

## **COMMANDquote (CC-QT or CA-QT)**

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### **Description**

COMMANDquote is a job/quote management, tracking and estimating solution that can serve as the initial point of entry of your business process. The foundation of the quote system is the job, from which one or many quotations can be easily created, tracked, managed, and printed. Quotes can be easily converted to orders and projects. Salespersons, sales managers and executives are target end users of this module.

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### **Features**

- Create, maintain and monitor Jobs. (Work being done in your business market area.)
    - o Create Jobs for a specific address or a general area (highway, subdivision, etc).
    - o Assign products with estimated quantities and default pricing, contacts, and other location-specific information.
    - o Assign Action Items to assist in developing job information. Create of "tickler lists" of job-related tasks with employee assignment and date required.
    - o Assign and update job statuses (quoted, not quoted, active, closed).
    - o Track date-related activities such as bid due, award, begin, and completion dates.
    - o Job forecasting spreads the estimated quantities for each product across the expected life of the job.
    - o Quote from job. Create single or multiple quotes for multiple prospects from the job information. You can also view a list of all quotes for the job. Copy quotes from one customer to another to support multiple bids on the same job. Select what job products to include on a given quote.
  
  - Create, maintain and monitor Quotes. (Agreements to provide specific materials at a specific price)
    - o Assign contacts, pricing, products and distribution with estimated quantities directly to the quote from the job.
    - o Assign Action Items. Assign action items to employees with due dates and notes. Generate "tickle lists" to identify action items approaching their due date.
    - o Assign and update quote statuses (Open, Accepted, Closed), both for an entire quote or for specific products within the quote. Perform win/loss analysis and track information pertaining to competitors.
    - o Automatically create Projects from the accepted quote, and view a list of all projects for the quote. When a quote is selected for the order, a project is automatically created and passed to the order. Based on the user option, quotes are displayed with project in the "possible projects" window.
    - o Configuration settings slows you to configure the default sources for project information—from system, customer, or quote.
    - o User-defined Microsoft Word templates allow the salesperson to submit quotes via printer, fax or email in a consistent, professional format.
  
  - Pricing/estimating
    - o General and product specific pricing may be assigned at any stage in the process (job/quote/project)
    - o A bid price-estimating tool calculates the minimum-selling price based upon material, overhead and delivery costs. The user can vary the average load size, travel time, costs etc. to determine the effect on pricing. The minimum selling price based on the desired profit per quantity
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- Reporting
  - o A wide variety of user defined reports and queries are available

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**Prerequisites**

- COMMANDconcrete or COMMANDaggregate 5.x or higher

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**Notes**

- Requires MS Word 2000 or higher for printing quotations

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