Workbench SBO
Project Management for SAP Business One

Functional Overview

For
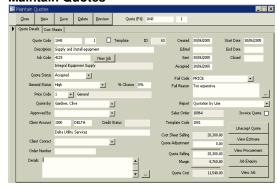
Quoting and Estimating

CHANNEL SAP PARTNER

Quoting and Estimating

This module is designed to efficiently prepare Job Estimates and Quotations which on Acceptance can be used to generate Job Budgets and Procurement Schedules.

Features include:

❑ Maintain multiple versions of a Quotation.

❑ Create new quotations from Templates or existing Quotations and automatically re-price using current Labour, Material, Stock and Plant rates.

❑ Structure the Quotation with multiple Costing Sheets to detail the cost estimates for each stage or element of the job.

❑ Copy and Insert individual Costing Sheets from existing Quotes or Templates.

❑ Create an unlimited number of estimate lines per costing sheet.

❑ Derive Labour Cost Prices based on Employee Class, Person, Activity.

❑ Use Workbench Supplier Catalogues and Stock to cost materials or manually enter estimated values.

❑ Select the default Selling Prices for Labour and Material Items from multiple user defined price lists.

❑ Record adjustments to the default Selling Price to arrive at the Quoted Price.

❑ Enquiry screen to track outstanding Quotes by Client, Date, Status, Quoted By.

❑ Record user defined reason codes for Wins and Losses to monitor overall quoting performance.

❑ Maintain multiple Quotation Report Formats using the Crystal Report Writer.

❑ Formal Acceptance of the Quotation with the option to use quotation estimate lines to create Job Budgets.

❑ Use the Bill of Material option to create Job budget lines at the parent part level or the raw material level.

❑ Interface Estimate lines to Procurement to generate Stock Issues and Purchase Orders.

❑ Link Costing Sheets to a single Job or separate Sub Jobs within a project.

❑ Interface to SAP Business One Quotations

Maintain Quotes

Costing Sheet

Quote Enquiry

Print Quotes