

# Sales Quotes

*Track your sales proposal activities – as well as the sales proposal activities of your competitors*

GLOVIA G2 Sales Quotes extends automation to the beginning of the sales cycle, before finalization of customer or prospect orders. This enhances both the efficiency and timeliness of reported sales data and activities.

### *Easy-to-Use Tracking System*

Sales Quotes records, maintains, and tracks sales quote and competitor information as well as statistics on the probability of closure. The user interface and document structure are nearly identical to that of GLOVIA G2 Sales Orders, minimizing the need for additional user training.

### *Timely, Accurate Sales Quotes*

The system automates the pricing of goods and services for faster and more accurate customer quotes. Flexible pricing options enable your organization to incorporate all standard sales order pricing and discounting techniques. Sales Quotes can be used with GLOVIA G2 Configurator for faster and more precise quoting of make-to-order products. All or part of the quote can then be converted directly into a sales order and the sales quote is automatically closed. All closed sales quotes are maintained in history files for future reporting purposes.

### *Generates Customer and Prospect Quotes*

For prospective customer quotes, prospect data is entered directly into the sales quote. When optionally converted to a sales order, customer master records are created directly from the sales quote, which eliminates the need to enter information twice. For sales quotes to existing customers, information is automatically pulled from customer master files.

### *Maintains Competitor Information*

Competitor information files track the activity of your competitors, including data on entire quotes or specific items. Win/Loss reports tell you who is winning orders, who is losing orders, and why.

### *Forecasting Aid*

By optionally assigning a probability code to sales quotes or line items, you can instruct the system to calculate the value of future expected orders based on quantities and prices in Sales Quotes. Expected sales value reports may be viewed or printed by customer, time frame, item, sales representative, or sales quote type.

## Define a Sales Quote



### Sales Quote Entry

- Quotes standard stock items, standard non-stock items, non-standard items, configured items, and additional charges
- Integrates all standard sales order pricing and discounting techniques
- Extensive text areas for additional comments
- Quotes for both existing customers and new prospects
- Tracks probability of closure for expected value reporting

### Competitor and Probability-of-Closure Tracking

- Maintains master file for each competitor
- Tracks competitor information for each sales quote or item
- Generates win/loss reports

### Convert Sales Quote to Sales Order

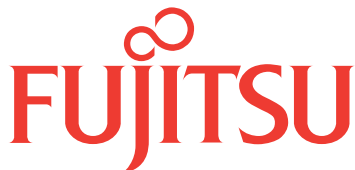
- All or selected part of sales quote can be converted to a sales order
- Optionally closes sales quote as a result of the conversion
- Creates customer information from prospect data

### Standard Inquiries

- Sales quote
- Sales quote history
- Sales quote product configuration review
- Sales quote status
- Sales quote by item
- Sales quote history by item
- Competitor

### Standard Reports

- Sales quote configured pricing
- Sales quote configuration review
- Sales quote status
- Sales quote history
- Sales quote review
- Sales quote expected value
- Sales quote win/loss analysis competitors
- Sales quote status codes
- Sales quote type
- Win/loss reason codes
- Probability of closure codes
- Sales quote analysis



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