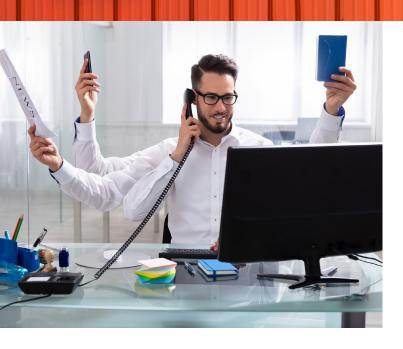


AgileQuote is a streamlined quoting tool, designed to empower Salesforce users to create quotes with efficiency and accuracy. Unlike other quoting apps, our Lightning Application is a pure extension of the Standard Quote objects, allowing for faster product entry, editing, and re-ordering, with minimal clicks on the same screen!





Increase Productivity with Streamlined Adoption

The adoption of AgileQuote is simple, and the setup is effortless. Editing quotes directly on the quote record page allows your team to spend more time selling, and less time navigating. You can also:

- Modify lines, quantities, prices, bundles, and discounts in-line
- Group, clone or delete items
- Drag and drop quote line and groups, to easily reorder
- Configuration screens allow you to quickly modify appearance and behavior

Accuracy of Data with the Use of Product Filters, Bundles, and Discount Schedules

AgileQuote's product bundles enable additional up-selling opportunities by associating related products and their rules with bundle constraints. Product filters dynamically restrict available products based on specific quote parameters. Pricing issues are not a factor, due to the ability to predefine price breaks and volume pricing with discount schedules.

Efficiency Achieved

Within the tool's administrative console, template creation provides a consistent, fluid workflow for quoting. Customized search functionality can be created by using look-up fields and product filters to select compatible configurations, avoid mismatched items, and reduce pricing errors. Product Grouping and line reordering allows for representing items in a logical and meaningful manner.







Platform

Built In Salesforce

As a 100% native Lightning app, AgileQuote works seamlessly with your Salesforce instance, featuring all the simplicity, flexibility, and security benefits you expect

Flexible Configuration

Customize With Clicks Not Code

Administer the many features and options of AgileQuote:

- Configure multiple templates for quote line and product search layouts
- Configure group header for quick edits
- Configure multiple views through templates
- Configure product filtering

Customizable Metadata

Declaratively sum product line values into group headers using customizable metadata/settings, and set up twin field capability between product and lines

Customizable Line Item /Visual Cues

Easily configure business line item rules or conditions, to notify users of out of bounds conditions

Discount Schedules

Creating discount schedules is simple and supports:

• Set via step or tier

- Disable at a line item level on quote
- Reconfigure for specific line item requirements
- Percentage discounts

• Per unit price discounts

• Utilizes standard discount field

Productivity/Efficiency

Drag and Drop

AgileQuote allows dragging and dropping to:

• Reorder line items

• Reorder groups

• Line items between groups

Create Quotes from Other Objects

Create quotes directly from accounts, contacts using flow, provided flow templates, and have opportunities created automatically

Group Product Lines

Logically group quote products by category, type or any method you choose

Clone Quotes

Clone quote on an existing opportunity, or a new one

Easy Configurable Product Bundles

With AgileQuote, managing product bundles is a breeze, providing the ability to:

- Create includes/excludes rules
- Customized pricing

Grouping of items

- Re-configure on the quote screen
- Display/hide bundle items on quote

Quote Document

- Use provided PDF with your own company logo
- Create your own using Visualforce
- Use packaged document generating tools like S-Docs, Nintex, or Conga*