



CONFIGURING GOLDMINE WITH  
"QUOTEWERKS"



by  
Aspire Technologies, Inc.  
7041 Grand National Drive  
Suite 207  
Orlando, FL 32819  
Sales 407-248-1481  
[www.quotewerks.com](http://www.quotewerks.com)



---

TABLE OF CONTENTS

---

**TABLE OF CONTENTS..... 2**

**OVERVIEW..... 3**

**ABOUT “QUOTEWERKS” ..... 4**

**“QUOTEWERKS” / GOLDMINE BENEFITS .....11**

**“QUOTEWERKS” / GOLDMINE INTEGRATION INSTRUCTIONS.....14**

**SUPPORT INFORMATION.....15**

    Contacting Support Services..... 15

    Standard Warranty Support ..... 15

    Extended Warranty Support ..... 16

        Pay-per-Minute phone support..... 16

        Paid Updates ..... 16



---

## OVERVIEW

---

Aspire Technologies, Inc. was formed in 1993. In 1994, there were no mainstream quoting packages that could handle our quoting needs. We developed QuoteWerks that same year to fulfill our quoting needs. Over the years, we have expanded upon QuoteWerks and in present day form, it is used worldwide by companies in many different industries.

It was a tedious task to track quotes for our clients. We had to track what our cost was, what their price was, and all of the vendor part number and ordering information. Inevitably we would be rewriting, and redoing, and re-researching each quote somewhere along the line.

Being Value Added Resellers we were creating a large number of quotes, and each quote took an unacceptable length of time to create. We quickly became aware that a quality quoting software package could save us a lot of time and money. So, in that same year, we created QuoteWerks.

QuoteWerks allowed us to easily and efficiently control the quoting process starting with the creation of the quote, followed by the ordering of the items, and ending with the invoicing of the sale.

We originally developed QuoteWerks to facilitate our internal quoting process. Over the years it has been shaped and molded in a continuing effort to improve the efficiency of the quoting process.

We work hard to make QuoteWerks a *quality* product that you can depend on. By *quality*, I mean a product that is well thought through and logically designed, not slapped together in a hurry. We believe in polishing existing features while adding new features rather than the approach of throwing out a new feature that is not very polished and then moving on to the next one. By *quality*, we mean that bugs are thought of as unacceptable.

In a time when software companies are cutting corners by no longer shipping their products in boxes containing up to date printed manuals and cd-roms, we still do. It is a sign of our commitment at Aspire Technologies, Inc. to providing a quality experience and quality service to our customers.

---

## ABOUT "QUOTEWERKS"

---

### **Pulls contact information from popular contact management software**

QuoteWerks integrates seamlessly with leading contact management software such as GoldMine. QuoteWerks supports GoldMine versions 2.5, 3.2, 4.0, 5.0, 5.5, 5.7, 6.0 BCM, and GoldMine FrontOffice 2000. For details on the GoldMine integration, see the next chapter titled *QuoteWerks/GoldMine Benefits*.

### **Quote Products and Services**

QuoteWerks allows you to quote products and services. You can enter information directly into the quote "on-the-fly", and you can setup a list of products and services that you commonly use in our product databases. You can setup a separate product database for each vendor that you purchase from and organize the products and services within each database using multiple-level folders. If you already have lists of products and services, you can import them into the QuoteWerks product databases using the QuoteWerks Product Import Wizard.

### **Computer Resellers can link to Distributor product databases**

If you are a computer reseller, we have a special edition of QuoteWerks called the PC Industry Edition. This PC Industry Edition links to the offline price guides of Ingram Micro, and Tech Data. Linking to their databases, gives you full access to each of their 30,000 products they carry. When you select items from their product databases, all the important information such as vendor part number, manufacturer part #, cost, suggest retail, etc is copied into the quote. You can even compare prices between the distributors with a single click!

### **Real-time web pricing and availability for Tech Data**

Many companies in the PC Consulting and integration industry purchase products from PC industry distributors such as Tech Data. It is very important to these companies to receive up to date pricing and availability information so that they have all the tools they need to deliver product to their customer as fast as possible. Having access to real-time pricing gives the company the ability to deliver last minute price savings to their customer. Having access to real-time availability gives the company the ability to know if the product will ship today, or if it will be backordered. Since a backordered product cannot be shipped to a customer, knowing that a product is backordered before placing an order will give you the tools you need to make a good purchasing decision. QuoteWerks offers a real-time web pricing and availability module.

### **Bundle Your Products/Services**

The powerful bundling feature adds groups of products to your quote with a single click. If you quote groups of products/services often, the bundling features in QuoteWerks will save you a tremendous amount of time. With bundles, you can specify which products/services are included in a bundle. Then, you can add that bundle to the quote and all the items that are in the bundle are automatically added to the quote. Using bundles also ensures that you will never forget to include an item in the quote. QuoteWerks has two types of bundles: Simple Bundles, and Grouped Bundles. With a Simple Bundle, the list of products/services that you specified in the bundle will simply be added to the quote when you select the bundle. With a Grouped Bundle, the list of products/services specified in the bundle will be "rolled up" into a single grouped line item. All the individual item prices will be hidden and automatically totaled and displayed in the single grouped line item. The individual item descriptions can optionally be displayed or hidden.



## Get the Best Prices

When you select the product that you want to add to the quote, you can right click to immediately see the cost of this product from *each* vendor that you have setup in QuoteWerks. In a flash, you know which vendor has the lowest price, and you can choose to purchase that item from that vendor.

## Refresh quote with latest or best prices

Often customers request a quote, and then for a variety of reasons, the project gets put on hold. Then, one day the customer calls back and says they would like a new quote. No problem for QuoteWerks. Simply select all the line items on the quote, and choose the Refresh with Latest price feature. Immediately, your quote has been updated. In fact, if your cost has now lowered, QuoteWerks will ask you if you would like to keep the profit for yourself, or pass on the lower cost to your customer!

Vendor prices fluctuate often. The QuoteWerks Refresh with Best price feature will automatically find the vendor with the lowest cost for each item on the quote, and update the quote with that information.

## Customize Quote Layouts

Use the QuoteWerks visual layout designer to format the layout of your quotes. All companies have different formats that they prefer to present the quote to their customer in. The built-in QuoteWerks visual layout designer gives you complete flexibility in designing the look of your printed quote. You can choose which information you would like to include in the quote, and which information you would like to not include in the quote. You can insert company logos, pictures, lines, boxes. You can set background colors, font colors, fonts, alignment, pretty much anything! If you prefer to include a picture of each line item in the quote, you can use the layout designer to control where the picture will be located, what size the picture will be, etc. On top of all this functionality, the QuoteWerks print layout designer also supports the creation of custom formulas. You can create formulas that calculate lease payments based on a number of months, and the total sale amount of the quote. You can create formulas that print a special message like "You are a valued customer." if the sale amount is over \$1000. You can create formulas that calculate a 50% down payment amount to display on the quote. You can create almost any solution using this formula functionality! The layout designer is very powerful, flexible and easy to use.

QuoteWerks comes with a default print layout for quotes, orders, invoices, sales orders, and purchase orders. You can modify these existing print layouts, and/or create any print layout format you would like, such as a work orders, packing slips, etc. There is no limit to the number of different print layouts you can create. Again, you have full control over what the end result will look like!

## Define your Pricing Strategies

In all, QuoteWerks supports 9 different ways to price your products and services!

1. **Enter Price Manually** - Use this when you have a fixed price for all customers
2. **Gross Margin** - Use this when you calculate your customer price by applying a % gross margin to your cost.
3. **Markup from Cost** - Use this when you calculate your customer price by adding a % of your cost to the cost of the product.
4. **Discount from List** - Use this when you calculate your customer price by discounting from the list price.
5. **Same as List** - Use this when in most cases you charge your customers the list price of a product (lucky you!).
6. **Volume Based** - Use this when your customer gets a different price depending upon how many of the item they are purchasing.

7. **Customer Based Price Levels** - Use this to have QuoteWerks automatically assign your customer a fixed price depending upon what type of customer this customer is. So, if your customer is a RETAIL customer, they get price X, and if they are a WHOLESALE customer, they get price Y.
8. **Based on Customer/Product profile** - Use this to have QuoteWerks automatically assign your customer a calculated price based on markup, margin, discount, or list depending upon the type of customer AND the type of product you are selling. So, one example is, if your customer is a RETAIL customer, they get a 10% discount, and if they are a WHOLESALE customer, they get a 30% discount. Another example is, if your customer is a RETAIL customer, they get a 40% marked up price, and if they are a WHOLESALE customer, they get a 10% marked up price.
9. **Formula Based** - Use this to have QuoteWerks calculate the price of the product as a % of the price of another product.

### Flexible line item features

Many types of line items are supported in the quote.

- You can have **Subtotal line items** which allow you to display grouped totals of key portions of your quote.
- You can have **Running Subtotal line items** which allow you to display the total of all the items from the beginning of the quote to this line item.
- You can have **% charge line items** which are calculated as a % of the amount of the line item above it. The line item above it can be a regular product/service, or it can be a subtotal/running subtotal allowing you to calculate a % of a group of items.
- You can have **% discount line items** which work in the same way as the % charge line items.
- You can have **comment line items** which allow you to easily insert additional spacing in between line items in the quote, and can also be used to indicate different sections or groups within the quote like "Options", etc.
- You can also mark **each line item individually to have certain attributes** like hide price, don't print, optional item, taxable, and more.
- When a line item has the **"hide price" attribute**, the individual price of the product is not printed. This is very useful in preventing your customer from seeing the price for each line item on the quote, and then haggling with you about each line item.
- When a line item has the **"don't print" attribute**, the line item will not be printed with the quote, but it will be included in the totals of the quote. This is very useful for including misc. items required in the quote that you do not want to clutter the quote with.
- When a line item has the **"optional item" attribute**, the line item will be displayed in the quote as an option that the customer can buy, and the price of the item will be displayed, but the price of the item will not be included in the quote totals since it is only an that we are presenting to the customer.
- When a line item has the **"taxable" attribute**, the tax rate will be applied to this line item to calculate sales tax due on this item.
- When a line item has the **"print picture" attribute**, a picture of the product will be printed with the line item (assuming that you have specified a picture for the product).

### Link to Accounting Software

Links to [QuickBooks](#) and [Peachtree](#) accounting software. The QuickBooks link uses the newest QuickBooks API which means that you no longer have to import and export QuickBooks iif files. We also have an [Open Export Module](#) that can be used to export QuoteWerks orders to other accounting software.



## **E-Mail Your Quotes**

QuoteWerks enables you to e-mail quotes directly from within QuoteWerks using the built-in SMTP e-mail or Microsoft Outlook. Your quotes are e-mailed as an attached .RTF file (Word Processor compatible like Microsoft Word) or .PDF file (Adobe Acrobat compatible). The e-mail setup options let you choose which format you want to your quotes to be emailed in. RTF files can be opened, and printed by all word processing applications. Your customer will receive the quote formatted exactly in the format that you sent it in, and your customer can simply double-click on the attached quote, and it will be opened by their word processor (RTF files) or the free Adobe Acrobat Reader software (PDF files).

## **Use WinFax® to fax your quotes**

QuoteWerks integrates with WinFax making it easy to fax quotes from QuoteWerks by passing the customer's fax number automatically to WinFax so that you do not have to manually enter it.

## **Configure Your Products**

QuoteWerks has a built-in configurator (most configurators cost thousands of dollars!) that will present you with a list of products to choose from in a step by step format. The list products displayed for you to select at each step is based on your previous selection. The configurator can maximize your sales forces productivity, efficiency, and accuracy by walking them through the process of building a quote, ensuring that the sales rep remembers to include all the items they need to in the quote.

## **Paste Special Feature**

Our Paste Special feature allows you to paste part number information created using other price list programs such as Hewlett Packard's configuration software. Another application for this feature is for PDAs. You could create a list of part numbers and quantities of products/services on your PDA, and then copy that information into the Windows clipboard, and then use the Paste Special feature to have QuoteWerks retrieve the part numbers, complete with description, and pricing into your QuoteWerks quote!

## **Import/Export XML formatted data**

XML is quickly becoming the new standard for data transfer and exchange. QuoteWerks can import quotes/orders/invoices that are formatted in XML (following our XML document specifications). This functionality is very useful for exporting data from web applications to an XML format that can then easily be imported into QuoteWerks. Our [Open Export Module](#) has an option that enables you to export quotes/orders/invoices from QuoteWerks to an XML file.

## **Share/Synchronize Quotes Between Offices**

Do you have sales people on the road, or do you work from home at times? QuoteWerks can synchronize quotes between different locations. QuoteWerks can be installed at the main office and then also installed on laptops and other office locations. Then while salesreps are out on the road creating quotes on their laptop with QuoteWerks, they can export their quote and use the built-in e-mail feature to e-mail the quote back to their main office where it can be imported! QuoteWerks manages the unique quote numbers across all the installations of QuoteWerks, so you do not have to worry about conflicting quote numbers! If you use GoldMine contact management software, and GoldMine's synchronization features, quotes can be automatically synchronized!

## **Know Your Profit Margin**

With QuoteWerks' extensive pricing features, you will know your profit margin on everything you



sell. Each line item in the quote can have a different profit margin and pricing method, so you can mix and match your product pricing with discounts, markups, etc. You can select an individual line item, or a group of line items to see the profit amount and profit margin for the selected items!

### **See Product Price History**

With a single-click, see what products you have sold to your customers in the past, and what price you charged your customer the last time you sold the product to them.

### **Create Quotes, Invoices, and Purchase Orders**

Start to finish QuoteWerks handles it all. Once you receive an order, the purchase order feature has option to print a separate purchase order for each vendor on the quote!

### **Required Items Support**

Many times you need to include certain products/services whenever you quote a particular product/service. This feature allows you to assign required items to items in QuoteWerks, and when you add that item to the quote, QuoteWerks will automatically include the required items. You will never forget to include an item in a quote again!

### **Track Custom Information**

QuoteWerks has customizable fields and columns accommodate your companies' unique product and quoting needs. If you need to track the color or other quality of a product, you can customize one of the QuoteWerks custom fields to "Color", and then enter the color of the product into that field. It is that simple to customize QuoteWerks to fit you needs.

### **Create Sales Reports and Product Catalogs**

In addition to the standard reports that come with QuoteWerks, the built-in visual reporting tool allows you to easily modify and even create new reports to report on just about any data you would want. You can create outstanding quotes reports, forecasted sales reports, commission reports, sales closure reports and more. You can find out who your most productive sales person is, what your most profitable product is, which is your highest selling product/service, etc. Create reports based on regions or territories, etc. The flexibility of our report designer allows you to create just about any report you can imagine. You can also create product/price catalogs for your customers (which can include customer specific pricing), and detail reports on your product lines, inventory, etc. Reports and documents can even be copied and then pasted into Microsoft Word.

### **Security Features**

The QuoteWerks Administrator can set the security settings for each user. You can specify which menu options each user has access to. You can specify which users can view/modify/delete each user's quotes. You can specify individual access rights for each user to limit their ability to perform tasks like deleting products from the product database, modifying print layouts, and many more. These security rights are centrally maintained, and can also be enforced on laptop installations of QuoteWerks.

### **Document Automation**

QuoteWerks automates the entire process of quote/order generation starting with the initial building of the quote on to the presentation format of the quote, and finally ending with the delivery of the quote to your customer.

To facilitate this process, QuoteWerks has **integrated cover page** and literature support. You can create a list of customized cover pages (using a word processor to create them and save them in RTF format) and then easily select from your list of cover pages when printing/emailing the quote. So QuoteWerks will do everything you need in order to get the quote to the customer.



QuoteWerks also has **integrated literature support**. This feature allows you to build a list of literature such as warranty information, support information, directions to your company, specials of the month, letters of acceptance, or essentially any additional information that you would like to include with the quote. Once you have your list of literature put together, you can easily select the literature pages that you would like send along with the quote. Literature pages can be in RTF format or PDF format (PDF formatted can only be sent via email feature).

QuoteWerks also supports **product/service spec sheets**. You can setup product/service spec sheets for all or some of the products in your product database. While the QuoteWerks product/service description can be up to 32,000 characters long, the spec sheet allows you to create a separate page of information and can also **include a picture of the product**. Then, when you print your quote, QuoteWerks will automatically include (at the end of the quote) the product/service spec sheets for each of the products that you have quoted. You do not need to create a spec sheet for the product in order to print a picture for the line item, however, the spec sheet feature gives you an additional flexibility over how and where you would like to display details about the items on the quote. Spec sheets can be in RTF format or PDF format (PDF formatted can only be sent via email feature). QuoteWerks also has integrated spell checking, and can export information to Microsoft Excel, and Microsoft Word.

### **International Features**

QuoteWerks enables you to display quote pricing in both your local currency AND another alternate currency. So, if you are in the United States and create quotes for some customers in Canada, by default QuoteWerks, can automatically generate the quote in United States dollars, and in Canadian dollars. If you then want to present that same quote in British pounds (GBP), all you have to do is click on GBP, and your alternate pricing is instantly recalculated to British pounds! Canadian GST/PST taxes supported (including compounded taxes). QuoteWerks supports the Australian GST tax scheme. Foreign date and currency formats also supported. If you purchase some or all of your products in a foreign currency, you can enter that foreign price for the product in the product definition, and then QuoteWerks will automatically calculate the price of the product in your local currency!

### **Find Products Quickly**

QuoteWerks displays all your products and services in the familiar Windows explorer format. You can organize your products and services in different product databases, and in different folders making it really easy to visually organize and find your products when quoting them. Our powerful search features also make it a breeze to do searches using partial descriptions, part numbers, etc.

### **Cross Industry Support**

QuoteWerks is designed to meet the needs of companies in most industries. We have many flexible features such as Unit of Pricing functionality (This lets you quote a "box of 10" at the per unit price as an example), and quantity multiplier columns (This lets you quote 5 feet wide X 4 feet deep X unit price = extended price)

### **QuoteWerks API enables developers to write applications that integrate with QuoteWerks**

QuoteWerks has an API (Application Programming Interface) that enables software developers to write custom software applications that interact with QuoteWerks. The API exposes events like BeforeSaveDocument, AfterSaveDocument, BeforePrintDocument, BeforeContactSelection, AfterContactSelection, etc. This enables the application to verify and/or change data, or even cancel the event. There are many different types of custom applications that can be written to integrate with QuoteWerks. Developers can even write applications that seamlessly integrate other CRM or SAP packages with QuoteWerks.



### **Industry Standard Database**

QuoteWerks data is stored in Microsoft Access 97 databases. It is important to mention that you *do not need* to have Microsoft Access installed on your computers to use QuoteWerks. Because QuoteWerks data is stored in this industry standard format, other applications can read and write data to our databases making QuoteWerks part of your entire solution.

---

## "QUOTEWERKS" / GOLDMINE BENEFITS

---

QuoteWerks is a powerful, comprehensive and easy to use product. What makes QuoteWerks particularly unique is its seamless integration with GoldMine.

QuoteWerks 3.0 is the winner of the prestigious **FrontRange Solutions 2002 Global Developer of the Year Award**. This award honors the Technology Partner that exhibits strong product innovation, while being highly respected and admired by customers, partners, and peers. Also recognized is the value of the product innovation in providing a complete solution for end users.

Read press release:

<http://www.quotewerks.com/pressreleases/2002frdevofyear.htm>

### **QuoteWerks pulls GoldMine contact information into the quote**

From our Sold To / Ship To tab of the QuoteWerks quote workbook, with a simple click of a button, QuoteWerks will fill in the contact information in the quote by pulling the contact information from the contact that is currently selected in GoldMine. You will never have to re-type your customer information. QuoteWerks can also search your entire GoldMine database to find the contact that you want to use in the quote. When you have found the contact, QuoteWerks will list the GoldMine primary and secondary contacts (secondary contacts are listed under the Contacts tab in GoldMine, and usually contain ship to addresses) allowing you to easily use primary and secondary contacts in your quote.

### **QuoteWerks pulls other GoldMine contact information into the quote**

When you select the GoldMine contact to use in the quote, our innovative *DataLink* feature can automatically pull other information from GoldMine into the quote such as customer terms, customer sales tax rate, customer profile etc. Customer profiles can be used by QuoteWerks to determine the appropriate pricing a particular customer should receive.

### **QuoteWerks prints information pulled from other GoldMine fields**

QuoteWerks has a built-in print layout designer that allows you to customize the look of your quote. The print layout designer also allows you to easily insert data fields from GoldMine into the QuoteWerks print layout. Then, when you print the quote, QuoteWerks will pull data from the GoldMine contact fields that you inserted into the print layout resulting in a printed quote that includes information from your GoldMine contact record. This feature is different from the *DataLink* feature (described above) in that this extra data is pulled from GoldMine and printed, but not saved with the quote. When you need to save the information pulled from GoldMine into the quote, you would use the *DataLink* feature. So, for example, if you are using a field in GoldMine to store the contact's assistant's name, you can insert that GoldMine field into the print layout so that when the quote is printed, the assistant's name will be printed on the quote, but not saved with the quote.

### **QuoteWerks Creates/Updates linked documents in GoldMine**

When saving a quote, QuoteWerks automatically creates a linked document under the *Links* tab in GoldMine that links to the quote you are saving. When you are in GoldMine and select the *Links* tab, you will see all the quotes that you have done for this GoldMine contact. You can even double-click on the linked document, and QuoteWerks will open and display the quote the link refers to. This feature is very useful for organizing and finding your quotes from within GoldMine.



### **QuoteWerks Creates/Updates forecasted sales/opportunities in GoldMine**

When saving a quote, QuoteWerks automatically creates a forecasted sale / opportunity under the Pending tab in GoldMine. When you are in GoldMine and select the Pending tab, you will see the forecasted sale amounts for each quote you have created for this GoldMine contact. The forecasted sale feature is very useful in determining your projected cash flow. In GoldMine, you can run forecasted sale reports that tell you how much income will possibly be generated from all the quotes you have generated. These reports also let you know when these quotes are estimated to become orders which again helps you estimate your cash flow. If you need to forecast your sales for each individual product you are selling in the quote, QuoteWerks has a built-in reporting module that can create such a report.

### **QuoteWerks Creates/Updates completed sales in GoldMine**

We create quotes in the hopes that the quotes will become orders. When the customer accepts the quote, QuoteWerks will convert the quote to an order and also convert your existing GoldMine forecasted sale into a completed sale. If no forecasted sale exists in GoldMine (This would be the case if a customer called to place an order without requesting a quote first), then QuoteWerks will simply create a new completed sale in GoldMine. The completed sale record will be created under the *History* tab in GoldMine. In GoldMine, you can run reports that tell you how much income was generated from the orders you have received. QuoteWerks also has a built-in reporting module that can create similar reports.

### **QuoteWerks Schedules Follow up calls in GoldMine**

When saving a quote, QuoteWerks offers to schedule a follow up call for you in GoldMine. By scheduling follow up calls you increase your chances of closing the sale! The follow up call will be listed under the *Pending* tab in GoldMine.

### **QuoteWerks Creates profile/detail records in GoldMine**

When saving a quote, QuoteWerks offers to create a "QuoteWerksDocument" profile/detail record in GoldMine that contains the QuoteWerks quote number. This allows you to search for a QuoteWerks quote number from within GoldMine using the GoldMine Query menu

### **QuoteWerks Logs e-mails sent from QuoteWerks in GoldMine**

QuoteWerks has a built-in e-mail client allowing you to e-mail the quote to your customer with a single-click. Your customer's e-mail address is automatically pulled from the GoldMine contact information, and after the e-mail has been sent the e-mail is logged under the GoldMine *History* tab as if you had sent the e-mail from within GoldMine itself.

### **QuoteWerks can pull lookup list information from GoldMine**

Many of the fields in QuoteWerks have a lookup list option. When you press the F2 key while in one of these fields, QuoteWerks will display a list of values that you can choose for the field. You can create a macro value that pulls information from a field in GoldMine. For example, if you press the F2 key while in the terms field in QuoteWerks, QuoteWerks will display a list of terms options that you have previously entered. You can create a new option that retrieves a value from a field in GoldMine where you normally store your terms.

### **QuoteWerks links directly to ZFirm's FaxRush/OmniRush GoldMine integrated faxing software**

FaxRush and it's successor OmniRush is faxing software that integrates very tightly with GoldMine contact management software. The contact's fax number listed in the GoldMine contact record is used to send the fax, so there is no need to keep a separate database of phone numbers. Once the fax has been sent, it will be logged under the *History* tab in GoldMine. QuoteWerks' unique integration with FaxRush submits faxes directly to the FaxRush fax server,



where the fax server takes care of sending the fax which leaves your workstation ready to be used for other tasks. [www.faxrush.com](http://www.faxrush.com)

**QuoteWerks synchronizes using GoldMine's synchronization features**

GoldMine has synchronization features that synchronize the contact data between different installations of GoldMine. Let's say that you have two offices one in Los Angeles and the other in New York and you have GoldMine installed at each office. When you add a new contact to your New York office installation of GoldMine, and then run the synchronization process, that new contact will appear in the contact database at the Los Angeles office installation of GoldMine.

When QuoteWerks saves a quote, it also saves a linked document to GoldMine that refers to the quote. The GoldMine synchronization features synchronize all linked documents, including QuoteWerks linked documents. So when you create a quote at the Los Angeles office, and then run the GoldMine synchronization process, someone in the New York office can double-click on the QuoteWerks linked document that has now appeared in their GoldMine installation. When they double-click on the linked document, QuoteWerks will detect that that quote is not in the New York office QuoteWerks database, and will proceed to add the quote to the New York office QuoteWerks database. Additionally, after the GoldMine synchronization process has completed, you can run QuoteWerks's batch merge utility which updates the local office quote database with all the synchronization changes at once instead of one at a time.

---

## "QUOTEWERKS" / GOLDMINE INTEGRATION INSTRUCTIONS

---

There are very few setup requirements when installing QuoteWerks to work in conjunction with GoldMine. When QuoteWerks is first started, it will ask you to select your preferred contact management software. After you have selected GoldMine, there will be some GoldMine integration setup options. These options are explained in the QuoteWerks user manual in the Contact Management Integration chapter.

One important installation note is that if you will be installing QuoteWerks and GoldMine at multiple locations, and using the GoldMine synchronization features, you need to install QuoteWerks into the same relative path at each location. An example is below:

**Correct** example of server and laptop installation directories:

Server: f:\apps\QuoteWerks

Laptop: c:\apps\QuoteWerks

**InCorrect** example of server and laptop installation directories:

Server: f:\apps\QuoteWerks

Laptop: c:\program files\QuoteWerks

(Notice how the paths are different "apps\QuoteWerks" vs "Program Files\QuoteWerks" in this incorrect installation)

---

## SUPPORT INFORMATION

---

### ***Contacting Support Services***

To contact support services by phone, call (407) 248-1481, 9:00 am to 6:00 pm Eastern Standard Time, Monday through Friday, excluding Holidays.

To contact support services by fax, send faxes to (407) 248-1482.

To contact support services by E-Mail, send your e-mails to [support@quotewerks.com](mailto:support@quotewerks.com)

A single representative from your company must be designated as the support contact. Typically this person is your system administrator, or QuoteWerks administrator. This requirement is in place to ensure that the person who is most familiar with your QuoteWerks installation is speaking with QuoteWerks support services.

When you contact support services by phone, you should be at the computer where you are experiencing the issue with and have the user manual or help file at hand. Be prepared to give the following information:

- ✓ The version of QuoteWerks that you are using including the build # located on Help|About menu.
- ✓ The exact wording of any messages that appeared on your screen.
- ✓ A description of what happened and what you were doing when the problem occurred.
- ✓ A description of how you tried to solve the problem.

### ***Standard Warranty Support***

Your initial QuoteWerks 3.0 purchase includes:

- 45 minutes of voice support for single-user installations and 90 minutes for multiple-user installations. These minutes are used in 5-minute increments. Each time you contact Aspire Technologies, Inc. for support a minimum of 5 minutes will be subtracted from your account balance. Minutes used are rounded up to the next highest 5-minute increment.
- 12 months of e-mail and fax support.
- 6 months of updates (not upgrades) available for download via our web site.

Your initial QuoteWerks 3.0 QuickBooks link, Peachtree link, or Open Export Module purchase includes:



- 30 minutes of voice support.
- 12 months of e-mail and fax support.

When you purchase a 1-user license, it includes 45 minutes of phone support. If at a later time you purchase your second license, you will receive an additional 45 minutes of phone support.

Please note, you do not receive additional phone support when purchasing more than 2 licenses.

## ***Extended Warranty Support***

### **Pay-per-Minute phone support**

Once your minutes of standard phone support have been depleted, you may contact support services by phone for Pay-per-Minute support at a rate of \$1.00 per minute for time spent on the phone with a technician, and for any time that the technician spends researching the issue. You will not be charged for any time spent on hold, unless the technician is actively working on the issue while you are on hold. Please note that with Pay-per-Minute support, you are paying for the time spent for our best reasonable attempt to resolve an issue, and does not guarantee a resolution. Pay-per-Minute support must be paid by credit card. VISA, Mastercard, American Express, and Discover are accepted.

Note: Only senior Aspire Technologies, Inc. technicians handle pay-per-minute calls, expediting a quick resolution of the issue.

### **Paid Updates**

Once your standard warranty support has expired, you may purchase an Update Password which entitles you to 6 more months of product updates (not upgrades). No additional voice support is included with the purchase of an Update Password.

During the 6 month period, the Paid Updates Program includes:

- E-mail support
- Fax support
- Product updates (not upgrades)

Please note: Support policies are subject to change without notice.