



QUOTATIONS MODULE ENHANCED FOR GREATER FUNCTIONALITY AND SPEED OF USE

The Quotations module is the cornerstone of the PSL Datatrack production control system. It is described as the software equivalent of setting a machine tool and once the information has been entered at the quotation stage it is reused throughout the rest of the production process. Its use obviates the need to re-enter information and as such minimises the risk of possible human error. With such importance attached to the module it remains the subject of continuous development by PSL Datatrack, ensuring greater functionality and speed in the preparation of quotations for both new and existing customers.

The Quotations module was initially developed to help small and medium subcontract engineering businesses cope with demand from customers for smaller batch sizes which had in turn led to the generation of many more quotations. The system automatically calculates the selling price of any component, assembly or product assembled from a Bill Of Materials (BOM) based on the cost of the production and machining processes, materials and tooling used and any subcontracted finishing processes.



Once data for a new quotation has been entered it is reused throughout the life cycle of the subsequent production process, culminating at final invoice. Accurate, reliable information is seamlessly integrated with all other PSL Datatrack modules that may be in use, from Works Orders and Scheduling to Process Layouts and Shop Floor Data Collection.

Latest improvements to the Quotations module include time-saving features for management of BOM items. Users now have the ability to copy a complete BOM from a similar quotation, which can act as a template for a new quote. If changes are required to the newly created quote, multiple BOM items can be selected and removed in one click.

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These developments build upon other recent Quotations enhancements made by PSL Datatrack to improve production planning. This includes a sales pipeline feature which allows the user to apply a percentage to the likelihood of converting a quote into a firm order and the expected order date. A technical search feature allows quotations to be filtered by material type and size, cost centre, component length and subcontract processes involved to save time when quoting for a component similar to another that has already been estimated.

New configuration options have been added to ensure easier calculation of material costs with faster navigation enabling users to move more easily between Quotations and other modules, including the facility to jump to Component Stocks and create a new stock header record for use in future quotations. Another configuration option identifies whether a specific drawing number has been quoted before, giving the option to reuse it. The Quotation generator screen enables users to generate quotations based on CSV import files as the basis for copying templates and generating new quotations.

Overall, the benefit of using the Quotations module is fast and accurate response to customer enquiries. Professional quotations can be produced quickly and will help to significantly reduce the overhead costs incurred as a result of needing to generate quotes for existing and new customers.