

Linked Systems 2014 for QuoteWerks - Pricing

PRICING

PRODUCT	PRICE	TYPE OF FEE
Linked Systems 2014 for QuoteWerks License	\$2000	Required One-Time Fee
Linked Systems 2014 - Purchase Order License	\$1500	Optional One-Time Fee
Linked Systems 2014 - Workstation Licenses	\$300 per user	Optional One-Time Fee
Linked Systems 2014 - Support Contract	40% of licenses	Required Annual Fee
Linked Systems 2014 - Implementation	\$225 per hour	Required One-Time Fee

Linked Systems 2014 for QuoteWerks

A pre-built product that integrates MS Dynamics Great Plains accounting software with QuoteWerks quoting software. It allows you to export one or multiple quotes/orders from QuoteWerks and create Sales Orders in MS Dynamics GP. It can also add new items and new customers from QuoteWerks to Great Plains as needed to export orders. This is our batch interface which is designed for accounting staff to export orders one or more times daily.

Selected	Document Number	Date	Customer	SalesRep
<input checked="" type="checkbox"/>	AAAO1001	11/1/2006	Effective Solutions	Administrator
<input type="checkbox"/>	AAAO1002	8/18/2009	American Electrical Contractor	IAN M.
<input type="checkbox"/>	AAAO1003	8/28/2009	Aaron Fitz Electrical	IAN M.
<input type="checkbox"/>	AAAO1004	7/15/2010	Eric Siko	Administrator
<input type="checkbox"/>	AAAO1005	7/27/2010	Crop King	Administrator
<input type="checkbox"/>	AAAO12345679	8/28/2009	TEST Central Illinois Distributing TEST	Administrator
<input type="checkbox"/>	AAAO12345680	5/29/2012	XYZ Test Company	Administrator

This is an unlimited user license and is a required one-time fee.

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Purchase Order License (Optional Module)

This Purchase Order License enables the ability to create standard and/or drop ship purchase orders from QuoteWerks when you export orders. Vendors will be read automatically from QuoteWerks.

Purchase orders can be linked to sales orders (sop to pop links). Per item, you can choose to pull an item from stock, generate a purchase order or mark it to purchase later. User can select site id's and edit costs, change required dates and edit po notes per purchase order as needed.

Looking to save money on shipping or meet economic order quantities ? Using the batch interface, Items from multiple QuoteWerks Orders can be combined onto the same purchase orders to help save money on shipments and meet economic order quantities. Users can select which po each item will go onto and see a summary before synching.

This license enabled purchase order generation functionality in the Linked systems 2014 for QuoteWerks product and is a one-time fee.

QW PART #	OPTION	VENDOR	PO TYPE	SITE ID	COST
100XLGXYY2Y3N	Purchase	WESTAMER0001 // WestAmerica Telephone	Drop Ship	0000	\$495.00
32X IDESGH9A	Purchase	UPTOWNTR0001 // Uptown Trust	Standard	118 RIDGE	\$264.00

QW DOC #	QW PART #	OPTION	VENDOR	PO TYPE	SITE ID	COST	PO DATE	SHIP
AAA01002	5-DIAGS13HLP	Purchase	ADVANCED0001 // Advanced	Drop Ship	MAIN	\$434.00	2/18/2013	group
AAA01003	TEST	Purchase Later	ADVANCED0001 // Advanced	Drop Ship	MAIN	\$475.00	3/1/2013	group
AAA01003	32X IDESGH9A	Purchase	ADVANCED0001 // Advanced	Drop Ship	MAIN	\$264.00	3/1/2013	group

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Workstation Licenses (Optional Module)

The workstation licenses provide the following additional functionality per concurrent user:

1. Export a single order
2. Dashboards
3. Printing and additional Reporting
4. Quote Validation

EXPORT A SINGLE ORDER

Export the current quote/order on your screen in QuoteWerks. This is an easier interface to use because you do not need to find the order # amongst a list of orders, you just bring the order up in QuoteWerks and export it. This interface is designed for Salespeople / Sales Admin staff and it will easily walk you through the steps to export an order to MS Dynamics GP.

Customer Name	Customer #	Address ID	Contact Name	Address 1	City
Aaron Fitz Electrical	AARONFIT0001	PRIMARY	Bob Fitz	One Microsoft Wa	Redn
Adam Park Resort	ADAMPARK0001	BILLING	Roberta Masouras	P. O. Box 1391	Indiar
Advanced Paper Co.	ADVANCED0001	PRIMARY	Manoj Monat	456 19th Street S.	Chic
Advanced Tech Satellite System	ADVANCED0002	PRIMARY	Grant Lasko	8765 66 Ave.	Toror
American Bank	AMERICAN0002	PRIMARY	Art Bartoll	2302 Whitman Ave	Santi
American Science Museum	AMERICAN0001	PRIMARY	Andrew MacWilliams	789 North Carlton	St. Lu
Associated Insurance Company	ASSOCIAT0001	BILLING	Dmitry Rodin	Box 3845	Lincol
Astor Suites	ASTORSUI0001	PRIMARY	Pat Turner	987 West Alaska /	Gary
Altmore Retirement Center	ATMORERE0001	PRIMARY	Jane Donato	567 W 7th St.	Bloor
Baker's Emporium Inc.	BAKERSEM0001	PRIMARY	Arthur Holmes	789 University Ave	Fort
Berry Medical Center	BERRYMED0001	BILLING	Accounting	Suite 189	Fond
Blue Yonder Airlines	BLUEYOND0001	BILLING		P. O. Box 5415	Wich
Boyle's Country Inn's	BOYLESCO0001	PRIMARY	Sarah Parnell	1234 Burke	Melbi
Breakthrough Telemarketing	BREAKTHR0001	BILLING	Marie Perry	15 Arbutus St	Mont
Castle Inn Resort	CASTLEIN0001	BILLING	Helen Cholakis	Box 3873	Ottav

The batch interface included with Linked systems 2014 for QuoteWerks is designed for Accounting staff that are more familiar with MS Dynamics GP. This module is included with the workstation licenses and is licensed per concurrent user.

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DASHBOARDS

Salespeople can lookup customer, order, inventory and purchase order information from QuoteWerks (or your CRM) in real-time without affecting the user licenses of MS Dynamics GP. Allow your salespeople to lookup their own live accounting information and reduce the stress on your accounting staff.

Dashboards also allow your purchasing/accounting staff to keep organized with automatic lists of items to order, orders processed, orders in process and can be customized to show whatever todo lists they need so things do not fall through the cracks. They also provide valuable real world features like purchasing items later, adding/deleting items from QuoteWerks orders afterwards, voiding and resynching orders and even changing vendors or item numbers on purchase orders.

The screenshot displays the 'Central Communications LTD' window with tabs for Sales Totals, Addresses, Receivables, History, Notes, Orders, Shipments, and Credit Cards. The 'Receivables' tab is active, showing a 'Terms' section with 'Payment Terms' (Net 30, Credit Limit 20000), 'Payment History' (Last Payment 4/12/2017 - \$375.00, Average Days to Pay 53), and 'Invoice History' (First Invoice Date 9/15/2013, Last Transaction 3/16/2017 - \$256.70). To the right, the 'Balances' section shows 'Current' (\$375.00), 'Overdue' (breakdown by days: 31-60, 61-90, 91-120, 121-150, 151-180, Over 999 days), and 'Total Balance' (\$0.58). Below these are tables for 'Open Invoices' and 'Closed Invoices'.

Type	Date	Due Date	Terms	Age	Salesperson	Voided?	Discount Date	Discount Available
Sales / Invoices	5/10/2014	6/9/2014	Net 30	-434	PAUL W.	No	5/10/2014	\$0.00
Payments	3/10/2016	1/1/1900		-1104		No	1/1/1900	\$0.00
Payments	3/21/2016	1/1/1900		-1115		No	1/1/1900	\$0.00
Payments	3/27/2016	1/1/1900		-1121		No	1/1/1900	\$0.00

Invoice #	Type	Date	Amount	Due Date	Balance	Age
PMT16001	Payments	1/6/2014	\$1,027.40	1/1/1900	\$0.00	-41643
PMT6002.1	Payments	10/25/2013	\$11,347.92	1/1/1900	\$0.00	-41570
PYMNT000000000016	Payments	1/31/2014	\$8,372.19	1/1/1900	\$0.00	-41668
PYMNT000000000019	Payments	1/31/2014	\$119.54	1/1/1900	\$0.00	-41668

The screenshot displays the 'Dashboard' window with tabs for Work in Progress, Orders Processed, Items to Order, and Purchase Orders. The 'Items to Order' tab is active, showing a table with columns for Item Number, Description, and Quantity. The table lists three items: 5-DIAGS13HLP (20 TV/DVD), TEST ITEM4AAGGJ88 (new Synnex item), and 32X IDESGH9A (Test item). At the bottom, there are buttons for 'Create PO in GP' and 'Print Purchase Order'.

Item Number	Description	Quantity
5-DIAGS13HLP	20 TV/DVD	1
TEST ITEM4AAGGJ88	new Synnex item with loong jfdklas;ffsa podfdeh fdsasjoip awjefajo; i	1
32X IDESGH9A	Test item	1

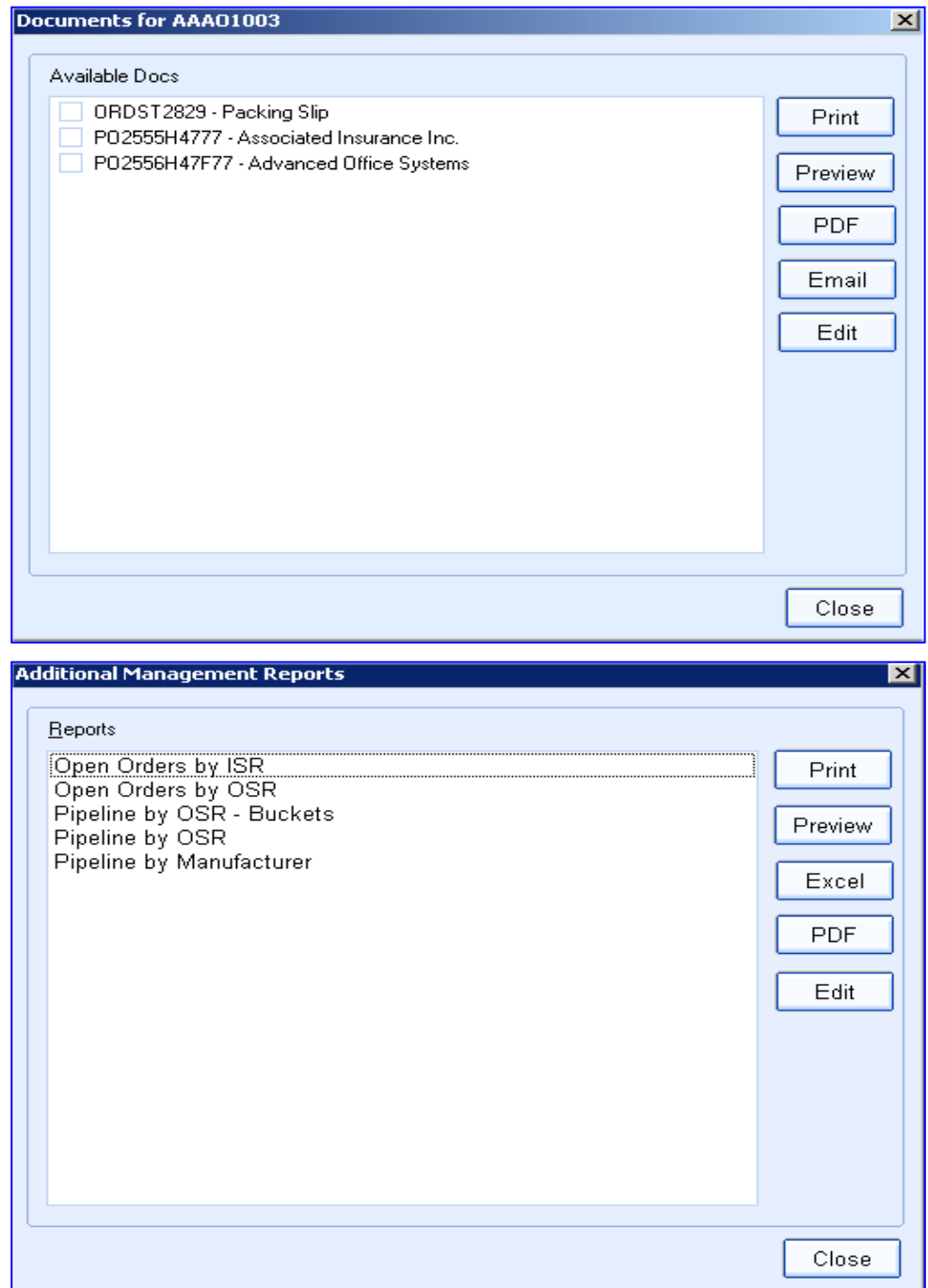
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PRINTING AND ADDITIONAL REPORTS

Print a Great Plains purchase order, sales order or invoice right from QuoteWerks without affecting the user licenses of MS Dynamics GP. This module will automatically show the user the purchase orders and orders/invoices related to the QuoteWerks quote they have on the screen. Salespeople can email, create a pdf (and save it) or just print with a single push of a button. They can also go back reprint any order, invoice or purchase order in Great Plains using the dashboard.

Additional management reports which can combine information from Quotewerks and Great Plains and/or your CRM into the same report. Try doing that from Great Plains or Quotewerks ! Easily export this report to excel or pdf with a push of a button.

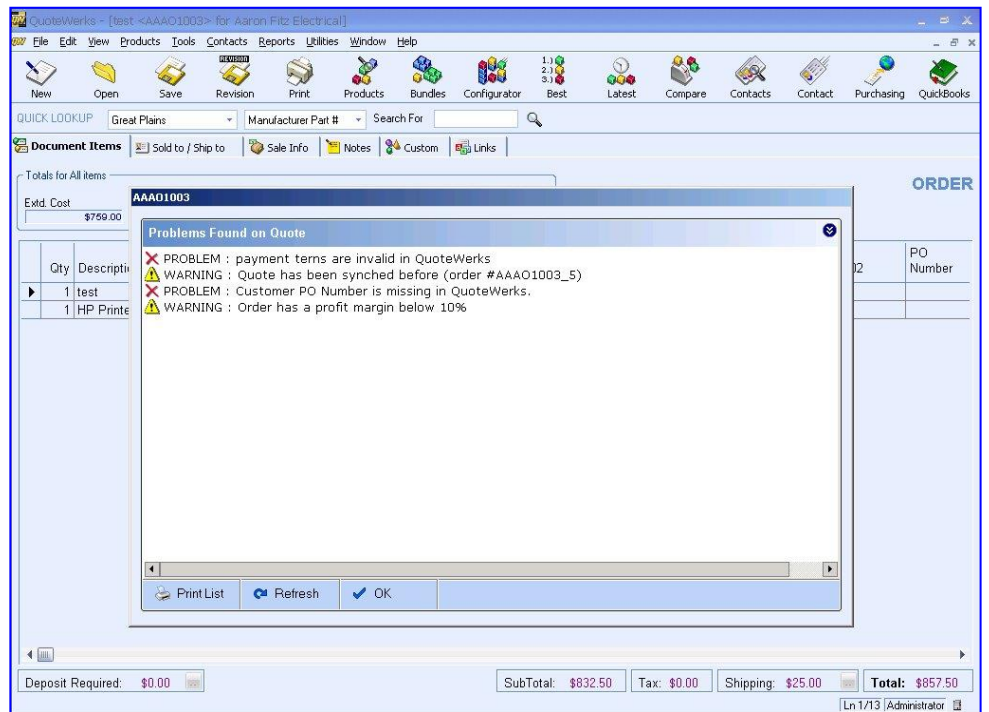


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QUOTE VALIDATION

Automatically check the quote in QuoteWerks and warn salespeople if information is missing before they convert that quote to an order. Fix order data in Linked Systems QuoteWerks before it is sent to MS Dynamics GP and ship your orders faster. You can select which warnings you want and this module can even send an email to a sales manager or accounting staff to warn them automatically.



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