

INFIMACS II® Data Sheet

Integrated Financial and Manufacturing Control System

Estimating Management

FUNCTIONS

- Generate Estimates for New or Existing Products
- Customize Estimates for Customers or Prospects
- Convert Estimates to Quotes and Orders
- Convert Prospects to Customers
- Extract Data in Reports and Queries
- Create and Use Cost Detail from Vendor RFQs for the Estimate

FEATURES

Existing BOMs

- Validate Existing Items and Bills from Production or Design
- Copy Bills and Routings
- Modify Existing Bills and Routings
- Add New Items or Other Direct Charges to Estimate Bills
- Change Factors for Material, Labor, Overhead, and Subcontract
- Price and Recalculate Estimate

Internal Estimates

- Add Items and Bills for Estimate Only
- Base Estimates on Other Charges Only
- Copy from One Estimate to Another
- Use Estimates for Planning and What-If Scenarios

Customers and Prospects

- Join Estimates to Existing Prospect or Customer Database and CRM Activities
- Customize Estimates for Specific Customers
- Convert Estimates to Quotes
- Convert Prospects to Customers

Converting Estimates

- Convert Estimates to Sales Orders
- Generate Engineering Master, Bill of Material, and Routings for New Items
- Generate Supply Orders
- Generate Standard Costs

SUMMARY

INFIMACS II Estimating Management works like an engineer's "white board", by providing the ability to change factors and routings, erase components, add other charges, and price and recalculate the estimate throughout the process. An estimate may be constructed from existing parts, existing bills of material, existing routings, user-defined new part numbers, user-entered bills of material, user-entered routings, and user-specified items to collect additional costs such as design labor, engineering labor, and special charges. The purpose

is to produce a cost basis of the product "assembled" on the white board.

Estimates can be generated for an existing customer, a prospect, or for internal use only, and can be customized to meet the requirements specified by the requester. Uses for estimates include "what-if" scenarios, developing new products or finding more cost-effective ways to manufacture an existing product.

The system can assign an estimate number, or the user can determine the numbering scheme. Possible entries include using a customer number, which is validated against the INFIMACS II Customer database, a prospect number from the Prospect database, or an internal reference indicator which requires no validation.

Users can enter an existing item number, which is validated against the Engineering Master database. Item Master, routings, and first-level BOM can be imported from production and then modified in the estimate. If a new item is added, it can be created from scratch, based on an existing production item, or added as an "Other Direct

Estimating Management

Charge” (ODC). If the entry is ODC, costs can be added to that line.

Once the base item and cost data are in the Estimating Database, the “white board” process can begin. Alter routings on a line to reflect changes in processing or costs, or modify detail components. The component may be an existing part or new one just for the estimate. The price can be calculated at any time by pressing the Recalculate button.

Factors can also be applied to material, labor, overhead, and subcontract costs. Factors may be applied to the total estimate or line level. By changing factors on specific elements and doing a recalculate, the effects on the estimate can be seen immediately.

Use one estimate as the basis for another by copying the estimate, or copy lines from one estimate to another. All details and associated data are copied with the estimate or lines.

After the estimating process is complete, an estimate can be converted to a quote or an actual order. Work orders, purchase requisitions, and purchase orders can be generated from a converted estimate. Prospects can be converted to customers.