

# Advanced QuoteWerks Training

## Location

Training Courses are conducted by a qualified QuoteWerks Trainer and can either take place in our offices, or at a location of your choice.

## Format

Advanced training courses typically last a full day, with a “learning by doing” approach.

The trainer starts with a demonstration of the software features that are going to be learnt so that trainees gain an understanding of the end result they are aiming for and the steps necessary to get there. After the demonstration, the training is “hands-on” to provide trainees with progressive practice in using functions of the software.

## Content

### Set up Products and Product Sources

- Create Product Sources
- Import Products and Prices
- Create new Products and edit/update existing Products
- Create Vendor databases

### Set up Pricing

- Set up Product Pricing Options
- Create Customer, Price and Product Profiles
- Price Comparison and Refresh with Best/Latest prices
- Product and Customer Price History

### Set up Product Selection Types

- Set up Required, Optional and Substitute Product Items
- Create Product Bundles
- Set up the Configurator

### Customise Fields and Layouts

- Customise Product and Document Fields
- Customise Document Layouts

### Import and Export

- Import Documents and Export Data

### International Features

- Exchange Rate Mechanism and Alternate Currencies

### Maintain QuoteWerks

- Contact Manager integration
- Synchronisation
- Create additional Users, allocate Access Rights and specify User Preferences
- Data Maintenance and Data Backup
- Software Updates

## Prices

### Training

- £750 per course\* (plus expenses if training is not conducted in our offices)

### Expenses

Travel expenses dependant upon location: petrol @ 40p/mile OR train and taxi fare  
Accommodation expenses for multi-day or distance training

Expenses will be agreed in advance of the course and be submitted with copies of receipts.

\*Special rates can be agreed for multi-day training.

## Booking

To book an Advanced QuoteWerks training course, please contact:

Vivienne Watts at Hilltops IT on +44 (0)844 357 7360 or email [sales@hilltopsit.co.uk](mailto:sales@hilltopsit.co.uk) to confirm dates and receive your booking reference. Please then complete, sign and return the Training Booking Form at the end of this document.

## Notes

- Before attending an advanced course, trainees should either have used QuoteWerks before or have attended the introductory training course.
- In order to reduce “background noise” and promote learning, it is strongly recommended that a separate room is used for the training course(s).
- We recommend that a maximum of four people attend each training course to maximise the benefit each individual will get from the session.
- If requested early enough in advance, the trainer may be able to bring some laptops if PCs can not be made available in the training room. Access to the internet is not necessary but access to your chosen Contact Manager will be necessary for the advanced training course.
- The duration of company-specific advanced training, to include the installation, configuration and implementation of QuoteWerks, will depend on the extent and complexity of the topics to be covered. An estimation of timescales and costs can be provided upon request once an understanding of the scope of the training is understood.

## Terms and Conditions

- The training course price and expense charges included in this document are valid until 31<sup>st</sup> July 2009 and are subject to VAT at current rates.
- One full day is the minimum training course booking.
- A cancellation fee of 50% of the value of the course(s) booked will be charged if a cancellation is made within 2 weeks of the course dates.

# Training Booking Form

Your Company Name			
Booking Reference			
Your Company Address			
Contact Name			
Contact Phone Number			
Contact Fax Number			
Contact Email Address			
Training Location (if different to above)			
QuoteWerks Version		e.g. QuoteWerks v4 build 43 Corporate	
QuoteWerks Reseller			
Course Name			
Course Date(s)			
Course Fee(s)	£750 per day plus VAT and any travel or accommodation expenses incurred		

Please list the attendees and tick which training course(s) they will be attending.

Trainee Name	Department	Introductory	Advanced

I hereby agree to the course Terms and Conditions:

Name	Position	Signature	Date

Return to: Vivienne Watts, Hilltops IT, Lymedale Business Centre, Lymedale Business Park, Newcastle-under-Lyme, Staffs, ST5 9QF