

INFIMACS II® Data Sheet

Integrated Financial and Manufacturing Control System

Quote Management

FUNCTIONS

- Quote Entry/Maintenance
- Convert Quotes to Orders
- Integrates with Relevant's CRM

FEATURES

- Enter/Maintain Quotations
- Enter/Maintain Prospects
- Utilize Information from INFIMACS II Estimating and Sales Order Management
- Print Quote Forms
- Convert Prospects to Customers
- Convert Quotations to Orders
- User-defined Quote Status
- User-definable Fields and Programs

REPORTS

- Quotation Forms
- Quote Details
- Quote Summary
- Prospect Report
- Prospect Mailing Labels

SUMMARY

Quote Management enables you to establish special price quotations for existing products. These quotations can then be printed on quote forms and mailed to customers or pros-

pects. They can be saved for future release. New quotations can be created by copying and modifying existing quotations.

Most standard data files and tables used by the INFIMACS II Sales Order Management module are shared with the Quote Management module. These include customers, addresses, products, prices, salespersons, and other information.

Quotations may be entered for existing customers or new sales prospects. INFIMACS II automatically maintains a file of active prospects. Information maintained for each prospect includes follow-up date, extensive notes, and other information that allows management of the prospecting function. When quotations are accepted as sales orders, prospects may be automatically converted to customers.

Any product in the Product Master Catalog may be included in a quotation. This includes stock products, configured and kitted products, services, or models.

Use of the INFIMACS II Model Configurator (*Option*) allows quotations to be easily prepared for various optional configurations. This provides the sales function with an ability to quickly answer what-if pricing questions.

Quotations may reference the results of cost estimates prepared using the INFIMACS II Estimating Management module.

From the initial Quotation Entry Screen, one may enter new quotes, view and modify existing quotes, enter new prospect information, and retrieve existing prospects or customers. In addition, when quotations have been accepted, prospects may be converted to customers and quotations may be converted to orders.

Extensive comments may be established on a quotation. These comments may be printed on the quote form and transmitted to the customer/prospect, if required. When the quote is converted to a sales order, one may designate whether or not to print the comments on sales order confirmations and invoices.

The INFIMACS II Quote Management module provides for a user-defined table of Quotation Status Codes. These status codes can be used to analyze the effectiveness and productivity of the quotation function. Lost sales by sales representative, converted quotes by product line, and other analyses can be accomplished by making use of the quotation status code feature.