

CRMLinX

FEATURES

CRMLinX provides a complete view of customer interactions to empower your work force.

CRMLinX

- ✓ Easy to Install
- ✓ Customizable Data Mapping
- ✓ Bi-directional Synchronization
- ✓ Scheduled Updates
- ✓ Immediate ROI

SalesLogix

- ✓ AR Summary
- ✓ Credit Information
- ✓ Invoice History
- ✓ Open Invoices
- ✓ Received Payments
- ✓ Product Availability
- ✓ Single Point of Entry
- ✓ Add-on Solution Support

QuickBooks

- ✓ Increased Efficiency
- ✓ Eliminate Duplicate Entry
- ✓ Accurate Addresses
- ✓ Product Management
- ✓ Automated Invoice Generation for Sales Orders, Contract Renewals, Billing of Services Rendered, Customer Support, and more.

CONTACT INFORMATION

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www.crmlinx.com

Accounting integration isn't supposed to be this easy!



CRMLinX, the premier accounting integration product specifically designed for SalesLogix and QuickBooks, offers a low cost of ownership, short implementation time and high return on investment. Flexible and easy to use, CRMLinX readily accommodates growth and changing business requirements.

Access QuickBooks Customer Data

CRMLinX empowers employees to make effective business decisions through its integration of QuickBooks and SalesLogix. Representatives responsible for the daily interaction with customers now have access to the information they need. Did you receive my payment? What is the status of my order? Additionally, by sharing customer aging and credit information, sales and customer service personnel are now empowered to ask for payments before taking another order.

Integration between QuickBooks and SalesLogix provides access to the most current product information and pricing when creating quotes or taking orders. Product availability, pricing, and management can now be maintained from either system ensuring accurate orders.

Reduce Telephone Calls and Increase Accounting Efficiency

The time and resources required of accounting to support the rest of the organization can be substantial. CRMLinX eliminates the need for internal support calls by transferring product availability, invoice history, payment, and outstanding balance information from QuickBooks to SalesLogix. CRMLinX eliminates duplicate data entry thus ensuring accuracy in data and billing.

Improve Customer Satisfaction

As a result of the CRMLinX automation process, detailed information moves rapidly throughout the organization. Company representatives now have access to complete customer profiles when handling inquiries. Customers are now able receive answers to their inquiries the first time they call, positively impacting your customer satisfaction.

CRMLinX has been specifically designed for use with SalesLogix and QuickBooks. The software maintains bi-directional synchronization of customer, billing, and AR summary information.

CRMLinX's unique customizable interface allows you to map data from any table within the SalesLogix CRM database to QuickBooks. This means that your integration can use existing information without the requirement or need for a lengthy customization and integration project.

Once CRMLinX has reviewed the data in both systems, it begins the process of inserting and updating customer and contact information, product items, invoice billing, invoice history, received payments, and more...

SalesLogix System Administrators can rest assured that crmLinX utilizes the SalesLogix OLEDB Provider to ensure data is synchronized to remote users.

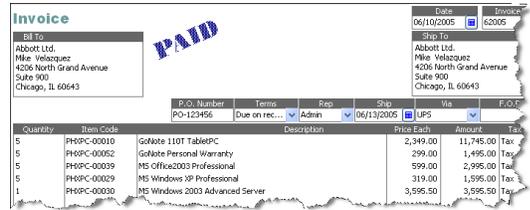
Empower the Front Line

CRMLinX provides employees interacting with customers on a daily basis with the information they need. AR aging and available credit information empowers your staff to ask for payments and/or defer orders until payment is received. Invoice and payment history provides answers to commonly asked questions.

How much time and money can your business afford to lose? CRMLinX can significantly reduce the cost of doing business by reducing the time required to complete customer billing, eliminating duplicate data entry, and increasing employee awareness of customer interactions. CRMLinX will free your employees from time consuming tasks to focus on growing your business, not just maintaining it.

Avg. Hours to Complete Common Tasks		
	Manual	CRMLinX
Duplicate Data Entry	40	0
Invoice Prep & Mgmt.	37	0
AR Collection	32	0
Internal Inquiries	20	0
Total Hours	129	0

Based on 200 invoices per month



Accounting					
Summary	Details	Credit Card	Invoice History	Received Payments	Comments
Invoice Aging					
Current	1 - 30	31 - 60	61 - 90	> 90	Balance / Credit
\$0.00	\$240.00	\$80.00	\$0.00	\$0.00	Balance Due: \$320.00
					Credit Limit: \$0.00
					Available: (\$320.00)

Automated Invoicing

- ✓ Sales Orders
- ✓ Contract Renewals
- ✓ Time Billing
- ✓ Services Rendered
- ✓ Customer Support

Accounting Summary Information

- ✓ View credit limit and terms, current balance and aging A/R
- ✓ Obtain account status, tax schedule and comments
- ✓ Review last invoice date, Year to Date totals compared to the previous year

Historical Invoices and Orders

- ✓ Reference PO numbers, amounts, tax, discount and freight information
- ✓ Evaluate open invoices by due date, balance and status
- ✓ View order date, number, type and ship-to information

Received Payments

- ✓ View payment date, invoice number, check number, transaction amount and status

Product Information

- ✓ Activate/Deactivate products at the click of a mouse
- ✓ Automatically create products
- ✓ View product name, part number, family, group, type, income, COGS, and asset
- ✓ Access pricing schedules

Technical Requirements

OS: Windows 7, Vista, XP
 Software: Microsoft .NET Framework QuickBooks 2009 or later SalesLogix 7.5 or later

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