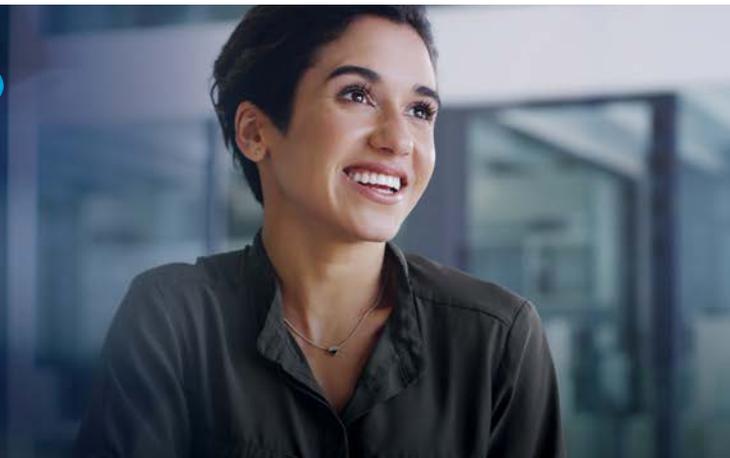


# TValue™ Direct for Salesforce®



**Flexibility to quickly and easily structure lease pricing options to win deals**



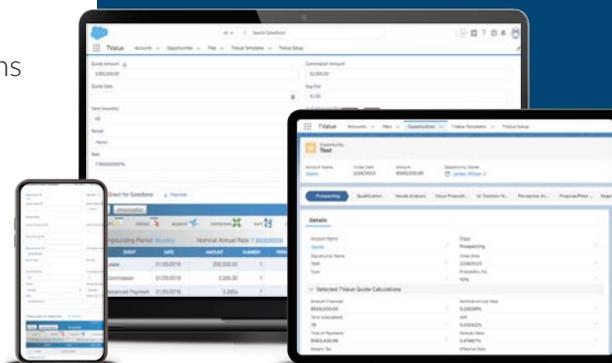
TimeValue Software and Northteq have joined forces to create TValue Direct for Salesforce. This unique and innovative app brings the unmatched power and accuracy of TValue amortization software and integrates it with the world's #1 CRM solution.

## The perfect marriage of CRM and pricing opportunities

- Easily provide quick, accurate quotes to customers — no matter how simple or complex
- Fully integrated solution to price, evaluate, manage, and close deals
- Use pre-set TValue Calculators for simple, straightforward deals
- Use the TValue Templates for structured deals that do monthly skips, modified/varied payments, amount steps, or percent steps
- Use the flexibility of TValue directly for creative deals by building the lease or loan as you need it
- Streamlines the process of calculating lease or loan payments with TValue that can be mapped into any Salesforce field and produce quotes, proposals, or contracts through Salesforce or other popular document generating applications
- Takes information from any Salesforce field and pre-populates the TValue cash flow data for quick customization and calculations
- Stores TValue cash flows and amortization schedules within a Salesforce Object for easy access in one central place

## Experience the power and unmatched capabilities of TValue

- Calculate various lease payment structures and determine the pricing with your yield parameters
- Determine the pricing based on your desired yield
- Formulate “what-ifs” to create the right deal structure in order to close the deal
- Calculate the buy and sell rates with simple inputs
- Determine your commission and price it into the deal
- Factor in residuals or buyouts
- Quickly designate payments in advance or payments in arrear
- Handle APR – Truth in Lending (Reg. Z) disclosures



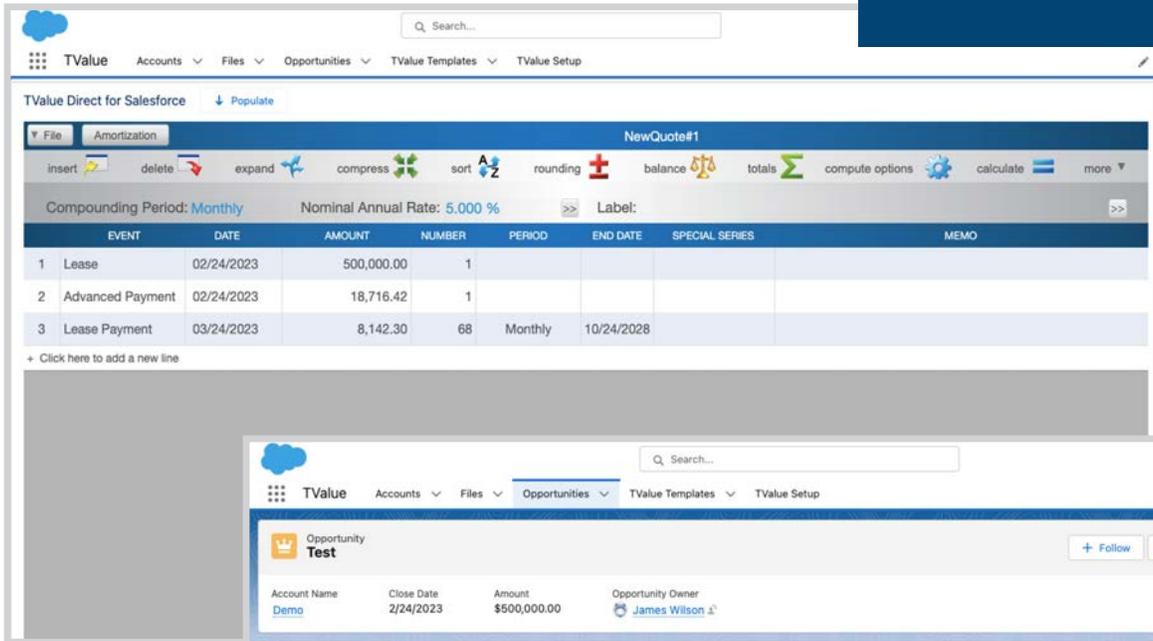
**TIMEVALUE™**  
software

nōrthteq

## Customizable user environment

- Customize your event names with the same terminology you use with your accounts
- Set your company defaults for Input Settings and Compute Options
- Determine the profiles or roles that can access the TValue Calculators, TValue Templates, or TValue Quotes

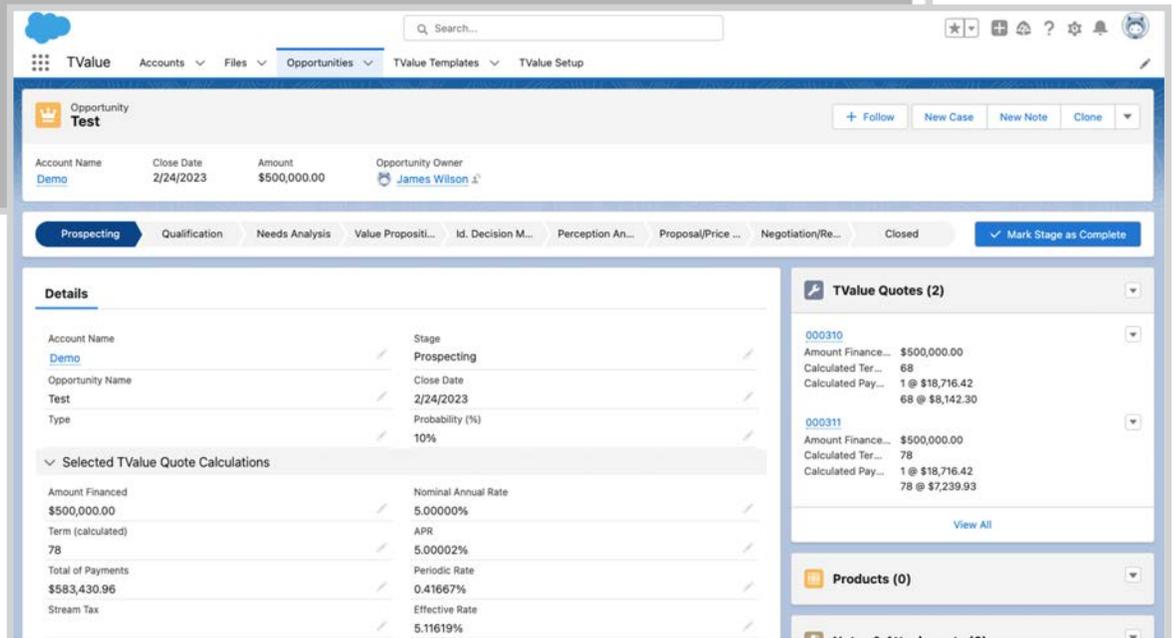
**TValue Direct for Salesforce streamlines the lease pricing process making it quick and easy to accurately price, evaluate, manage, and close deals in one solution**



The screenshot shows the TValue Direct for Salesforce interface. At the top, there is a search bar and navigation tabs for Accounts, Files, Opportunities, TValue Templates, and TValue Setup. Below this, the interface is titled "TValue Direct for Salesforce" and includes a "Populate" button. A toolbar contains various icons for file operations (insert, delete, expand, compress, sort, rounding, balance, totals, compute options, calculate, more). Below the toolbar, there are input fields for "Compounding Period: Monthly", "Nominal Annual Rate: 5.000 %", and "Label:". The main area is a table with columns: EVENT, DATE, AMOUNT, NUMBER, PERIOD, END DATE, SPECIAL SERIES, and MEMO. The table contains three rows of data:

EVENT	DATE	AMOUNT	NUMBER	PERIOD	END DATE	SPECIAL SERIES	MEMO
1 Lease	02/24/2023	500,000.00	1				
2 Advanced Payment	02/24/2023	18,716.42	1				
3 Lease Payment	03/24/2023	8,142.30	68	Monthly	10/24/2028		

Below the table, there is a link: "+ Click here to add a new line".



The screenshot shows the TValue Direct for Salesforce interface for an opportunity. At the top, there is a search bar and navigation tabs for Accounts, Files, Opportunities, TValue Templates, and TValue Setup. Below this, the interface is titled "Opportunity Test" and includes buttons for "+ Follow", "New Case", "New Note", and "Clone". Below the title, there are fields for "Account Name: Demo", "Close Date: 2/24/2023", "Amount: \$500,000.00", and "Opportunity Owner: James Wilson". Below these fields, there is a progress bar with stages: "Prospecting", "Qualification", "Needs Analysis", "Value Proposit...", "Id. Decision M...", "Perception An...", "Proposal/Price ...", "Negotiation/Re...", and "Closed". Below the progress bar, there is a "Mark Stage as Complete" button. The main area is divided into two sections: "Details" and "TValue Quotes (2)".

**Details**

Account Name	Demo	Stage	Prospecting
Opportunity Name	Test	Close Date	2/24/2023
Type		Probability (%)	10%
Selected TValue Quote Calculations			
Amount Financed	\$500,000.00	Nominal Annual Rate	5.00000%
Term (calculated)	78	APR	5.00002%
Total of Payments	\$583,430.96	Periodic Rate	0.41667%
Stream Tax		Effective Rate	5.11619%

**TValue Quotes (2)**

000310	Amount Finance...	\$500,000.00
	Calculated Ter...	68
	Calculated Pay...	1 @ \$18,716.42
		68 @ \$8,142.30
000311	Amount Finance...	\$500,000.00
	Calculated Ter...	78
	Calculated Pay...	1 @ \$18,716.42
		78 @ \$7,239.93

Below the quotes, there is a "View All" button. At the bottom, there is a "Products (0)" section.

**Operate in Lightning Experience and Salesforce Classic Environments**

## TValue Direct for Salesforce

**Available in the Salesforce App Exchange**

To order or for pricing specific to your individual needs contact our partner, Northteq, at [sales@northteq.com](mailto:sales@northteq.com), or by calling **888-337-0473**.