

CIS QuoteBuilder

Create/Edit Quote

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Quote #: 100200	Created: 01/31/2010	Updated: 01/31/2010
Billing Address: Complete Information Solutions LLC Bob Thompson 253 Market Square Lake Forest, IL 60045		Ship-To Address: Complete Information Solutions LLC Jim Smyth Unit 25 Waterview Trading Estate Buffalo, NY 100895
Short Description:		Shipping Instructions:

CIS QuoteBuilder is a sleek, feature rich web based quote management tool designed for manufacturers and distributors to efficiently manage and accelerate quote activity across a range of sales channels and geographic areas. Employees, sales staff, independent dealers and distributors access this application with controlled security and visibility. QuoteBuilder allows the manufacturer to manage pricing and discounting on a by-client/by-product basis.

Quotes are constructed quickly in a single screen, adding both configured products and regular products. Quotes can be edited, copied, printed, and/or emailed as PDF's. Other features include managing quote status and sequenced quote numbers with revisions.

Users have an attractive lookup screen to manage all of the quotes they have permission to view. The lookup has search and filter features to quickly find quotes using a range of key data. Search results are displayed dynamically and can be exported to Excel including all the key data within the selected quotes. Reporting is designed to provide the common reporting options as standard and add customer specific reporting as required.

A quote in QuoteBuilder can contain any number of configurations including variations of the same product(s). CIS QuoteBuilder is seamlessly integrated with CIS Configurator allowing the user to create and add configured items to the quote that include pricing based on rules. Configurations within quotes can be edited, altering details as needed without having to redo the whole quote.

Very little training is required for QuoteBuilder users. QuoteBuilder is a web browser based application built on the VB.Net platform and has many features similar to a Windows based application from the user perspective.

Item #	Description	Qty	Price
TL40-53	Trailer	1	\$23,500.00
DA-3458	Double Axles	4	\$11,400.00
WH-2116	Standard Wheels	16	\$3,800.00
C07074-22...	Continental	16	\$71,800.00
A8550558	ABS unit	4	\$3,300.00
L0850956	Landing Gear	1	\$600.00
L045468	Liftgate	1	\$2,200.00

CIS Configurator

#	Question	Answer
1	Select a trailer type	Tautliner
2	Select an Axle type	Double (Twin wheeled 2X2)
3	# of Double Axles	4
5	Select - Tire choice	Continental
6	Select - If ABS is required	Yes
7	ABS - Option to which axles	All
8	Length - Select a length fr...	52 FT

Item #	Description	Qty	Price
TL48-53	Tautliner	1	\$23,500.00
DA-3456	Double Axles	4	\$11,400.00
WH-8216	Standard Wheels	16	\$3,600.00
CO7674-22...	Continental	16	\$21,600.00
ABS56588	ABS unit	4	\$3,000.00
LGR658956...	Landing Gear	1	\$800.00

CIS Configurator is a web browser-based application; embedded within QuoteBuilder, it is used to automate the configuration of build-to-order products with multiple options. Designed to be extremely flexible, it provides manufacturing operations with the capability to easily and efficiently produce highly customizable and configurable product lines. It has different settings to provide a guided selling format or the configuration can show all the questions.

There is great flexibility in the user interface – the appearance and management of features displayed in the Configurator including item lists, graphics or question and answer lists are easily and quickly controlled.

Our Configurator application works within QuoteBuilder or it can be embedded and integrated to other applications. The results of the users' configuration data are stored as an XML file and can be made available and transported easily with the quote.

Easy to set up and use

With a small amount of training, non-IT people learn to build the rules and relationships; ensuring products are always valid and correctly specified and priced. Maintain your own models and add new ones without programming or training.

Rule based Models

Because CIS Configurator is rule based, it allows business owners, employees, distributors or customers to accurately build quotes and orders for complex products or services with a large number of variables; this is especially useful where components have a number of inter-dependencies and relationships.

You can set questions to guide the user through the selling process; you can quickly build relationships between the answers so that only valid options can be quoted or ordered. The ability to incorporate calculations into models makes this a powerful and feature rich offering.

CIS ModelBuilder

CIS ModelBuilder is the administrative tool for CIS Configurator and is also a web-based application. The manufacturer's product experts use our latest technology built into this innovative and powerful tool to create configuration models, which dictate the rules the Configurator will use. The general user population will never see ModelBuilder – they will only see the configurations.

The ModelBuilder user architects the attribute(s), which the configurations will use, and determines whether and how these are displayed.

ModelBuilder does not require programming skills only product knowledge and understanding of the product's rules; however the program does require training.

A number of unique design features are employed to create rules and relationships; models can have attributes at multiple levels, exceptions are created quickly, a wide variety of single level and multiple calculations are accommodated; multiple answers can be linked to produce a relationship, forcing a specific result when particular conditions are met.

Item information can be added as can graphics to represent answers and selections. Graphics can be uploaded in seconds from an image library.

Item #	Descrip...	Qty	Weight	Price
TG45478-45...	Tautliner	1	35000.00	\$19,500.00
AX676776	Twin w...	4	13824.00	\$19,960.00
2232-2222-2...	Wheels	16	1200.00	\$2,000.00
45454-55457...	Floor m...	504	1260.00	\$15,120.00
54545-5878-...	Curtain ...	141	6345.00	\$13,959.00
545454-5888...	Alumini...	56	4928.00	\$7,000.00
259-5885-263	Brigest...	16	1600.00	\$12,128.00
LG5458	Landing...	1	215.50	\$300.00
258-5588-56...	Splash ...	16	320.00	\$4,608.00
ABS5656565	ABS unit	4	2180.00	\$3,996.00

Weight: 66872.50 Lbs | Price: \$98,571.00



CIS Compass

CIS provides Compass, its web based implementation support tool as part of the implementation process. Compass provides an accessible database of current project status where fixes, enhancements, requests and questions are efficiently directed to the correct resource using email and phone messages based on the priority. Clients assign a priority to their request/question and see responses as soon as they are updated. Compass provides a dynamic view on all open and completed issues related to the implementation

Experience

One size does not fit all in the configuration software market - although our solutions are very flexible, there are a small percentage of situations where the client's needs or problems are so unique that no generic solution can truly addresses all the aspects. While some competitors will bend the client's need to their product offering, our answer in this situation is to develop a custom application for that client using the experience of our development team, which includes individuals who built custom configuration solutions as early as 15 years ago, solutions which are still in daily use today.

Unique Requirements

Customization can be as simple as a different interface to gather the configuration data and in other situations where the client need is more sophisticated, additional programs provide specific functionality. A recent example of the latter is a drawing tool which will be used by sales people to specify installation requirements, produce installation drawings and use the rules engine to constrain what can be done within the drawing tool, and generate BOM's; this automation frees up the engineering department, which was previously involved at every stage.

Integration to your back-end ERP Accounting, Manufacturing or CRM system

No need to duplicate data, we can create an integration so both systems can talk to each other thus limiting the potential of errors caused by duplicate entry of data. We can read Customers, Items and Pricing from your ERP/MRP system and send back Orders, Bill of Materials and Manufacturing Work Orders. We can also integrate into your CRM system so your salespeople can have CIS Builder at their fingertips.



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