

QuoteSync

Sync Quotes Once. Sell Everywhere.

QuoteSync is a quoting experience within TD SYNnex PartnerFirst Digital Bridge that allows quotes to sync directly into your connected CRM or PSA. Built to support both, simple and complex quotes, QuoteSync eliminates manual re-entry and ensures your sales and operations teams work from a single, accurate source of truth.

Key Outcomes



Faster Quote-to-Deal Flow

Move quotes directly into opportunities or deals without re-entry.



Cleaner CRM Records

Ensure products and line items are always attached correctly.



Reduced Manual Work

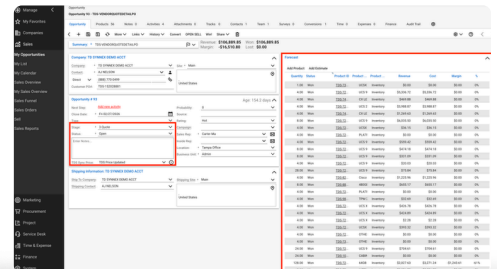
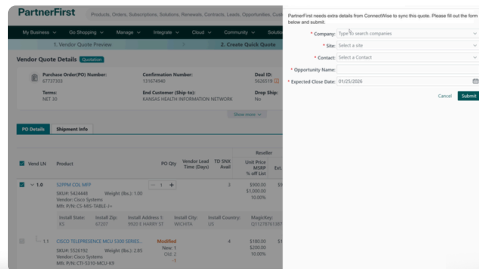
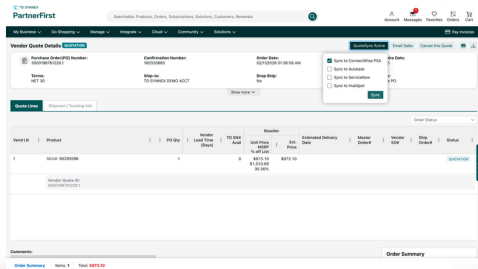
Eliminate copy-paste, exports, and reconciliation between systems.



Greater Sales Visibility

Maintain accurate pipeline data for forecasting and reporting.

How It Works



- 1 Create a quote in TD SYNnex PartnerFirst (simple or complex, with all line items included)
- 2 Enable QuoteSync and confirm required deal details (customer, stage, close date, etc.)
- 3 It automatically creates the opportunity or deal and attaches all associated products or line items to your CRM or PSA
- 4 When the opportunity/deal is closed, everything needed to place the order is already aligned
- 5 Receive order status updates synced back into your CRM or PSA
- 6 Streamline your quote-to-order process with aligned data and fewer manual steps

Why it Matters

QuoteSync transforms quoting into a connected workflow. By syncing complete quote data into your CRM or PSA, it eliminates manual steps, prevent errors, and creates a smoother, faster path from quote to closed order.

