

MAX

# QUOTING



Start winning more business. Create, revise, and close sales quotes quicker and easier.

## WITH QUOTING, YOU CAN:

1. Improve the response time and accuracy of quotes to customers
2. Quickly and easily convert quotes into Sales Orders
3. Run a Quote variance report for analysis
4. Print, fax, and email the quote document
5. Integrate with Exact Synergy

The correlation between timely responses and increased conversions of quotes to orders is well documented and highlights the need for an efficient quoting mechanism. The ability to quickly respond to a request for a quote is critical in a competitive environment, and if you don't use your sales order system or manufacturing database to help you manage the information that goes into the quote, a quick, accurate response can become exceedingly difficult to provide to your customers. Fully integrated with MAX, the Quoting module allows you to create, estimate, revise, and clone sales quotes, then easily convert them into MAX sales orders, eliminating time-consuming and error prone data entry steps and allowing you to win more business.

MAX Quoting also presents a powerful estimating tool that enhances the sales order process by providing useful estimates to customers and collecting useful conversion data about each sale. Estimating allows you to produce price quotes using MAX product BOM and routing as well as

MS Excel estimating spreadsheets. This flexibility provides synergy between the manufacturing data in your MAX database and the industry standard estimating tools.

## MAX Quoting Highlights

- Use Drag & Drop to add Quote Line Items to a MAX Sales Order for quick entry, or develop quote templates for items repeated on a regular basis.
- Clone quotes using the same specific quote information as an existing quote. Modify that information to create the new quote and save data entry time.
- Print quotes for internal or external electronic distribution as confirmation
- of part quantities estimated and prices assigned per quote line item.
- Integrate with Exact Synergy
  - Update the Exact Synergy customer account card during the MAX quoting process.
  - Convert Exact Synergy customer/prospect IDs to MAX customer IDs.
  - Automatically save resulting quote to the Exact Synergy customer document.
- The MAX Multi-Currency option allows you to select from several currency types and exchange rates that may be applied to quotes for customers using a different currency.

Quote 1 - 90000004

**= exact**  
BUSINESS SOFTWARE

# Quote

Quote Number: 9000004 | Quote Date: 10/04/2016 | Customer ID: 800

**Bill To:** Acme Enterprises, 2101 Main St, Springfield, Mass, 01101

**Ship To:** Acme Enterprises Midwest Distribution Center, 5572 Waukegan Dr, Des Plaines, IL 60016

PO Reference Number: | Terms: 2% 10 Net 30 | Ship Via: Federal Express | F.O.B. Point:

Requested By: | Sales Representative: Alfred Baker | Status: Open | Quote No.: 90000004 | Customer ID: 800

Line	DL	Order Qty	Part ID	Description/Notes	Unit	Unit Price	Ext. Price	Due Date
01	01	10.00	11000	PowerServe 7299	EA	1022.00	10220.00	11/08/2016
02	01	5.00	11111	Model 11000 Pnestol	EA	586.16	2930.80	10/18/2016

Comments: | Order Notes... | Extended Fields | Total: \$ 13,051,533

MAX Quoting enhances your ability to respond to a customer's request for a quote. It eliminates repetitive data entry steps, saving time, increasing accuracy, and giving you the tools you need to turn more quotes into sales orders. And with MAX's ability to handle multi-currency transactions, the borders of your business can stretch across the globe.

Now there is an easier, more efficient way to manage your quotes. Enhance your MAX System with MAX Quoting today! Please contact your Account Manager for details.

With a Quote form that contains familiar features of the Sales Order, the sales order process begins before the sales order is even initiated

Estimate: 90000004-01-01

Customer: Acme Enterprises | Part: 11000 | Computer: MAX

File Path: Acme Enterprises\90000004\01\01.xls | Load Data | Save File | Clear

BOM Part: 11000 | Routing Part: 11000 | Load BOM & Routing | Estimated Price: Col: J | Row: 25 | Apply

Parent Part ID	Component Part ID	Comp Description	Qty Per	Unit Cost	Extended Cost	Scrap %	Scrap Cost Markup %	Total	
11000	12100	System Unit	1.00	444.80	444.80	0.00	0.00	444.80	
11000	1234	1234 Desc	1.00	0.00	0.00	0.00	0.00	0.00	
11000	13000	Keyboard	1.00	16.32	16.32	0.00	0.00	16.32	
11000	13100	Monitor, 17" Standard Plus	1.00	70.00	70.00	0.00	0.00	70.00	
11000	13990	Box, Carboard Shipping	1.00	1.00	1.00	0.00	0.00	1.00	
11000	BCL	Backflush Component Lot	1.00	0.00	0.00	0.00	0.00	0.00	
<b>Total Materials:</b>					<b>540.12</b>			<b>540.12</b>	
Operation ID	Workcenter	Operation Description	Run Time	Setup Time	Labor Rate	LOH %	LOH Cost	Markup %	Total
0010	EAS5Y	Assemble Per Print	0.2500	1.0000	10.00	200.00	25.00	0.00	37.50
0020	BURN	24 Hour Burn In	24.0000	2.0000	18.00	500.00	2340.00	0.00	2808.00
0030	FINQA	Final Inspection	0.1000	0.0000	10.00	200.00	2.00	0.00	3.00
0040	PACK	Pack and Ship	0.2500	0.0000	10.00	200.00	5.00	0.00	7.50
0000	BURN		0.0000	0.0000	18.00	500.00	0.00	0.00	0.00
<b>Total Labor:</b>									<b>2956.0000</b>
<b>Total:</b>									<b>3396.1200</b>
<b>Yield:</b>									<b>100.0000</b>
<b>Grand Total:</b>									<b>3396.1200</b>

Create quotes directly from existing product price estimates

For further information please call  
**1.855.392.2862**