



Quoting



The Quoting Module allows users to create quotes for Repair, Sales, Hire and Service work. EMiR provides all the tracking and traceability you need to know.

OVERVIEW

The Quoting Process

Quotes can be raised from EMiR either from a job [in the case of service/repair] or by just creating a quote [for a Sales Order]. EMiR can tell you:

- Which jobs need to be quoted?
- Which quotes are outstanding and need to be followed up by date?
- Which quotes have been successful?
- Which quotes have been rejected?

Job Status

For those created from a job, EMiR will change the status of the job from "Work In Progress" to "Evaluation", so that the user can tell from the status that the job has an open quote against it that the customer is evaluating.

Types of Quote

There are a number of different types of quote within the EMiR System:

- **EMiR Quote Layout.** You can choose to use the EMiR quote layout which allows you to combine the customer information with a description of the work to be carried out and photographs of the item concerned. EMiR allows you two different layouts, including a BASEEFA style layout which shows more technical information about the item being repaired. You can optionally create a new quote from an old one, and you can also add a Quote Acceptance page to your quote for the customer to simply sign and send back to proceed with the quoted work.

You can also store notes against the quote so any users can see how the quote has progressed. EMiR also allows you to plan the materials and labour element of the quote which can optionally be printed in detail on the quote – should the customer require it. EMiR will also allow you to order the necessary materials from the accepted quote via a direct link to the **Purchasing** Module.

- **File based quote layout.** You can also optionally add the 'File-based' quoting system in which EMiR allows you to use Microsoft Word™ or Excel™ to create the quote to your own layout, but key information about the quote is stored within EMiR. The document is also stored within the EMiR system so everyone can find it and view it [you don't need to worry about where it is saved!]. You can also use 'Merge' technology to combine your EMiR layout with Microsoft Word™ for ultimate flexibility in **Quoting!**
- **Sales Quote.** A template format to allow selection of the items for sale along with key contact, terms and other relevant information.
- **Hire Quote.** This allows the user to select items for hire from a hire fleet and quote prices based on the period of hire for each item.

Certificate of Conformance

EMiR also allows you to produce a certificate of conformance, similar to the BASEEFA style layout, so that you can provide a suitable certificate of conformity for any quoted item.



“ We have grown the business very quickly and EMiR has enabled us to keep track of all our jobs, purchases, stock, quotes, and it has also given us complete financial management. It's an excellent system and I have no hesitation in recommending it to others. ”

Malcolm Martin
Managing Director, Stardelta, Lincolnshire

The Quoting Module has many useful features to help deliver real benefits to your business:

FEATURES & BENEFITS

- EMiR ensures you can keep track of all quoting work and as all the information is stored within EMiR records, you don't have to go hunting for paper information ever again!
- All quotes are created in consistent formats, providing a professional image for your business.
- EMiR allows customisation of your layout with your logo so that your branding is shown and quotes can also be emailed directly from EMiR in full colour PDF, saving the need for printing.
- EMiR allows you to plan the materials and labour for any quote and these can be printed optionally if the customer requires a breakdown of the costs involved. These costs are stored against the quote and can be transferred and compared against the job to see how you have fared compared to the planned price. This is ideal for seeing how good your predicted costs are against the actual and so learning where costs have been underestimated.
- EMiR allows you to include photos on the quote, that print two across the page, to show damage or other visual information that you wish to help demonstrate the work/cost involved.
- The quote provides an acceptance area on the quote so the customer can quickly sign off the work to be completed.
- Do you need to show "EX" type repair information in your quote and produce a Certificate of Conformity when the work is done? No problem, EMiR's BASEEFA style quotes do all this for you and make it quick and easy for you!
- EMiR's file-based quoting option allows you to make use of Microsoft Word™ or Excel™ to produce your quotes should you need to provide lots of information and options within your quote. The quote is still stored within EMiR so all staff can still find the quotes quickly and easily!
- Take control of your quoting process by ensuring you know what quotes need to be produced and which need to be chased. Keep track of how a quote is progressing by reviewing notes, and don't miss out on business ever again!



SCAN ME

