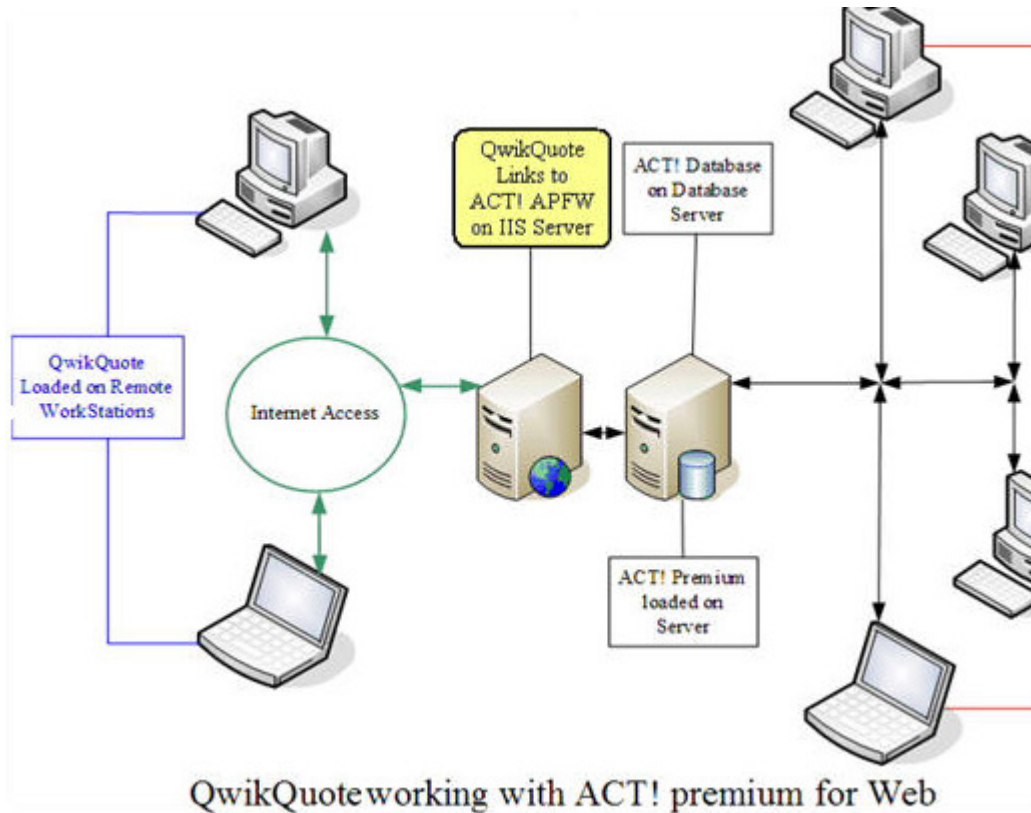


# ACT Premium for Web

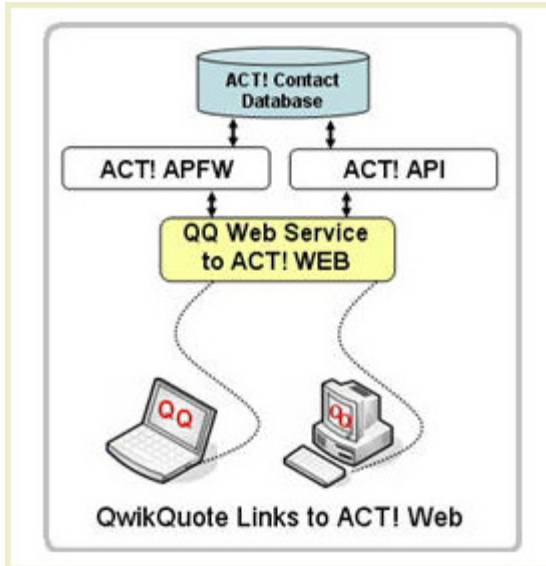
QwikQuote is the only quoting software that links to ACT Premium for Web.

Here is a schematic representation of the QwikQuote to ACT Web Link Module:  
Watch a short [Video](#) with QwikQuote and APFW working together.



## The Power of Linking QwikQuote with ACT Premium for Web

When the link is installed, QwikQuote's local users become part of a web service. The link uses both APFW and the ACT API to access the ACT Databases. When a quote is created on the local workstation, contact information is retrieved from an ACT contact database selected by the user. The following illustration shows how the link allows remote access by the user:



The advantage of working with QwikQuote link to ACT Premium for Web

- Salespeople are always using the most up to the minute Database without the home office constantly updating field sales staff.
- Saved quotes are immediately available at the home office.
- Salespeople are not walking around with your database of Products and Price List.
- Salespeople can be restricted so that they can only see their own quotes.
- Your Customer Database is secure and can't be downloaded by field staff.

Let's face the facts that salespeople leave positions and many times go to competing companies.\*

Your Customer Database and Price List are one of your most important assets and QwikQuote helps you keep them secure.

*\*(Read a real life horror story)*

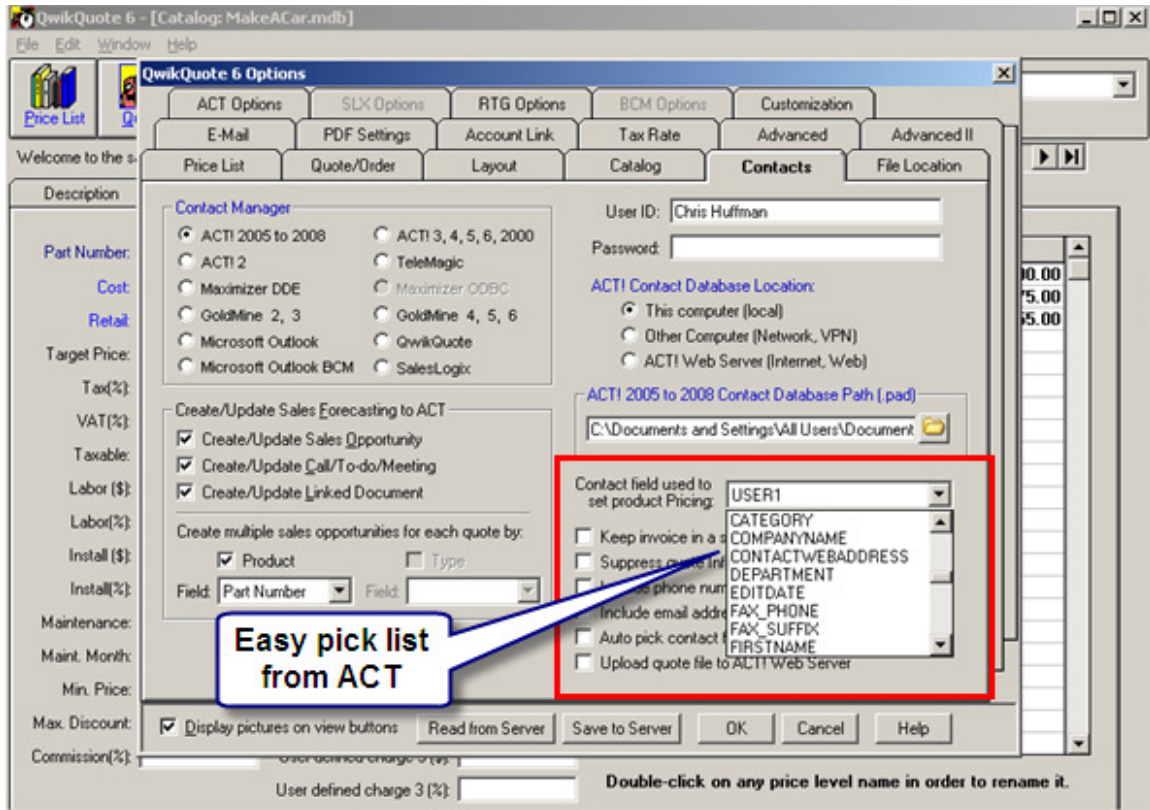
*After installing the QwikQuote links to ACT Premium for Web (QQ/APFW) you will find that*

*QQ/APFW works just like the desktop version. Here is how they work:*

### **Information from ACT to QwikQuote**

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.



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

**Information brought in from ACT! Automatically**

Part #	Description	Price	Qty	Extend
1	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
2	12VCAR\$ Battery -- Best	\$105.00	1	\$105.00
3	Carbonara 8 Cylinder with Bi-Valves	\$2,395.00	1	\$2,395.00
<b>Subtotal</b>				<b>\$52,050.00</b>
5	BERTHA19 Big-8 8 Cylinder	\$1,695.00	1	\$1,695.00
<b>Grand Total</b>				<b>\$53,745.00</b>

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.

**Since the contact is a dealer, ACT triggered the correct price level in QwikQuote.**

Price Level Name	Start Qty	End Qty	Price
End User			\$100.00
Dealer			\$75.00
Supplier			\$55.00
Price Level 11			
Price Level 12			
Price Level 13			
Price Level 14			
Price Level 15			

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

**TO:** Customer information brought in from ACT ACT! Customer ID Number: 34569732

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

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

**Sales Quotation**

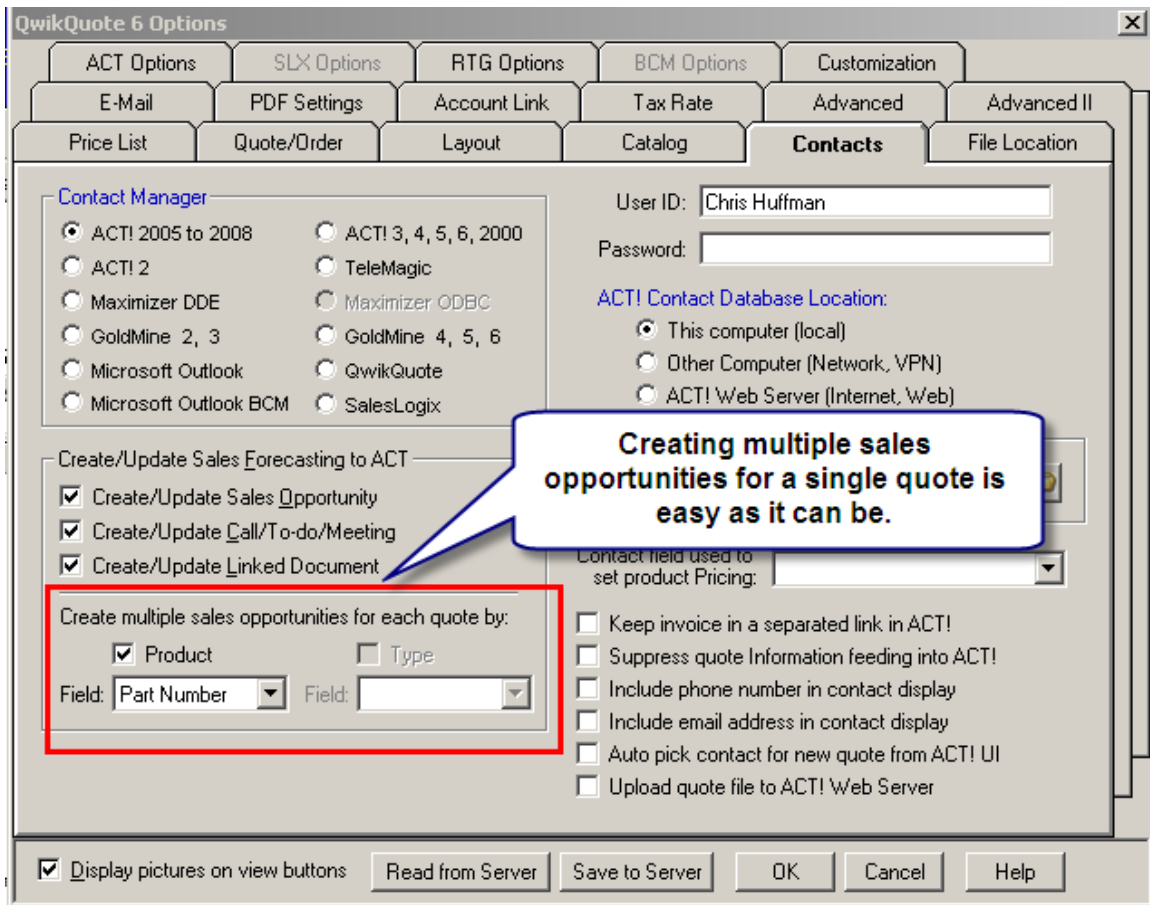
Part #	Description	Price	Qty	Extend
001	The Chrysler Chronos Concept Car To say that the Chrysler Chronos Concept Car is dramatic is to understate the obvious.	\$49,550.00	1	\$49,550.00

### Information from QwikQuote to ACT

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 as to how many of a single line item is in the pipeline. If you only write back total amounts vital information is lost. However, if a 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.



When you save your quote you will have the chance to add additional information to:

- Schedule Sales Opportunity
- Schedule Activity
- Create Quote History
- Create 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 for each of the above:

## Opportunities Tab

Bundle	Discount	Subtotal	Pricing	Opportunity List
ept		\$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	<b>\$52,050.00</b>
				\$1,695.00
<b>total</b>				<b>\$53,745.00</b>

Qwikquote

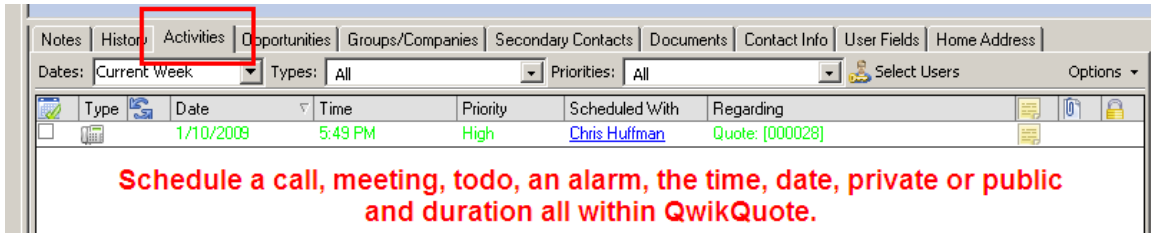
ACT

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

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

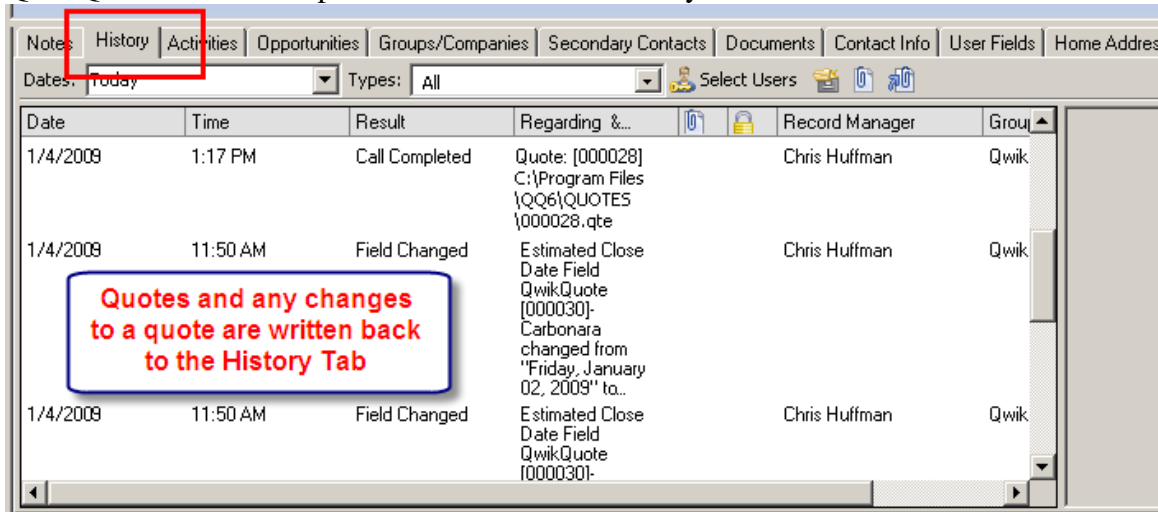
## Activities Tab

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



## History Tab

QwikQuote writes back pertinent information for easy reference in ACT.



## Documents Tab

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.

