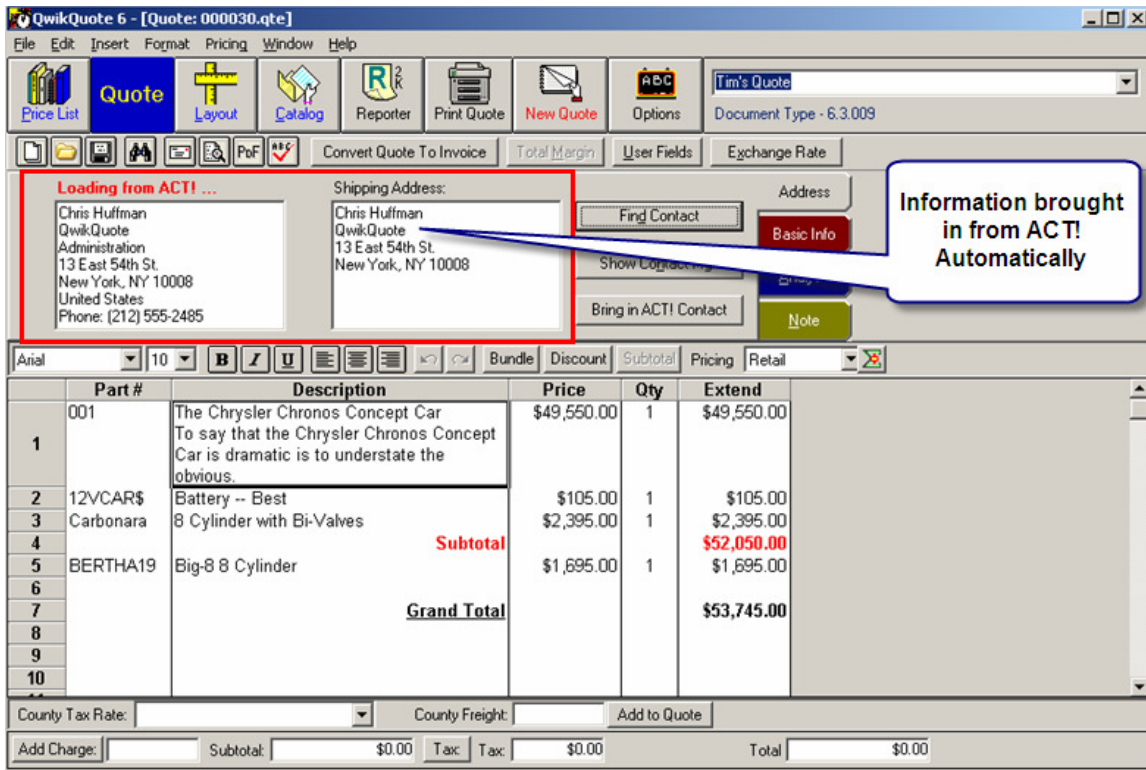
## Information from ACT to QwikQuote

**Figure 1:** QwikQuote and ACT work seamlessly together. Salespeople will no longer have to remember what kind of pricing a customer gets. QwikQuote automatically sets the proper price level based on your setting in the ACT customer contact record. Here is just some of the information that can be linked:

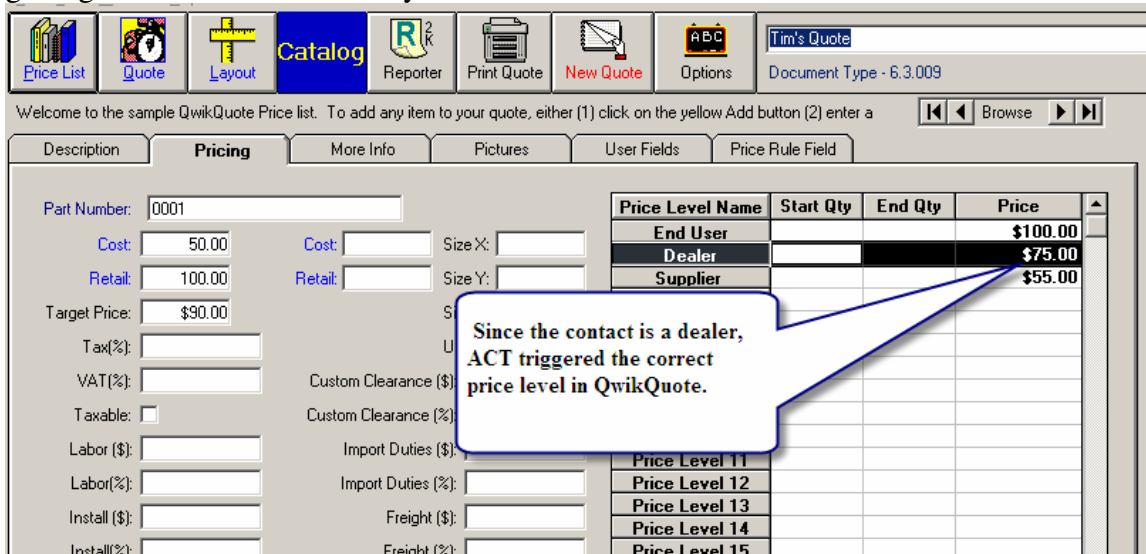
- Contact information
- Shipping Address
- Pricing level
- Any other fields you consider important.



**Figure 2:** Customer contact and shipping address is brought over from ACT with one click of your mouse.



**Figure 3:** Not all customers get the same pricing and QwikQuote makes it easy to set the correct pricing level. No more checking and double checking to make sure an end user is getting a discount reserved for your best customers.



**Figure 4:** Bring in other important fields from your ACT contact record. For example, the ACT Customer ID for easy cross reference for your accounting department.



"A program worth quoting."  
- PC Today



**TO:**

Customer information  
brought in from ACT

ACT! Customer ID Number: 34569732

Chris Huffman  
QwikQuote  
13 East 54th St.  
New York, NY 10008

**Sales Quotation**

**Quote Number:** 000030  
**Date:** 1/2/2009  
**Quote Expires on:** 2/3/2009

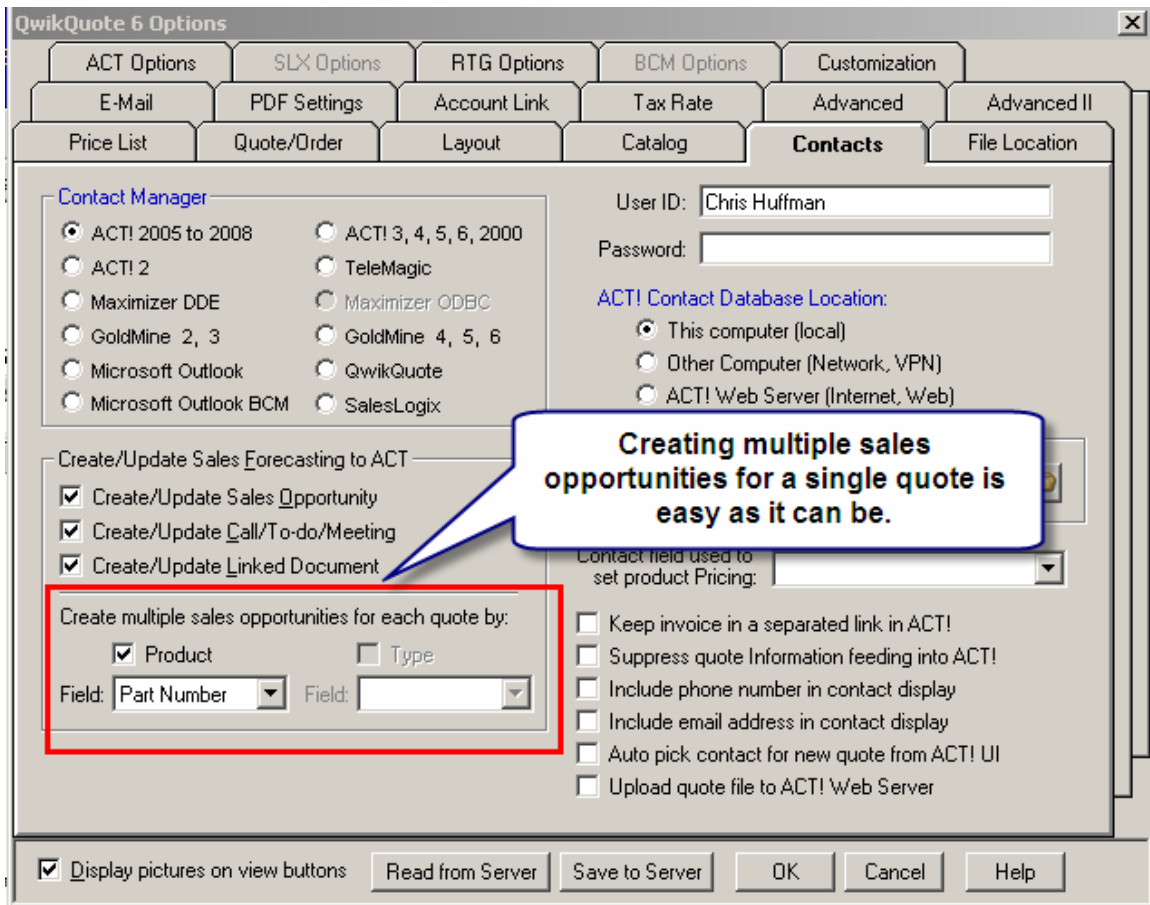
Part #	Description	Price	Qty	Extend
001	The Chrysler Chronos Concept Car To say that the Chrysler Chronos Concept Car is dramatic is to understate the obvious.	\$49,550.00	1	\$49,550.00

## Information from QwikQuote to ACT

**Figure 5:** Writing back information about the quote to your ACT customer record is very important, that's why we do it better than our competition. See for yourself.

- Opportunities Tab
  - As a total amount
  - As separate line items
- History Tab
- Activities Tab
- Documents Tab

QwikQuote can write back to the ACT Opportunity Manager as individual line items. This can be very important when you want to run a report. Say you need to know how many of a single line item is in the pipeline. If you only write back total amounts that information is not available. With QwikQuote you can get that information in a few seconds. If your quote is the kind that has hundreds of line items you can choose to only show a total amount. The setting is simple and straight forward as shown below.



**Figure 6:** If you look at Figure 2 above you will see several line items. When you save your quote you will have the chance to add additional information:

- Schedule a Sales Opportunity
- Schedule an Activity
- Create a Quote History
- Create a Linked Document

QwikQuote Links to ACT! - Save Quote Info by ACT! UI

Document Description: C:\Program Files\QQ6\QUOTES\000028.qte

Company: QwikQuote Group:

**Schedule Sales Opportunity**

Sales proc.: ACT! Sales Cycle Competitor:

Sales stage: Initial Communicat Close on: 1/ 2/2009

Probability: 10

Opportunity Details: C:\Program Files\QQ6\QUOTES\000028.qte

Product: 001  
12VCAR\$  
Carbonara  
BERTHA19

**Schedule Activity**

Date: 1/11/2009 Duration: 0 minutes Activity type: Call

Time: 12:54 PM Priority: High Scheduled for: Chris Huffmar

Color: Alarm 5 minutes before activity

Private  Show full day banner

**Create Quote History**

Regard: Quote: [000030]

Details: C:\Program Files\QQ6\QUOTES\000028.qte

**Create Linked Document**

.qte File: C:\Program Files\QQ6\QUOTES\000028.qte

ACT 10 PremiumWeb v.10.1.199.0

Let's look at the results in ACT when you save this quote.

### Opportunities Tab

Figure 7: QwikQuote writes back either individual line items or a total amount of the quote.

Bundle	Discount	Subtotal	Pricing	Opportunity List
		\$49,550.00	1	\$49,550.00
		\$105.00	1	\$105.00
		\$2,395.00	1	\$2,395.00
<b>total</b>		\$1,695.00	1	\$1,695.00
<b>total</b>				\$53,745.00

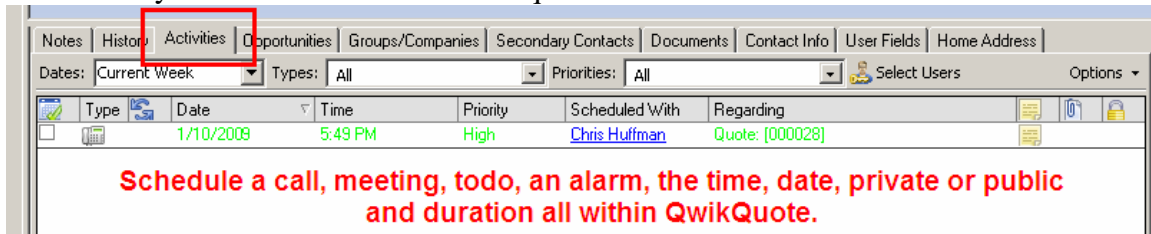
Opportunity Name	Stage	Probability of...	Product Name	Total / Weig
QwikQuote[000030]...	Initial...	10%	12VCAR\$	\$105.00
QwikQuote[000030]...	Initial...	10%	Carbonara	\$2,395.00
QwikQuote[000030]...	Initial...	10%	001	\$49,550.00

Four line items in the quote are written back to the ACT Opportunity Tab

Qwikquote ACT

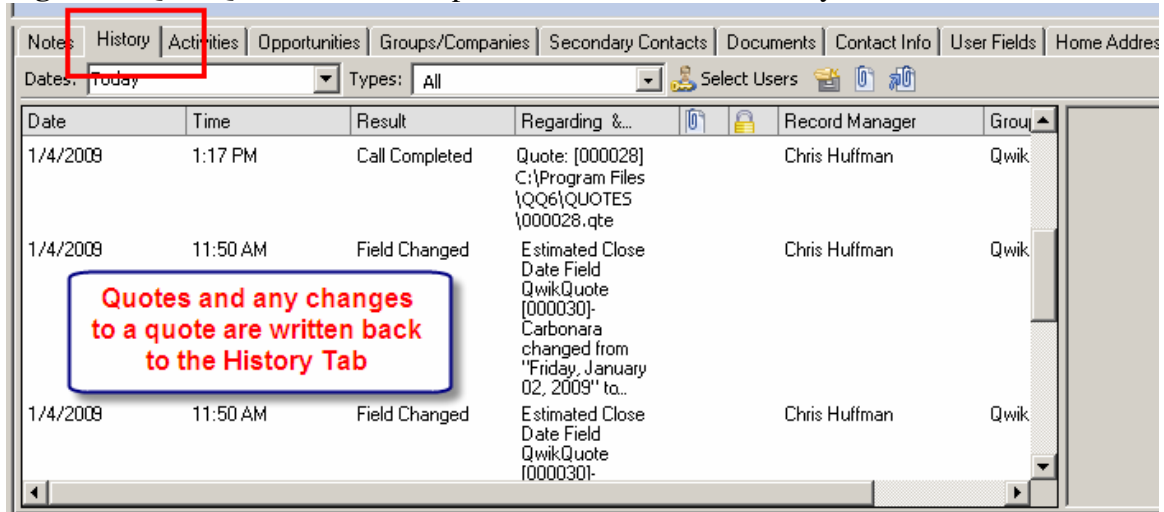
## Activities Tab

**Figure 8:** QwikQuote allows you to schedule follow up calls, meetings, or create a to-do. It is fast so you can move on to the next quote.



## History Tab

**Figure 9:** QwikQuote writes back pertinent information for easy reference in ACT.



## Documents Tab

**Figure 10:** QwikQuote writes back to the document tab so that all you have to do is click on it and that quote will appear. You don't even have to have QwikQuote open. Fast and easy, no more looking around for that quote did a while ago.

