



QUOTING Overview

A component part of Intech's PYRAMID Software

The Intech **QUOTING** module handles the preparation of quotations for quoted jobs and it is equally suited to workshop or time materials based charge out situations. The module can be configured to suit a variety of environments ranging from servicing and contracting through to organisations involved in assembly processes.

Quoting interfaces with the Intech **STOCK** Inventory system for its database of products and other resources. It also optionally links to the Intech Contract Costing module.

Features of the System

The key features of the module are:

Preparation of Quotations: Detailed information stored includes customer, job description, start and end dates. Information is also maintained for materials, labour, non-stocked items and outwork. Standard mark-up percentages can be applied and manipulated to arrive at a quotation total.

Quotation Tracking: Quotations can be tracked over a maximum of 9 stages ranging from 'quoted' through to 'rejected'. Intermediate stages can be used for work in progress tracking and valuations.

Job costing: Actual costs / usage can be reported on versus quoted for variance and performance reporting purposes.

Billing: Once a job is completed the application can automatically initiate billing transactions.

Archiving: Jobs can be archived to a history file and subsequently recalled for referral as required.

Quotations

Up to four separate stages can be involved in the preparation of a quotation.

Header Details: The quote number can be keyed or automatically allocated by the application. There is provision for a job description and a customer name. If Quoting is only interfaced with **STOCK** Inventory an invoice number is picked up and displayed on this screen once the job has been charged. The estimated actual start and end dates are also recorded. A two digit branch or division code can be entered for reporting purposes.

Task Details: Multiple tasks can be established within each job. It is usual to establish separate task numbers for each major work category within a job (for example rebuild motor, recondition transmission etc). A further 40 character description is available for each task and there is also a start and end date. A job status is maintained for each task.

Presentations: Multiple presentations can be established. These are simply used as a basis for the valuation of mark-up percentages and labour rates for the elements in the quantity of schedules. Different rates can be established for each of the main quantity schedule element categories. These are materials, sundry materials, labour and outwork.

Worksheet: One worksheet per task can be created. The worksheet layout is similar to a spreadsheet and it is used to build up a schedule of quantities. It allows a series of items (stock, non-stock, labour and outwork) to be entered and holds quantities, prices, discounts, area information and the presentation level to point to for calculations.



QUOTING Quotations

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Once all quotation details have been entered, the system will display total costs, mark-ups, a quotation price and a total average mark-up percentage. The total mark-up percentage can be manually altered and the quotation price will automatically recalculate.

Reports Available Include:

Quotation Details: This report details all data keyed for the Quote, Task presentation and Worksheet.

Quotation Summary: This is a summary report of the presentation calculations / mark-ups, cost prices, rates etc.

Quotation Form: The quotation form is designed to print on A4 letterhead in a format that is suitable for submission to clients or prospective clients.

Inquiry: Quotations can be retrieved, displayed and amended directly under the quote maintenance selection. This facility also applies to archived quotes.

System Links

The Quoting module can be linked to only Intech's **STOCK** Inventory and **DEBTORS** Accounts Receivable modules or it can become an extension of the full **PYRAMID** suite of applications incorporating Contract Costing.

STOCK Inventory: Integration with **STOCK** Inventory is essential. All product information which is required to assemble the schedule of quantities (description, prices etc) is held within the Stock module. Once a quotation has been accepted, stock which will be required is flagged as Reserved. Once a job is invoiced stock on hand reduces.

DEBTORS Accounts Receivable: Integration with **DEBTORS** Accounts Receivable is also essential. Customer details required for the preparation of quotations are accessed from the Account Receivable databases. If Quoting is only integrated with Stock and Accounts Receivable, invoices generated within Quoting are transferred directly to **DEBTORS** Accounts Receivable. If Quoting is integrated with Contract Costing as part of the **PYRAMID** suite of applications the invoicing process is initiated from within Contract Costing.

Contract Costing: Quoting can be optionally linked to Contract Costing. Quotations prepared within Quoting are reflected in Contract Costing as budgets.

CGL / Purchase Orders: Linkage to the **CREDITORS** / General Ledger and Purchase Order modules is also optional. When interfaced, Purchase Orders for individual quotations can be automatically generated from within Quoting and passed through to the Purchase Orders module which in turn links with Creditors, General Leger and Contract Costing.

Contact Details

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