



CODEY LABS

QUOTEX Features

Magic Begins Here...

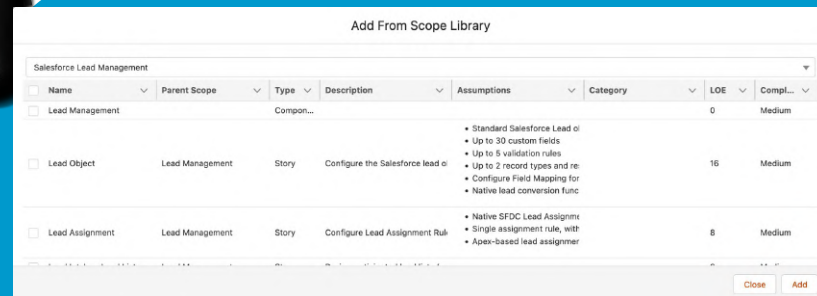
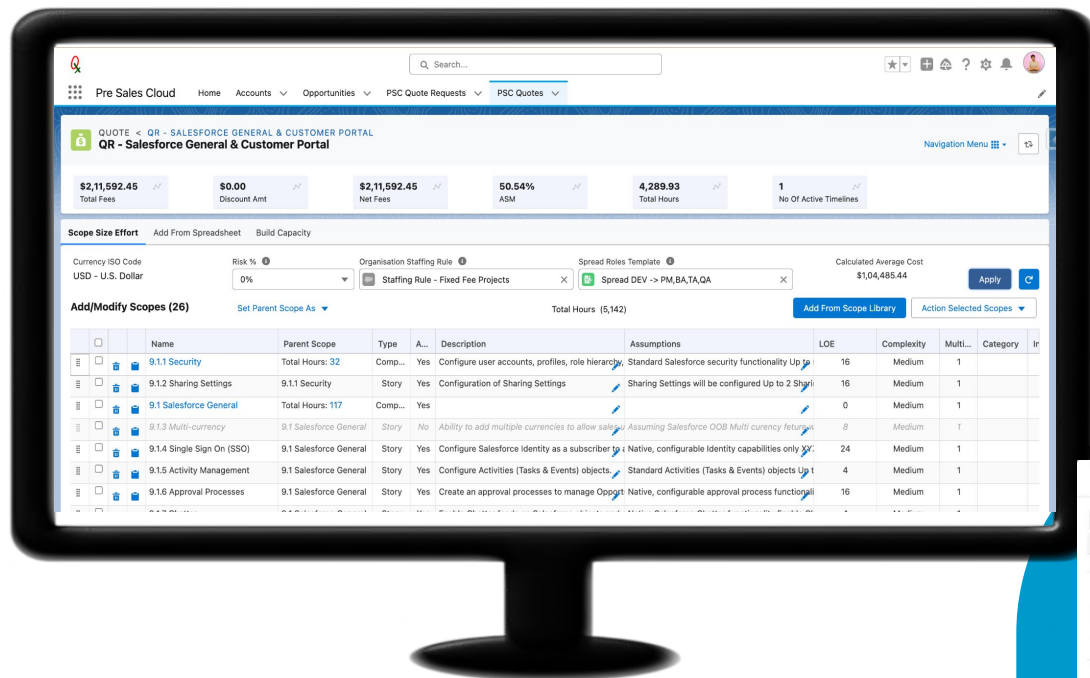
FEATURES



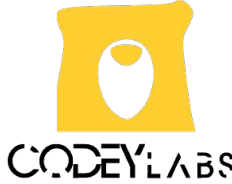
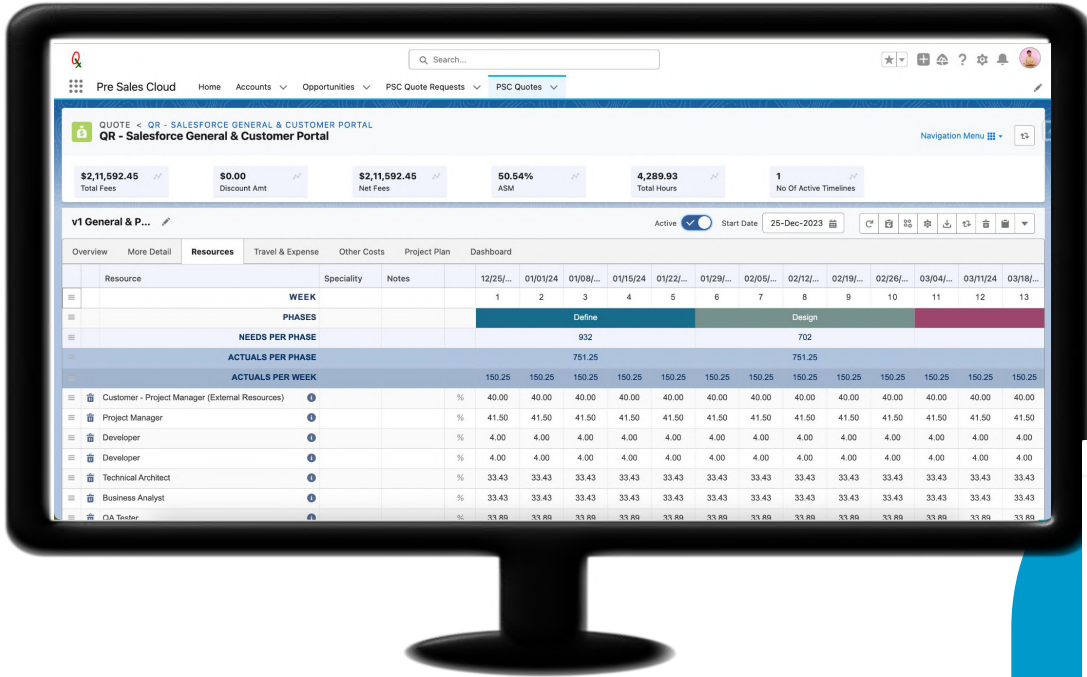
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SCOPE LIBRARY

Document, build, collaborate and iterate on project-based scope items with reusable scope templates.



FEATURES



TIMELINE LIBRARY

Build from scratch or use and modify existing timeline templates designed for common project types, durations, and sizes.

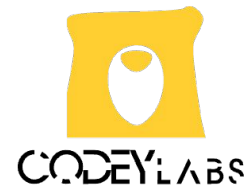
Add From Timeline Library

Timeline Name: Practice: Region: Price Range: Frequency: Period Range: Contract Type: [Reset Filters]

Name	#Period	Total Fee	Resource Fees	Total T&E	Total Other Costs	#Template Usage
8 Weeks Fixed Fee Lead...	8 Week(s)	\$96,560.00	\$94,560.00	\$2,000.00	\$0.00	1
10 Weeks Fixed Fee Sal...	10 Week(s)	\$260,237.50	\$245,937.50	\$14,000.00	\$300.00	1

[Save]

FEATURES

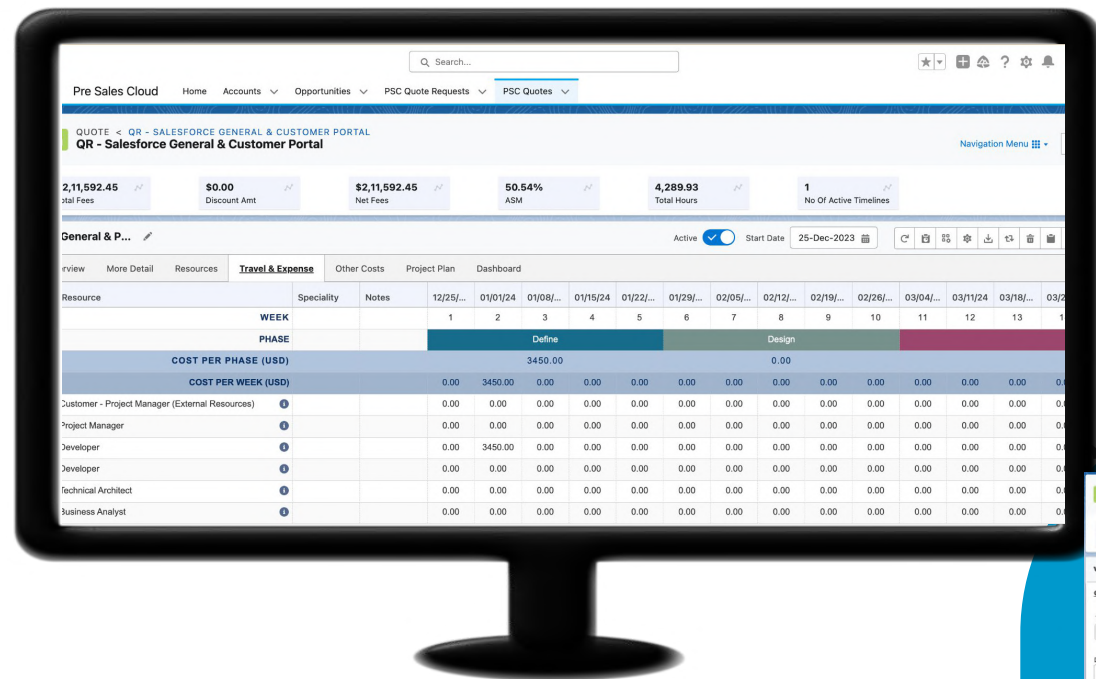


RATE CARD

Assign specific roles, rates and resourcing plan rules to scopes & timelines.

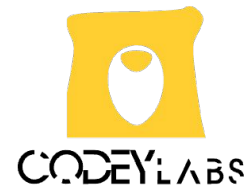
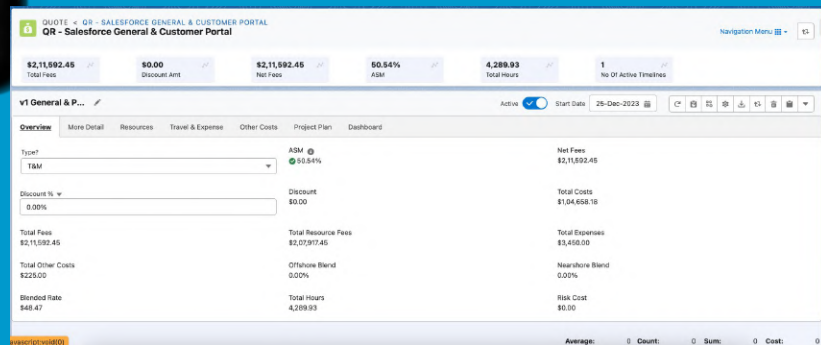
	PSC Rate Card No.	Resource Role	Resource Level	Suggested Bill Rate	Average Cost Rate	Region	Practice	Account
1	RC-15	QA Tester		INR 1,235.00 (USD 14.96)	INR 990.00 (USD 11.99)	INDIA	Salesforce	
2	RC-7	QA Tester		USD 35.00	USD 15.00	INDIA	Salesforce	
3	RC-14	Technical Architect		INR 4,095.00 (USD 49.61)	INR 2,200.00 (USD 26.65)	INDIA	Salesforce	
4	RC-10	Technical Architect		USD 95.00	USD 42.00	INDIA	Salesforce	
5	RC-13	Business Analyst		INR 3,065.00 (USD 37.13)	INR 1,935.00 (USD 23.44)	INDIA	Salesforce	
6	RC-12	Project Manager		INR 3,065.00 (USD 37.13)	INR 1,935.00 (USD 23.44)	INDIA	Salesforce	
7	RC-11	Developer		INR 2,065.00 (USD 25.02)	INR 1,235.00 (USD 14.96)	INDIA	Salesforce	
8	RC-1	Developer		USD 65.00	USD 29.00	INDIA	Salesforce	
9	RC-9	Technical Architect		USD 210.00	USD 122.00	USA	Salesforce	
10	RC-8	QA Tester	Senior	USD 45.00	USD 19.00	INDIA	Salesforce	
11	RC-6	Business Analyst	Principal	USD 195.00	USD 120.00	USA	Salesforce	
12	RC-5	Business Analyst		USD 95.00	USD 60.00			
13	RC-4	Project Manager	Senior	USD 175.00	USD 125.00	USA	Salesforce	
14	RC-3	Project Manager		USD 125.00	USD 100.00	USA	Salesforce	
15	RC-2	Developer	Associate	USD 85.00	USD 19.00	INDIA	Salesforce	
16	RC-0	Developer	Principal	USD 85.00	USD 40.00	INDIA	Salesforce	

FEATURES

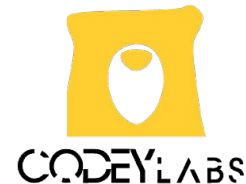


PRICING ENGINE

Fully define a quote by defining the contract type, applying discounts and adding in travel and expense costs & other costs.

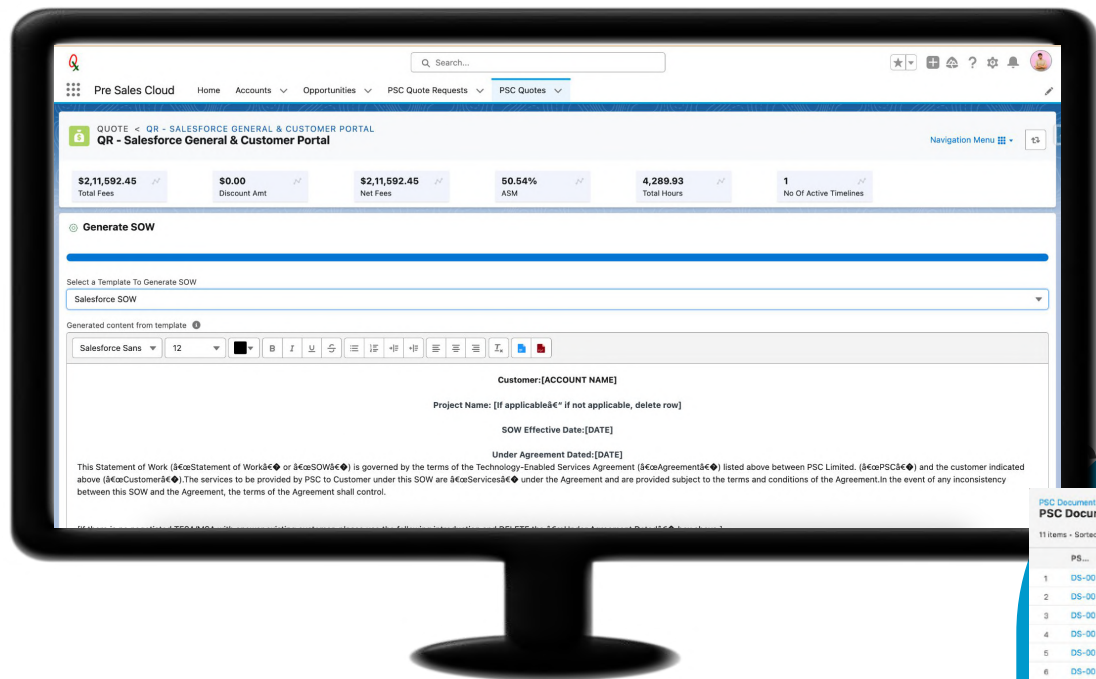


FEATURES



GENERATE DOCUMENT

Download the SOW/Contact/Document in just one click in the pre-defined template format.



PSC Document Templates > DT-0000

PSC Document Sections

11 items - Sorted by Display Order - Updated a few seconds ago

PS...	DI	HTML Content	Is...	SQL Query	S...	Table Config JSON	Type	Table Style JSON
1	DS-0000	1	Customer:[ACCOUNT NAME]Proje...	☒	☐		Paragraph	
2	DS-0001	2	This Statement of Work ("State...	☒	☐		Paragraph	
3	DS-0002	3	1. Project Description	☒	☐	{ "Description": "psce__Descriptio...	Table	
4	DS-0003	4	2. SCOPE	☒	☐	{ "Component/Epig/Parent Scope": "...	Table	
5	DS-0004	5	3. Data Migration Scope	☒	☐	{ "Source": "psce__Integration_Ve...	Table	
6	DS-0005	6	4. Integration ScopeOption 1: PSC ...	☒	☐	{ "Source": "psce__Integration_Ve...	Table	
7	DS-0006	7	5. Organization Change Managem...	☒	☐	{ "Function": "psce__Functional_A...	Table	
8	DS-0007	8	6. Roles & Responsibilities	☒	☐	{ "PSC Role": "psce__Resource_R...	Table	
9	DS-0008	9	7. FEES/Fees under this Statement ...	☒	☐	{ "Role": "psce__Role__c", "Rate": "...	Table	{ "Role": "{ "style": "width:40%;te...
10	DS-0009	10	8. Discounts, Travel Expense & Ot...	☒	☐	{ "Subtotal Fees": "psce__Service...	Table	{ "Subtotal Fees": "{ "style": "widt...
11	DS-0010	11	9. GENERALSupport Inapplicable: ...	☒	☐		Paragraph	

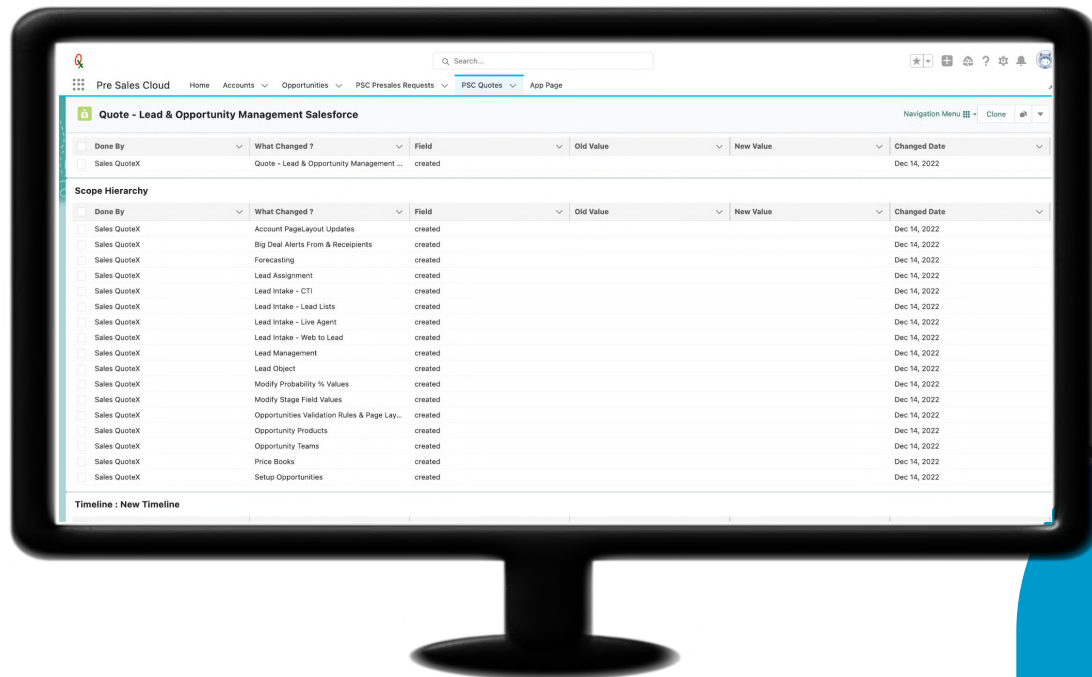
FEATURES



CODEYLABS

AUDIT HISTORY

A comprehensive audit history on each quote elements.



ADDITIONAL FEATURES

BYOF - Build Your Own Feature

The extensible feature of QuoteX allows subscribers to build their own components and make those components part of the QuoteX framework to solve their unique business problems.

Leverage Existing Rate Cards

If you use FinancialForce today, QuoteX automatically leverages your current Rate cards, practices, regions and skills to seamlessly integrate quotes into your existing process

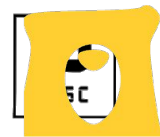
Create Quotes, Proposals, and SOWs through external tools

By leveraging external tools like Conga or Drawloop, you can easily generate any document, spreadsheet or powerpoint using scope, timelines, resources and pricing

ROADMAP/EXTENSIONS

1. Generate Quote powered by Gen AI
2. Scope Effort Matrix
3. Staffing Rules Adjudication
4. Analogous Scoping & Scheduling
5. Add To Timeline Library
6. Contribute To Scope Library
7. Dashboard For Quote

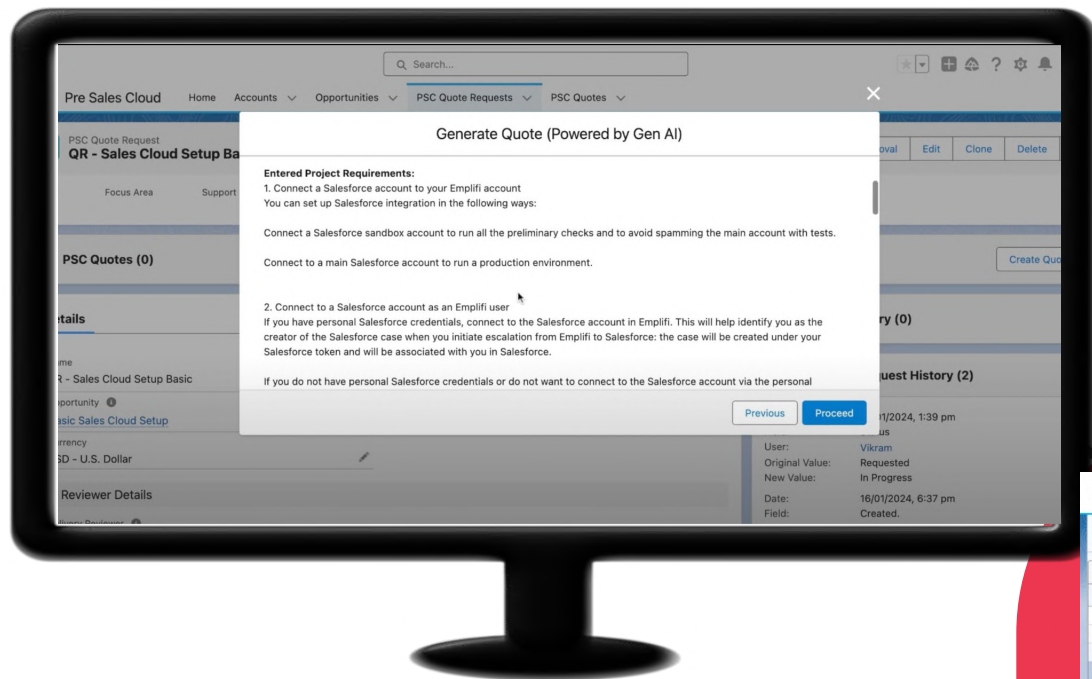
SNEAK PEEK



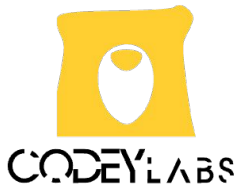
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Generate Quote (powered by GEN AI)

Utilizing the powerful capabilities of QuoteX and generative AI, seamlessly creates, customizes, and finalizes project quotes with speed and precision.

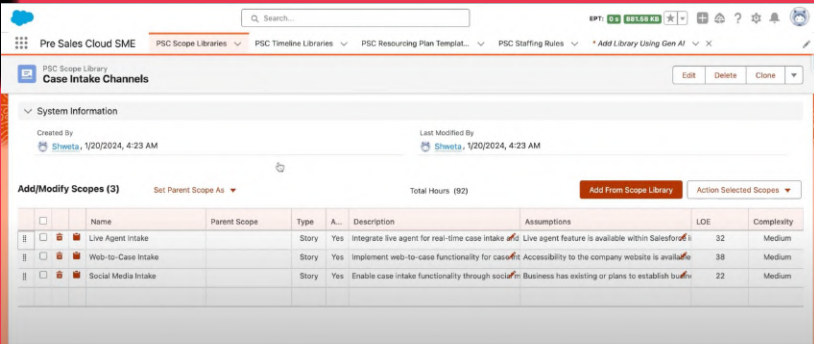
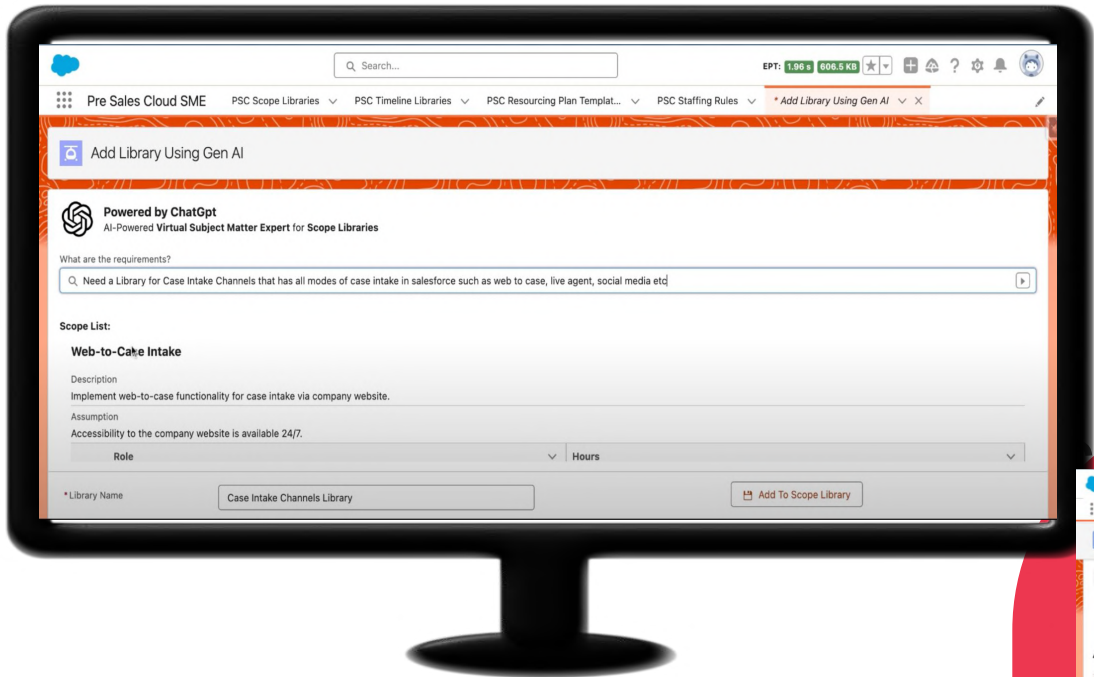


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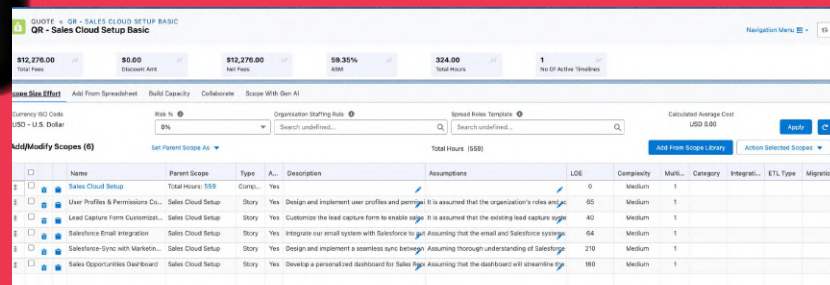
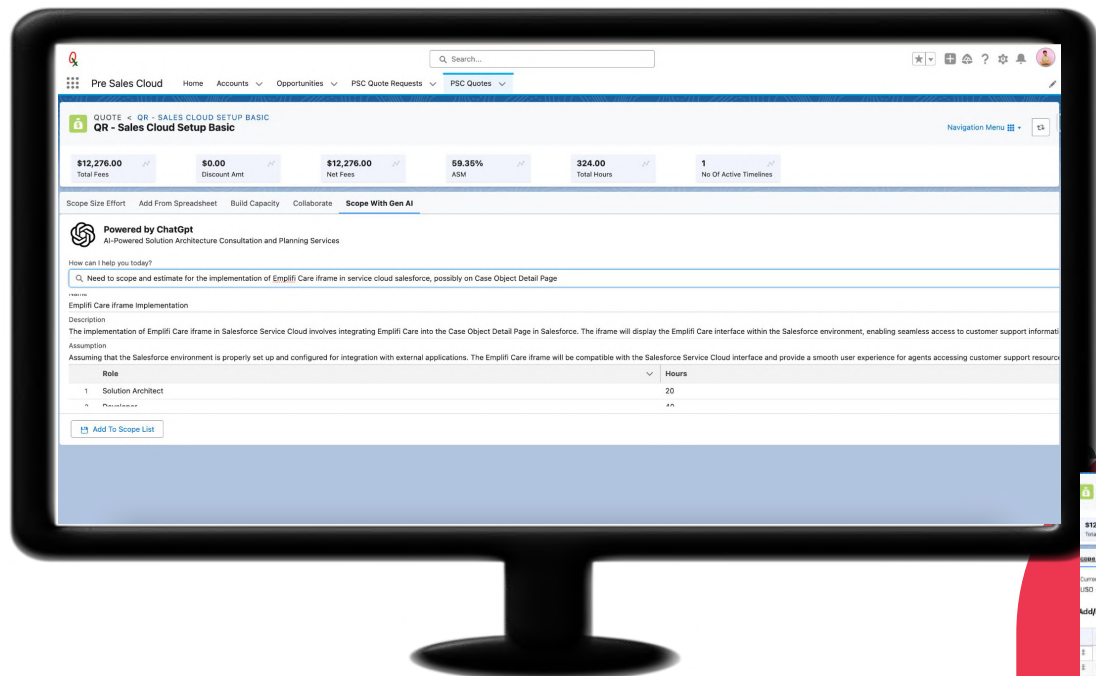
Generate Library (powered by GEN AI)

Gen AI interprets your library needs, generates a list of scope items and efforts, and assists you in the creation process.



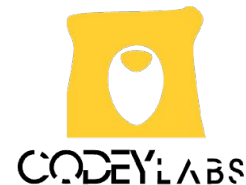
SCOPING W/GEN AI

Effortlessly determine feature scoping and sizing estimations in QuoteX using Gen AI powered by ChatGPT for precise and efficient project planning.



Name	Parent Scope	Type	Description	Assumptions	LOE	Complexity	Metric	Category	Integration	ETL Type	Migration
Sales Cloud Setup	Total Hours: 559	Comp.	Yes		0	Medium	1				
User Profiles & Permissions Co.	Sales Cloud Setup	Story	Yes	Design and implement user profiles and permissions. It is assumed that the organization's roles and permissions are already defined.	85	Medium	1				
Lead Capture Form Customization	Sales Cloud Setup	Story	Yes	Customize the lead capture form to enable org. It is assumed that the existing lead capture system is already in place.	40	Medium	1				
Salesforce Email Integration	Sales Cloud Setup	Story	Yes	Integrate our email system with Salesforce to get. Assuming that the email and Salesforce systems are already in place.	64	Medium	1				
Salesforce-Sync with Market...	Sales Cloud Setup	Story	Yes	Design and implement a seamless sync between. Assuming thorough understanding of Salesforce.	210	Medium	1				
Sales Opportunities Dashboard	Sales Cloud Setup	Story	Yes	Develop a personalized dashboard for Sales Rep. assuming that the dashboard will streamline the	180	Medium	1				

SNEAK PEEK



SCOPE EFFORT MATRIX

The Scope Effort Matrix feature in QuoteX provides a comprehensive overview of scoping and effort estimations through a matrix format, facilitating a swift understanding of the overall scope, categorized by role, phase, and specialty.

Q Search...

Pre Sales Cloud Home Accounts Opportunities PSC Quote Requests PSC Quotes

QUOTE < QR - SALES CLOUD SETUP BASIC
QR - Sales Cloud Setup Basic

\$12,276.00 Total Fees \$0.00 Discount Amt \$12,276.00 Net Fees 59.35% ASM 324.00 Total Hours 1 No Of Active Timelines

Scope Size Effort Add From Spreadsheet Build Capacity Collaborate Review

Scope Effort Matrix

Categorize by: Role

Rate Category: Average Rate

Scope Name	BI Archt...	BI Consu...	Developer	Integrati...	Integrati...	QA Tester	Solution ...	Technica...	UX/UI D...	Total	(Timelin...	(Blende...
Lead Capture Form Customization	0.00	8.00	20.00	0.00	0.00	0.00	0.00	0.00	12.00	40.00	\$1,377.78	\$0.00
Sales Opportunities Dashboard	0.00	0.00	80.00	0.00	0.00	0.00	0.00	60.00	40.00	180.00	\$6,200.00	\$0.00
Salesforce Email Integration	0.00	0.00	40.00	8.00	16.00	0.00	0.00	0.00	0.00	64.00	\$2,204.44	\$0.00
Salesforce-Sync with Marketing Aut...	0.00	0.00	80.00	0.00	60.00	30.00	40.00	0.00	0.00	210.00	\$7,233.33	\$0.00
User Profiles & Permissions Configur...	20.00	0.00	30.00	0.00	15.00	0.00	0.00	0.00	0.00	65.00	\$2,238.89	\$0.00
Total	20.00	8.00	250.00	8.00	91.00	30.00	40.00	60.00	52.00	559.00	\$19,254.44	\$0.00
(Timelines) Average Cost	688.89	275.56	8,611.11	275.56	3,134.44	1,033.33	1,377.78	2,066.67	1,791.11	19,254.44		
(Blended) Average Cost	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		

QUOTE < QR - SALES CLOUD SETUP BASIC
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Scope Effort Matrix

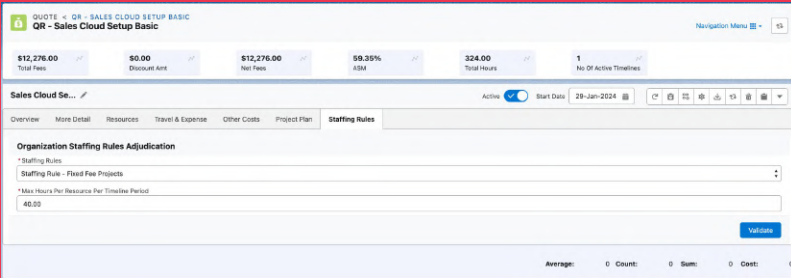
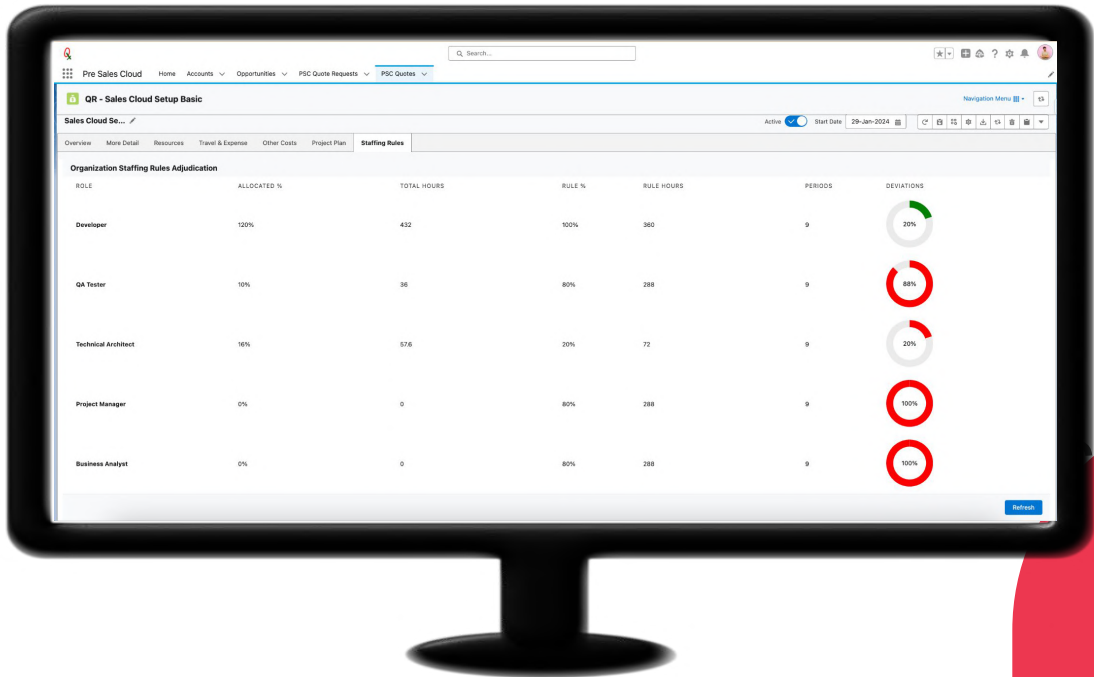
Categorize by: Phase

Rate Category: Average Rate

Scope Name	Develop	Total	(Timelin...	(Blende...
Lead Capture Form Customization	40.00	40.00	\$1,377.78	\$0.00
Sales Opportunities Dashboard	180.00	180.00	\$6,200.00	\$0.00
Salesforce Email Integration	64.00	64.00	\$2,204.44	\$0.00
Salesforce-Sync with Marketing Aut...	210.00	210.00	\$7,233.33	\$0.00
User Profiles & Permissions Configur...	65.00	65.00	\$2,238.89	\$0.00
Total	559.00	559.00	\$19,254.44	\$0.00
(Timelines) Average Cost	19,254.44	19,254.44		
(Blended) Average Cost	0.00	0.00		

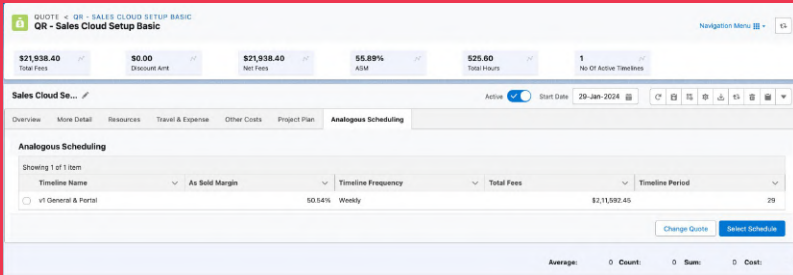
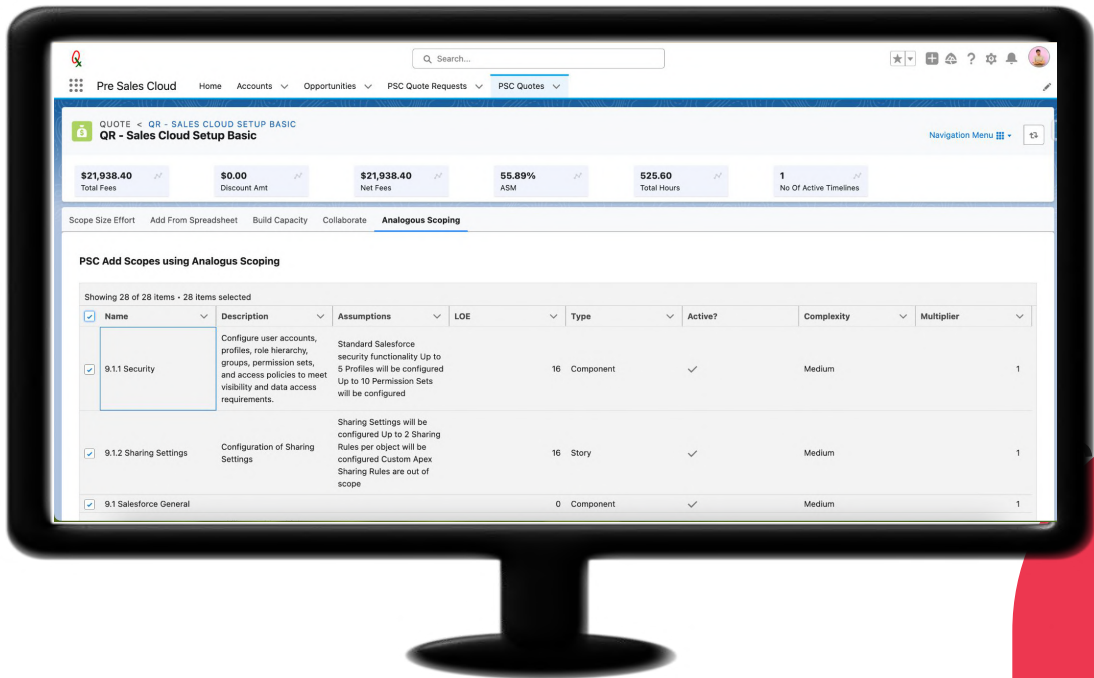
STAFFING ADJUDICATION

QuoteX streamlines workforce management with its innovative staffing rules adjudication feature, ensuring optimal resource allocation and compliance for each timeline.

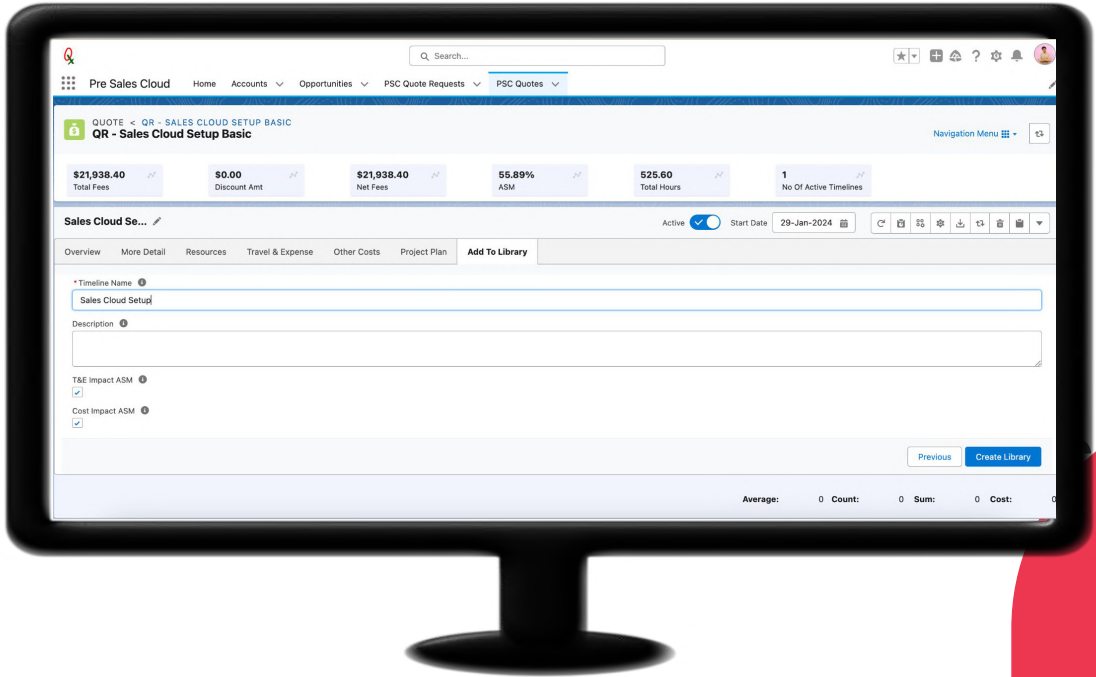


ANALOGOUS QUOTING

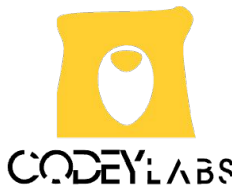
Optimize project planning accuracy using QuoteX's Analogous Scope & Schedule feature, facilitating the creation of scopes and timelines based on past projects with similar parameters.



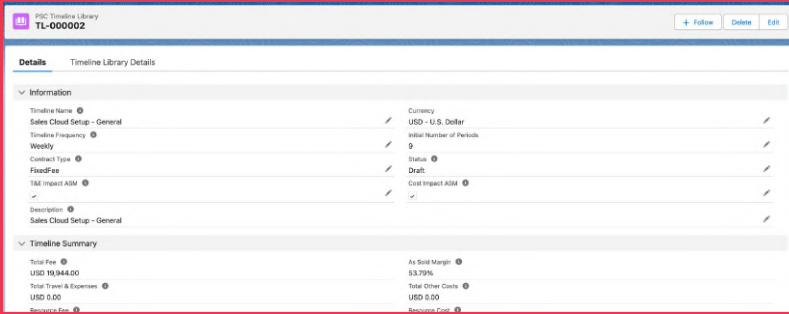
SNEAK PEEK

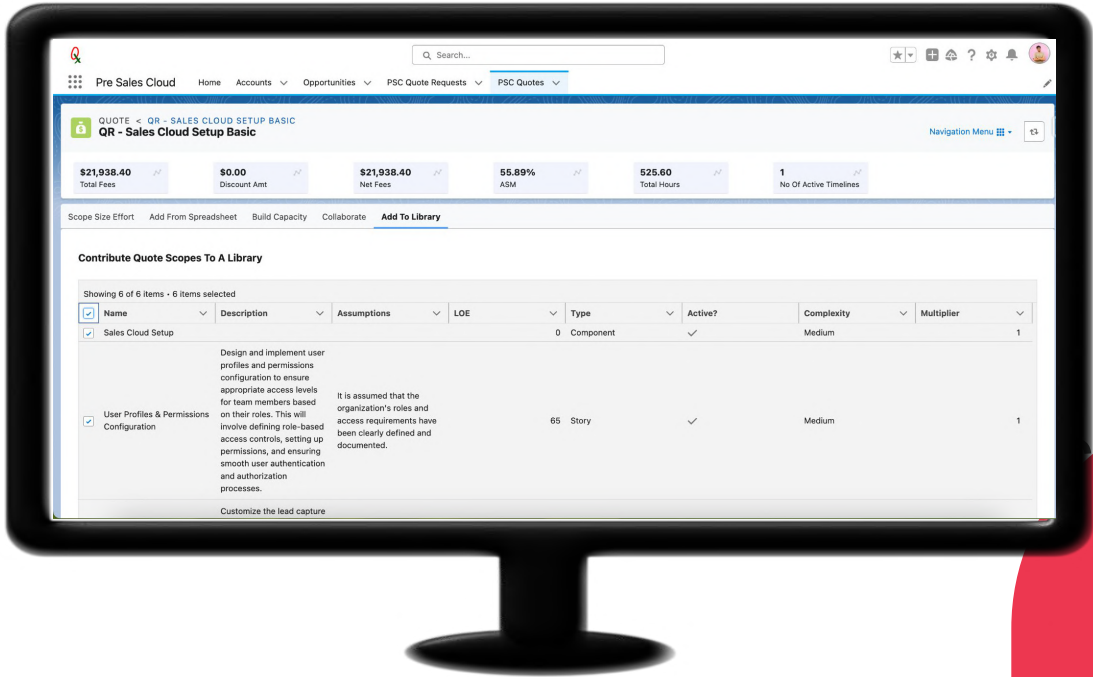


ADD TO TIMELINE LIBRARY

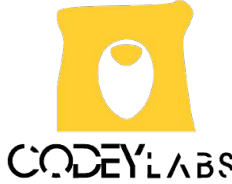


Effortlessly contribute to QuoteX's Timeline Library directly from your current quote, recognizing and sharing general, reusable project elements for enhanced collaboration and efficiency.

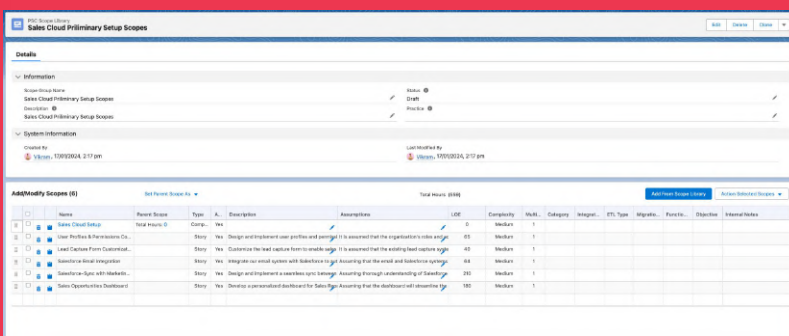


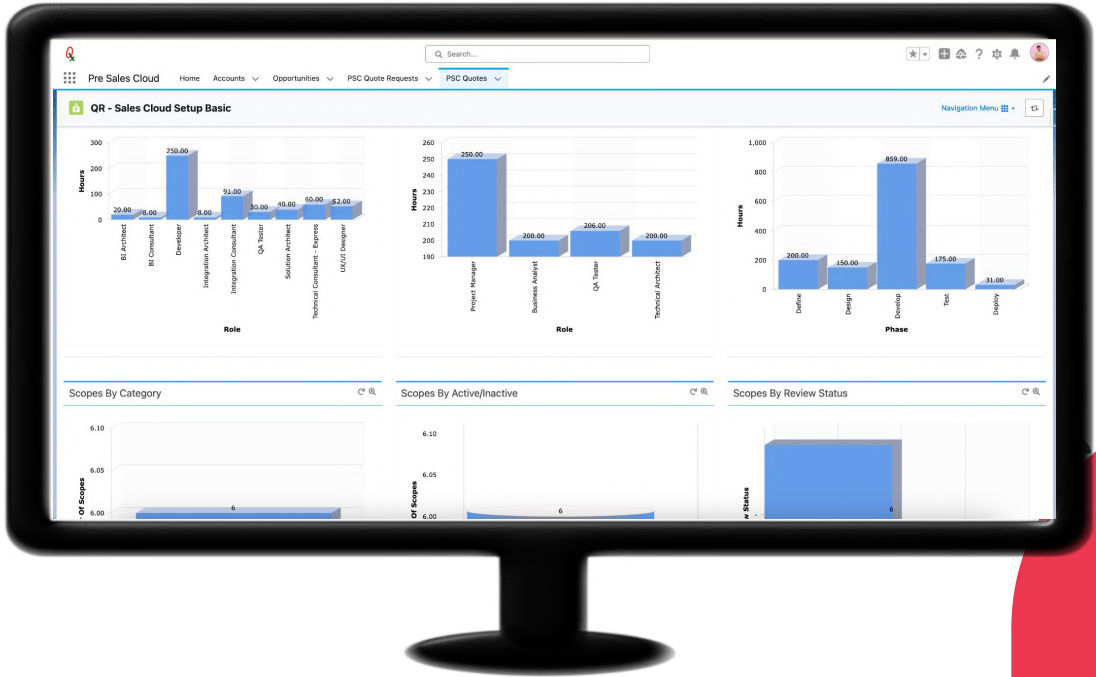
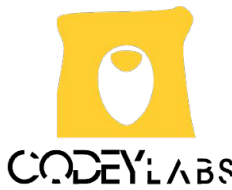


CONTRIBUTE TO SCOPE LIBRARY



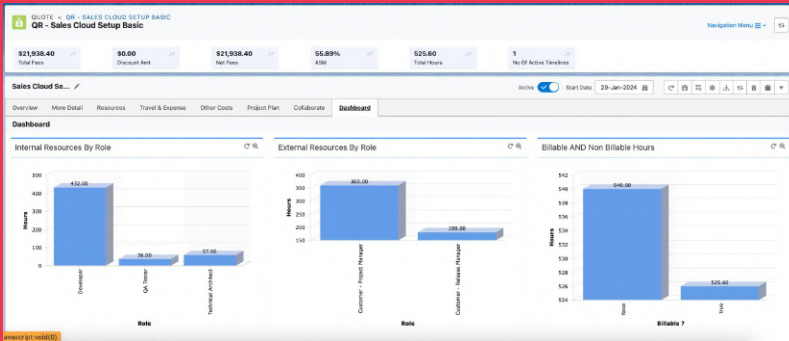
Contribute seamlessly to QuoteX's Scope Library from your ongoing project, recognizing and sharing generalized, reusable scope elements to enhance collaboration and efficiency in future endeavors.

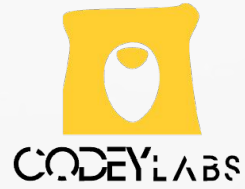




DASHBOARD

Empower users with QuoteX's Custom Dashboard feature for both scope and individual timelines, facilitating comprehensive reviews, informed decision-making, and efficient validation processes.





THANK YOU

