



idylis Invoicing Solution

idylis Invoicing Solution for Salesforce

English version

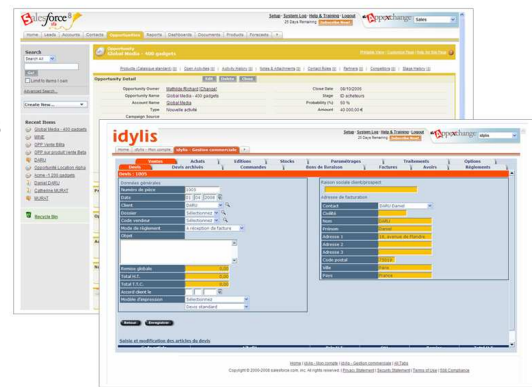
« idylis Invoicing Solution for Salesforce » is a powerful application integrated with Salesforce solution, the worldwide leader in on-demand customer relationship management (CRM) services.

Now available via the AppExchange marketplace, « idylis Invoicing Solution » can help monitoring your business, from customer acquisition process to final billing, while managing your inventory and generating purchase and sales books.

[Download this product summary](#)

Features :

- « idylis Invoicing Solution » is intended for French users.
- This solution obtained AppExchange certification for its compliance with the quality and security standards drawn up by Salesforce.
- Multisite, multi user access and multi operating application.

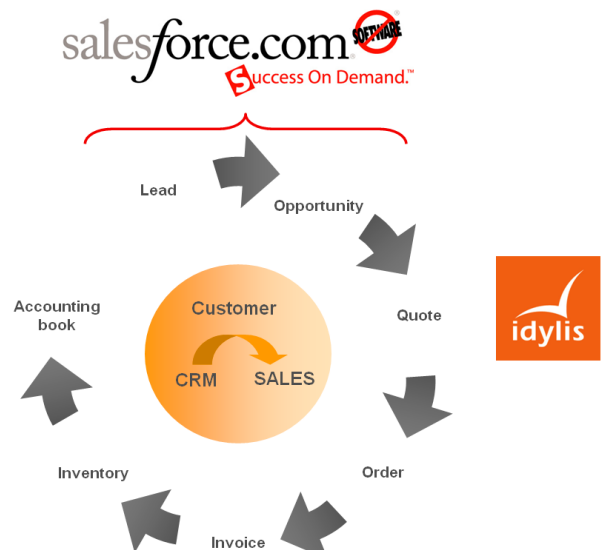


Highlights :

- A unique Client, Product and Pricing Database to get rid of data entry duplication and keep an updated database.
- Very easy to use with an intuitive and user-friendly interface.
- Very good value to the money: 300 € per year and per user. The subscription includes the maintenance service and the hotline to answer questions related to the application.

Business Benefits :

- Generate with a single click your sales quotes based on your opportunities.
- Run on one solution, including CRM, sales, purchasing, inventory and accounting books.
- Increase your visibility for better Decision Making and optimize the management of your business.



Key functions :

Sales :

- Create directly your sales quotes or invoices within idylis Invoicing Solution or from the Salesforce's opportunities.
- Automatic transfer quotes to invoices.

- Automatic transfer orders to delivery order.
- Customize quotes, invoices, credit notes and delivery order.
- E-mail quotes and invoices.
- Put your company's logo on your invoices.
- Manage rebates and credit notes.
- Manage Price book.
- Manage Sales reps.
- Create clients groups.
- Track customer's payment.

Purchasing :

- Create and manage suppliers.
- Create the tenders and the purchase orders.
- Automatic transfer purchase orders to receipt.
- Customize the suppliers' files, orders, tenders and receipts.

Inventory Management :

- Manage the information regarding the inventory.
- Manage the i/o history of inventory.
- Warehouse management.
- Customize the warehouse's files

Data processing :

- Consistency control.
- Import/Export.
- Customers' follow-up.

Key Reports and Dashboards :

- Sales and purchases report with multiples filters (defined period, client and project).
- Monthly sales analysis reports with multiples filters (client, project, product, type of project, analytical coding, products group, clients' group and sales reps code).
- Gross margin analysis reports with real time data, client and project criteria.
- Inventory reports with i/o history.
- Report generator with advance filter, choose the fields (sort, criteria, filters...), then you can save your customize reports as templates.
- Payments Reports.

- For more information on idylis Invoicing Solution for Salesforce, please visit www.appexchange.com or contact us at this phone: +33 (0)1.46.90.56.10.

- Download the user guide :

