

Your Rep Firm All On One Platform



Fully Integrated Quoting and Ordering



AccuQuote is powerful quoting software designed specifically for manufacturer representatives, streamlining the quoting process to save time and enhance accuracy.

Key Features

- **Quote Faster:** Our customers tell us they are 30% more efficient when quoting with AQ.
- **Professional and Consistent Branding:** Quotes custom built for you ensuring unique and polished presentation.
- **eJob Folder:** Automatic storage of job quote history. Store all quote-related files stored in Google Drive, One Drive, Sharepoint - specifications, drawings, safety data sheets, and history in one organized place.
- **Real-Time Quote Reporting:** Track key metrics like conversion rates and revenue impact to boost quoting efficiency.
- **Revisions:** 1 click snapshots of your quote groups to easily rebid any job in seconds.

Benefits

- **Enhanced Efficiency:** Real-time tracking and filters let your team focus on priority tasks and handle more bids effectively.
- **Unmatched Consistency:** Automatic updates and instant access to details keep you prepared for new opportunities.
- **Accurate Pricing:** Automated cost, price, and profit calculations eliminate manual spreadsheets.
- **Organized Workflows:** Reschedule bids with drag-and-drop ease, keeping calendars accurate and teams aligned.
- **Actionable Insights:** Centralized tools and clear communication foster collaboration and efficiency.

Integration

- Seamlessly integrates with AccuTrack for a complete solution, creating an unmatched user experience all the way through project management and delivery.
- Leverage AccuConnect to connect to your finance and inventory management platforms.

Pricing

- \$275/month for 5 seats; additional seats at \$55/user/month. Integration services at an additional cost.

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AccuTrack is cutting-edge sales order tracking software designed specifically for manufacturer representatives for project management and tracking commissions, order status, and when connected to financial systems such as QuickBooks, AccuTrack provides financial tracking of WIP balances by Sales Order and Job.

Key Features:

- **Streamlined Order Processing:** AccuTrack simplifies order management with automated sales order creation with no rekeying information from the quote, and real-time updates, reducing administrative time and allowing your team to focus on growth. Its seamless integration with AccuQuote ensures smooth, error-free workflows that enhance communication, collaboration and support faster order fulfillment.
- **Simplified Project Oversight:** AccuTrack's project management tools provide comprehensive oversight – tracks sales order revenue, commissions, costs and profit in real time, project management, tracks shipping dates, 1 click customer and team updates when shipping dates change, helping to ensure projects stay on schedule. This centralized approach minimizes errors and enhances team collaboration.
- **Comprehensive Commission Tracking:** AccuTrack automates commission calculations and reconciliation, providing real-time visibility into earnings and reducing administrative burden as well as 1 click commission statement creation for all sales reps. This transparency ensures accuracy and boosts sales team motivation.

Benefits:

- **Enhanced Efficiency:** By automating essential processes and centralizing data, AccuTrack frees up your team's time, allowing them to focus on building client relationships and closing deals. This streamlined approach reinforces your presence in the market.
- **Improved Accuracy:** AccuTrack's real-time updates and automated workflows reduce the risk of errors, ensuring that orders, projects, and commissions are managed with precision. This reliability builds trust with clients and manufacturers alike.
- **Seamless Integration:** AccuTrack works in harmony with AccuQuote, providing a unified platform that covers the entire sales process from quoting to order fulfillment. This integration enhances data consistency and operational efficiency.

Pricing:

- Includes AccuQuote and starts at \$500/mo for 5 AccuQuote seats and 5 AccuTrack seats. Each additional seat of AccuQuote and AccuTrack is \$100/mo. Integration services at an additional cost.

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AccuInsights is comprehensive data and analytics software designed to empower manufacturer representatives with actionable insights, enhancing decision-making and operational efficiency.

Key Features:

- **Real-Time Data Visibility:** Access up-to-the-minute information – volume, margin and profit across all aspects of your quoting and sales operations – margin, volume and profit for manufacturer, division, engineer, salesperson – all with 1 click. Having the data you need, gives you the edge to respond quickly and decisively to market changes and client needs.
- **Customizable Reporting:** Tailor your view to monitor key performance indicators (KPIs) that matter most to your business, providing a personalized analytics experience.
- **In-Depth Reporting:** See your strongest bidder, contractor and engineer relationships. Who do you win with and who specifies you – in real time.

Benefits:

- **Enhanced Decision-Making:** Leverage comprehensive data analysis to identify trends and opportunities, supporting proactive business strategies.
- **Improved Operational Efficiency:** Streamline workflows by centralizing critical data, reducing time spent on manual data collection and analysis.
- **Increased Sales Performance:** Monitor and optimize sales activities through performance metrics, leading to more effective sales strategies and higher conversion rates.

Integration:

- AccuInsights seamlessly integrates with the ROM platform, including tools like AccuQuote and AccuTrack, providing a unified solution for managing quotes, orders, and customer relationships.

Pricing:

- AccuInsights is included in every deployment of AccuQuote at no additional cost.

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AccuConnect is a robust integration platform designed to unify your existing financial, inventory, and ERP systems with the ROM suite, enhancing efficiency and data accuracy across your operations.

Key Features:

- Seamless Financial System Integration:** AccuConnect integrates effortlessly with financial platforms like QuickBooks, and Microsoft Dynamics and NetSuite ensuring your data remains accurate and up-to-date. This automation eliminates manual data entry, reducing errors and saving time. Sage Integration is Q2/2026.
- Streamlined Data Management:** AccuConnect can integrate with any system that has an API.
- Customizable API Connections:** With AccuConnect's open API, you can integrate any third-party tool to match your unique business processes, allowing your ROM platform to become the cornerstone of your customized tech stack.

Benefits:

- Increased Efficiency:** Stop rekeying of data! Automating data connections across platforms reduces manual entry, allowing your team to focus on strategic tasks that drive growth.
- Enhanced Accuracy:** Digital data connections are more accurate and faster for your team and therefore minimizing errors and improving decision-making.
- Scalability:** As your business grows, AccuConnect scales with you, delivering the flexibility and adaptability needed to stay ahead in an ever-changing landscape.
- Streamlined Workflows:** Unifying operations across quoting, sales, inventory, and financial management leads to seamless processes and improved productivity.
- Real-Time Insights:** Connecting your data connections across systems enables faster, smarter decision-making.

Integration:

- AccuConnect serves as the bridge between your existing tools and the ROM platform, ensuring a cohesive and efficient operational ecosystem. Enhance your business operations with AccuConnect, the integration solution that brings all your essential tools together for optimal performance.

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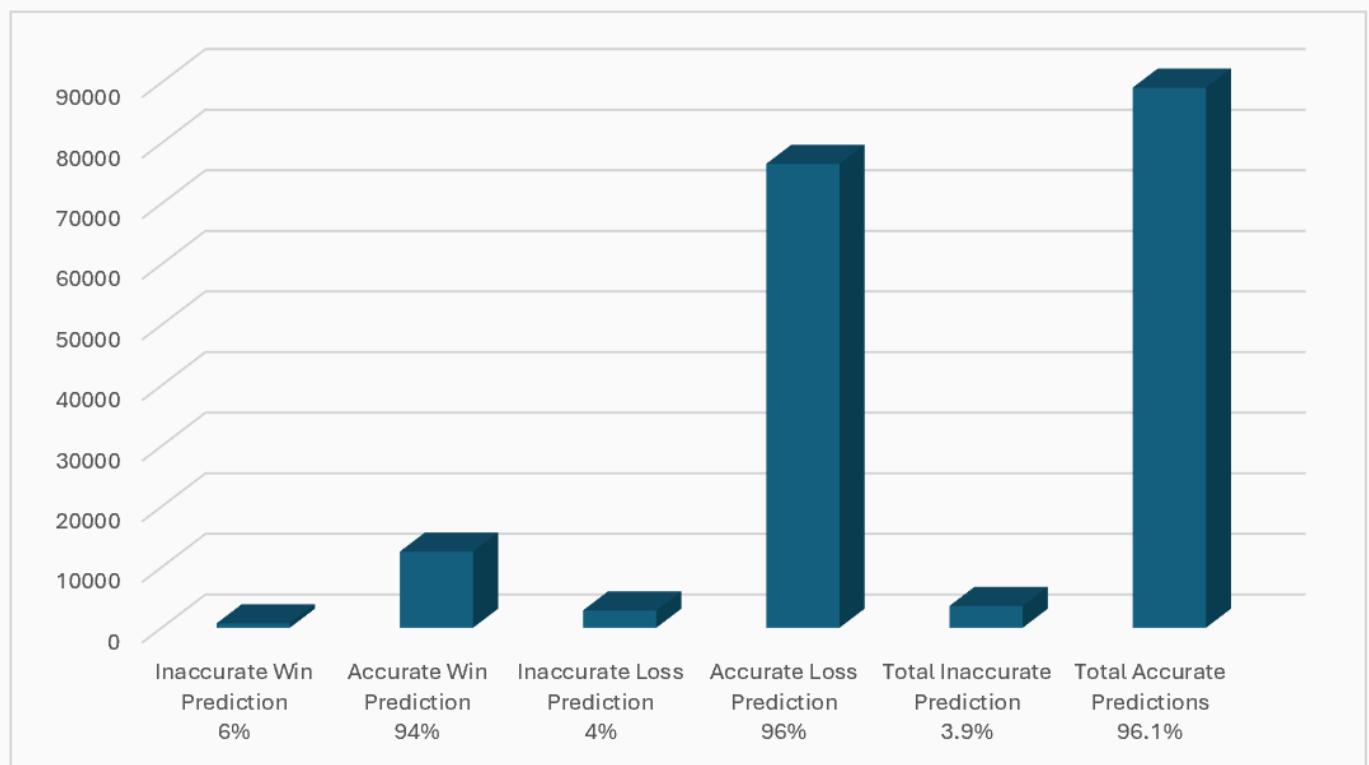


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What would a 1% increase in Closure Rate mean to your business?

- Scorecard based on 92,763 quote line items over a 4 year period
- Shows actual customer won/loss results compared with AccuIntelligence predictions
- Multiple customer data sets have been evaluated with similar results



HOW WE START

- Analyze 57 data elements
- We use only your data to make predictions for you

WHAT WE DO

- Build and train the predictive model
- Compare results to what actually happened
- Connect model to AccuQuote

WHAT THIS MEANS TO YOU

- Augmented Intelligence accurately predicts won/loss before quote is sent out
- Results based on live data
- Predictions are provided on a line by line basis within a job

Would knowing which jobs you're likely to win—and which you're likely to lose—help you improve win rates, training, and product decisions?

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“RepOrderManagement’s vision of leveraging data to increase customer sales performance is becoming a reality. By applying data science and neural network techniques, ROM analyzes quoting data, order data, and customer behavior to predict project outcomes.

Improving the quoting process to drive growth is a major opportunity, and I’m excited to work with the ROM team to make it happen.”

Alexei Kolesnikov – ROM Data Science Advisor
Carnegie Mellon University - PHD Mathematics

AccuIntelligence is a machine-learning engine built for HVAC manufacturer reps to help them win more in competitive bidding environments. It analyzes your historical performance—engineers, GCs, manufacturers, project types, divisions, sales reps, estimators—and predicts how likely you are to win each quote line.

Key Features:

- **Predicts Your Win Probability:** AccuIntelligence evaluates thousands of historical signals and returns a real-time win probability for every single quote line. It learns your customers, your team, your region, and your line card combinations to provide predictions.
- **Gives You Insights:** The engine doesn’t just predict—it explains. You receive the top drivers behind each prediction, showing whether they helped or hurt your chance of winning. This includes engineer bias, GC behavior, manufacturer alignment, division history, salesperson/estimator patterns, and competitive context.
- **Real Data - Real Decision Science:** Most businesses rely on gut feel, tribal knowledge, or outdated assumptions. AccuIntelligence turns everything your company has learned over years of quoting into a data-backed, objective prediction and explanation engine.

Benefits:

- **Higher Win Rates:** Even a small improvement in qualification and focus creates significant revenue lift. A 3–5% increase in win rates often means hundreds of thousands or millions of incremental sales annually.
- **Improved Team Efficiency:** Focus your team’s efforts on bids with the highest likelihood of success, improving overall productivity and reducing time spent on less promising opportunities.

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AreYouSpecified is advanced software that reads documents and is designed to streamline the specification review process for estimators, sales teams, general contractors - anyone that needs to review large documents and organize them quickly. Utilizing Natural Language Processing (NLP) and Optical Character Recognition (OCR) technologies, it quickly analyzes documents to identify key equipment and design details.

Key Features:

- **Rapid Specification Analysis:** Processes documents at an impressive rate of 15 pages per second, significantly reducing manual review time.
- **Accurate Product Identification:** Search 100's of keywords simultaneously to pinpoint the information you seek, thereby ensuring precise and reliable results. Add/remove keywords in seconds from search targets.
- **User-Friendly Interface:** Designed for ease of use, allowing teams to get started within minutes without the need for extensive training.
- **Saves all your previous searches:** Scanned documents are saved for future review and use.

Benefits:

- **Faster Bid/No Bid Decisions:** Quickly determine if you are specified, an alternate or not listed.
- **Enhanced Efficiency:** By automating the specification review process, AreYouSpecified enables your team to focus on strategic tasks, improving overall productivity.
- **Improved Accuracy:** Reduces the risk of human error in document analysis, ensuring that critical details are correctly identified and addressed

Try It Out:

- AreYouSpecified is fully functional – we can create an account for you to begin searching documents faster than ever.

Pricing:

- We are seeking new customers to try out the software at no charge. When fully released, we anticipate a minimal charge for using this software.

Integration:

- In Q3, 2026, AYS will seamlessly integrate within the ROM suite to speed up creating a job in AccuQuote with no rekeying of information.

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