

Introductory 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

Introductory 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

Create a Quote Workbook

- Select Products to appear on the Quote
- Select the Company and Contact the Quote is going to
- Append, Insert, Move and Delete items on the Quote
- Change Quantities and Prices
- Apply Discounts and Mark-ups
- Add Sub-Totals and Running Totals
- Append and insert Blank Lines and Comments
- Change Line Item Attributes
- Enter Sale Information
- Enter Notes
- Enter Custom Information

Preview, Print and Email Quotes/Orders/Invoices

- Preview Quotes with different Layouts
- Print Quotes with different Layouts
- Email Quotes with different Layouts
- Attach associated Files, Documents and Literature to emailed Quotes

Convert Quotes to Orders and Order to Invoices

- Convert Quotes to Sales Orders
- Create Purchase Orders
- Convert Sales Orders to Invoices

Save, Revise, Duplicate and Retrieve Quotes/Orders/Invoices

- Save and retrieve documents and document revisions
- Duplicate documents
- Use Template documents

Customise your QuoteWerks

- Customize your views
- Modify your User Preferences

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 Introductory QuoteWerks training course, please contact:

Vivienne Watts at Hilltops IT on +44 (0)844 357 7360 or email 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

- 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.
- Training courses can be tailored to meet your specific requirements – please contact us to discuss content, duration and cost.

Terms and Conditions

- The training course price and expense charges included in this document are valid until 31st 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.

QuoteWerks 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	Reports

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