

AUTO QUOTE

INTEGRATED PROTOTYPE

Objective

Demonstrate and test the feasibility of using an automated quoting tool for foam products that fall within 9 geometric shape categories. Manual quoting is a laborious and slow process with a very low % of quotes ever converted to sales.

Additional Requirements

Provide a costing model that can be audited and verified taking into account foam types available in different geographic areas, customer segmentation to apply margins based on segment or custom to each customer. Costing to account for material usage, material waste, machining time and labour cost with overhead allocations

Result

A prototype that performed the cost calculation and applied the margins required. Future development would refactor this into a web application with full database functionality to record all quotes and allow eventual promotion of the quote into the production system.

The image displays three overlapping windows from the 'Auto Quote Integrated Prototype' software.

- Customer and Grade Selection**: This window contains fields for 'Search for Customer' (with a dropdown menu showing 'TOWN & COUNTRY UPHOLSTERY SERV L6'), 'Select Location' (dropdown: 'TASM'), 'Select Grade' (dropdown: 'AA21-300'), and 'Select Shape' (dropdown: 'D Bolster'). There is also a 'Customer Item identifier' field and a 'Calc Cost' button.
- Square Cut Costing**: This window shows 'Parameters for the required item' with input fields for 'Length' (1500), 'Width' (400), and 'Height' (200). A 'Calculate Cost' button is at the bottom.
- Costing Results**: This window displays a table with the following data:

Qty	Cost Per Unit	Price Per Unit
1	80.37	401.83
5	17.45	87.25
25	16.58	82.9

Solution Overview

The solution built in Excel with a SQL backend has the following workflow:

- Activate a new quote, select known customer or new prospect
- Select the shape, region
- Enter the dimensions required for the shape and quantity required
- System then calculates costing based on single item, sheet and block lots
- System applies the sales margin and records the detail pricing for review by the sales team - dynamic based on some business rules that determine when it is required