

## The Complete Microsoft Excel Solution for Salesforce

With Apttus X-Author's comprehensive suite of solutions, everyone in your organization can use Microsoft Excel and Salesforce together to dramatically boost productivity and increase user adoption. Salesforce Admins can now work in Excel to maintain and migrate data in record time while business users can get their Salesforce work done at Excel speed. Excel becomes just the user interface for Salesforce. All data, permissions, rules, and routing are centralized in Salesforce.

### Build Your Own Salesforce User Experience in Excel

Customers can build and customize their own X-Author Applications to work with Salesforce data in Excel by using one or more of the X-Author products below. These products require no programming and users can easily get started in just 5 minutes.



#### X-Author Essentials

High speed record editing/creating using Excel.

- Any Salesforce list of records
- Up to 2 objects per app including a parent object
- Wizard app creation in less than 2 minutes
- Launch from Excel or Salesforce
- Work offline and sync when reconnected to Salesforce



#### X-Author Reporting

Unparalleled Salesforce data access inside Excel.

- Point and click queries using unlimited objects simultaneously into unlimited worksheets
- Exceptional user filtering
- Standard Excel reporting and analytics functionality



#### X-Author Presto

Ground-breaking technology that updates/adds Salesforce records using Excel calculations.

- No need for the user to open Excel
- No programming
- Use any Salesforce fields as input to Excel calculations
- Easily replace combination of APEX coding and formula fields
- Can be called from a Salesforce button or API



#### X-Author Power Admin

Industry-leading data administration and migration for Salesforce using Excel.

- CRUD for unlimited objects simultaneously across unlimited worksheets
- Reduce org-to-org data migration by 80%
- Compare data across Salesforce orgs in a single workbook



#### X-Author Enterprise

Ultimate Excel user experience for Salesforce.

- Create a completely customized experience using new or existing workbooks
- Use unlimited objects simultaneously in any layout, any workbook, and across unlimited worksheets
- Update parent-child records on the same Excel row
- Support for auto-macro execution, attachments, online and offline lookups from any cell, industry-leading querying, searching and filtering, complex object hierarchies

#### Business Users

- Increase Salesforce productivity and adoption
- Move Excel spreadsheets onto Salesforce
- Work in Chatter inside Excel
- Work offline and sync when reconnected

#### Admin Users

- Faster data loading and maintenance
- Streamlined data migration
- Excel calculations inside Salesforce

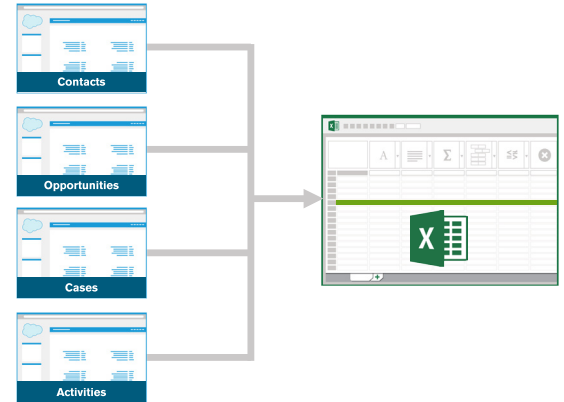
## X-Author Pre-Configured Applications

If a custom-built solution isn't the right route for your company, take a look at these complete X-Author Applications that are ready to run right out of the box. All are easy to configure and add other fields and related objects.

### Salesforce Account Management

With this all-in-one App, sales users can easily manage their Account-related data in a single workbook.

- ✓ View, update and add Opportunity, Activity, Contact, and Case data by Account
- ✓ Access only the information you need to be more efficient



### Salesforce Opportunity Management

Allows sales users to manage Salesforce Opportunities, and related objects, directly in Excel.

- ✓ Sales Managers no longer receive standalone Excel forecasts
- ✓ Users can retrieve all Opportunities or a subset based on Account or any other field
- ✓ Includes charts and reporting in Excel



### Salesforce Campaign Management

Streamlined control over Salesforce Campaigns and Campaign Members.

- ✓ Bulk load Contacts and Campaign Members simultaneously
- ✓ View all Campaign Members and mass update any standard or custom field in Excel



### Salesforce Quoting in Excel

Sales users can create new quotes or modify existing quotes right from Excel. Uses standard Salesforce objects and fields but can be configured to use local Excel pricing and other fields.

#### Quote Flow:

- 1 Select an Opportunity, Price Book, and Product
- 2 Excel populated with list prices
- 3 Edit quantity and/or discount and add/delete products
- 4 Save Quote
- 5 Generate quote in Salesforce using standard PDF Quote template