

QuoteLinx™ and QuoteLinx PLUS+

for Sage SalesLogix® & TimeLinx™



PROFESSIONAL QUOTING AND QUOTATION MANAGEMENT

QuoteLinx and QuoteLinx+ enable Sage SalesLogix and TimeLinx users to create elaborate quotations using QuoteWerks from inside SalesLogix that can include products, services and expenses. The original out-of-box SalesLogix workflow and line item product functionality remains while adding sophisticated quoting capabilities.

To use both QuoteLinx and QuoteLinx+, the user creates an Opportunity in SalesLogix. QuoteWerks starts automatically, allowing the addition and pricing of any number of products using standard QuoteWerks functionality including volume pricing and the configurator. All product manipulation is done within QuoteWerks. With QuoteLinx+, services, labor, and travel or custom expenses can also be added.

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

A “document” link is created automatically and maintained permanently in the SalesLogix Opportunity, allowing editing as needed, adding and deleting of products and services, and maintaining any number of stored revisions.

Every saved revision of a quote is listed on a new Quotes tab. An unlimited number of quote revisions per Opportunity are allowed. Any one of them can be made into the “active” quote at any time for forecasting, and to further edit as needed. When ready to close the Opportunity, the products and details on the then-active quote are used.

The screenshot displays the QuoteWerks interface within a browser window. The top navigation bar shows 'Opportunities' and '12 of 345'. The main area is split into two panes. The left pane shows the 'Opportunity' details for 'TLX for S', including account information, dates, and status. The right pane shows the 'Opportunity Snapshot' with a 'Value' section (Sales Potential = \$89,605.00, Weighted = \$44,802.50) and a 'Summary' section (Opened 118 days ago on 3/10/2011, Currently in 4-Proposed stage). Below the panes is a menu bar with options like 'Notes/History', 'Activities', 'Attachments', 'Sales Process', 'Quotes', 'Sales Orders', 'Products', 'Competitors', 'Contacts', 'Summary', and 'Projects'. A summary bar shows 'Total: \$89,605.00', 'Profit: \$58,534.50', 'Profit Margin: 65.77%', and 'Active QuoteID: 6UJ9Q1087-01'. The bottom section is a table with columns: #, Qty, Part Num., Description, Family, Price, Disc., and Adj Price. The table lists various products such as 'TLX-SLX-SERV-PR', 'TLX-PM-PR', 'TLX-WBSHEET', and 'TLX-REPORT-PRO5'.

#	Qty	Part Num.	Description	Family	Price	Disc.	Adj Price
6135	1	TLX-SLX-SERV-PR	TimeLinx Premier Edition Server for Sage SalesLogix	TimeLinx	\$4,395.00	20.02%	\$3,515.00
6136	61	TLX-PM-PR	TimeLinx Premier Edition LAN PM User for SLX	TimeLinx	\$195.00	16.81%	\$162.00
6137	66	TLX-WBSHEET	TimeLinx WebSheet Timekeeper User License	TimeLinx	\$245.00	100%	\$0.00
6138	103	TLX-WBSHEET	TimeLinx WebSheet Timekeeper User License	TimeLinx	\$245.00	100%	\$0.00
6139	1	TLX-SLX-AIP100	TimeLinx AIP-100 Accounting Integration Platform	TimeLinx	\$3,495.00	0%	\$3,495.00
6140	1	TLX-AIP-TIMBER	TimeLinx AIP-Timberline	TimeLinx	\$1,395.00	0%	\$1,395.00
6141	1	TLX-WEBCAL-250	TimeLinx WebCalendar - 250+ users	TimeLinx	\$4,395.00	40.04%	\$2,635.00
6142	1	TLX-REPORT-PRO5	TimeLinx Reporter Pro - 5 User	TimeLinx	\$2,495.00	0%	\$2,495.00
6143	20	TLX-REPORTER	TimeLinx Reporter Viewer	TimeLinx	\$75.00	0%	\$75.00
6144	0	TLX-SLX-CPAK	KnowledgeShare Alert Pak for TimeLinx	TimeLinx	\$495.00	0%	\$495.00

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

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 SalesLogix), QuoteLinx will maintain and populate the SalesLogix products table by automatically adding items to it only when one is actually used in a Quote. This keeps the SalesLogix Products table from needing to be pre-populated or maintained separately with thousands of potential items over time. QuoteLinx also maintains referential integrity between the main Products table and the Opportunity Products table at all times.

QuoteLinx+ adds 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, and 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 TimeLinx and the TimeLinx Accounting Platform (TAP), service work can be delivered, approved, and invoiced with bi-directional synchronization into Sage ERP 100, Sage 300 ERP, Sage 500 ERP, and Intuit QuickBooks®.

Qty	Description	Services	Cost Modifier	Unit Cost	Price Modifier	Unit Price	Tax Code	Unit List	Est Price	Manufacturer Part #	W/P
PRODUCTS											
1	TimeLinx Premier Edition Server for Sage SalesLogix		000	\$399.00		\$3,990.00	N	\$4,990.00	\$3,990.00	TLX-SLS-SERVFR	
61	TimeLinx Premier LAN-FM User for SLS		000	\$119.00		\$695.00	N	\$695.00	\$3,195.00	TLX-PW-FR	
60	TimeLinx WebSheet Timekeeper User License		070	\$29.50		\$0.00	N	\$245.00	\$0.00	TLX-WBSHEET	
103	TimeLinx WebSheet Timekeeper User License		070	\$7.50		\$0.00	N	\$245.00	\$0.00	TLX-WBSHEET	
1	TimeLinx AP-100 Accounting Integration Platform		00	\$3,495.00		\$3,495.00	N	\$3,495.00	\$3,495.00	TLX-SLS-APP100	
1	TimeLinx AP-1000 Accounting Integration Platform		000	\$3,999.00		\$3,999.00	N	\$3,999.00	\$3,999.00	TLX-APP-TIMBER	
1	TimeLinx Web Calendar - 250+ users		070	\$1,499.00		\$2,999.00	N	\$4,999.00	\$2,999.00	TLX-WEBCAL_250	
1	TimeLinx Reporter Pro - 5 User		070	\$749.00		\$2,495.00	N	\$2,495.00	\$2,495.00	TLX-REPORTR_PRODS	
20	TimeLinx Reporter Viewer		070	\$22.50		\$75.00	N	\$75.00	\$1,500.00	TLX-REPORTR	
0	KnowledgeSync-Alert Pack for TimeLinx		000	\$199.00		\$995.00	N	\$995.00	\$0.00	TLX-SLS-KSPAK	
	SubTotal								\$69,870.00	PROD	
PROFESSIONAL SERVICES											
1	TimeLinx for SalesLogix Quick-Start Program		000	\$9,400.00		\$9,500.00	N	\$9,500.00	\$9,500.00	TLX-SLS-QS	
10	Days - Professional Services, Estimated		060	\$0.00		\$1,500.00	N	\$0.00	\$15,000.00	TLX-PSD	
	**Services to be performed to incorporate existing								\$29,500.00		
	SubTotal								\$29,500.00		
1	SOFTWARE ASSURANCE (SA*)			\$0.00		\$19,435.00	N	\$0.00	\$19,435.00	SA	
	* SA is 20% of MSRP Annually										
SubTotal: \$83,605.00 Tax: \$0.00 Shipping: \$0.00 Tot: \$83,605.00											

FEATURES INCLUDE:

- Line item details are seamlessly passed into the Sage SalesLogix opportunity. Services added with QuoteLinx+ are seamlessly passed back into QuoteWerks.
- Automatically populates the Sold To / Ship To fields in QuoteWerks with the Primary Contact from the Opportunity.
- QuoteLinx automatically uses the correct QW Product Lookup template for quoting based on the Opportunity Type.
- Items in the QuoteWerks Items view can be sectioned into groups with sub-totals.
- Discounts, markups, and formulas applied to groups of items in QuoteWerks pass back into Sage SalesLogix.
- Item costs are also tracked and passed back to the Opportunity to calculate profitability.
- Optional items created for a quote are passed back to the Opportunity as "0" dollar items and are not included in the Sales Potential field of the Opportunity.
- Users can create multiple revisions of a quote within a single opportunity.
- Converting a quote revision into the active quote is easily achieved with a right click of the mouse.
- Various output layouts can be created for highly personalized final quotes, including PDF output which can be manually saved at the Opportunity Attachments tab.
- On installation, existing SalesLogix Opportunities are not altered and are maintained using the functionality used when created. New quotes created after installation automatically adopt the improved QuoteLinx functionality.
- Easy to install with minimal configuration.
- Requires SalesLogix versions 7.5.0 or higher and/or TimeLinx version 6.3.0 or higher.
- Requires the Corporate edition of QuoteWerks 4.0 or greater.



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