

QuoteLinx™

Professional Quoting and Quotation Management for TimeLinx, Infor CRM, and Sage CRM.

The QuoteLinx™ integration from TimeLinx enables estimates, proposals, and quotes to be created directly from within your CRM system while passing company, contact, pricing parameters, terms and more directly into the quote. The result is an easy and repeatable process to create simple to elaborate quotations for products, materials, service labor, expenses and contracts. Customized delivery outputs to match your company's graphical look and feel are designed into all output formats for the most professional look possible with unflinching accuracy, plus terms and conditions, cover pages, literature attachments, images and more. Quotes can be delivered electronically over the web using QuoteValet™, or by emailing Word and PDF documents through direct email integration.

Using QuoteLinx eliminates using your ERP system to create quotations, some of which are never accepted. This keeps prospects who never buy, and quotes that are never accepted, from cluttering up the ERP system with thousands of unnecessary entries. Quoting happens before any transaction occurs so why put it into the ERP? They belong in CRM during the sales process.

First, a sales Opportunity is created in the CRM and managed by the salesperson in their usual manner. When a quote is needed, QuoteLinx transfers the user into QuoteWerks™ to add the products, services and expenses needed. Various pricing methodologies, levels and discounts are supported along with product bundles and full CPQ (Configure-Price-Quote) capabilities for building an estimate using a "guided selling" wizard, avoiding any mistakes in specifying the correct items and quantities needed. Items are then synchronized with the Opportunity so the CRM's normal forecasting and detailed tracking is all available.

QuoteWerks with QuoteLinx enables sophisticated price option capabilities, quote revisions, multi-

FEATURES INCLUDE:

- Line item details are seamlessly passed between the CRM Opportunity and the quote document.
- Automatically populates the Bill To, Sold To, and Ship To fields in QuoteWerks with a choice of Contact for each from the CRM.
- Items in quotes can be sectioned into groups with headings, sub-totals, and calculations.
- Discounts and markups are applied to the items in the CRM opportunity to keep forecasts accurate.
- Item selling prices and costs are tracked and passed back into the Opportunity to calculate profitability and margin.
- "Optional" items can allow the customer to choose what items they want or don't want, or what quantities they want, when electronic delivery is enabled.
- Create a custom shopping cart for regular customers who re-order many of the same items regularly.
- Create multiple Revisions of a quote within a single opportunity.
- Convert any Revision into the "active" version with a click of the mouse, then modify further if needed into a new Revision.
- Unlimited output layouts can be created for uses perhaps with different company logos, or languages, customer terms for a country or customer and more.
- Delivery options include 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.
- The QuoteWerks Corporate Edition using SQL is required.

currency, electronic delivery, acceptance, signature and payment options. All products and services are instantly calculated for profits and margins which are also displayed for the user within the CRM Opportunity, if desired. Math and calculation errors disappear!

QuoteLinx is a module of the TimeLinx product suite so that, upon customer acceptance of a quote, QuoteLinx will insert the items into a TimeLinx project for delivery, intelligently understanding what the items are passed into a linked TimeLinx Project as Tasks, Products, Materials, Expenses, and Contracts.

Real-time synchronization keeps the QuoteWerks document and the Opportunity aligned at all times with “one-button” application switching. Quotes and multiple Revisions are tracked and managed showing every revision created during the sales process.

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

Lists of items to be quoted can be maintained by automated synchronization of items from your CRM or ERP system, or created manually on demand. The import of an unlimited number of vendor price lists can be used in creating quotes, or by using the “real-time” feature for direct connection to supported distributors and manufacturers.

QuoteLinx requires the Corporate SQL edition of QuoteWerks, and also works with QuoteWerks Web and QuoteValet™ for electronic delivery, tracking, acceptance, and payment of quotes.

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

For information about TimeLinx, please visit

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TimeLinx™

Project & Service Management

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