

1. OVERVIEW

Quotis is an all-in-one estimating and quoting solution that can be tailored to suit almost any industry, product, or service. Quotis speeds up the quoting process, and allows your team, or even your customers, to generate an accurate quote for custom jobs in minutes.

2. SOFTWARE FEATURES

The following features are standard with Quotis:

Build Flow Templates

Build Flow Templates are a flowchart based configuration module that provides calculations, decisions, filters, control over item selection, cumulative values, and option selections. This feature allows users to create a template for almost any item, process, or project, that can be used by non-technical users to create accurate estimates by answering simple questions. Each time an option is selected, or a value entered, the system automatically guides the user to the next logical step and can use the values and options entered to roll up costs, process times, or items for inclusion.

Project Records

Projects can be created by the user to encompass all aspects of the job, including Estimates, Quotes, Files, Notes, and Orders. Users can report on the value and status of Projects via the Project listing screen.

Estimating

Users can create an Estimate by selecting a relevant Build Flow Template and answering simple questions. Options can be supplemented with images or notes to provide more context and assist with correct identification and selection. Values can be validated with maximum and minimum input ranges, as well as input types. Estimates can include standard Items, Sundry Items, or can include 'pseudo items' via the use of Build Flows. Estimates can also include 'options' or 'add-ons' for the customer to select via the Quote Portal.

Quoting

Quotes can be generated from Estimates with the ability to select from a range of document layout and design options. Quotes can be presented as a traditional PDF or uploaded via the Quote Portal where users can view an 'on-screen' view of the Quote, with the option to interact with the quote, select options, ask questions, and accept or decline the Quote.

Approvals

Quotes can be set for authorisation by other users (e.g. managers) to approve or reject with comments. Values can be set for the approval threshold, and Approvers can see all Quotes for approval in one location, with a clear view of what the customer will see. The approval process is quick and can be completed from any device.

Quote Portal

Once Quotes are approved (if this option is switched on), Quotes can be added to the Quote Portal and an email sent to the customer. Customers can access a listing page that displays all current and previous quotes, with the option to filter and sort. Quotes can be viewed on-screen with the ability to add comments, select options, and communicate with the salesperson. Quotes can be accepted or declined with a reason.

Item management

Items can be imported, managed, and amended via the Item list page. Changes to Items can optionally be rolled out to all existing templates, if desired.

Customer management

Customers can be added or imported with the ability to add multiple address locations, contacts, and a range of other information.

Contact management

Contacts can be added or imported with the ability to attach against Customers, or multiple Customers, if needed.

Reporting

Users can report on the status and progress of Projects or Quotes. Reports include analysis of won/lost, Customers, User sales performance, sales cycle, and the ability to view the on-screen activity of individual Customers via the Quote Portal.

3. PARAMETERS

Quotis is sold with a base price plus any additional named internal or external users, and any additional modules. Professional services are additional and not included in the subscription cost.

4. OPTIONAL EXTRAS

External users

External users can be included, for example, to include sub-contractors, end-user customers, or installation teams. These users are priced on a 'per user' basis.

Additional functionality

We may quote separately for additional functionality that are outside of the standard feature offering.

5. SYSTEM REQUIREMENTS

Quotis is a web browser based application and does not require an 'installation'. We support the following web browsers:

- Mozilla Firefox (latest versions)
- Google Chrome (latest versions)
- Microsoft Edge (latest versions)
- Other browsers may work, but we do not test or support any outside of the aforementioned.

The entire Quotis system can work on a desktop computer, laptop, and tablet device. We recommend a minimum display of 1024 x 768.

Some parts of the system are also designed to work on mobile devices (approvals, Quote Portal, quote view, etc). We recommend any modern desktop, laptop, or

tablet device with at least the recommended processor (Intel or equivalent) speed of 2 GHz and, ideally, we recommend at least 4 GHz of RAM.

We are committed to developing modern web applications and look to exploit new capabilities available in modern, up-to-date browsers. Because some browsers, (such as Google Chrome), can be set to automatically update whenever it detects that a new version of the browser is available, we cannot always guarantee that such new versions will not introduce a problem. All browsers must have cookies, JavaScript and pop ups enabled.

6. SECURITY

Hosted solutions or software as a service solutions are provided in accordance with the relevant technical and organisational Security Measures.