

How Quoter integrates into MSP workflows for faster sales cycles

If you're curious about implementing Quoter to speed up your MSP's sales cycles but don't know how or where it will fit into your existing workflows, you've come to the right place!

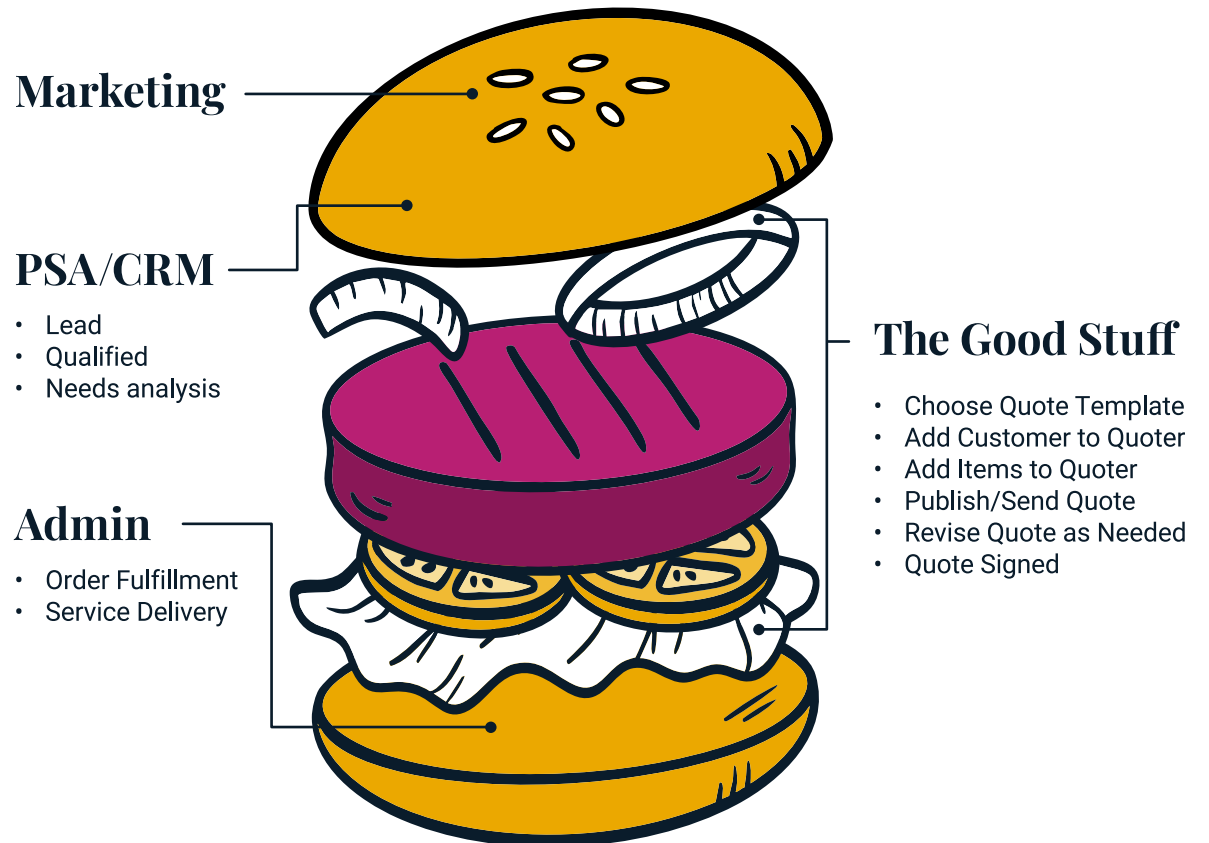
Burgers might not immediately come to mind when thinking about **quoting software for MSPs**. There's no better visual than a big, juicy burger when considering where Quoter "fits" in an MSP's sales workflow.

The best parts of a burger are between the buns: lettuce, pickles, delicious sauces, and, oh, the patty! (Chicken, beef, a big ol' portabello mushroom.)

Think of **Quoter** as everything between the buns of a sales workflow burger. The top bun is your PSA, and the bottom is your admin, with marketing as the sesame seeds sprinkled on top. Quoter is the good stuff: **quote creation, sending, tracking, revising, and acceptance**, all in one tasty platform.

With Quoter's powerful **integrations** connecting the entire sales process, your whole team can easily send professional, error-free quotes, eliminating bottlenecks and improving client turnaround time.

Let's take a closer look at that epic burger with an overview of where and how MSPs use Quoter in their workflows to speed up sales cycles.



Finished the needs analysis? Fire up Quoter

In a typical MSP sales cycle, Quoter kicks in after the needs analysis or client conversation where the scope of the quote is discussed. When you're ready to quote, so is Quoter.

The first step in Quoter is to select a Template.

Every quote is built from a template in Quoter. [Quote Templates](#) are easy to create (you build your first one during onboarding), and they're set-and-forget once put together. You can attach other content like brochures or contracts, and they're easy to brand, customize, or even clone if you want different versions for hardware, software, or services, such as:

- MSA template
- Server install template
- Project templates
- Top 5 servers with specific SKUs as line items included (Quoter can streamline this as much as you like!)

Line Items

i Add Items to a Template to include them in your Quote automatically. This saves time creating new Quotes.

1 Year Service Agreement	Min Qty: 1	Max Qty: 5
Activation Fee - TEST111	Min Qty: 1	Max Qty: 1

+ Add Item

+ Add Section

Recurring Fees

i Note that a Template can only utilize one recurring billing frequency. If any of your included Items contain recurring fees, their billing frequencies will be adjusted to match the billing frequency set below.

Recurring Fee Billing Frequency

Monthly with 1 payment(s) upfront, and a 14 day grace period.

Minimize data entry with reusable templates and build quotes in seconds.

Pull in contact details

Populate your templated quote with the correct details by pulling a contact from your integrated PSA, CRM, or bookkeeping tool.

You can absolutely add new individual contacts or organizations to Quoter if you choose, but most Quoter Partners keep their prospects' and clients' contact information saved in another system.

Revise Quote – AAA

Help Resources ?

Reseller ?

None

Quote

23541.2 (optional)

Expires

2025-03-18

Quote Name

AAA

Cover Page

Cover Letter

Prepared For

Prepared for

ABC Test

Person

25100 Detroit Rd

jturner+1@quoter.com

Address 2 (optional)

44231446432

United States

Ohio

ABC Test Company

Title (optional)

Westlake

44145

☐ Shipping Address on Quote ?

Currency

USD

Eliminate copy and paste from your quote-to-cash process with integrations for your PSA, CRM, and bookkeeping tools.

Connect your sales activities to Quoter

Your sales opportunities likely don't start in Quoter. Top-of-funnel sales activities, such as qualifying a lead and conducting a needs analysis (the "top bun" in our burger analogy), are logged in your PSA or CRM.

As you get the quote underway in Quoter, you can look up the contact, person, or organization your team has been speaking with through your PSA or CRM to see open opportunities or deals. This links the quote you're creating to the specific opportunity you started elsewhere. No duplication, just a clean, logical process.

QUOTER SUPPORT Logged in as: Peter Logout

Dashboard Quotes Contracts People Items Templates Reports Settings Account Help Resources

General Shipping Taxes Discounts Currencies Payment Gateways Integrations Labels & Messages Required Fields Pricing Table Approval Policies Quote Reminders

Integrations

[+ New Integration](#) [Integration Requests Status](#)

Showing 1 to 27 of 27 entries

Integration	Label	Type	Reseller	Status	Actions
	ad	Custom Webhook			
	Agile CRM	Agile CRM			
	Amazon	Amazon			
	Autotask	Datto Autotask PSA			
	D&H	D&H XML Service			
	Halo PSA	Halo			
	HubSpot	HubSpot			
	Kaseya	Kaseya BMS			
	OnePage	OnePage CRM			



"Quoter is clean; it's intuitive. I can train someone within 30 minutes and say, here's the template to quote a simple project."

BRIAN LARGENT,
CEO, ARCLIGHT GROUP

Integrating your sales tools to centralize and streamline quoting tasks in Quoter is easy.

Configure, Price, Quote

Here's where your workflow gets beefy!

The quote is generated using a configure, price, and quote process. Quoter can include PSA, CRM, and distributor software integrations to ensure accuracy and detail, and our Import Line Items tool with saved mappings can pull in CSV files with line items from virtually any source.

Depending on the template you've chosen, you may already have products, services, or recurring services as line items on the quote. For example, an agreement might have basic services that are always included. These are populated and always up-to-date as they pull from externally linked/ integrated systems.

You can customize and configure each quote as needed, but templates make it quick and easy. Quoter also offers an optional [Manager Approvals](#) module for MSPs that want an internal sign-off process before moving to the next stage — a double-check on margins or to ensure new team members are quoting error-free.

Category	Name	Qty	Unit Cost	Price Modifier [®]	Unit Price	Discount	Total
Hardware	MacBook Air	1	\$600.00	Markup: 1.01% Margin: 1%	\$606.06	—	\$606.06 \$6.06 (1%)
Base Price			\$ 600.00	Mgn % 1.00	\$ 606.06	0.00	
Size *							
<input type="radio"/>	13 Inch	SKU	\$ 0.00	Mgn % 0.00	\$ 0.00		
<input type="radio"/>	15 Inch	SKU	\$ 100.00	Mgn % 50.00	\$ 200.00		
Colour *							
<input type="radio"/>	Black	SKU	\$ 0.00	Mgn % 0.00	\$ 0.00		
<input type="radio"/>	Grey	SKU	\$ 0.00	Mgn % 0.00	\$ 0.00		
RAM *							
<input type="radio"/>	8GB	SKU	\$ 0.00	Mgn % 0.00	\$ 0.00		
<input type="radio"/>	16GB	SKU	\$ 25.00	Mgn % 50.00	\$ 50.00		
Summary			Total One-Time		Total Recurring		Total Up-front
			\$606.06		—		\$606.06

☐ Open Email Dialog

This Quote requires approval upon submission. Integrations requests will not be pushed until the Quote is approved.

Manager Approvals helps move quotes through the sales cycle faster by automatically triggering review notifications for policy-violating quotes.

Publish and ship the quote

Quotes created in Quoter are sent to your customers by email.

Direct from Quoter is best because we track and remind you about email opens and clicks with [Email Tracking](#), but you can also copy the link and put it in your own email message.

Email templates can include merge tokens to personalize and automatically add important quote details in the body of the message —highlighting key points or numbers for your clients. Email signatures can even include merge tokens!

Total ^	Recurring ^	Status ^	^	Actions
\$10.00 USD \$8.00 (80%)	\$0.00 USD \$0.00 (0%)	Pending ▾	○	
\$5,837.43 USD \$2,408.02 (43%)	\$275.60 USD \$187.00 (71%)	Pending ▾	○	
\$5,458.04 USD \$1,084.30 (20%)	\$490.00 USD \$196.00 (40%)	Pending ▾	✓	
\$0.00 USD \$0.00 (0%)	\$5,400.00 USD \$3,600.00 (67%)	Pending ▾	✓	
\$2,729.02 USD \$542.15 (20%)	\$20.00 USD \$11.00 (55%)	Pending ▾	✓	

Bounced

Follow up on the quote

How do you ensure deals close?

Quotes sent from Quoter are tracked, and a reminder is automatically sent to the customer at a scheduled date based on relative dates to quote expiry or send (Standard plan and higher). We make it easy to stay on top of multiple quotes so nothing gets lost in the shuffle, and you don't have to figure out your own follow-ups each time a quote goes out.

Want to stay on top of all the quotes you've sent? Save customized views for one-click access to the quotes most relevant to you – set views to see all the quotes you've sent in the last [x] days or all quotes that have been sent and not accepted. When you log into Quoter, you get your saved views front and center, and it's easy to build more views for different purposes and users – an account manager can see all their own quotes, or your leadership team can see a complete overview.

QUOTER SUPPORT

Logged in as: Peter Logout

Dashboard

Quotes

Contracts

People

Items

Templates

Reports

Settings

Account

Quotes List

Quotes (Legacy)

Pending Approval 0

Approval History

New Quote

New Template

Search by quote name, customer name, or customer organization name...

Sort & Filter

Sort by: Last Modified

Bulk actions:

Submit

Export to CSV

	OWNER	NUMBER	CUSTOMER	NAME	STAGE	TOTAL	ACTIONS
<input type="checkbox"/>	JT	23541	ABC Test Person ABC Test Compa...	AAA	Published	\$533 USD	Edit Email Search Print Refresh More
<input type="checkbox"/>		235...	ABC Test Person1 Quoter Software ...	AAA	Draft	\$23,533 USD \$1,188 USD	Edit Email Search Print Refresh More
<input type="checkbox"/>		23540	ABC Test Person1 Quoter Software ...	AAA	Published	\$23,533 USD	Edit Email Search Print Refresh More
<input type="checkbox"/>		23539	ABC Test Person1 Quoter Software ...	AAA	Published	\$1,066 USD	Edit Email Search Print Refresh More
<input type="checkbox"/>		23538	ABC Test Person Quoter Software ...	AAA	Published	\$533 USD	Edit Email Search Print Refresh More

Centralize your quote pipeline with all of your team's quoting activity in one place.

Track quote revisions

Changes to the quote, such as item quantities, product types, or negotiated discounts, are all part of a typical sales cycle for MSPs.

With Quoter, you have two options for handling changes:

- Discuss revisions with the client, and then send an updated quote or
- Leverage Optional Items, Single-Select Items, or Groups to enable the client to configure the modifications within the original quote.

Revisions are tracked and appended to the original quote in Quoter so everything stays together and is associated with the original opportunity or deal and the correct contact. There is version tracking for each quote, but if you want to start fresh, you can create new quotes from revisions by easily copying and cloning.

Summary

Total One-Time	\$24,472.56 USD
Total Monthly	\$1,599.92 USD
One-Time	\$24,472.56
Recurring Up-front	\$1,599.92*
Total Up-front	\$26,072.48 USD

*

ACCEPT QUOTE

Cost Breakdown

Category	One-Time Fees	Monthly Fees
Professional Services	—	\$1,440.00
Hardware / PC	\$16,799.92	—
Product	\$5,432.64	—
Non-serialised	—	—
Labour	—	—
Support	\$2,240.00	—
Service	—	—
Email	—	—
Warranty	—	\$159.92
Total	\$24,472.56 USD	\$1,599.92 USD

Quoter automatically calculates new totals on revised quotes, so there's no tedious back-and-forth to get the quote approved.

Get paid

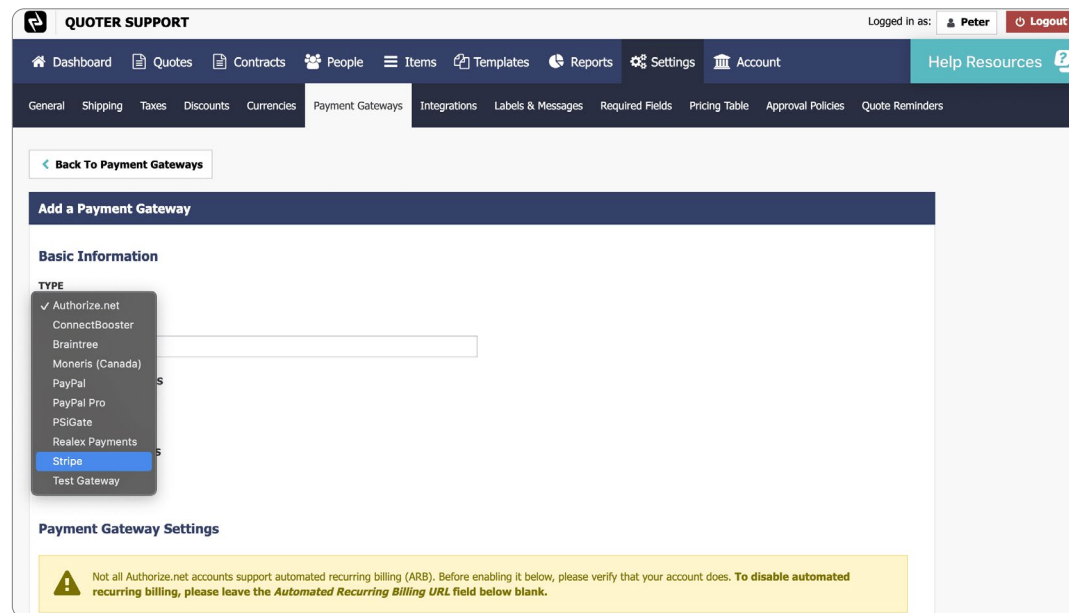
Once the contract is signed, it's time to invoice.

Get a deposit payment started by connecting a [payment gateway](#). You can initiate recurring payments at the quote level, too.

Quoter does not do invoicing; that happens in your billing tool or PSA, an essential part of the "bottom bun" in our burger analogy of the MSP sales workflow. Many MSPs move from their billing and accounting tool, like QuickBooks Online, into their PSA tool and PSA into Quoter.

We recommend that you collect payment online through your preferred payment gateway (or gateways) and have payment record data sent directly to your accounting software. Quoter integrates with Quickbooks Online, DataGate, ConnectBooster, and more accounting and billing software for better account tracking.

If you prefer, Quoter can take payments directly, with integrations for several different payment gateways, like Stripe and PayPal.



"Once we had Autotask integrated with Quoter, and it was synching quotes back and forth, probably about a month or two in, I felt like I was getting serious ROI from Quoter. Pretty darn good for a SaaS tool."

ALEX WILKINS,
CEO, WILKINS IT SOLUTIONS INC.

Now that's a burger

By consolidating the meat of your quote-to-cash tasks in one platform, Quoter fits into your MSP's sales workflows like a patty between two buns. Now that you know how and where Quoter "fits" for faster sales cycles, **book a personalized, 1:1 demo to see it in action.**

[Book A Demo](#)