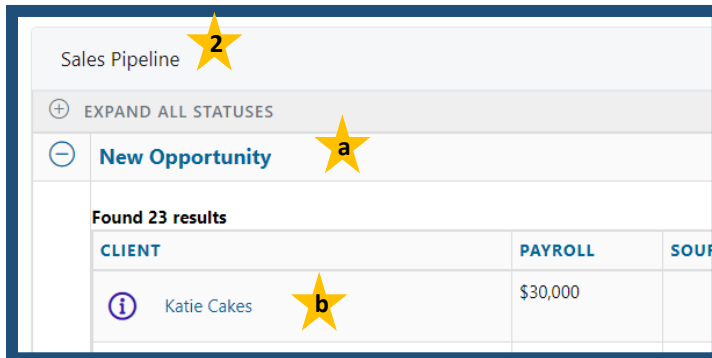


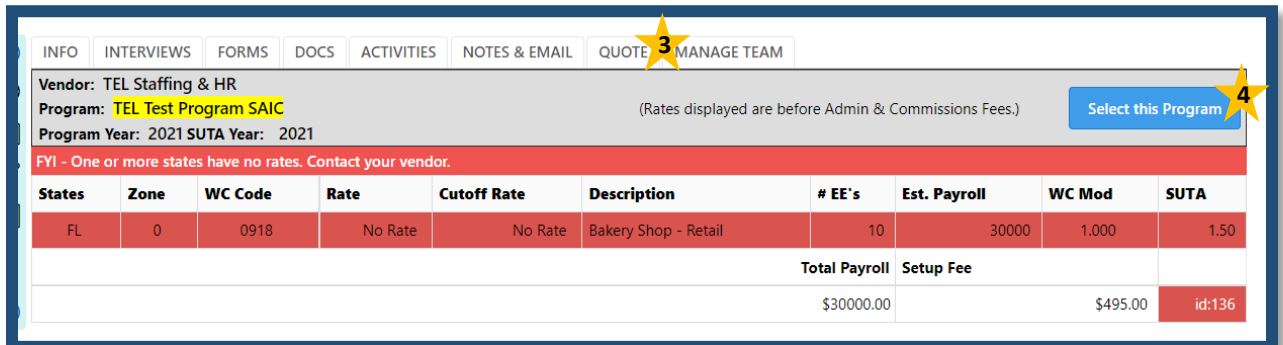
i-Linked Step – By – Step Instructions

Creating Proposal

1. **Sign in to i-Linked**
 - a. See **Accessing i-Linked (pg. 1)**
2. **Open Prospect** from the Sales Pipeline
 - a. **Expand New Opportunity List**
 - b. **Click the Client Name**



3. **Click Quote** tab
4. **Click Select This Program** button



5. **Click Mark Available to Share** button
 - a. This will change from Not Shared to Share
6. **Change Rates** as necessary
7. **Click Generate Quote**

i-Linked Step – By – Step Instructions

i If you make code, employee, payroll amounts, pay frequency or other changes on the INFO tab, [please click here for important information.](#)

PRICING PROGRAM		PRINT TEMPLATE		DATE	
TEL Test Program SAIC		TEL Standard PEO Program		01/10/2022	
SETUP FEE	WC MODIFIER	ADMIN FEE	COMMISSION	DELIVERY FEE	AVG. HOURS/EE
495.00	1.000	26.67	0.00	0	80
MAKE AVAILABLE TO SHARE?		CUTOFF RATES		UNBUNDLED QUOTE?	
Shared 5		Cutoffs On		Bundled	

Florida					SUTA 6	Change all SUTA for:	SUTA Cost	Total EEs	Total Payroll
					1.50	Florida	2.70	FT: 10 PT: 0	\$30,000.00
ZONE	WC CODE	RATE	CUTOFF RATE	DESCRIPTION	#FT EES	#PT EES	PAYROLL BY CODE		
FYI - One or more states have no rates. Contact your vendor. M-435									
0	0918	36.42	34.32	Bakery Shop - Retail	10		\$30,000.00		

PROFIT ESTIMATES **Estimated Profit Per Year is: \$7,160.04**

NOTICES

Save Generate Quote **7** Clear Quote

8. Click Docs tab
9. Click Document Merge Tool

INFO INTERVIEWS FORMS **8** DOCS ACTIVITIES NOTES & EMAIL QUOTE MANAGE TEAM

DOCUMENTS

OTHER DOCUMENTS:

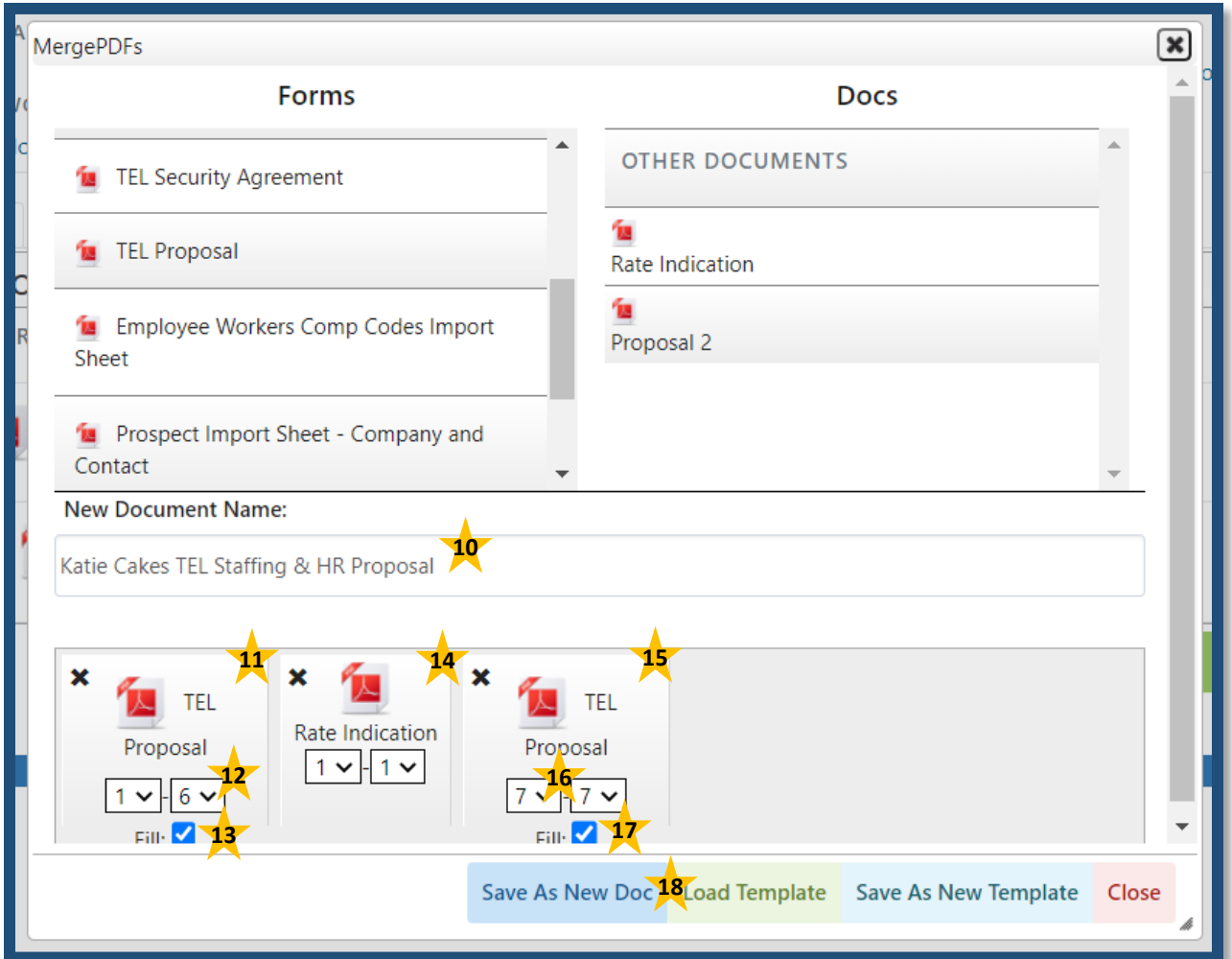
- Rate Indication (2:07 PM 01/10/22) Size: n/a
Shared With: Not shared
Download | Share
- Proposal 2 (1:11 PM 01/10/22) Size: 2 MB
Shared With: Not shared
Download | Change | Remove

Document Merge Tool **9** Upload New File

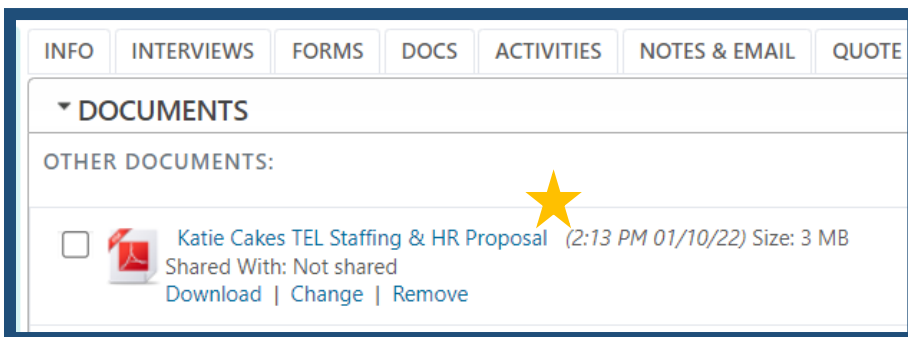
10. Name Document
 - a. Use Clients Name
11. Drag & Drop TEL Proposal into drag & drop box
12. Edit Last Fill Page Number
 - b. Change from 7 to 6
13. Check Fill box
14. Drag & Drop Rate Indication into drag & drop box
15. Drag & Drop TEL Proposal into drag & drop box

i-Linked Step – By – Step Instructions

16. Edit **First Fill Page Number**
 - c. Change from 1 to 7
17. Check **Fill box**
18. Click **Save As New Doc** button



Note: You can now open, download, print, etc. your Client proposal from the Docs Tab.



i-Linked Step – By – Step Instructions

19. Click **Info** tab
20. Select **Proposal to Prospect** from the Opportunity Status drop-down
21. Click **Save**

The screenshot displays the 'INFO' tab of the i-Linked system. The 'SET STATUS' section is expanded, showing three columns of dropdown menus. The first column, 'OPPORTUNITY STATUS', has 'Proposal To Prospect' selected, with a yellow star and the number '20' overlaid on it. The second column, 'PRIORITY', has 'Normal' selected. The third column, 'SET ALERT', has 'None' selected. Below each dropdown menu is a 'LAST UPDATED:' label. At the bottom right of the form, there is a blue 'Save' button with a yellow star and the number '21' overlaid on it. The top navigation bar includes tabs for INFO, INTERVIEWS, FORMS, DOCS, ACTIVITIES, NOTES & EMAIL, QUOTE, and MANAGE TEAM. The main content area has expandable sections for PRODUCTS, ACCOUNT INFORMATION, CONTACT INFORMATION, DEMOGRAPHIC INFORMATION, QUALIFICATION & FORECASTING, and SET STATUS.