



QUOTE

# centre

## 4.2 Global Service Management System



*The Quote Centre module is designed to permit collection of Prospect data and preparation of Quotes in a format which 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.

*continued overleaf:*



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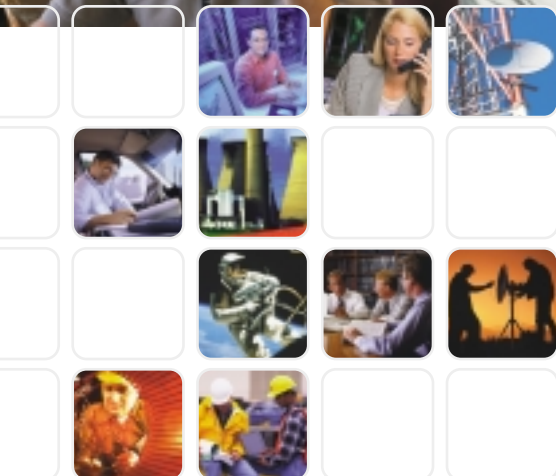
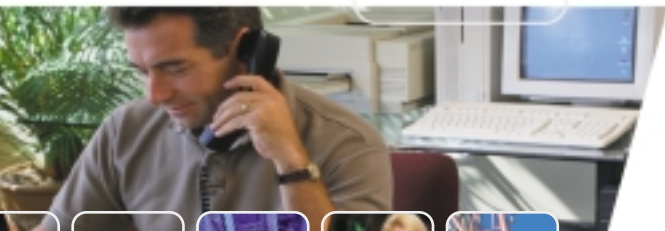


Product Brief

### Company Overview

Tesseract was formed in 1985 to develop, market, sell and support specialised 'Problem Management Systems' for the Service Industry. Our singular commitment to Service Management ensures that we are in touch with the requirements of our customers not only for today, but for the future. Our development within the field of Service Management leads the way for the next generation of Service Operations.

SERVICE CENTRE, our service management package, has evolved over the last 15 years and can now boast over 350 successful installations in 27 countries.



Tesseract 'Service Centre' has been successfully implemented in many different industries.

OnLine **4.2** Demo



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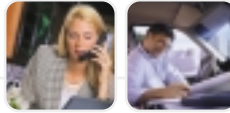
Quote Centre also includes Quote actions and associated notes which can be used to co-ordinate previous and outstanding Sales activity and provide a daily "to-do" list by Salesperson.

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.

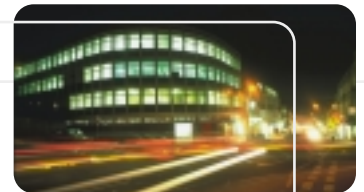
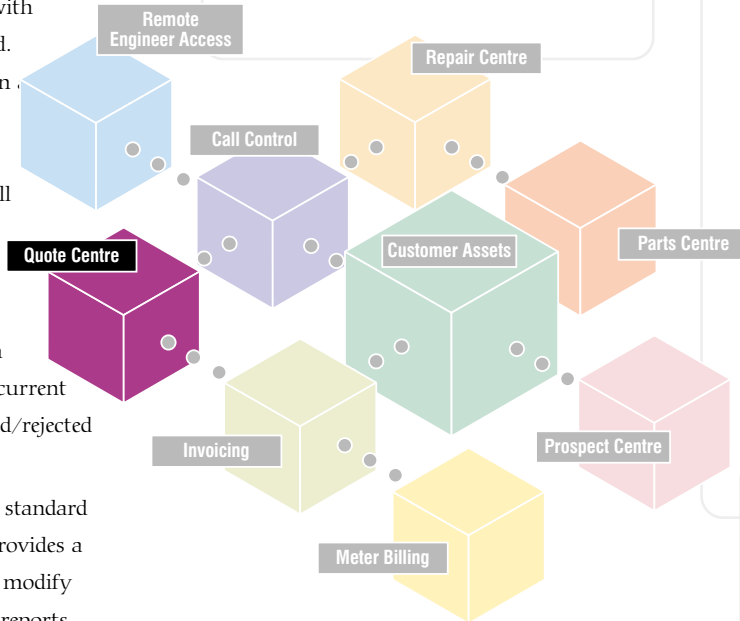
If the quote is rejected then rejection status is given together with a reason. This rejected quote can still be used for a re-quote later.

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 CENTRE is a modular product and designed to integrate in a range of configurations to meet specific customer requirements.**



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### Repair Centre

A flexible workshop module including job tracking, escalation, batch book-in/ship-out and workflow; all with bar coding.

### Parts Centre

An integrated multi-location stock control system specifically designed for the control of service stock from warehouse to van.

### Prospect Centre

This module handles both new and known (customer) sales prospects. Actions are logged against each prospect and salesman's to-do list generated.

5

Quote Centre

## Product Overview

### Customer Assets

Comprehensive records of multiple site, customer equipment installations with configuration options, contract, sub-contract and service level control.

### Call Control

Effective call management in a response-critical environment with call escalation, service diary and parts usage.

