5.1 tesseract

tesseract service management software
core component v.5.1

corecomponent

quote center module

The **Quote Center** module is designed to permit collection of prospect data and preparation of quotes.

The Quote Center format is simple for the Sales team to enter but sufficiently structured for it to be easily converted to a Contract when the Quote is accepted. To minimise user training the module is based around Wizards for Quote generation and Acceptance. Each wizard takes the user through simple entry screens in a logical sequence, prompting for user input where required.

A new Quote can be based upon an existing Contract, a previous Quote or entered data. Where available, it is possible to capture detail down to the level of accurate Site schedules including Serial Numbers but, where data is limited, it will accept simple listings of quantities against each product type. In the latter case, the user is prompted to collect the missing data only when the quote is accepted. Quote Terms permit structured pricing, from a standard 'price book', using up to five factors based on Cover, Service level, Routine maintenance, plus user defined factors.

A user definable Quote status permits tracking of the quote through any number of stages between creation and acceptance or rejection. Rejection can also be given a status to indicate reason for rejection.

The status also prevents modification of Quotes after predefined stages in the process to provide the level of control required.

Quote Center also includes Quote actions and associated notes which can be used to co-ordinate previous and outstanding Sales activity and provide a daily 'to-do' list by Salesperson.

If the customer accepts the quote then the quotation-acceptance wizard will process all the data, prompting the user to fill in the gaps, and generate a new contract with all the equipment attached. If the quote is rejected then a rejection status is given together with a reason. This rejected quote can still be used for a re-quote later.

A selection of standard reports includes quotation print, next action report, current quotes and quotes accepted/rejected in the last 99 days.

In addition to the Suite of standard reports, Crystal Reports provides a powerful end user tool to modify existing or add additional reports, as required.

service center 5
A true end-to-end web product

Developed using Microsoft.Net technology, **SC 5.0** is a browser based software supporting a range of databases and allowing for a 'zero footprint client'.

SC 5 service centre five

tesseract
supplying service solutions
for over 25 years