

Exact Macola ES: Quoting & Estimating

“Providing a quote to a prospective customer is one of the first impressions they have of our business, and it needs to get to them quickly but most importantly, accurately.”

In your business, short time-to-market processes are crucial. This includes the sales cycle, where a quick, seamless quoting and estimating process can curtail the time it takes to get an order out the door and get revenue into your company.

The *Macola ES Quoting and Estimating (QE)* system, by fully automating all facets of your sales quotations, allows for fast, reliable and detailed quotes that can easily be converted to sales orders. By using a flexible spreadsheet interface that integrates with the many combinations of goods and services your business has to offer, *Macola ES QE* can facilitate a successful turnaround of quotes-to-orders, whether you are a distributor providing quotes to different customers, or a manufacturer quoting every job on a case-by-case basis.

Accuracy and Detail, Quickly

Macola ES QE lets you determine the level of detail to provide on your estimates; with its distinctive capability to create estimates based on percentage markup, price code tables or price list, you can fulfill any type of quotation request. And, as quotes are only the beginning of the sales process, the information can be easily and automatically converted to a sales order, preventing any delays in the start of order production.

By understanding what customers require, Macola ES QE eliminates guesswork, ensuring precise quotations with immediate turnaround. With consolidated quote management, you will generate sales quotes faster, which means realizing revenue that much sooner.

The *Macola ES Quoting and Estimating* module is based on a very flexible, user-friendly interface that provides you with all of the information required to give your customer a detailed and timely quote or estimate. Easy and efficient quote preparation is key to a smooth quotation process, and being able to view customer status, check item availability and



With Macola ES Quoting and Estimating you can:

- Convert quotes into manufacturing and sales orders automatically and quickly for rapid order response
- Utilize powerful industry-standard Crystal Reports for integrated, customized solutions
- Refine future quotes with estimated cost comparisons to better service potential opportunities
- Make the most of purchase and manufacturing histories to develop realistic costing models for better estimating control

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confirm delivery dates will ensure that your customers receive quotes right the first time. Some of the functional highlights within Macola ES QE include:

Integration: There are two areas of integration that make Macola ES QE unique. First, you can quote any combination of material, labor, overhead, outside and service costs to create a quote/estimate. The system interfaces with Macola ES Order Entry, Production Order Processing and Shop Floor Control packages, creating easy access to the information you need. Second, the quote/estimate can be converted into both sales and manufacturing orders once an estimate has been accepted by the customer.

Item Number	Description	UoM	Quantity	UoM	Dst Date	Unit Cost	Unit Price	Markup/Sum	% Markup	% Discount	Fixed Price	Type	Item Code
BRP20	Schwanz, LV, Black	MS	100.0000	EA	12/21/2006	1.25812700	1.49508	C-Coat	20.00	0.00	149508.11	Subst.	HeldInventory
BRP20	Housing Base Left Window	MS	10.0000	EA	12/21/2006	302.75000	1.49508	C-Coat	190.00	0.00	14949.50	Subst.	HeldInventory
NEW INVENTORY ITEM	New Inventory Item	MS	1.0000	EA	12/21/2006	308.80000	3.00000	C-Coat	90.00	40.00	500.00	NonInventory	Purchased
NEW BOM	New BOM	MS	1.0000	EA	12/21/2006	1.408.80000	2.80000	C-Coat	40.00	2.00	1.388.00	NonInventory	Purchased
HELMET	Helmet	MS	1.0000	EA	12/21/2006	4.80000	0.00	C-Coat	40.00	0.00	0.00	NonInventory	Purchased

Estimates for inventory and non-inventory items are streamlined in Macola ES.

What-if multiple quantity cost analysis: By adding an unlimited number of other possible quantities, you can perform what-if analysis to provide your customers with the best options. The spreadsheet interface dynamically calculates the unit cost for various what-if quantities defined, spreading the fixed costs across the quote quantities. This powerful tool provides the estimator with the required visibility over costs to maintain the target level of profitability.

Manufacturing and purchasing history: During the quoting process, both the manufacturing and purchasing history are available to the estimator. The manufacturing cost break-down for material, labor, overhead, unit and outside costs are available as well as purchase quantities with unit costs, all helping the estimator make a better-informed decision.

Some of the Macola ES Quoting and Estimating features and functions include:

- Creation of estimates for both inventory and non-inventory items
- Flexible, user-friendly interface which allows fields to be turned on or off dynamically
- Inclusion and mark-up of vendor-related service costs as a part of estimate
- Creation of new items and bill of materials (BOMs) for new items within various Macola ES packages

Material and labor costs: Both costs can be calculated respectively by copying an item's BOM or a sequence of operations from an existing routing. Other material or routing can be added for either cost. With material costs, another item's BOM can also be copied as material to build an estimate. Both existing inventory and non-inventory items can be used in the material quoting process. For labor costs, the processing steps of similar items can be copied in when creating a new quote.

The Macola ES Quoting and Estimating system ensures that existing customers and new opportunities receive the information they need, when they need it, whether it be quotes or estimates for materials, labor or services.

For more information about Macola ES Quoting and Estimating, please contact your Exact Software business partner or account representative today, or visit www.exactamerica.com/macola.