

Fast, easy, accurate sales quotations
Flexible and easy-to-use
Entirely from within Sage CRM SalesLogix

QuoteWizard™ for SalesLogix®

“ Customers, prospects and resellers need complete, accurate price requests and sales quotations ... today.
Your sales and marketing professionals need to keep track of all your quotes, including revisions,
while accurately forecasting your opportunities. QuoteWizard for SalesLogix strengthens your ability to identify, win and
build upon profitable customer relationships. ”

For a more productive, more effective sales team!



Win more often with professional quotes that help drive accurate sales orders!

You can generate customer sales quotations and sales orders faster than you've ever imagined, right from within SalesLogix! Whether you need to answer a casual price request or provide a formal quote, quotations are quick and easy to create – even for first time customers! QuoteWizard™ for SalesLogix® delivers with a powerful price list view, product selectors, revision and copying functions, OmniRush® integration and much more ...

- ✓ QuoteWizard is fully-integrated with SalesLogix opportunities for convenient forecast updates
- ✓ Up-sell by including optional products and services with every sales quotation
- ✓ Clone an existing quotation to any account, saving valuable user time
- ✓ QuoteWizard automatically records quotation revision history in the customer record
- ✓ E-mail a quote (Adobe PDF format) at the touch of a button
- ✓ Merge your quotation to an MS Word document
- ✓ QuoteWizard supports multiple currencies
- ✓ And much more ...!



Call or e-mail Client 1 to find out more.
Toll-free 1-866-CLIENT1 (1-866-254-3681)
QuoteWizard@Client1.com

QuoteWizard™ for SalesLogix® Features

We built QuoteWizard completely within SalesLogix ...

- ✓ Use SalesLogix products and pricing. With QuoteWizard, you have only one catalogue to maintain
- ✓ You can revise existing quotes and quickly update the opportunity to reflect the "most likely" quote and QuoteWizard automatically maintains a history of all revisions in the customer file in SalesLogix
- ✓ You can clone a quote, to another account and create a new opportunity
- ✓ Choose to format your quote by adding customer comments or a page break where you want
- ✓ Update contact and account information from within QuoteWizard for SalesLogix
- ✓ Add a new contact, account and/or opportunity during the quote preparation process
- ✓ Track quotations and opportunities to gather reliable information for sales and marketing

... using SalesLogix Architect, Active Forms and Active Scripts, ...

- ✓ In-line editing for faster, easier quote updates
- ✓ Security restrictions ensure only authorized users have access to cost and margin information
- ✓ Sales quotations are customizable via Crystal Reports and/or MS Word
- ✓ Full SalesLogix compatibility ensures reliable remote synchronization
- ✓ Custom tables added to facilitate accounting integration
- ✓ Maintains existing integrations and functionality
- ✓ Supports multiple currencies as provided in current versions of SalesLogix
- ✓ Implemented using SalesLogix bundler technology

... to empower you with exceptional added flexibility!

- ✓ Need to add an item that is not already in the SalesLogix database? No problem. With QuoteWizard for SalesLogix, you can add products on-the-fly
- ✓ Quickly add products to your sales quotations by: complete or partial part numbers and/or product descriptions, or simply drill in by group, model, family or type
- ✓ Add or change quantities, descriptions and/or prices and insert comments for your customers
- ✓ Manage your cost information through secure access
- ✓ Make pricing adjustments based upon margin or dollar amount
- ✓ Add shipping and payment term information as well as taxes and miscellaneous charges
- ✓ QuoteWizard automatically calculates shipment weight and volume
- ✓ Add confidential comments to the quote for internal use only
- ✓ Merge quotes into MS Word documents and proposals
- ✓ Out-of-stock? No problem, you can offer your customer substitute items
- ✓ Include optional items for cross-selling and up-selling
- ✓ Track your wins and losses and update your SalesLogix opportunities and forecasts with ease
- ✓ Base pricing on gross margin, cost plus, list price, volume and/or quantity based pricing programs
- ✓ Use OmniRush® to merge fax or e-mail quotes