

Estimating & Quoting

Track your true costs in real time. Generate detailed routers. Create accurate, data-based quotes. All from one powerful software module.

- Generate quotes from single level & bill of material (BOM) estimate & routers
- Automatically generate sales orders when you win quotes
- See variance between actual & estimate costs
- Easily quote repeat orders using data already in the system
- Track quote status by date range, customer, or salesperson
- Use “what if” capabilities to promise accurate delivery dates
- Instantly send customer quotes via email
- Automatically convert prospects to customer status when you win a quote
- Review quote won/lost trends by customer, salesperson, or quote number
- Compare actual versus estimated time for each job sequence/step
- Quickly adjust estimates & quotes when material costs fluctuate
- Turn sales orders into work orders
- Analyze estimate vs. actual vs. budget over the life of the project
- Know exact costs of each part
- Integrate Product Configurator for automatic estimating & quoting
- Simplify quote to order to job flow
- Use of similar routings & existing estimates to quickly recalculate at different quantities
- Compare estimate vs actual for labor, materials, outside costs, assembly details & more
- Integrate with Shop Floor Data Collection to refine your estimates
- Update repeat routers with actual averages using data from completed work orders
- Track BOM & router changes while only allowing work orders to be created against completed BOMs & routers
- View prior quotes & sales while creating new quotes

BENEFITS

- Meet the customer’s need for speed
- Guess less, know more
- Hone your competitive edge
- Get quotes out faster & more accurately
- Identify margins that will satisfy customers & your business