

## QuoteLinx™ Professional Quoting and Quotation Management for Infor CRM, Sage CRM, & TimeLinx

QuoteLinx and QuoteLinx+ are integrations that enable Infor CRM, Sage CRM, and TimeLinx users to create simple to elaborate quotations for products, services, and expenses with custom outputs to match your company's document look and feel. The native sequence of "Opportunity then Quote" is enforced adding sophisticated quoting and pricing capabilities, revision management, and electronic delivery, acceptance, signature and payment options.

To use QuoteLinx and QuoteLinx+, the user creates an Opportunity in the CRM and is taken to QuoteWerks to add products, services and contracts using various pricing methodologies, bundles and full CPQ configuration (Configure-Price-Quote). All data is synchronized with the CRM's Opportunity so standard CRM forecasting and sales management is supported. QuoteLinx+ add synchronization of the data into the proper "buckets" of TimeLinx for the delivery of services, products, contracts and more.

All products and services are instantly calculated for profits and margins which are displayed for the user within the CRM Opportunity, if desired.

Realtime synchronization keeps the QuoteWerks document and the CRM Opportunity aligned at all times with "one-button" application switching. Quotes and revisions are tracked and managed as needed, adding and deleting of products and services, and maintaining any number of originals and revisions.

Every revision can be made into the "active" quote at any time for forecasting and final delivery to the customer. When ready to close the Opportunity, the products and details on the then-active quote are used.

All revisions are retained in the Opportunity for future reference, analysis and historical purposes.

### FEATURES INCLUDE:

- Line item details are seamlessly passed into the CRM Opportunity. Products and Services added with QuoteLinx+ are seamlessly passed back into QuoteWerks.
- Automatically populates the Sold To/Ship To fields in QuoteWerks with a choice of Contact from the Account.
- Items in the QuoteWerks Items view can be sectioned into groups with sub-totals.
- Discounts, markups, and formulas applied to items in QuoteWerks pass back into the CRM.
- Item costs are tracked and passed back to the Opportunity to calculate profitability and margin.
- Optional items allow the customer to choose what items they want or don't want when electronic delivery is enabled and pricing/cost values are updated automatically.
- Create multiple revisions of a quote within a single opportunity.
- Converting a revision into the "active" quote is easily achieved with a right click of the mouse.
- Various output layouts can be created for highly personalized quotes for different situations. Delivery includes PDF output or electronic delivery. PDF's can be saved to the CRM's Opportunity documents tab.
- Adding QuoteLinx to an existing system does not impact the functionality or data already in the CRM system.
- QuoteLinx supports all versions of ICRM from v7.5.3 and later, all versions of Sage CRM, and and TimeLinx version 8 or later.
- The Corporate SQL edition of QuoteWerks is required.

QuoteLinx and QuoteLinx+ also use the “price list” feature of QuoteWerks, allowing the import or creation of an unlimited number of vendor price lists to be used in creating quotes, or using the “real-time” feature for direct connection to supported distributors. To eliminate the maintenance of two product price lists (QuoteWerks and the CRM), QuoteLinx will maintain and populate the CRM’s products tables by automatically adding items to it when an item is added to a Quote. This keeps the CRM’s products tables from being overwhelmed with thousands of items that have never been used in a quote. QuoteLinx also maintains referral integrity between the main Products table and the CRM’s products tables at all times.

QuoteLinx+ add enhanced quoting capabilities for professional services. This includes variable labor rates such as hourly, half-day, full-day, fixed fee, skill-based levels, project management fees, regional rate overrides, travel and other expenses. Costs for all labor by amount or percentage is included so profits and margins are computed on the fly.

With the addition of the TimeLinx Accounting Package (TAP), service work can be delivered, approved, and invoiced with bi-directional synchronization into various Sage and Infor accounting products, and Quickbooks®.

## About TimeLinx Software

*TimeLinx Software, Inc. was founded in 2001 to provide comprehensive time and project management functionality within popular CRM systems. TimeLinx’s various software products integrate time tracking, expense management, project management, resource scheduling, contracts, calendaring, and more to provide an integrated view of client relationships.*

*TimeLinx applications eliminate paper and multiple applications to streamline the processes of managing services in industries including manufacturing, consulting, technology, engineering, architecture and others. Additionally, TimeLinx manages complex rate and cost structure calculations using a proprietary Profit Optimization*

*Engine™ that auto-posts approved time and expenses into various ERP systems without re-typing.*

For information about TimeLinx, please visit  
[www.TimeLinxSoftware.com](http://www.TimeLinxSoftware.com)

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