



Roofing and Siding Contractor Management Solutions

Interlinx Associates makes it our business to help our roofing & siding contractor clients streamline their businesses, reduce costs, increase revenues, create automated workflows, and make software solutions fit the business, not the other way around.

We know that in the roofing and siding industry there are a multitude of business processes to keep on top of: crews, suppliers, insurance documents, permits, supplements, payments, draws and commissions — the list goes on. And historically, it's taken a focused, multi-tasker to keep track of it all, and workflow bottlenecks abound.

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Interlinx Associates has worked with some of the leaders in the industry to create supporting information technology systems to help keep track of all aspects of the exterior insurance restoration business. From the initial sales call to the final payments of commissions, Interlinx's Contractor Management Solution leverages some of the best software in the market to help your business stay on track and make money.

Interlinx Contractor Management Solutions are available in two versions. The ACT!® version has basic exterior restoration management functionality that includes task management, account and contact management and opportunity/job management. The SalesLogix® version includes everything offered at the Entry Level and also change order, purchase order, crew pay, draw/commission processing, document management, workflow and accounting integration. Versions are built on established, industry leading contact and customer relationship management software. Which version is right for you depends on your business, your business goals, and your unique needs. We can work with you to determine the best fit.



Interlinx consultants have walked in your shoes, and have worked with hundreds of companies improving their CRM tactics. Interlinx has the technical background to identify where your company can leverage information technology tools to your company's advantage. And Interlinx consultants have proven track records at small and large companies alike to be able to create nimble and effective implementation plans that work.





Roofing & Siding Contractors Solution Features	ACT!	SalesLogix
Sales Management		
Contact Management	√	√
Account/Company Management	√	√
Calendar and Activity management	√	√
Sales Opportunity Tracking	√	√
Multiple Sales Processes with Stage & Steps	√	√
Group Management	√	√
Lookups and Searches	√	√
Email from Contact Record	√	√
Letter/Document Merge	√	√
Sales Process Automated Actions		√
Lead Capture to Conversion		√
Accounting Integration*		√
Marketing		
Track Marketing Campaigns		√
Email Marketing Tracking*	√	√
Customer Service & Support		
Create, Edit, Manage Tickets		√
Create, Edit, Manage Contracts/Warranties		√
Dashboards & Reporting		
Preformatted Sales Reports	√	√
Graphical Sales Pipeline	√	√
Activity Dashboards	√	√
Opportunity/Job Tracking		
Track Insurance Providers	√	√
Track Job Status	√	√
Job Specification Tracking	√	√
Attach Documents	√	√
Job Reporting	√	√
Accounting Integration for Job Costing*		√
Crew Pay Calculation*		√
Draw/Commission Calculation*		√
Purchase Orders*		√
Advanced Features		
Activity Series	√	√
Integration with Microsoft Outlook, Word, Excel	√	√
Access Anywhere (Web, Windows, Mobile)	√	√
Mobile Solution*	√	√
Workflow Notifications*		√
*Add-on Functionality		
Email Marketing Tracking	√	√
Mobile Solutions	√	√
Automated Workflow		√
Automated Task Management		√
Accounting Integration		√
Document Management & Automated Routing		√

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