

Control of quotations

- ▶ Formal, consistent approach
- ▶ Quote for existing standard products as well as new products
- ▶ Quote for Services
- ▶ Convert quotations to 'lost' or to a sales order/work order/schedule

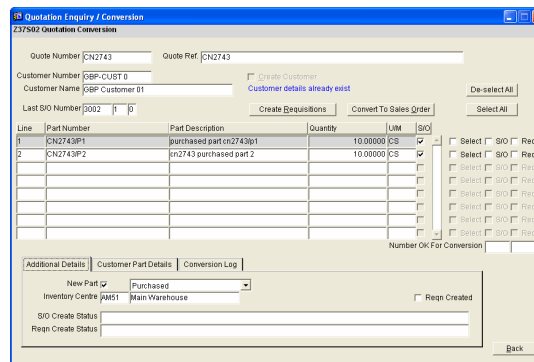
A formal, consistent and controlled approach to customer/prospect quotations is a must have for businesses today.

Quote for existing standard products and/or for new products built up from new bills, routings, tooling and so on, and/or Services provided i.e. Repair, Service etc.

Answer Quotation Management can also be used to quote for new or existing products that are factored or purchased in for resale.

Convert quotations to a 'lost' status or, where business has been won, convert to a sales order, a corresponding work order/schedule and/or corresponding purchase order.

A single quotation can be defined containing an unlimited number of parts being quoted for. These can be existing parts, new parts, manufactured parts, purchased parts or any combination required.



Answer Quotation Management integrates with the Bill of Materials, Purchasing, Inventory, Sales Order Processing and CRM modules.

Quotation Workbench

- ▶ Create Quotations for Customers, Existing Prospects, New Prospects or draft/template
- ▶ Utilise Post Code look up for Prospect address details
- ▶ Define standard text notes and unlimited comments at every point in the process
- ▶ Define the Product, existing or new, being quoted for and the quantities or define the Service being quoted for
- ▶ Optionally define a Bill of Materials (BOM) structure with Parts, Quantities etc, or copy and amend an existing structure
- ▶ Where the Product being quoted for is a new Product, the BOM Parts do not necessarily have to exist. Where they don't exist a description, quantity, unit of measure and cost will be prompted for
- ▶ Additional Vendor Part Information can be supplied
- ▶ Ability to indicate if Parts are 'Free Issue'
- ▶ Record Visual and Nominal Fill as well as Specific Gravity
- ▶ Optionally define a Routing Operation structure with Work Centre/Resources, times etc or copy and amend an existing structure
- ▶ For Routing details define the quantity that the times entered will manufacture, which also impacts the Quotation Costing and Pricing
- ▶ Optionally define any Resources, these can be external operations, or anything else necessary for the manufacturing process
- ▶ Optionally define any Tooling requirements, costs, usage details
- ▶ Where a Service is being quoted for, optionally define the PM Jobs to be performed
- ▶ Optionally define any Charges that need to be applied – Delivery, Insurance etc
- ▶ Optionally assign a Cost Mark Up Identifier which enables different Cost Uplift Amounts and/or Percentages to be applied to the Quotation for Bills of Material details, Internal and External operations, Resources and Tooling
- ▶ Cost the Quotation based on the Quote Bills, Routes, Resources, Tooling and/or Charges with or without uplift amounts and/or percentages
- ▶ Assign all necessary Approvals to a Quotation
- ▶ Determine if Maintenance is allowed after Approval
- ▶ Assign selling price uplifts based on a Margin Amount and/or Margin Percentage
- ▶ Optionally Assign a Margin Mark Up Identifier which enables different Margin Uplift Amounts and/or Percentages to be applied to the Quotation for Bills of Material details, Internal and External operations, Resources and Tooling
- ▶ View full Quotation cost build up and selling price details at any time within the Quotation Workbench
- ▶ Manual option, via a privilege to manually override calculated cost/price
- ▶ Optionally assign up to 10 user defined Quotation Analysis Codes
- ▶ Define your percentage confidence
- ▶ Quote for Additional Quantities, 10's, 100's, 1000's and so on. Optionally apply amount and/or percentage discounts to the Per Unit Quote Price
- ▶ Add Attachments, drawings, pictures etc to any Quotation using the Answer Attachment Centre module
- ▶ For Vendor supplied Resources or Tooling, optionally automatically create Purchase Requisitions
- ▶ Create Quotations for factored or purchase for resale products
- ▶ Create new Quote lines by copying existing lines
- ▶ For factored/purchase for resale quotations, define each Vendor approached, price/cost details and other appropriate details
- ▶ Define which Vendor quote will be used for the Quotation Costing and Pricing process
- ▶ Full audit tracking and version control

Quotation Management

- ▶ Quotation Tailoring enables all defaults to be defined, Quotation Numbering methodologies, Printing Defaults, Enabling Currency Quotations and more
- ▶ Quotation Tailoring also defines Work Centre/Resource Costs usage, BOM Batch Size multiples processing activities, Time defaults, Default Margin Values and/or percentages and more
- ▶ Define all Approval Requirement details and periods of effectivity i.e. Manufacturing, Engineering etc
- ▶ Define Mark Up Identifiers for Cost or Margin Mark Up purposes for each Quotation element, BOM details, Operations, Resources, Tooling and so on
- ▶ Create and/or Maintain Prospects and optionally link to Contact Centre
- ▶ Enquire on Quotations and all the associated details, viewing Approved, Printed, Converted, Lost or Expired Quotations for Customers, Prospects and more
- ▶ Print Quotations in draft or external document format
- ▶ Copy an existing Quotation and create a new Quotation for a Customer, Existing Prospect, New Prospect or a Draft and optionally print or maintain this new Quotation
- ▶ Approve Quotations by the necessary approval authorisation personnel
- ▶ Convert a Quotation to 'Lost' with appropriate user defined Reason Codes
- ▶ Record for 'lost' quotations competitor details, vendor details and up to 10 further user defined reason codes to better categorise the 'Lost' status as well as unlimited text/comments recording
- ▶ Quotation Conversion may be stopped i.e. as your confidence increases you may create the Parts details, then the BOM and Routing details and lastly the Sales Order can be created
- ▶ Resources and/or Tooling can optionally be created as back flushed parts and appropriately attached to the BOM
- ▶ Auto expire Quotations to a 'Lost' status when they expire
- ▶ Purge Quotations based on user defined criteria
- ▶ Version Number Control to manage change
- ▶ On conversion, if necessary, create the Vendor/Part cross reference details
- ▶ Create a back to back Purchase Order at Quotation conversion for those Quotations for factored/purchased for resale parts

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