

**PLEASE KEEP  
THIS BROCHURE  
AS A RESOURCE**



# The CPQ solution for window and door manufacturers and dealers

## **Presets and Global Change in one Click.**

Optimize your quoting with IQX. Presets and Global Change let you apply and update common item features across the quote in just one click.

## WINDOWS DESCRIPTION

|    |                                                                                   | Unit Price | Qty | Total Extended |
|----|-----------------------------------------------------------------------------------|------------|-----|----------------|
| 1. |  |            |     |                |
|    | <b>HSlder-Black</b>                                                               | \$ 470.44  | 8   | \$ 3,763.50    |
|    | POSITION: South                                                                   |            |     |                |
|    | ROOM NAME:                                                                        |            |     |                |
|    | FRAME CHOICE: Block Frame                                                         |            |     |                |
|    | COLORS: Black                                                                     |            |     |                |
|    | HARDWARE CHOICES: Cam lock                                                        |            |     |                |
|    | HARDWARE COLOR: Black                                                             |            |     |                |
|    | ENERGY PACKAGE: EP-T24-2019                                                       |            |     |                |
|    | EXTERIOR GLASS: Clear                                                             |            |     |                |
|    | INTERIOR GLASS: Cardinal Low-E                                                    |            |     |                |
|    | WIDTH: 36.00                                                                      |            |     |                |
|    | HEIGHT: 36.00                                                                     |            |     |                |
|    | GAS-FILLED: Argon                                                                 |            |     |                |
|    | GRID TYPE: Sculptured                                                             |            |     |                |
|    | GRID PATTERN: Colonial                                                            |            |     |                |
|    | SCREEN TYPE: Standard with Fiberglass Mesh                                        |            |     |                |
|    | TEMPERED GLASS: Yes                                                               |            |     |                |
|    | GRIDS: 2 W X 2 H Lites                                                            |            |     |                |

Viewed from the Outside

|    |                                                                                    |           |   |             |
|----|------------------------------------------------------------------------------------|-----------|---|-------------|
| 2. |  |           |   |             |
|    | <b>VSlder-White</b>                                                                | \$ 460.69 | 8 | \$ 3,665.50 |
|    | POSITION: 0                                                                        |           |   |             |
|    | ROOM NAME:                                                                         |           |   |             |
|    | FRAME CHOICE: Block Frame                                                          |           |   |             |
|    | COLORS: White                                                                      |           |   |             |
|    | HARDWARE CHOICES: Touch lock                                                       |           |   |             |
|    | HARDWARE COLOR: White                                                              |           |   |             |
|    | ENERGY PACKAGE: EP-T24-2019                                                        |           |   |             |
|    | EXTERIOR GLASS: Clear                                                              |           |   |             |
|    | INTERIOR GLASS: Cardinal Low-E                                                     |           |   |             |
|    | WIDTH: 36.00                                                                       |           |   |             |
|    | HEIGHT: 48.00                                                                      |           |   |             |
|    | GAS-FILLED: Argon                                                                  |           |   |             |
|    | GRID TYPE: Sculptured                                                              |           |   |             |
|    | GRID PATTERN: Colonial                                                             |           |   |             |
|    | SCREEN TYPE: Standard with Fiberglass Mesh                                         |           |   |             |
|    | TEMPERED GLASS: Yes                                                                |           |   |             |
|    | GRIDS: 2 W X 2 H Lites                                                             |           |   |             |

Viewed from the Outside

|               |            |
|---------------|------------|
| Subtotal:     | \$7,449.00 |
| Installation: | 4,800.00   |
| Shipping:     | 300.00     |
| Tax:          | \$1066.67  |

Local Sales Tax:

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**\$13,615.67**

**Leverage E-signature and on-the-spot payments.**  
**Receive orders from your dealers via E-signature!**  
**Dealers can have their customers sign in their living rooms with E-signature!**

Payment Form - Order #137-1

Please complete all the payment information below and click on the pay button to finalize the transaction.

*Michael David*

|                                                                                                                                                                                                                                                                                                               |  |                                                                                                                                     |                                                                                                                                                                         |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|-------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Billing Address</b><br>Marcus Thompson<br>Marcus Thompson<br>123 Highland Rd<br>Los Angeles, California, 90210<br>UNITED STATES                                                                                                                                                                            |  | <b>Shipping Address</b><br>Marcus Thompson<br>Marcus Thompson<br>123 Highland Rd<br>Los Angeles, California, 90210<br>UNITED STATES | <b>Total Amount Due</b><br>Subtotal<br>2,133.30<br>Discount (0%)<br>0.00<br>Net total<br>2,133.30<br>Other<br>2,100.00<br>Sales Tax<br>359.83<br>Total (USD)<br>4593.13 |
| <b>Card Information</b><br>Minimum Payment Required: 4593.13    Amount Paid: 4593.13<br>Name on Card: * Marcus Thompson    email: * mthompson@gmail.com<br>Address Line 1: * 123 Highland Rd    Address Line 2:<br>City: * Los Angeles    State: * California    Zipcode: * 91896<br>Country: * UNITED STATES |  |                                                                                                                                     |                                                                                                                                                                         |
| <b>Payment Method Details</b><br>Card    Cash App Pay<br>Secure, 1-click checkout with Link<br>Card Number: 1234 1234 1234 1234    Expiration Date: MM/YY    Security Code: CVC<br>Country: UNITED STATES    Zip code: 12345                                                                                  |  |                                                                                                                                     |                                                                                                                                                                         |

IQX allows dealers to make more deals on the spot every month, right in a customer's living room!

With functions like **Presets, Copy, Global Change, E-Signature and On the Spot Payment Methods**, you can quickly make bids with dozens of products in a fraction of the time, and provide customers who want multiple options with multiple quotes.

Don't settle for spreadsheets or Word docs that don't do enough, or costly, cumbersome "one size fits all" CPQ tools. Choose IQX and get an easy-to-use, surprisingly affordable, mobile sales proposal solution designed to the exact needs of the window and door industry.

33



Proposals Created in Range

105



Proposals Open to Date

15



Proposals Closed in Range

12%



Closing Ratio

2



Proposals Lost in Range

111,922.00



Total Revenue



## Proposal 134-2 ACCEPTED

Pay [Download](#)

## MESSAGES

admin admin 421  
Proposal sent

02-Jul-25 07:15 PM

Customer  
Document opened

02-Jul-25 07:16 PM

Customer  
Accepted

02-Jul-25 07:22 PM

Customer  
Stripe/ Payment  
pi\_3RgWF6EJ4rgYJGX90CTMY  
EzT - requires payment method  
02-Jul-25 07:22 PM

Type here

Track each proposal granularly - from sent, to signed, to paid.

## Top 5 Opportunities by Revenue by Week

Quote #



3245-0

70%

Sunset Home Builders

\$64.73K



3259-0

70%

Desert Window Sales

\$6.56K



3252-0

75%

US Energy Windows

\$5.72K



3248-0

70%

Thermal Windows

\$5.9K



3251-0

75%

Northwest Windows USA

\$1.32K

Take advantage of these opportunities to reach targets

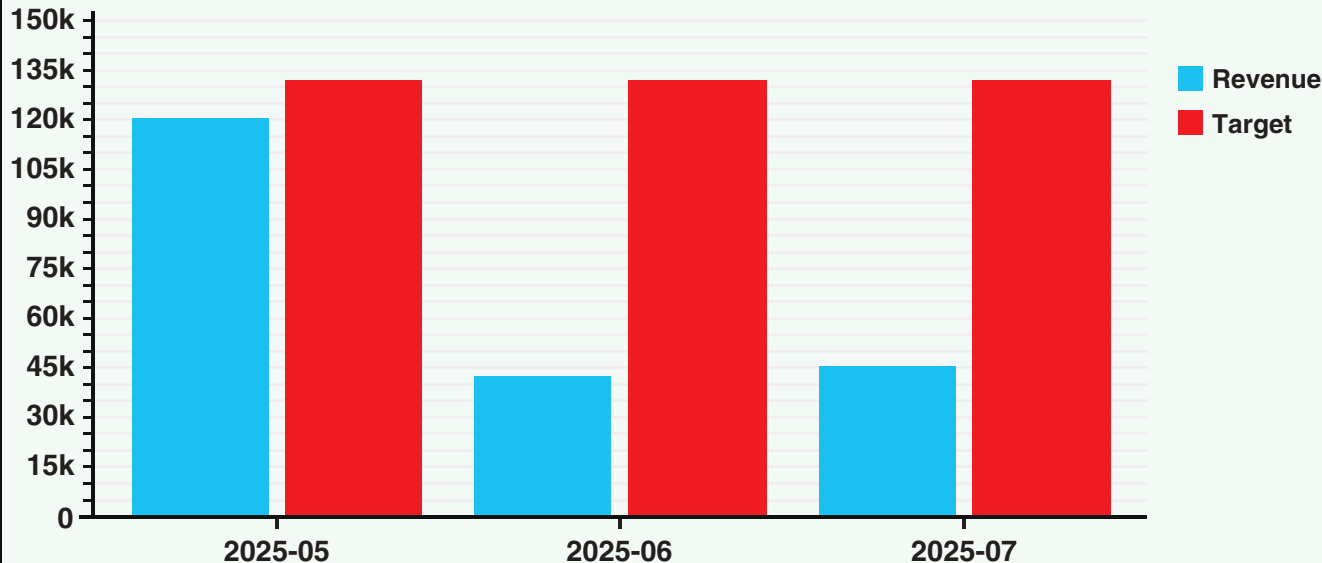
## Top 5 Products by Revenue

| Line           | Window               | Door        | Weekly Revenue |
|----------------|----------------------|-------------|----------------|
| Vinyl GS       | XO Horizontal Slider | XO SGD      | \$22K          |
| Vinyl Galaxy   | XO Horizontal Slider | XO SGD      | \$15K          |
| Vinyl Imperial | Double Casement      | French Door | \$14K          |
| Fiberglass     | SH Single Hung       | French Door | \$14K          |
| Aluminum       | XO Horizontal Slider | XO SGD      | \$13K          |

Vinyl GS XO Products are the top products - \$22k

Get a clear picture of what's selling, and where the revenue opportunities are.

## Revenue vs Target by Month



Total sales for the period is \$203K

Colorful dashboards give sales leaders immediate insights.

# What is iQuoteXpress?

Simply, IQX is a full-service CPQ (configure price, quote application) with a product configurator made specifically for window and door manufacturers and their dealers.

It empowers users to create visually compelling sales quotes for windows, doors, and more in just a few minutes, and includes a host of tools to help drive more revenue, such as:

- **Smart Presets:** Skip repetitive setups for windows and doors being quoted.
- **Global Change:** Copy all or some of the item features with one time-saving click
- **Real-Time Visuals:** Let customers and quote makers see their choices in real time as their quote is built.
- **Quick Closing:** Leverage built-in tools for contracts, e-signatures, and more.

Window Configurator v4.1.1 demo

INDEX

PRODUCT SUMMARY

Preset 1

Preset 2

Room Name Location South

MIN-MAX Sizes (12 MIN - 96 MAX)

Width 36.00 Height 36.00

Fixed

VSlider

HSlider

Casement

Awning

Colors

White

Tan

Black

Bronze

Brownstone

Aluminum

Select Grid Type

Flat

Sculptured

Home

Thinner Simulated Divided

Thicker Simulated Divided

Preview

Email

New Revision

Edit

GLOBAL CHANGE

FRAME CHOICE

Block frame

COLORS

Black

HARDWARE CHOICES

-Select-

HARDWARE COLOR

Bronze

ENERGY PACKAGE

-Select-

INTERIOR GLASS

-Select-

EXTERIOR GLASS

-Select-

GAS-FILLED

-Select-

GRID TYPE

-Select-

GRID PATTERN

-Select-

SCREEN TYPE

-Select-

TEMPERED GLASS

-Select-

As Viewed from the Outside:

As Viewed from the Outside:

Give customers the ability to instantly view other styles right inside the quote!

If your customer wants to compare a quote in a black frame to a quote in a white frame, use Global Change to modify the color option or any other window or door feature on all line items with just one click.

# A little about IQX

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Developed by window and door salespeople FOR window and door salespeople.

IQX came online in 2009 with a simple mission: make the quoting and proposal process as streamlined and as effective as possible.

From day one, the way we chose to realize this mission – and stand apart from other CPQ applications – was through custom solutions (such as our window & door version), personalized support, and competitive pricing.



The IQX quoting system works seamlessly with all global brands such as: Simonton, Jeld-Wen, Pella, Ply Gem, and more!

## Contact us for a demonstration or more information.

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[www.iquotexpress.com](http://www.iquotexpress.com)



(818) 765-3149  
(in Studio City, CA)