

Saleslogix

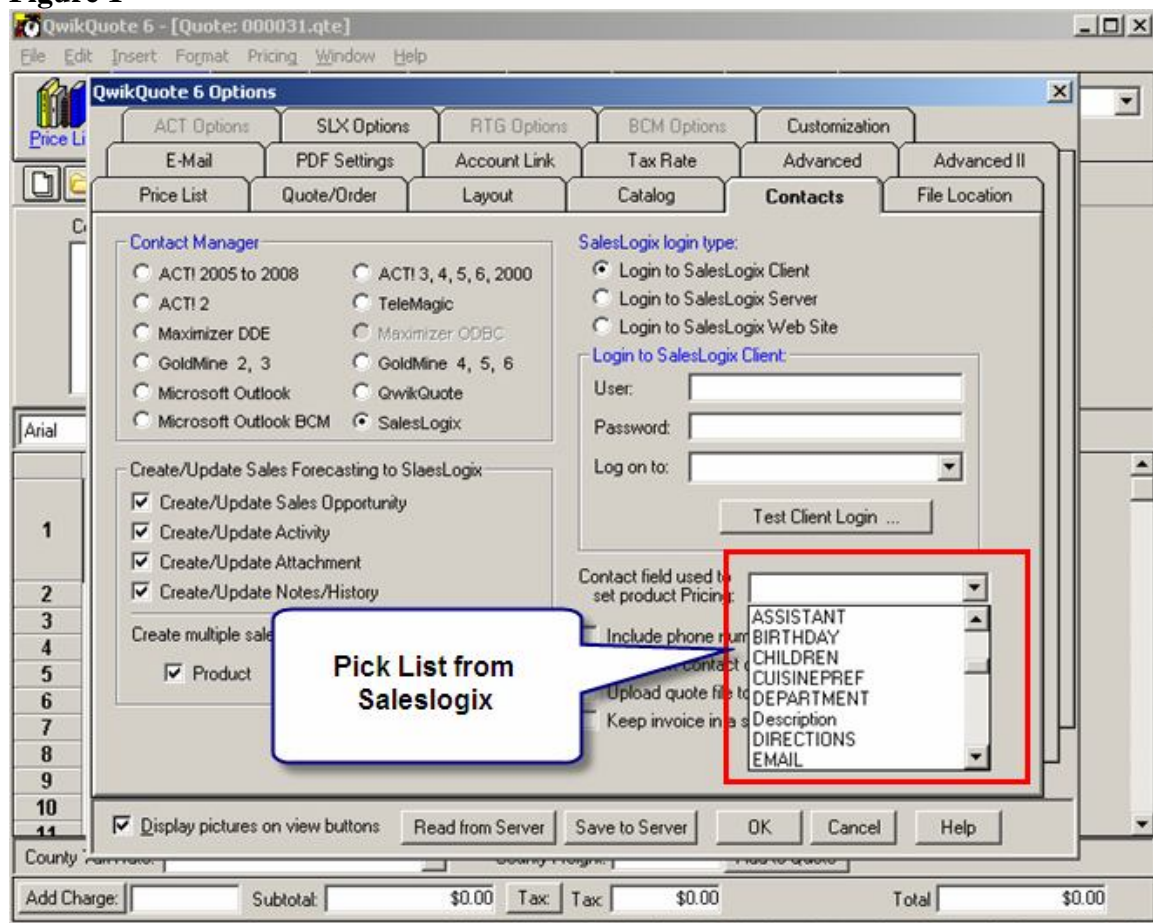
QwikQuote communicates with Saleslogix better than other quoting programs, right out of the box.

Information from Saleslogix to QwikQuote

QwikQuote and Saleslogix work seamlessly together. Salespeople will no longer have to remember what kind of pricing a customer gets. QwikQuote automatically sets the proper price level based on your setting in the customer contact record. Here is just some of the information that can be linked:

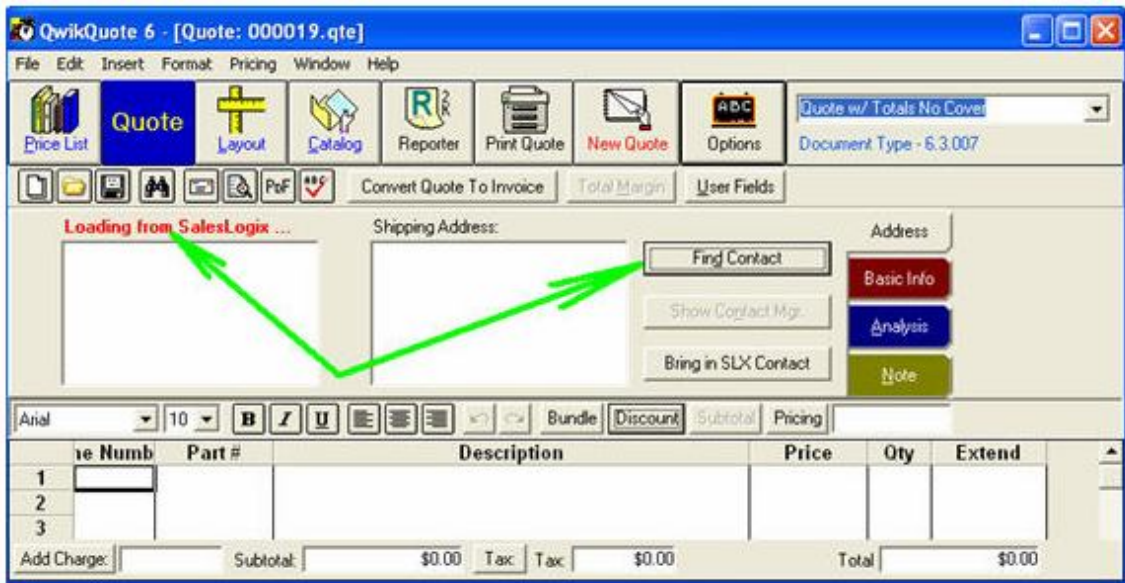
- Any fields you consider important.
- Contact information
- Shipping Address
- Pricing level

Figure 1



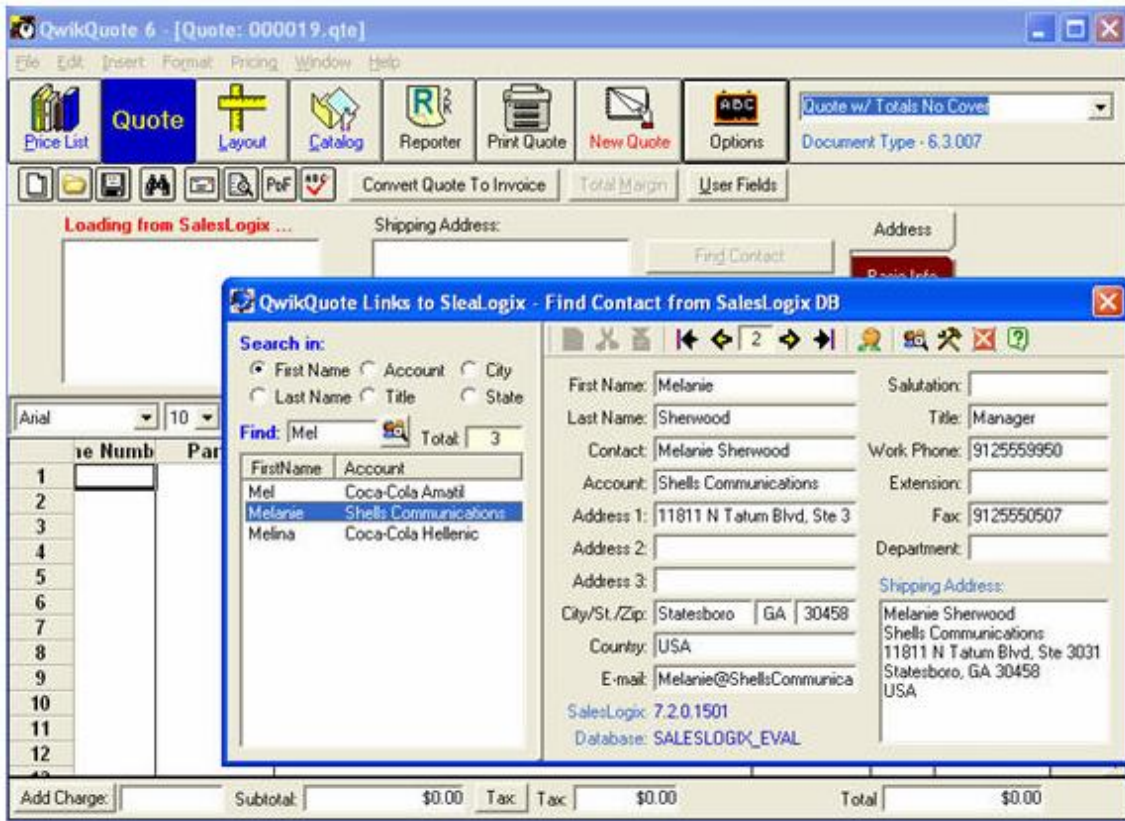
Contact and Shipping Address is brought in from the Saleslogix database.

Figure 2



QwikQuote searches the Saleslogix Customer database:

Figure 3



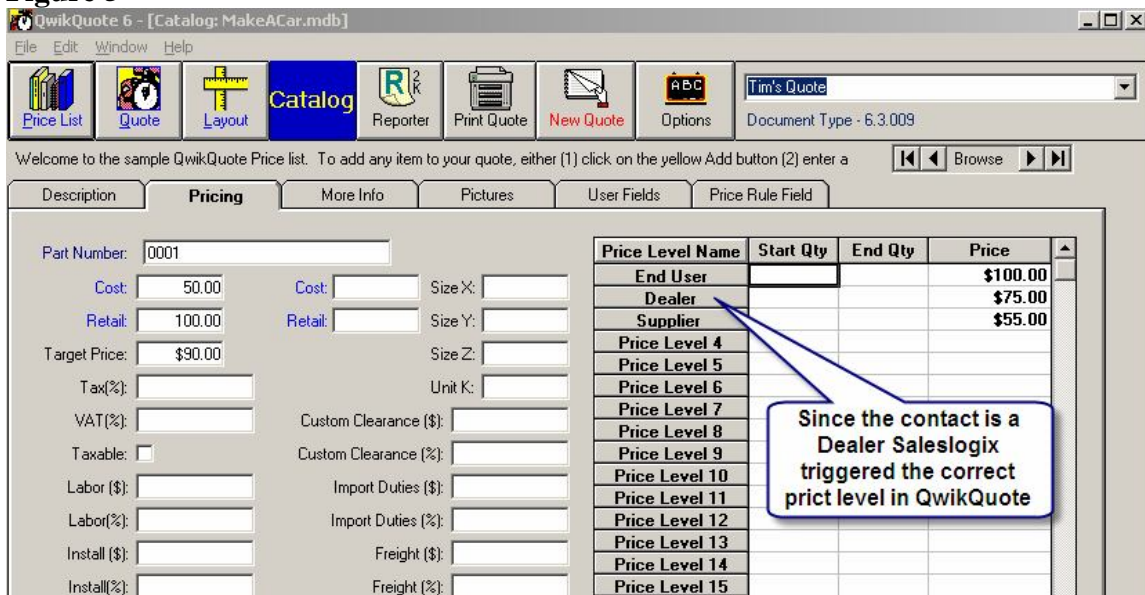
Contact information and Shipping Address are now in the quote.

Figure 4



Pricing Levels: Not all customers get the same pricing and QwikQuote makes it easy to set the correct pricing level. No more checking and double checking to make sure an end user is getting a discount reserved for your best customers.

Figure 5



Bring in other important fields from your Saleslogix contact record. For example the Saleslogix Customer ID for easy cross reference for your accounting department.

Figure 6



TO:

Melanie Sherwood
 Shells Communications
 11811 N Tatum Blvd. St 3031
 Statesboro, GA 30458

Saleslogix Customer ID Number: 123456789

Quote Number: 000032
Date: 1/5/2009
Quote Expires on: 2/4/2009

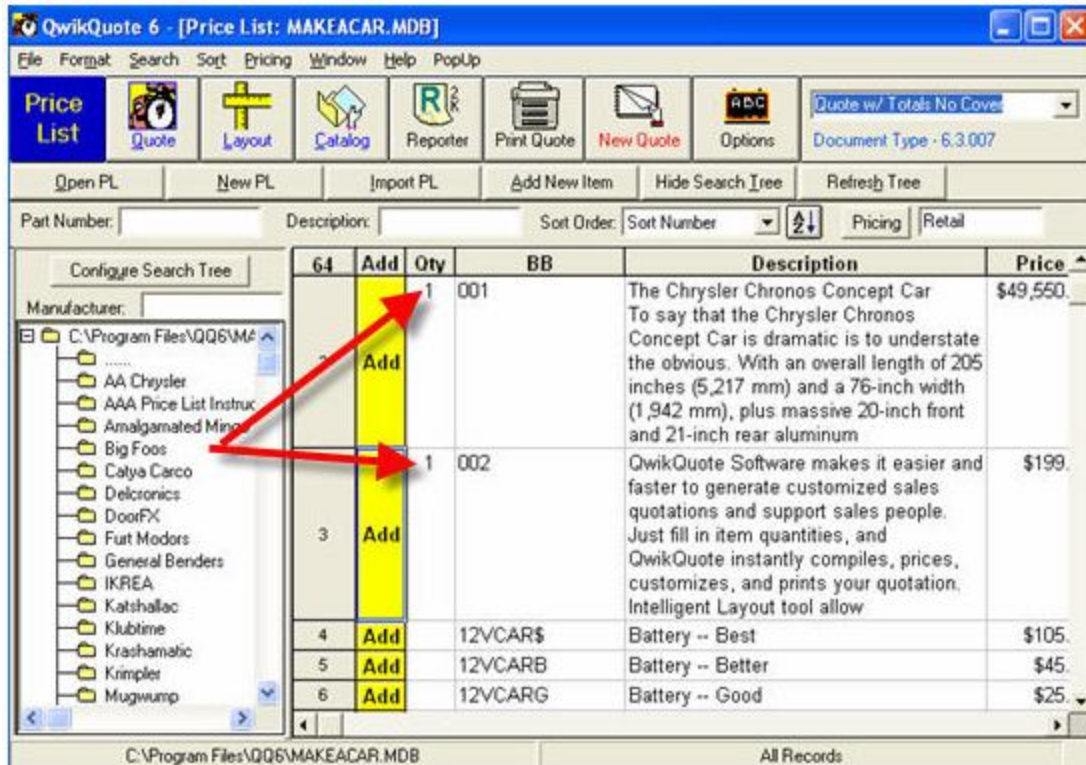
Sales Quotation

Part #	Description	Price	Qty	Extend
001	The Chrysler Chronos Concept Car To say that the Chrysler Chronos Concept Car is dramatic is to understate the obvious.	\$49,550.00	1	\$49,550.00

Making a QwikQuote:

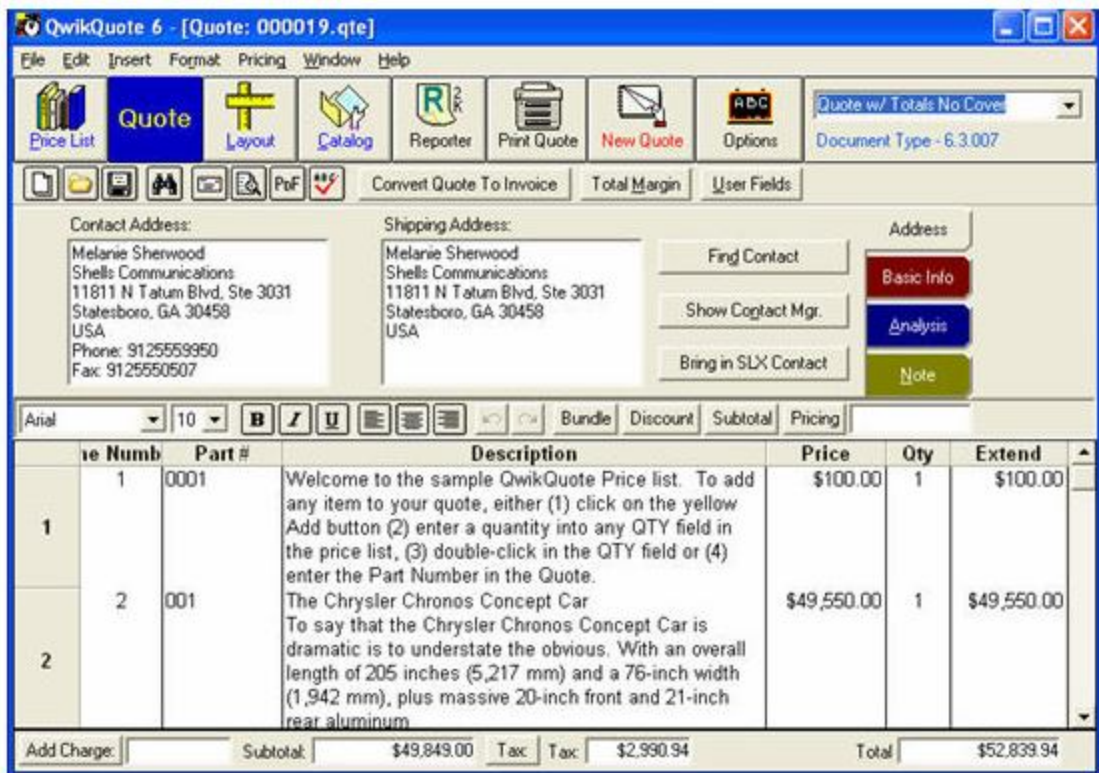
First go to the Price List and pick your products:

Figure 7



Your items are brought into the quote:

Figure 8



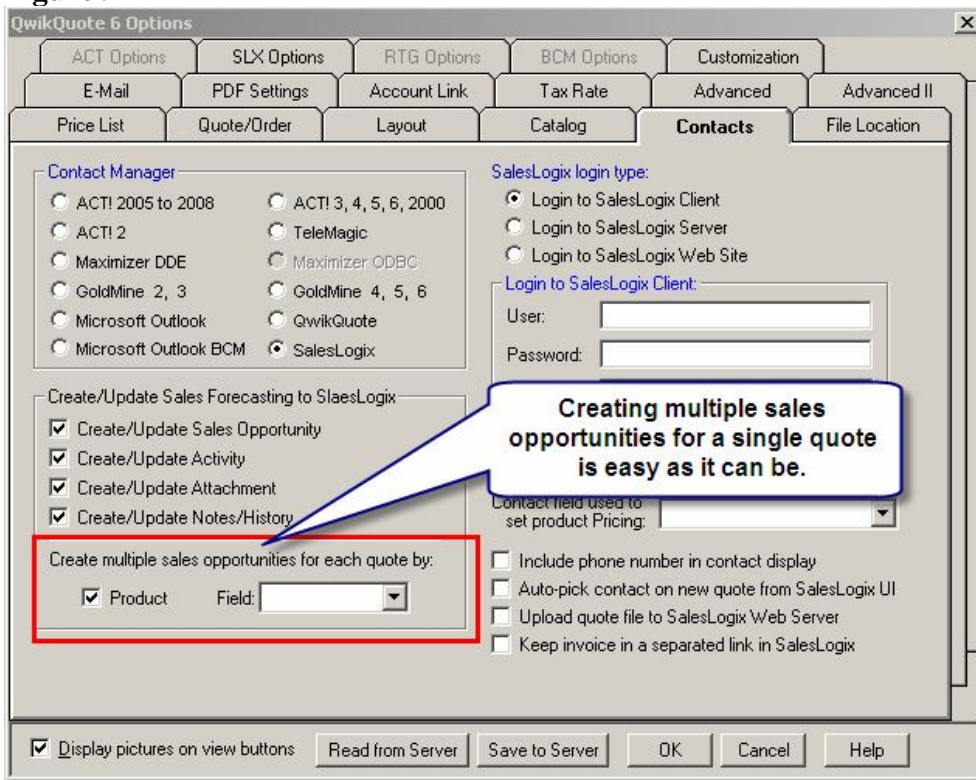
Information from QwikQuote to ACT

Writing back information about the quote to your ACT customer record is very important, that's why we do it better than our competition. See for yourself.

- Opportunities Tab
 - As a total amount
 - As separate line items
- History Tab
- Activities Tab
- Documents Tab

QwikQuote can write back to the Saleslogix Opportunity Manager as individual line items. This can be very important when you want to run a report as to how many of a single line item is in the pipeline. If you only write back total amounts vital information is lost. However, if a quote is the kind that has hundreds of line items you can choose to only show a total amount. The setting is simple and straight forward as shown below.

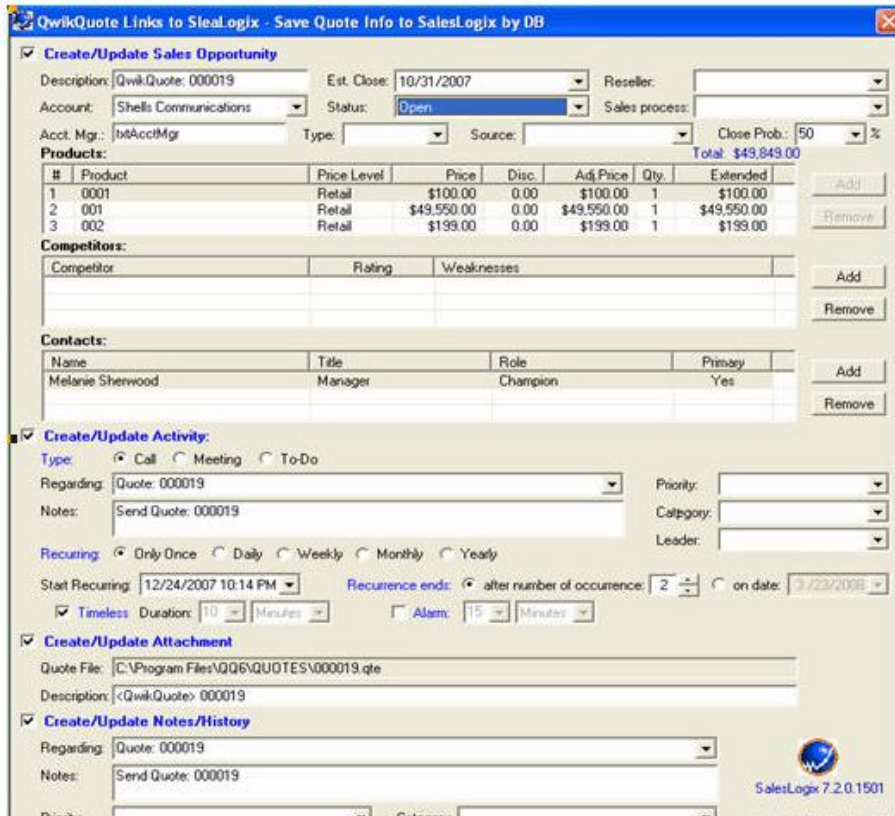
Figure 9



When you save your quote you will have the chance to add additional information to:

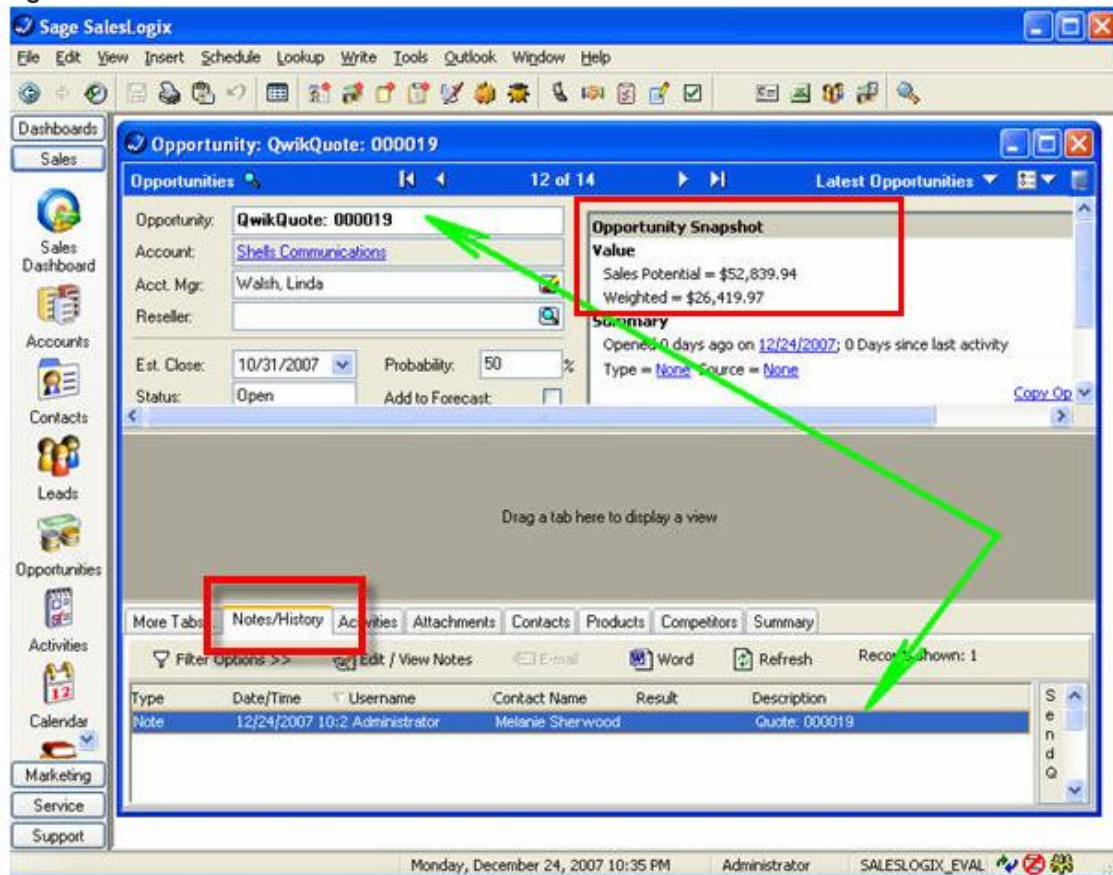
- Schedule Sales Opportunity
- Schedule Activity
- Create Quote History
- Create Linked Document

Figure 10



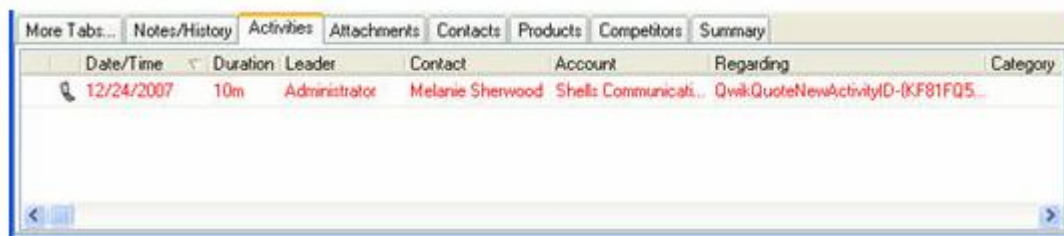
You can decide if you want to create/update the Sales Opportunity Snapshot, Activity, Attachment, and/or Notes/History in Saleslogix. You can also make changes on the fly. When you are finished, press the OK button to save the quote information back into Saleslogix. See example quote 000019:

Figure 11



An Activity was created for the quote:

Figure 12



An Attachment was created for the quote:

Figure 13

Attachment	User	Last Updated	Size
<QwikQuote> 000019	Administrator	12/24/2007 10:22:32 PM	21 KB

You can also check and see your items in the Products Tab:

Figure 14

#	Product	Family	Price Level	Price	Disc	Adj. Price	Qty	Extended
1	0001	AAA	Retail	\$100.00	0%	\$100.000	1	\$100.00
2	001	AA Concept	Retail	\$49,550.00	0%	\$49,550.000	1	\$49,550.00
3	002	QwikQuote So	Retail	\$199.00	0%	\$199.000	1	\$199.00

Products can be added to the Saleslogix database:

Figure 15

Add Opportunity Product

Filter Options:
To filter the list of available products, select from the following options:

Name: Family: All Display results when opened
 Description: Status: Show Results
 SKU: Display product packages only Clear Filters

Available Products:

- 0001
- 001
- 002
- 10/100/1000 NIC
- 12VCAR\$
- 12VCARB
- 12VCARG
- 208SHMENK
- BlackBerry
- CSA
- Consulting Services
- Dell Latitude
- Dell Optiplex
- Fujitsu Lifebook TabletPC
- GoStore 200GB
- Kiva Big Mouth Briefcase
- Laptop Personal/Warranty
- Laptop/Warranty

Selected Products:

#	Product	Price Level	Price	Disc	Adj. Price	Qty	Extended
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Record Count: 43 Total: \$0.00

Manage Products... OK Cancel Help

Products not in the Saleslogix database would be added if they were not there.

QwikQuote makes it easy for you to make a quote, save a quote, print a quote and to email or fax that quote. See [Email](#) for more information.