

# Quotations and Estimates

## SOLUTION FACTSHEET

Quotations and Estimates facilitates the creation of professional and comprehensive quotations. The capability provides the flexibility to produce quotes with multiple offers on stocked and/or customised items for existing and prospective customers. It is a highly flexible interface which provides all the information required to produce timely quotes or estimates which include material, labor, burden, and outside services. As more and more services are being outsourced to gain manufacturing and cost efficiencies, these costs continue to be an important part of your quoting process. SYSPRO's Quotations and Estimates capability provides the ability to incorporate vendor related service costs which can be marked up as a part of the cost estimate.

When customised items must be specially made, supporting estimates can be created. And if one or more special parts are required for the customised items, they also can be supported by estimates. This process can be extended to fourteen levels, which are then rolled up to complete the quotation's top-level costing.

### The Benefits of Quotations and Estimates

- **Drive customer satisfaction with timely and complete quotes**  
With Quotations and Estimates, manual quoting processes can be removed and comprehensive quotes can be created quickly by streamlining the import of required details from third-party products and Microsoft Excel. Quotations can also include multiple offers, providing customers with options. The quote to sales conversion ratio also provides insight into uptake of offers.
- **Flexibility in creating quotes**  
Quotes can be created for existing and/or custom items by copying from another quote, an existing stock code or importing from excel then modifying the new estimate to match the customer's specifications. In addition, quotes can be numbered manually or automatically, by branch and with prefix. Changes to quotes are also tracked using versioning.
- **Speed up time-to-manufacture**  
Upon confirmation of awarded contracts, sales orders, purchase orders and work orders can easily be created. This makes accurate information required for manufacturing easily available, speeding up the process from quote to manufacture. Based on the probability of the quotation being accepted, there is also an option to include quotations in material requirements planning for forward planning.
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#### Product Version:

SYSPRO 8

#### Sectors:

Manufacturing and Distribution

#### Industries:

- Automotive Parts and Accessories
- Electronics
- Fabricated Metals
- Food and Beverage
- Industrial Equipment and Machinery
- Packaging
- Plastics and Rubber

#### Related modules:

- Inventory
- Accounts Receivable
- Sales Orders

- Improved sales and finance insights and management

The identity of the SYSPRO Bot can match your organization to assume a digital 'persona' and become the 'face' of the company.

## Quotations and Estimates Capabilities

- Determine price and lead time with online cost roll-up
- Define multiple formats for generating quote documents for printing, faxing and emailing
- Track changes by using revision numbers
- Attach supporting documentation
- Control quoted costs with expiration dates
- Create up to five offers per quotation with default quantity breaks
- Copy and modify previous quotations
- Recall non-stocked item information for use in multiple quotations
- Re-value quotes based on current inventory or bill of material costs
- Import estimates and quotes from external files such as CAD-generated data
- Recall configurations previously defined using the Product Configurator
- Automatically create work orders, purchase orders, sales orders, retentions, deposits and billing schedules on acceptance of a quote
- Add and print notes, comments and instructions on reports and quotation formats
- Create inventory items and generate a bill of material from an estimate
- Optionally include progressive scrap in the calculation of material and capacity requirements
- Optionally prefix automatically generated nonstock codes
- Job chaining for multi-level custom bills of material
- Bill of Materials can also be retained for custom manufactured items for future use.

## Contact Us

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