

# Estimate and Quote Management

Easily generate and track all customer or prospect requests for quotation (RFQs), from the time of receipt until an order is placed. You can get quotations out more quickly and be more accurate with pricing and lead-times.

## ESTIMATING

Calculate material, subcontract, and labor and burden costs for multiple quantities of a part, with information from the last time you quoted or ran the part, something similar, or from the BOM. Add any special charges (e.g., tooling or design). When the order arrives, punch a few keys and the detailed routing will be ready to go to the floor or to make additional changes.

## STANDARD ROUTINGS

Pull same-as-except type parts into a quote, then modify them quickly and easily to create a new one.

## PIPELINE MANAGEMENT

Track confidence levels by quote line to accurately predict pipeline activity.

## DRAG-AND-DROP INTERFACE

Use a tree interface to drag-and-drop components, operations or materials from another quote, BOM or previous job.

## REALISTIC COST ESTIMATES

Perform realistic cost estimating with minimum lot charges, price breaks and scrap factors on materials and subcontracting.

## INVENTORY AVAILABILITY

Check inventory availability during quote entry.

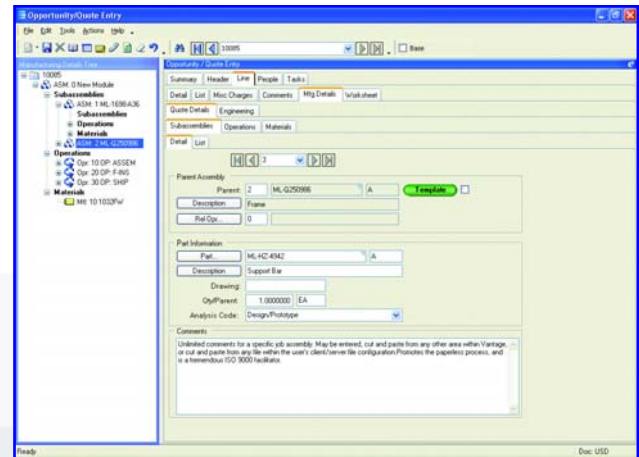
## MARKUPS

Specify and store individual markups for material class, subcontracting, operations, and special costs.

## ORDER/JOB INTEGRATION

Transfer quote information to a sales order or job. Built with tremendous flexibility, there are multiple ways to process an order and job from an existing quote such as:

- Push to an order by the line item within Quote Management
- Flag as won, automatically generating an order
- Pull from Order Management with flexibility to define specific lines and quantities desired



Generate accurate and timely estimates and quotes, and import data from a variety of customer and system sources.

## PART ADVISOR

Drill down into the quote/job/part status and history, and answer critical questions related to a part:

- Have I quoted it before?
- Are there current orders for it?
- Have I run it before?
- Am I currently running it?
- Do I have any in inventory?
- Is part profitability available?

## PROSPECTS

Send quotes to prospects, even if they don't exist in the customer file.

## QUOTE TRACKER

Instantly query summary and detailed information on an estimate/quote — all online.

## COMPETITIVE ANALYSIS

Track all competitors to find out where you are losing and why.

## WORKFLOW

Manage the sales cycle with dynamic task lists that ensure the right people are working on the quote at the right time.

## PART CROSS-REFERENCE

Cross-reference customer part numbers to your part numbers



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