



QuoteWizard™

for SalesLogix®

Introduction

Quotations must be quick and easy to create under different user circumstances: whether the customer already exists in your database or not and whether they call for a casual price request or a formal quote.

Building on the SalesLogix Advanced Sales quotation capabilities, the Client 1 QuoteWizard delivers the usability and features that many companies need to deliver effective quotes quickly and effectively. (Advanced Sales is not required.)

Features

- Price list view to quickly browse the Price Catalogue
- Select products from the Price List view and convert into a quote
- Select existing contact for the quote or create a new Contact/Account directly from the wizard with duplicate checking.
- Create a new Opportunity or link to an existing one while creating the quote.
- Automatically generates unique quote numbers, even for remote users
- Add to or enhance the product descriptions for the quote
- Create new "custom" products during quote creation (security controlled)
- Include "optional" products to the quote which sub-total separately
- Cost and Margin analysis for authorized users
- Create revisions to existing quotes. A new revision number is automatically assigned and quote history is maintained.
- Copy your quotes. Copy to the same account or another account.
- Update Opportunity Products and pricing from your quote.
- Format your quote with line item options and page breaks
- Print or e-mail via Crystal Reports®, Fax or e-mail through OmniRush®
- Improved Product Management and selection views

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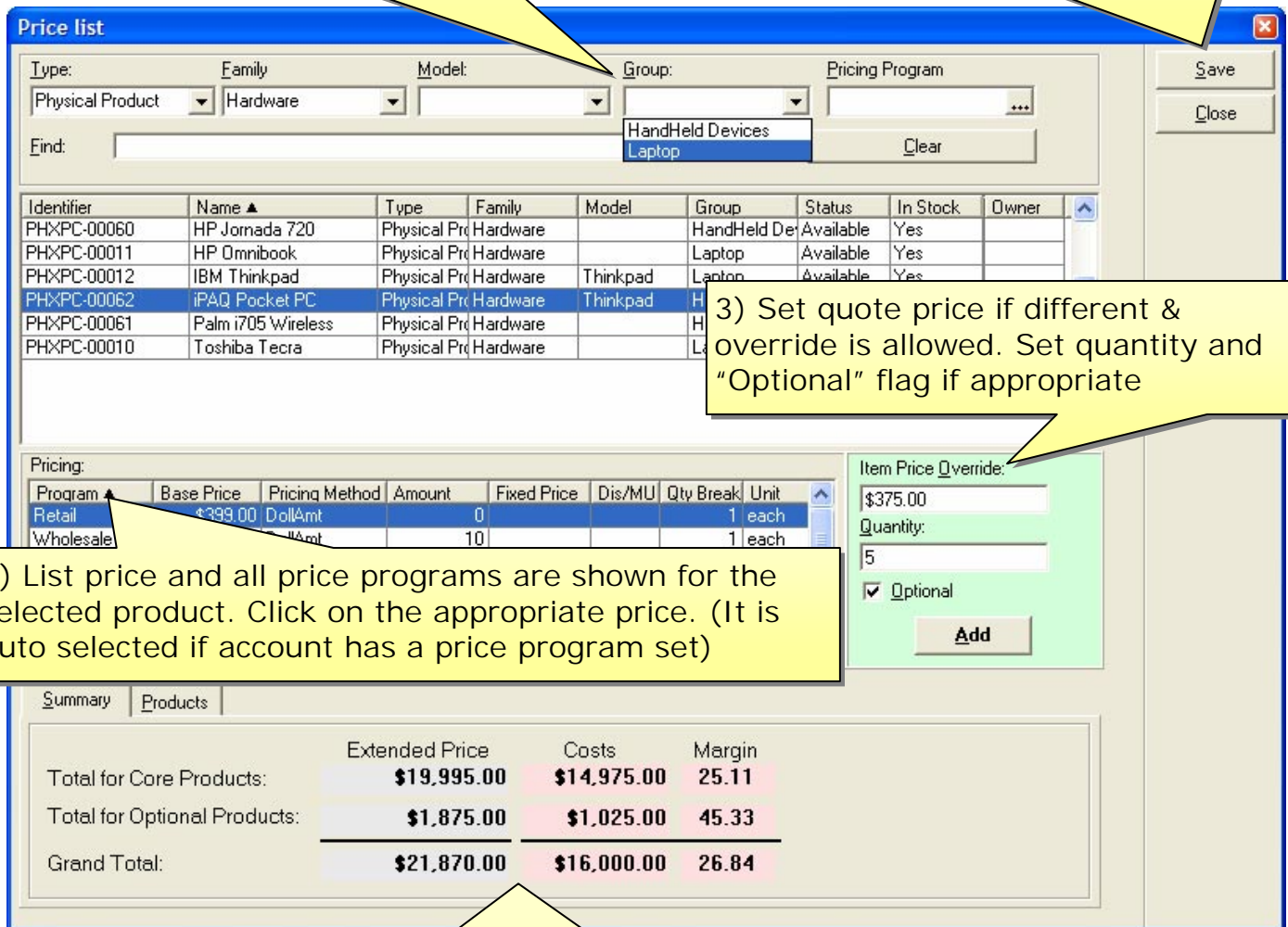
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Screen Shots

Price List View

1) Pull down lists are automatically filtered showing only those selections still valid based on the choices in the other selector fields.

5) Launch the QuoteWizard directly from your price lookup! Your product selections are loaded for you. (Or cancel if a quote is not required)



The screenshot shows the 'Price list' window with the following components:

- Filters:** Type (Physical Product), Family (Hardware), Model, Group (HandHeld Devices, Laptop), Pricing Program.
- Product List Table:**

Identifier	Name	Type	Family	Model	Group	Status	In Stock	Owner
PHXPC-00060	HP Jornada 720	Physical Pro	Hardware		HandHeld De	Available	Yes	
PHXPC-00011	HP Omnibook	Physical Pro	Hardware		Laptop	Available	Yes	
PHXPC-00012	IBM Thinkpad	Physical Pro	Hardware	Thinkpad	Laptop	Available	Yes	
PHXPC-00062	iPAQ Pocket PC	Physical Pro	Hardware	Thinkpad	H			
PHXPC-00061	Palm i705 Wireless	Physical Pro	Hardware		H			
PHXPC-00010	Toshiba Tecra	Physical Pro	Hardware		L			
- Pricing Table:**

Program	Base Price	Pricing Method	Amount	Fixed Price	Dis/MU	Qty Break	Unit
Retail	\$399.00	DollAmt	0				1 each
Wholesale			10				1 each
- Item Price Override Panel:**
 - Item Price Override: \$375.00
 - Quantity: 5
 - Optional
 - Add button
- Summary Table:**

	Extended Price	Costs	Margin
Total for Core Products:	\$19,995.00	\$14,975.00	25.11
Total for Optional Products:	\$1,875.00	\$1,025.00	45.33
Grand Total:	\$21,870.00	\$16,000.00	26.84

2) List price and all price programs are shown for the selected product. Click on the appropriate price. (It is auto selected if account has a price program set)

3) Set quote price if different & override is allowed. Set quantity and "Optional" flag if appropriate

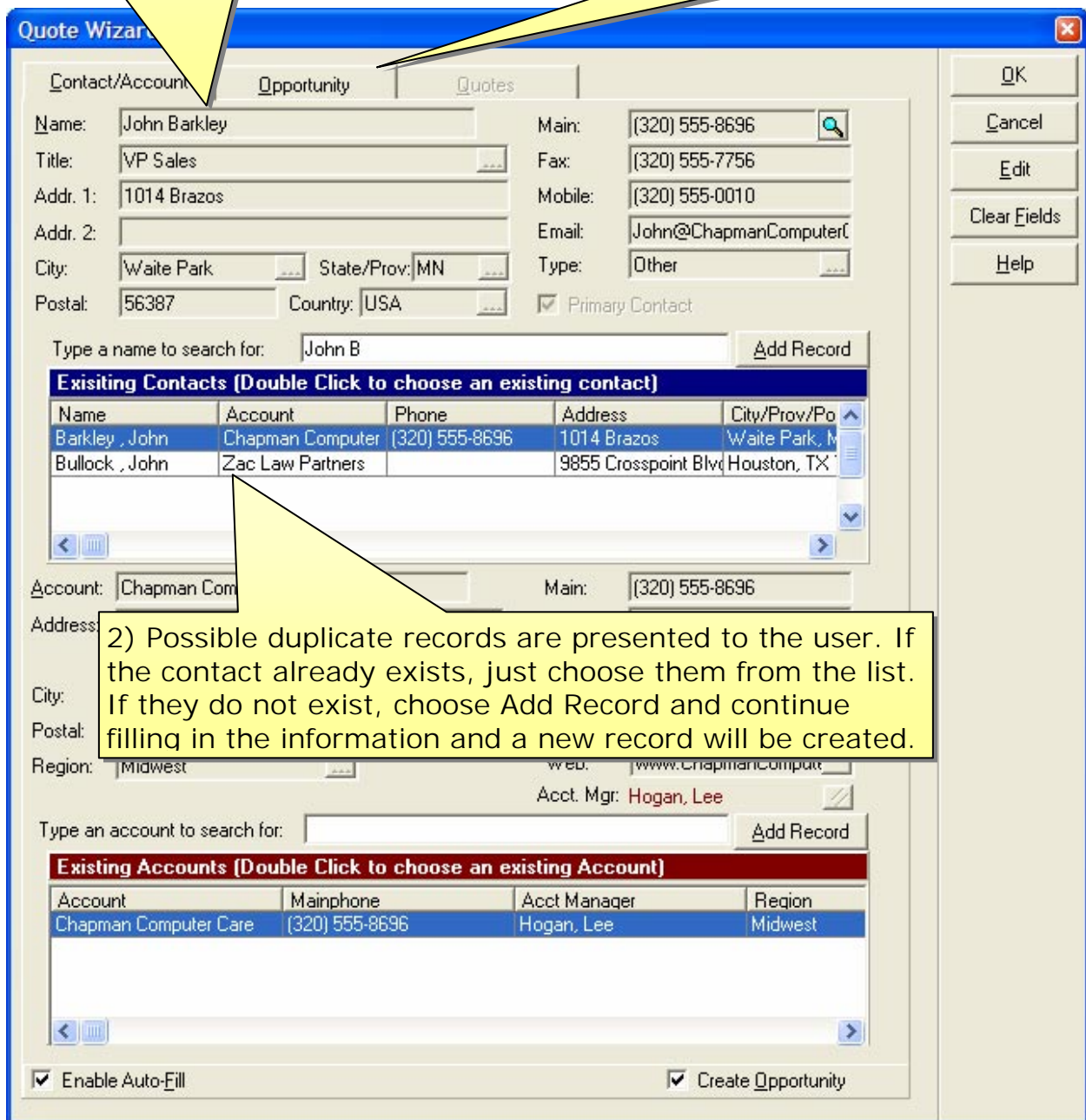
4) As products are selected, they are added to the products tab and the summary tab adds the pricing. Cost and margin information are only visible to users with security permission.

QuoteWizard View

Select Contact/Account or create a new one.

1) QuoteWizard loads current Contact and Account info. To lookup another, begin typing the Contact's or Account's name

3) Once the Contact and Account information is filled, create a new Opportunity or link to an existing one.



The screenshot shows the 'Quote Wizard' application window with three tabs: 'Contact/Account', 'Opportunity', and 'Quotes'. The 'Contact/Account' tab is active, displaying a form for entering contact information. The form includes fields for Name, Title, Address (1 and 2), City, State/Prov, Postal, Country, Main, Fax, Mobile, Email, and Type. A search box for contacts is present with 'John B' entered. Below the search box is a table of 'Existing Contacts'.

Name	Account	Phone	Address	City/Prov/Po
Barkley, John	Chapman Computer	(320) 555-8696	1014 Brazos	Waite Park, MN
Bullock, John	Zac Law Partners		9855 Crosspoint Blvd	Houston, TX

Below the contact list, the 'Account' field is populated with 'Chapman Computer' and the 'Main' phone field with '(320) 555-8696'. A search box for accounts is also present with an empty field. Below it is a table of 'Existing Accounts'.

Account	Mainphone	Acct Manager	Region
Chapman Computer Care	(320) 555-8696	Hogan, Lee	Midwest

At the bottom of the window, there are checkboxes for 'Enable Auto-Fill' and 'Create Opportunity'. On the right side, there are buttons for 'OK', 'Cancel', 'Edit', 'Clear Fields', and 'Help'.

2) Possible duplicate records are presented to the user. If the contact already exists, just choose them from the list. If they do not exist, choose Add Record and continue filling in the information and a new record will be created.

Create a new Opportunity or link to an existing one on the account.

View existing quotes on the account.

Quote Wizard

Contact/Account Opportunity Quotes

Opportunity: Chapman: 5 Notebooks

Acct. Mgr: Hogan, Lee

Source: Telemarketing - General

Quality: Excellent

Status: Open

Potential:

Probability: 50

Stage: Proposal

Est. Close: 2/27/2004

Type: New

OK
Cancel
Edit
Clear Fields
Help

Current Account's Opportunities (Double Click to choose an Opportunity)

Description	Prob	Type	Status	Account Mgr

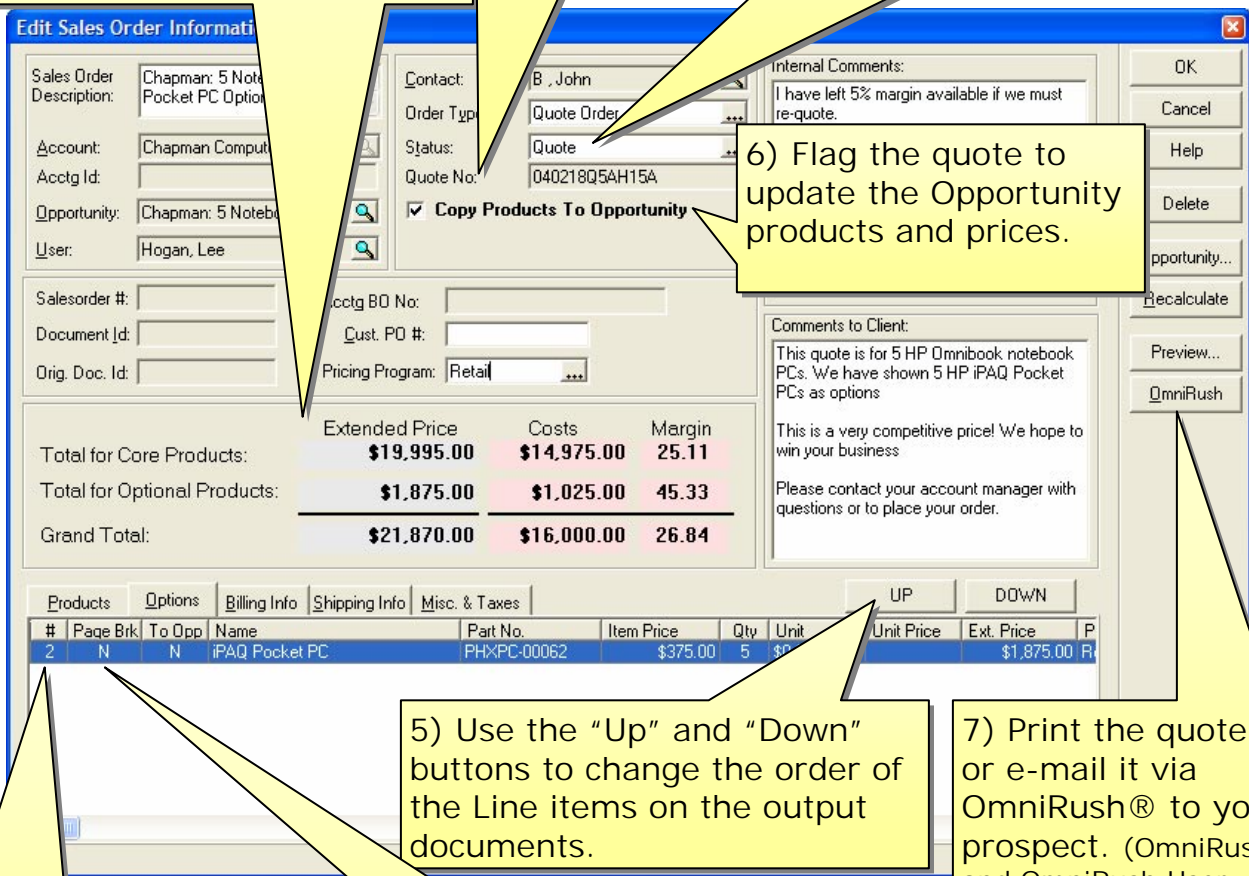
Quote/Sales Order View

1) A quote number is automatically generated. This can be customized to fit your business needs.

2) Quotation totals are displayed as products are added. Cost and margin information are visible only to authorized users.

8) To convert your quote to an order, simply change the Status to an "Order". Printouts will show "Order" instead of "Quote"

6) Flag the quote to update the Opportunity products and prices.



Edit Sales Order Information

Sales Order Description: Chapman: 5 Note
Pocket PC Option

Account: Chapman Comput
Acctg Id:
Opportunity: Chapman: 5 Noteb
User: Hogan, Lee

Contact: B, John
Order Type: Quote Order
Status: Quote
Quote No.: 040218Q5AH15A
 Copy Products To Opportunity

Internal Comments:
I have left 5% margin available if we must re-quote.

Salesorder #:
Document Id:
Orig. Doc. Id:
Acctg BO No:
Cust. PO #:
Pricing Program: Retail

	Extended Price	Costs	Margin
Total for Core Products:	\$19,995.00	\$14,975.00	25.11
Total for Optional Products:	\$1,875.00	\$1,025.00	45.33
Grand Total:	\$21,870.00	\$16,000.00	26.84

Comments to Client:
This quote is for 5 HP Omnibook notebook PCs. We have shown 5 HP iPAQ Pocket PCs as options
This is a very competitive price! We hope to win your business
Please contact your account manager with questions or to place your order.

UP DOWN

#	Page Brk	To Opp	Name	Part No.	Item Price	Qty	Unit	Unit Price	Ext. Price	P
2	N	N	iPAQ Pocket PC	PHXPC-00062	\$375.00	5		\$1,875.00	R	

3) Line item numbers indicate what order this item will be shown on output documents.

4) Insert page breaks after line items to format the output documents as desired.

5) Use the "Up" and "Down" buttons to change the order of the Line items on the output documents.

7) Print the quote, fax or e-mail it via OmniRush® to your prospect. (OmniRush and OmniRush User Interface Bundle required)



Print your Quote through Crystal Reports, Fax or e-mail it via OmniRush



Quote

P.O. Number:
 Order Date: 05/13/2005
 Document Id:
 Order Type: Quote Order
 Status: Quote
 Page No.: Page 1 of 1
 Quote No.: 05/05/13 Q5AH-01-A

Bill To: Abbott Ltd.
Attn. To: John Abbott
Address: 4206 North Grand Avenue Suite 900
 Chicago, IL 60643

Ship To: Abbott Ltd.
Attn. To: John Abbott
Address: 4206 North Grand Avenue Suite 900
 Chicago, IL 60643
Ship Via: FedEx

This quote is for 500 GoNote Tablet PCs with Windows XP Pro and includes a one year warranty on parts and labour.
 We have shown MSOffice Pro as an optional item.

This is a very competitive price and we hope to win your business! Please contact your Account Manager with questions
 or to place your order.

Quoted Items

Item	Description	Unit	Quantity	Unit Price	Ext. Price
PHXPC-00010	GoNote 110T TabletPC TabletPC convertible to laptop		500.00	2,610.00	1,305,000.00
PHXPC-00052	GoNote Personal Warranty 2yr mail-in warranty		500.00	299.00	149,500.00
PHXPC-00029	MS Windows XP Professional Windows XP Pro		400.00	319.00	127,600.00
Sub-total for Quoted Items:					\$1,582,100.00

Options

Item	Description	Unit	Quantity	Unit Price	Ext. Price
PHXPC-00039	MS Office2003 Professional Office 2003 Professional		500.00	599.00	299,500.00
Sub-total for Options:					\$299,500.00

Terms: Net 30 Days
Issue Date: Friday, May 13, 2005
 This Quote is valid for 30 days from the issue date. All applicable taxes extra.

Misc. Charge Description	Subtotal:	\$1,582,100.00
Just for fun	Misc.:	\$124.00
	Tax:	\$250,000.00
	Freight:	\$1,235.00

Grand Total (Excluding Options): \$1,833,459.00

Phoenix Computers, Inc.
 130 Oxford Avenue, Chicago, IL 60614
 Phone: (312) 666-1212 Fax: (312) 666-1299 Toll free: 1-800-666-1000



License

This Bundled product is licensed to the licensee for use as a plug-in to the SalesLogix® Customer Relationship Management environment. It is licensed based on the number of users requiring the quotation functionality and need not match the number of SalesLogix for Sales licenses.

The license fee is applicable to each master SalesLogix Server database on which the QuoteWizard is installed and **may not be reverse engineered or copied for any purpose**. Please see the Client 1 Software License Agreement for further information.

Warranty

This bundle is guaranteed to be free of defect for a period of 90 days from date of purchase. Customization or modification to any component of the bundle may invalidate this warranty. Questions or requests for support may be directed to support@client1.com

Pricing and Further Information

To obtain more information about the Client 1 QuoteWizard for SalesLogix, please contact your SalesLogix Business Partner.

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