

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

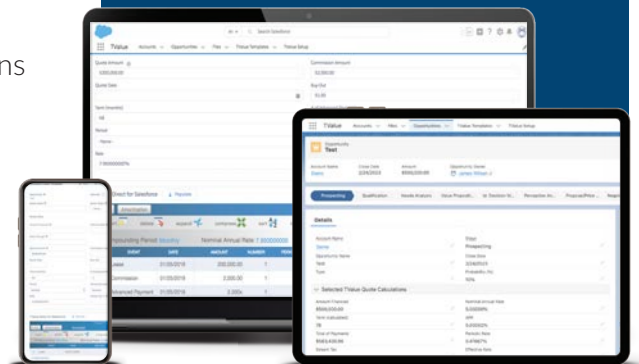
- Easily provide quick, accurate quotes to customers — no matter how simple or complex
- Fully integrated solution to price, evaluate, manage, and close deals
- Use pre-set TValue Calculators for simple, straightforward deals
- Use the TValue Templates for structured deals that do monthly skips, modified/varied 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 displays the TValue Direct for Salesforce interface. The top navigation bar includes 'TValue', 'Accounts', 'Files', 'Opportunities', 'TValue Templates', and 'TValue Setup'. The main content area is divided into two sections. The top section, titled 'TValue Direct for Salesforce', shows the 'Amortization' tab for 'NewQuote#1'. It includes a toolbar with icons for insert, delete, expand, compress, sort, rounding, balance, totals, compute options, calculate, and more. Below the toolbar, the 'Compounding Period' is set to 'Monthly' and the 'Nominal Annual Rate' is '5.000 %'. A table lists three events: 1. Lease (02/24/2023, \$500,000.00, 1), 2. Advanced Payment (02/24/2023, \$18,716.42, 1), and 3. Lease Payment (03/24/2023, \$8,142.30, 68, Monthly, 10/24/2028). The bottom section, titled 'Opportunity Test', shows details for an account named 'Demo' with a close date of 2/24/2023 and an amount of \$500,000.00. The opportunity owner is James Wilson. The 'Details' tab is active, showing a table of 'Selected TValue Quote Calculations' with columns for Amount Financed, Term, Total of Payments, Stream Tax, Nominal Annual Rate, APR, Periodic Rate, and Effective Rate. The 'TValue Quotes (2)' section on the right shows two quotes: 000310 and 000311, each with a table of calculations including Amount Financed, Calculated Term, and Calculated Payments.

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		

Account Name	Close Date	Amount	Opportunity Owner
Demo	2/24/2023	\$500,000.00	James Wilson

Details	Stage
Account Name: Demo	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
Calculated Pay...: 68 @ \$8,142.30
000311
Amount Finance...: \$500,000.00
Calculated Ter...: 78
Calculated Pay...: 1 @ \$18,716.42
Calculated Pay...: 78 @ \$7,239.93

**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, or by calling **888-337-0473**.