

INTEGRATED QUOTE CREATION AND PROPOSAL GENERATION

Nsite Quote and Proposal Management

Benefits

Reduce time to quote

Improve pricing controls

Improve auditing and SOX compliance

Increase revenue through business intelligence — bid selection analysis, margin analysis, discounting strategies

Extend Salesforce to provide deal exception handling

Features

Track approvals in real-time

Create and track quotes within Salesforce

Configure product families directly to Salesforce Price Book

Two-way synchronization with Salesforce

Generate PDF proposals from online data

EXTEND SALESFORCE TO HANDLE QUOTES

The integration of Nsite Quote and Proposal Management application with Salesforce helps resolve a significant and long-standing business problem for sales organizations: manual review and approval of contracts, new-business proposals, pricing discounts, and other quote related activities managed through email, spreadsheets and paper forms.

- Do you experience long response times for quotes due to bottlenecks and manual processes?
- Do you lack control and visibility around pricing, discounting and margins?
- Do you lose deals or revenue because of the above issues?

Salesforce users can now leverage Nsite track and automate their quote and proposal management process as well as improve speed, control and visibility. Quotes can be easily initiated from within



then configured with specific pricing and discounts based on prior approvals. Once complete, you can instantly generate a proposal, and even route it electronically for approval by the customer. View real-time status updates of all in-progress and completed quotes. Drill down to uncover bottlenecks and make adjustments that improve your overall sales efficiency.

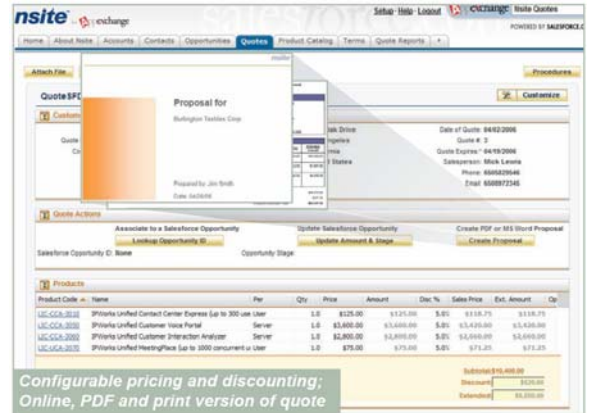
The Nsite service is as easy to use as e-mail, yet delivers control and visibility with its dynamic workflow capabilities. Sales channel partners and customers can also easily be included in processes using the rich Channel Management feature included in the service.

Nsite Quote and Proposal Management Solution is AppExchange certified. This integration extends the value of Salesforce by automatically tracking and managing processes and tasks that require human judgment, collaboration and decision making, which until now have been performed manually. The combined solution provides the following values to both sales management and sales reps:

- Improve pricing controls and compliance (SOX): Helps create a structured, auditable quote process
- Reduce time to quote: Faster approvals, eliminate bottlenecks, automate proposal preparation
- Increase Revenue: Increased intelligence about quote process, bid to selection analysis, margin analysis, competitive bids, and discounting strategies

Features:

- Create multiple quotes and launch approval process directly from the Opportunity tab within Salesforce
- Configure product families to License/Product, Services and Support table and import directly from Price Book
- 2-way synchronization with Salesforce for accurate quote data and forecasting
- Attach files to support contract review and approval of terms & conditions
- Approval and workflow set up through point-and-click -- no programming
- Track quote approvals in real-time through Nsite dashboard launched within Salesforce
- Send electronic version of quote to customer for approval using their email (online approvals)
- Ability to issue electronic Personal Identification Number (PIN) to customer prior to their quote approval adding extra layer of security
- Create proposals in PDF or Word with a single click
- Get complete audit trail of approvals, time stamps and posted notes during each step of the process
- Reporting and analysis of quote history and approval process



Benefits:

- Eliminate "running sales by spreadsheets, word docs and email" method for quote creation and approvals
- Reduce errors and guarantee consistent, accurate quotes through enforcement of price book "list prices"
- Enforce process control by authorization levels (discount %, deal size) to ensure compliance and audit trail

