



**XPERT
TECHNOLOGIES**

RELEASE 4 - METIS SMART QUOTES

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1. INTRODUCTION

METIS Smart Quotes makes the quotes creation process fast, easy and intuitive.

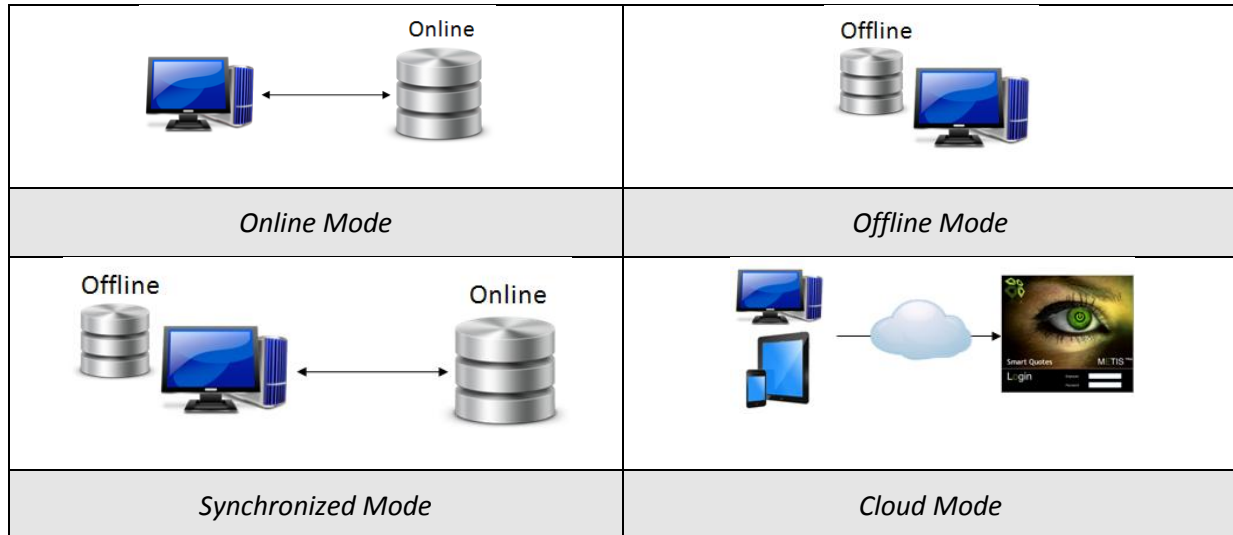
Its Graphical User Interface has been designed to be as user-friendly as possible for any sales representative.

METIS Smart Quotes is highly scalable, flexible and it interfaces with other applications.

This document aims at describing the functionalities and the features of METIS Smart Quotes.

2. OPERATING MODES

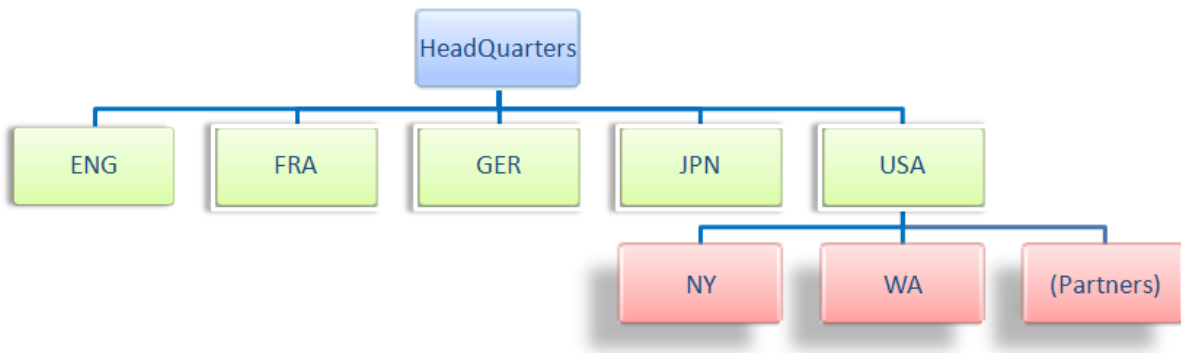
METIS Smart Quotes works in the following modes:



- Online: Smart Quotes is always connected to a central database.
- Offline: Smart Quotes is connected to a local database only.
- Synchronized: A mix of the online and offline modes. Offers are saved locally but they can be synchronized with a central database.
- Cloud: Smart Quotes is accessible via the web. The environment is managed by Xpert Technologies.

3. VERSION CONCEPT

Versions can be compared the various sales divisions or the different markets of a company. Each Smart Quotes user gets a different access and contents depending upon the version he/she belongs to, as shown in the following example:



In the above example, “HeadQuarters” is the main version that includes the entire product portfolio of the company and their worldwide official prices.

“Headquarters” has five sub-versions that represent a market. “HeadQuarters” can manage the contents to be granted to the sub-versions. For example: the set of products that can be sold in each country and the corresponding prices.

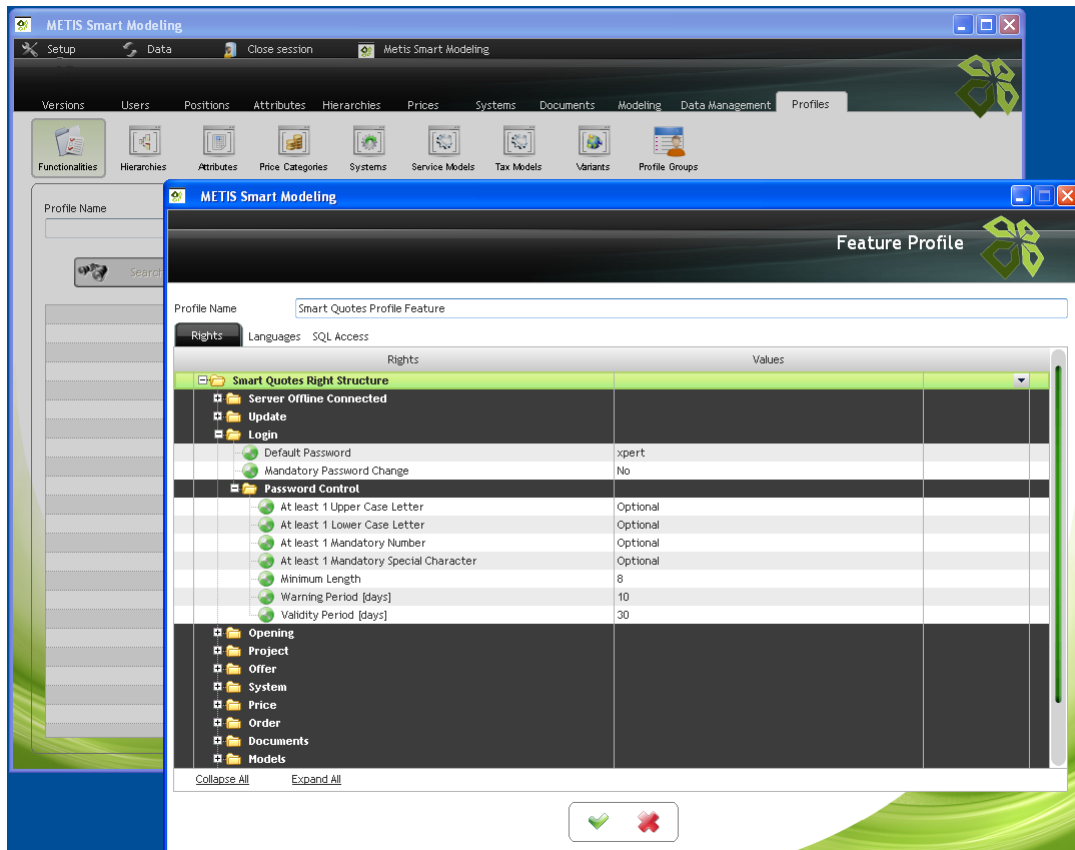
Similarly, “USA” has sub-versions that represent geographical areas and the official resellers in USA. “USA” can also control the set of products that can be offered in each geographical area or sold by each official reseller, together with the corresponding prices.

However, “HeadQuarters” cannot control the contents of “NY”, “WA” or of the US official resellers. A version can only control the contents of its direct sub-versions. Based upon the above example, “HeadQuarters” can only control the contents of its direct sub-versions which are ENG, FRA, GER, JPN and USA.

In most of the cases, a version has contents inherited from a parent version. However, customized contents can be created in each version for the sole use of the sales representatives belonging to the corresponding version.

4. FEATURES AND CONTENTS MANAGEMENT

Most of the features described in this document can be enabled or disabled via a right. The rights and the set of data granted to the Smart Quotes users are managed by an administrator with another application (METIS Smart Modeling).



5. LICENSE MANAGEMENT

To see the number of licenses currently activated, to whom, or when the user launched the application for the last time.

6. LOGIN

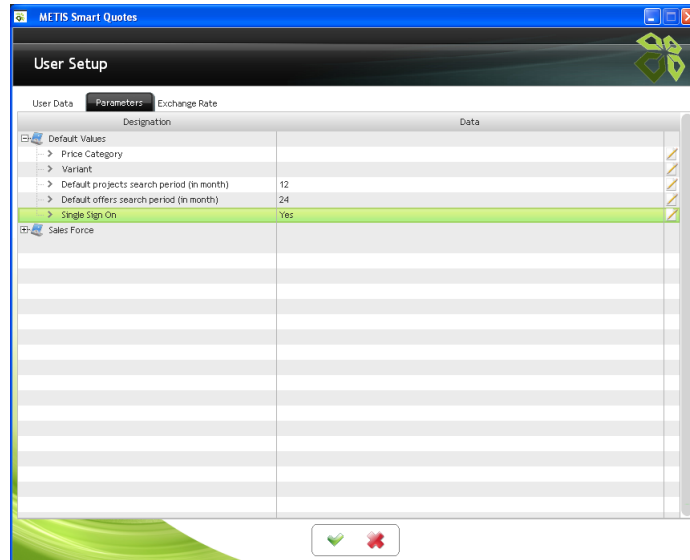
To access to certain versions or features depending upon the user's privileges:



- Access to different databases
- Access to customized features
- Access to customized set of data
- Password management (mandatory change of the password after a pre-defined time, minimal length, special characters, etc.)

7. SINGLE SIGN-ON

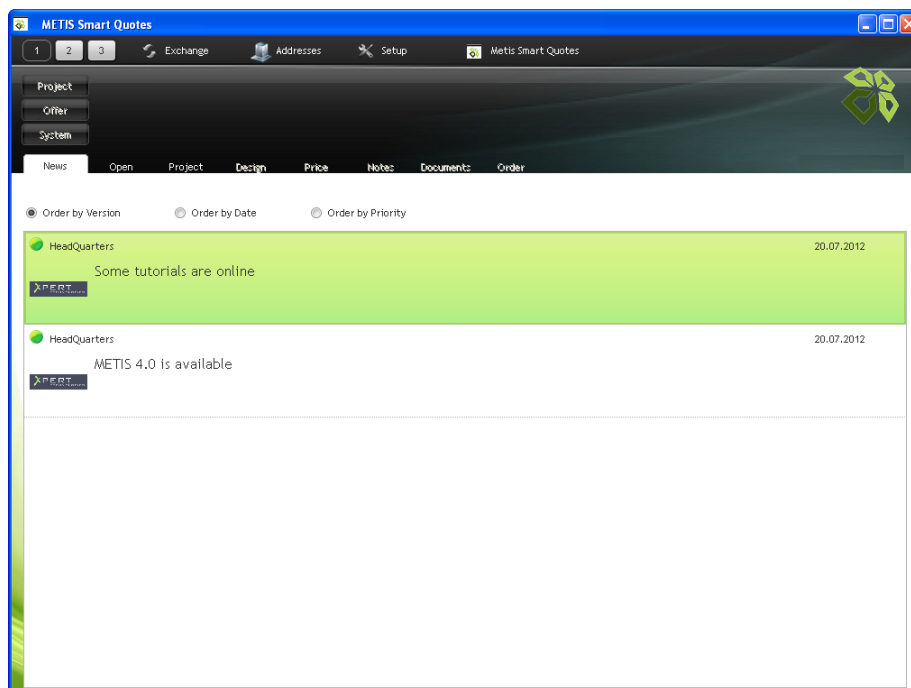
To automatically launch Smart Quotes, without having to enter a login and a password.



- Logging-in from on any machine (i.e. the user's machine login is mapped with his/her Smart Quotes credentials)
- Activation / deactivation of the single sign-on mode at any time

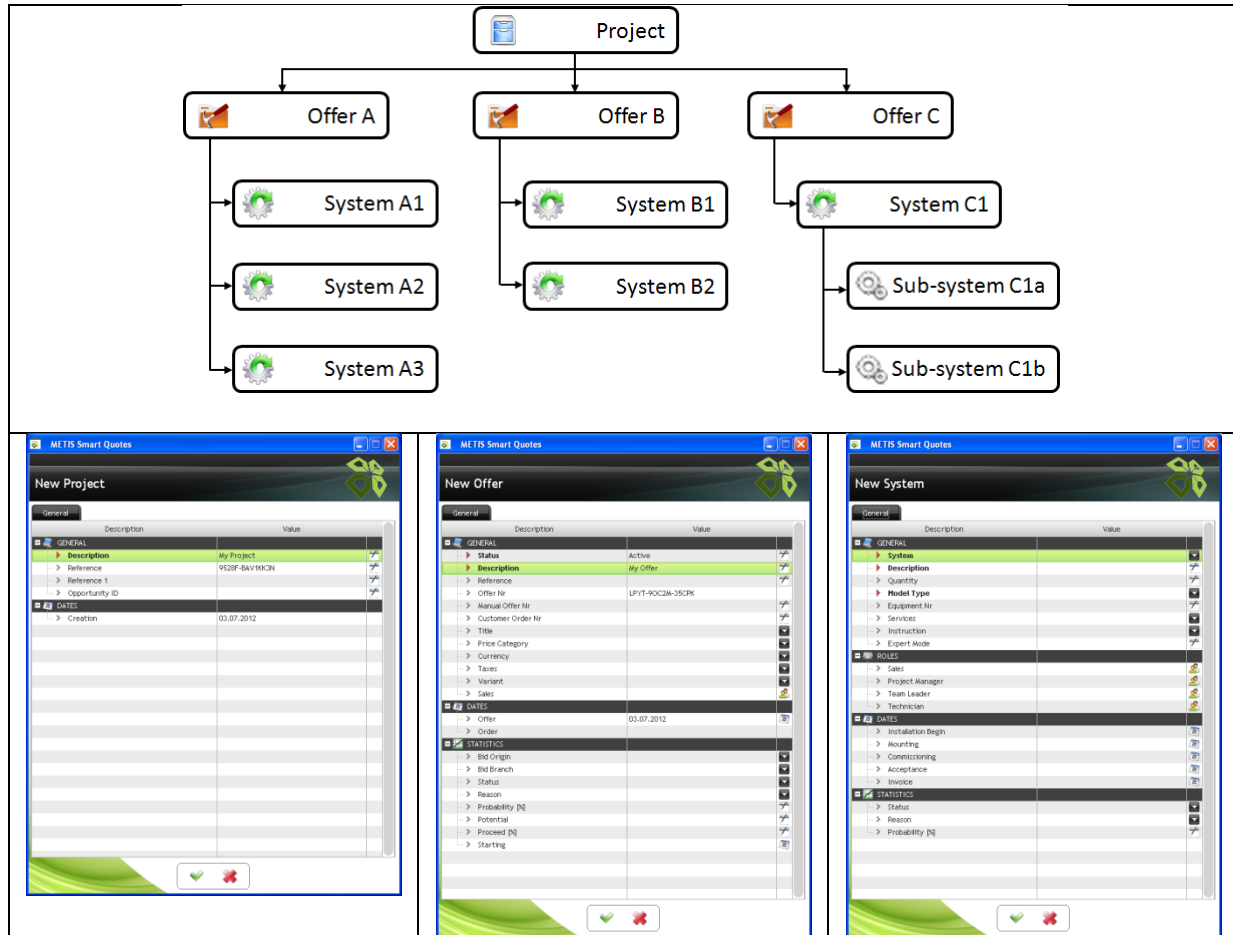
8. NEWS

To share any kind of information to the Smart Quotes users:



9. OFFER CREATION & STRUCTURE

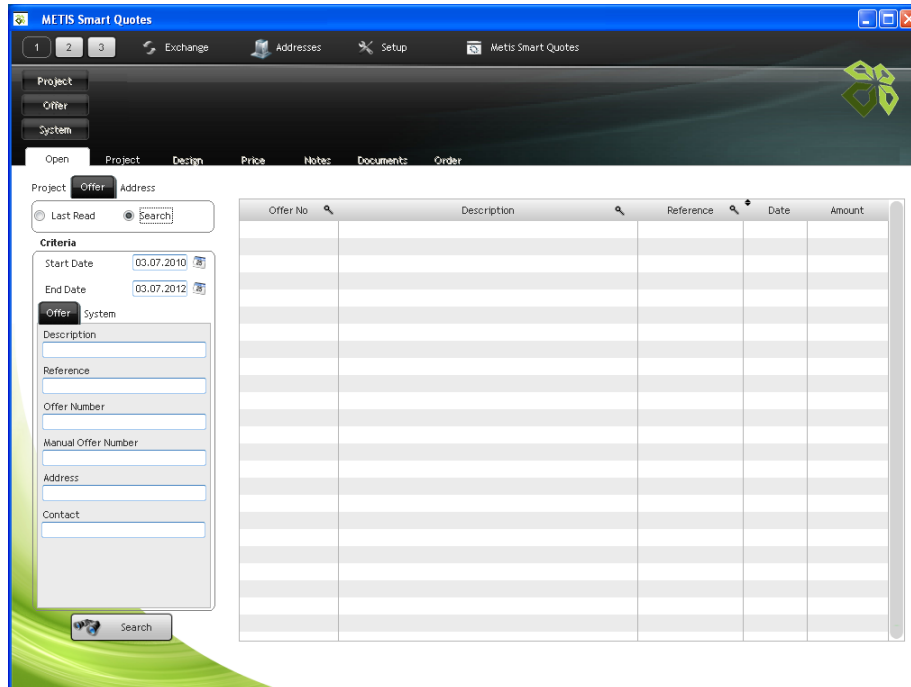
The only condition is that a project must be created first. Then, offers can be linked to a project:



- Creation of a project
- Auto-generation of the project's reference number
- Definition of a project's responsible
- Creation of one or several offers within the same project
- Assignment of one or several systems or sub-systems to the same offer
- Possibility to see a field as mandatory or optional to fill-in
- Possibility to hide fields
- Possibility to see customizable fields in the project, offer, system or sub-system properties
- Fields present for statistics purpose
- Warning message if the offer estimated total amount exceeds a pre-defined threshold

10. OPENING UP OF A PROJECT / OFFER

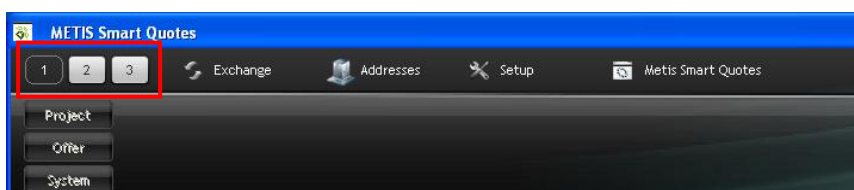
To search for a project or an offer to open up.



- Display of the last projects opened up
- Display of the last offers opened up
- Definition of the number of last opened projects / offers to be listed
- Search of a project from criteria such as the creation date, the name, the reference, etc.
- Search of an offer from criteria such as the creation date, the name, the reference, the systems contained in the sought offer, etc.
- Search of a project / offer from an address (company and/ or contact person) linked to the sought project / offer
- Search of a project or an offer from a customized field
- Opening of offers made in other versions

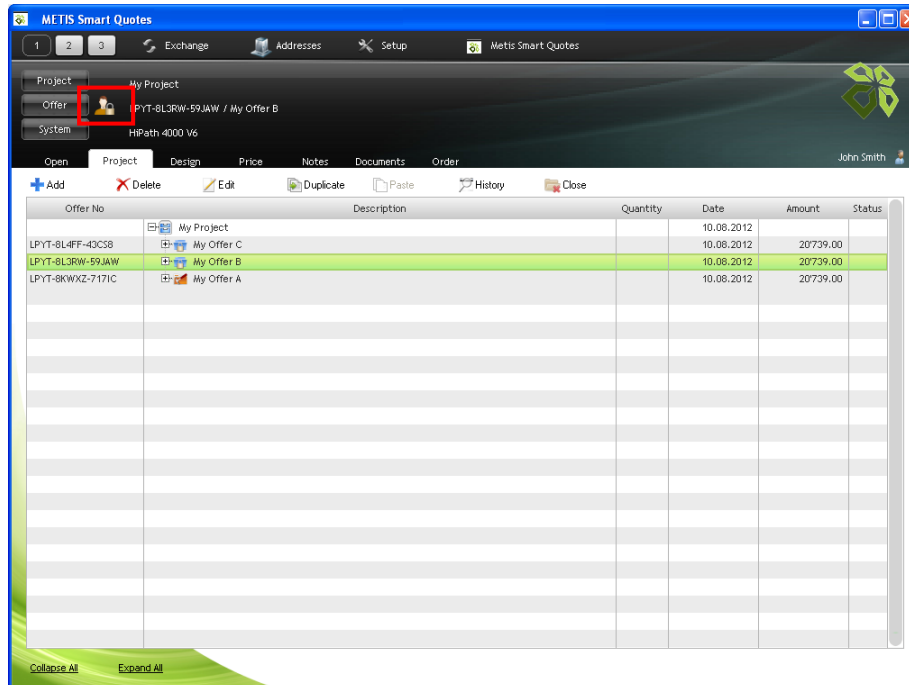
11. MULTIPLE OFFERS


To open and work with multiple offers at the same time.



12. AUTOMATIC LOCKING OF OPEN OFFER

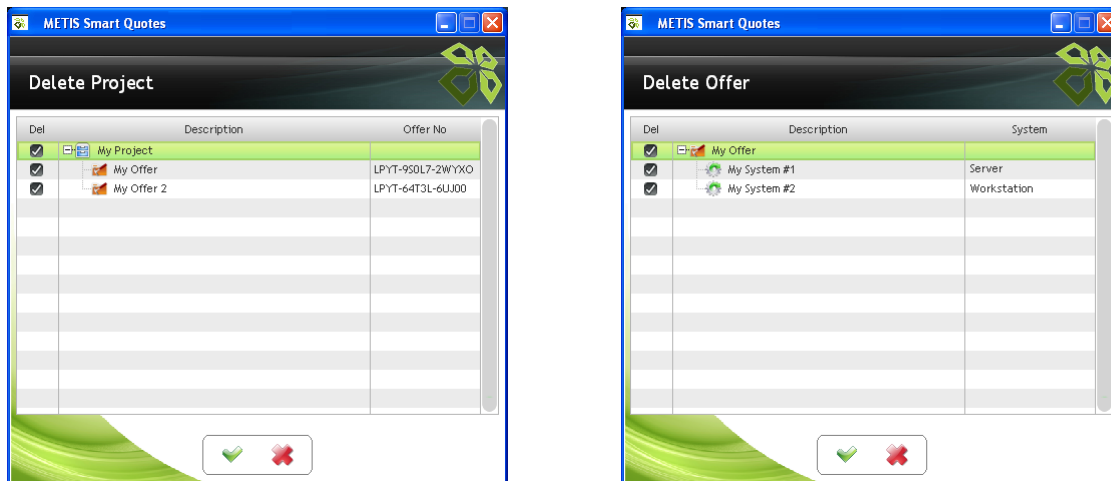
To prevent simultaneous edition of the same offer.



- Offer in read-only mode for the other users
- Blocking of the opening of the same offer in the others panes ()

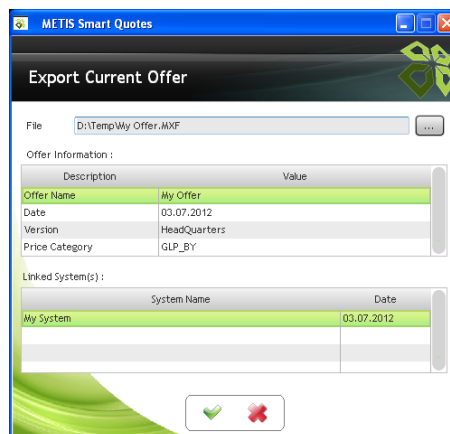
13. DELETION OF PROJECT / OFFER / SYSTEM

To delete the entire project or only some parts of the project's content (i.e. offer(s), system(s) or sub-system(s)):



14. IMPORT / EXPORT OF OFFER

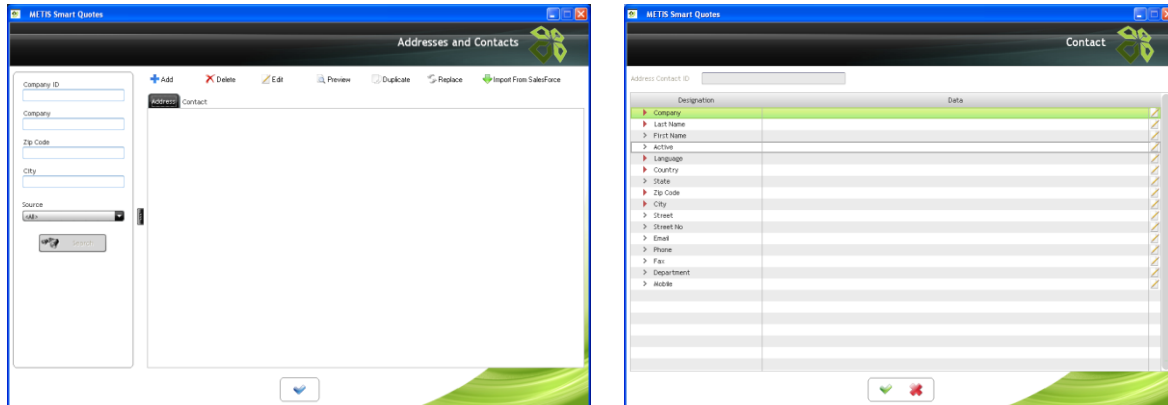
To share offers between Smart Quotes users.



- Export of an offer (as a proprietary “.MXF” file format for confidentiality reason)
- Import of an offer

15. ADDRESSES

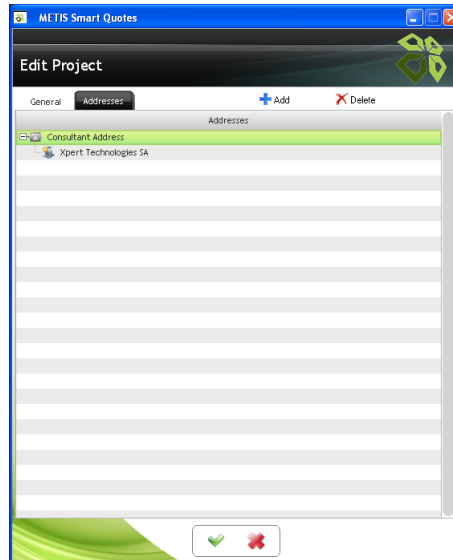
To manage the clients and contact persons portfolio.



- Search of a client company from criteria such as the company ID, the name, the source, etc.
- Search of a contact person from criteria such as the linked company, the name of the contact person, etc.
- Preview / Addition / Edition / Deletion of addresses (i.e. clients) & contact persons
- Copying of clients imported from an external source
- Replacement of a client created in METIS by a client imported from an external source

16. ADDRESS ASSIGNMENT

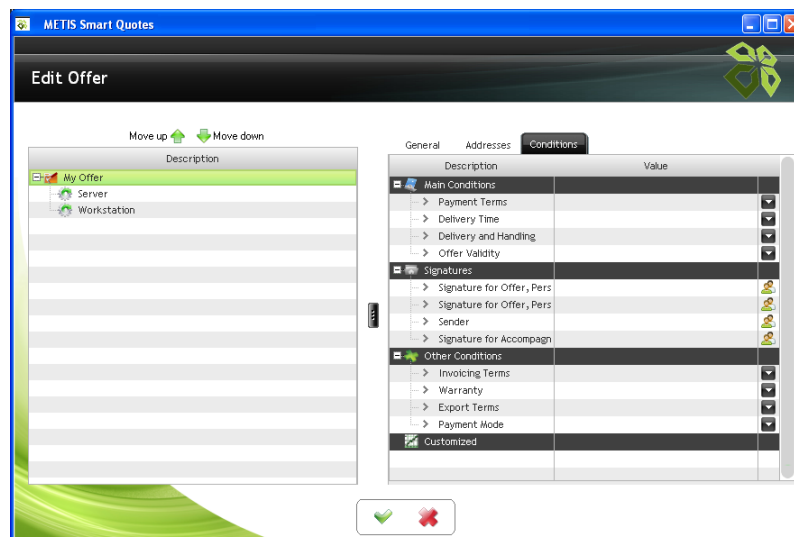
To assign a company and /or a contact person to the project, offer, system and sub-system levels:



- Customisation of the role depending upon the level (project, offer, system/ sub-system)
- Assignment of several companies to the same role
- Assignment of one company to several roles

17. OFFER COMMERCIAL CONDITIONS

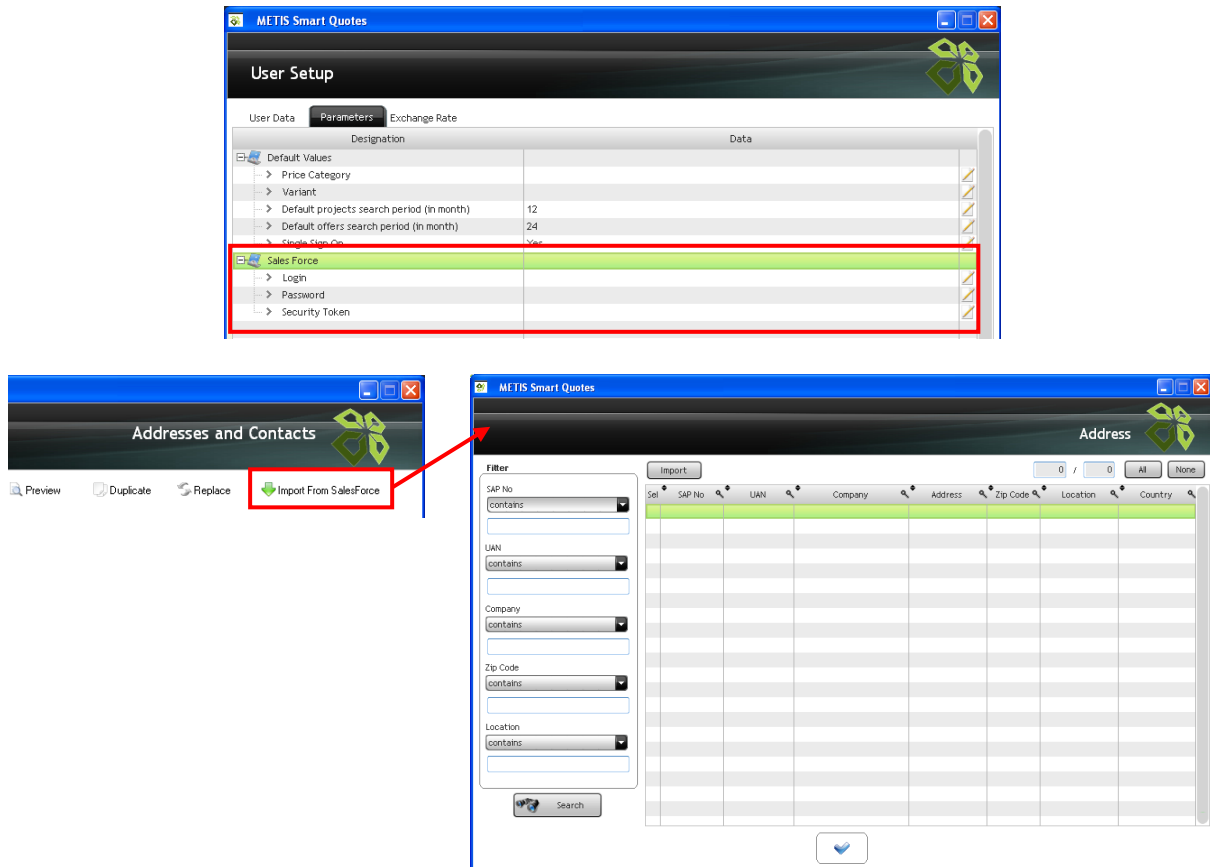
To define the commercial conditions for each offer.



- Selection from a pre-defined list
- Definition of conditions by the user

18. INTERFACE WITH SALESFORCE (CLIENTS & CONTACTS)

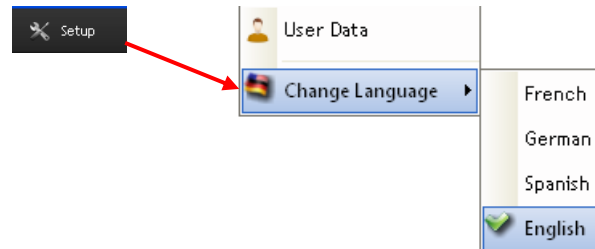
To import clients into METIS.



- Definition of the Salesforce login credentials
- Import of clients and contact persons
- Maximum number of clients that can be imported at the same time

19. LANGUAGE

To select a preferred language for using Smart Quotes.



- Several languages selectable depending upon the languages created and granted by the administrator
- Smart Quotes' contents entirely translatable
- Support of Unicode characters (Chinese, Japanese, Russian, etc.)

20. USER PERSONAL DATA

To see the personal data of the logged-in Smart Quotes user.

The screenshot shows the 'User Setup' window in the METIS Smart Quotes application. It has tabs for 'User Data', 'Parameters', and 'Exchange Rate'. The 'User Data' tab is active, showing a tree view with categories: Main, Company, Contact, and Address. Each category has several fields with edit icons (pencil) on the right.

Category	Field	Value	Edit
Main	Employee Code	dsmith	✎
	Last Name	Smith	✎
	First Name	Daniel	✎
	Language	English	✎
	Password	*	✎
Company	Company 1	Xpert Technologies	✎
	Company 2		✎
	Department	IT	✎
Contact	Email	daniel.smith@xpert-technologies.ch	✎
	Fax	+41264222780	✎
	Mobile	+41789999999	✎
	Tel	+41264222770	✎
Address	Address	Route André Piller 33a	✎
	Building	Tour Nord	✎
	Zip Code	1762	✎
	City	Givisiez	✎

At the bottom of the window, there are green and red checkmark icons.

- Definition of the editable fields (all fields read-only, fields partially editable or all fields editable)
- Customizable fields

21. USER PREFERENCES

To define some default parameters applicable to the Smart Quotes user only.

Designation	Data
Price Category	
Variant	
Default projects search period (in month)	12
Default offers search period (in month)	24
Single Sign On	Yes
Sales Force	

- Definition of a default offer price category
- Definition of a default offer variant
- Definition of a default search period for the projects and offers (to be applied in the Open menu)

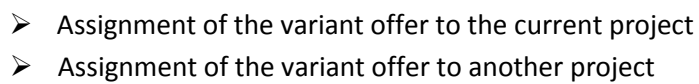
22. EXCHANGE RATES

To define exchange rate values different from those defined by the administrator.

	CAD	EUR	GBP	USD
1 CAD	1.000000	0.782772	0.638195	0.994872
1 EUR	1.277510	1.000000	0.802510	1.258360
1 GBP	1.591860	1.240690	1.000000	1.568298
1 USD	1.015360	0.794692	0.637650	1.000000

- Changes applicable to the Smart Quotes user only
- Changes cancelled upon update of the exchange rates by the administrator

To create a copy of an offer (also named a “variant” offer).

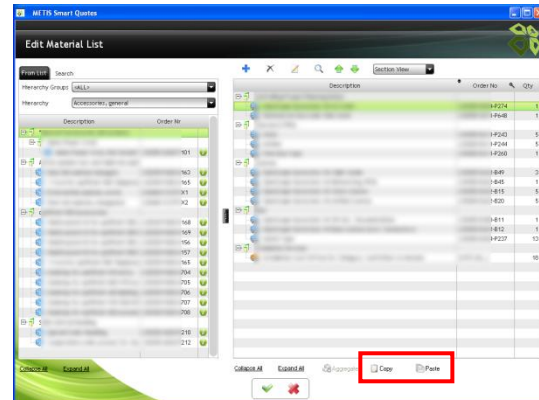
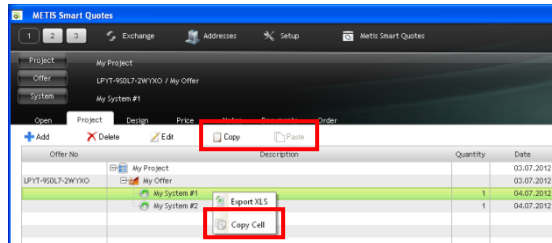


To see at a glance some actions performed within an offer.

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25. COPY / PASTE

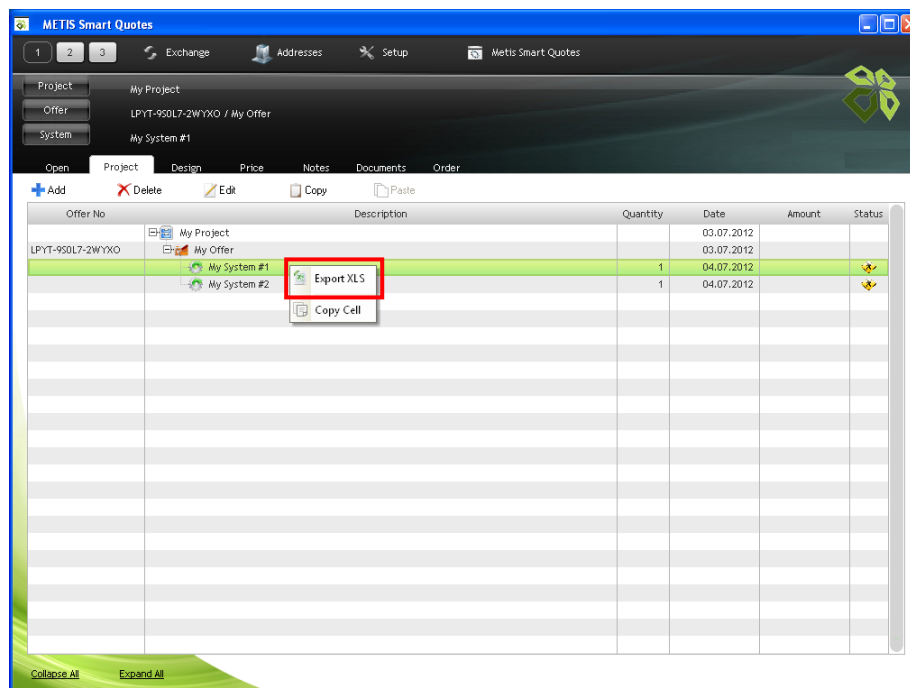
Copy and paste of different elements.



- Copy / paste of system and sub-system
- Copy / paste of items from the material list
- Copy / paste of the contents of a cell

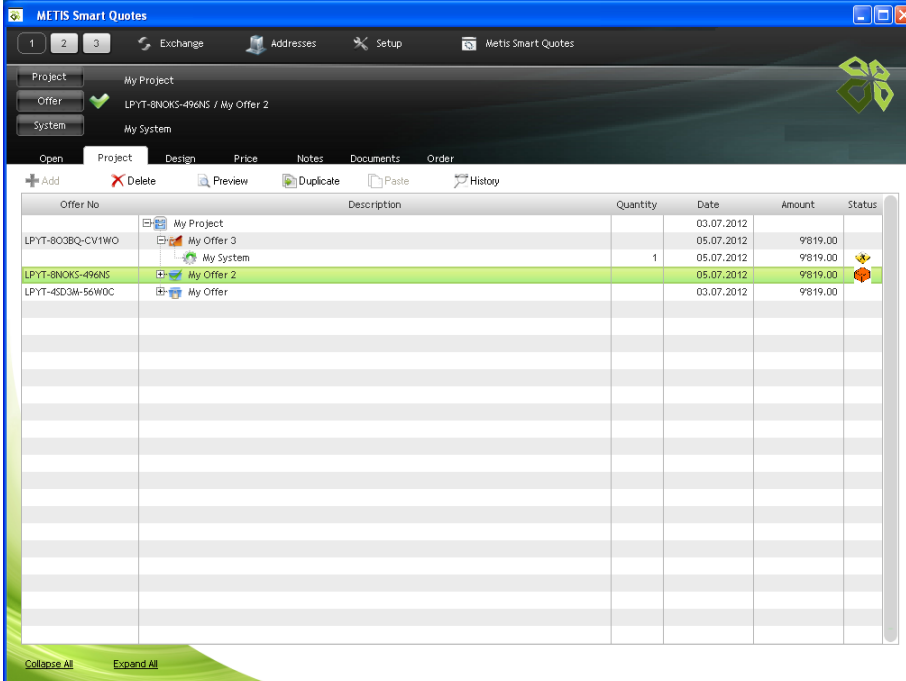
26. EXPORT TO EXCEL

Export of the current contents of any Smart Quotes table to an Excel file.



27. STATUS AND OTHER PIECES OF INFORMATION AT A GLANCE

To see at a glance the amounts or the status of an offer, a system or a sub-system.



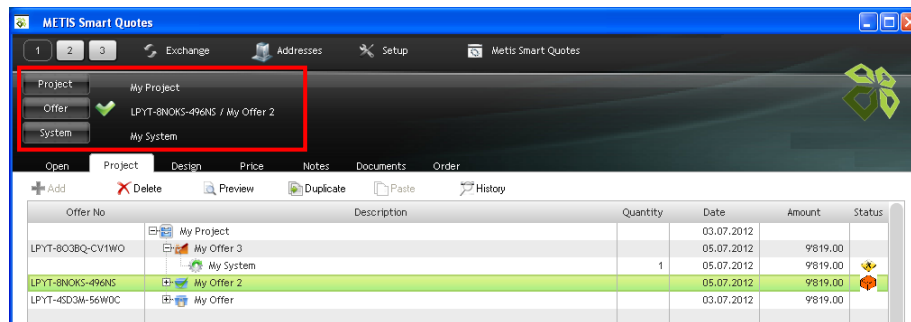
The screenshot shows the METIS Smart Quotes application window. It features a top menu bar with options like Exchange, Addresses, Setup, and a sidebar with Project, Offer, and System views. The main area displays a table with columns for Offer No, Description, Quantity, Date, Amount, and Status. The table contains several rows of data, including offers and systems, with some rows highlighted in green. Icons are used to distinguish between different statuses and types of items.

Offer No	Description	Quantity	Date	Amount	Status
LPYT-803BQ-CV1WO	My Project		03.07.2012		
	My Offer 3		05.07.2012	9819.00	
	My System		05.07.2012	9819.00	
LPYT-8NOKS-496NS	My Offer 2	1	05.07.2012	9819.00	
LPYT-4SD3W-56WOC	My Offer		03.07.2012	9819.00	

- Display of the amount at the offer, system and sub-system level
- Icons to distinguish the different main statuses of an offer
- Icons to distinguish the different statuses of a system or a sub-system
- Icons to distinguish the different secondary statuses of an offer, system or sub-system (for statistics purpose)
- Icons to distinguish the different types of items within a material list

28. HEADER

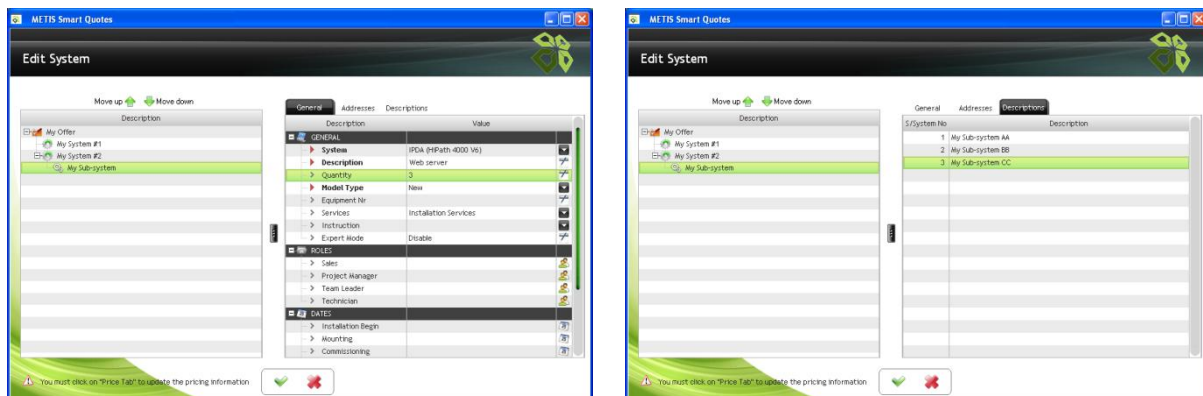
Access to the properties of a project, offer, system or subsystem at any time, from Smart Quotes' header.



- Display of the currently opened project and offer
- Display of the offer status
- Display of the currently selected system or sub-system
- Opening of the window with the properties of the project, offer, system or sub-system

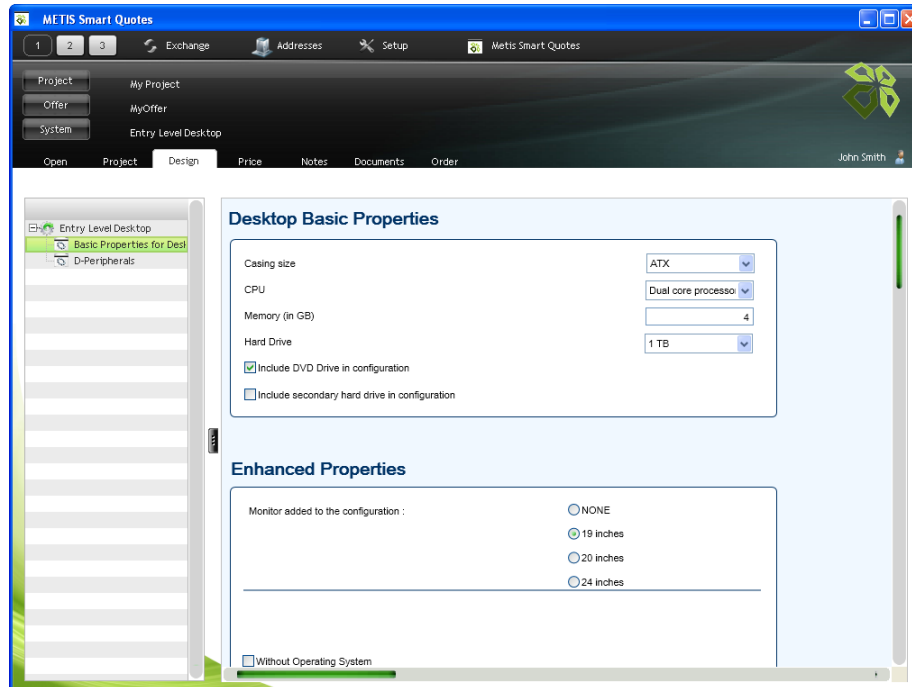
29. MULTIPLE INSTANCES OF A SUB-SYSTEM

To configure only once a sub-system and indicate the required quantity of that sub-system:



30. CONFIGURATION MASKS

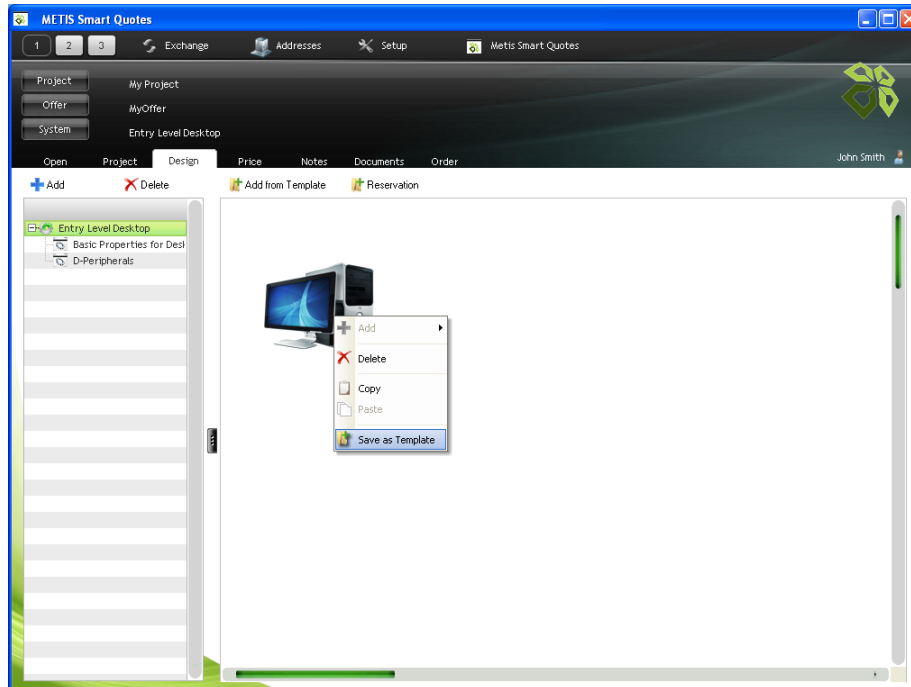
To configure graphically the properties of a system / sub-system via configuration masks.



- Usage of the pieces of the information entered in the masks to generate the material list
- Usage of the pieces of the information entered in the masks to generate service items
- Display of additional information and files to help the user in entering the values in the configuration masks

31. SYSTEM / SUB-SYSTEM TEMPLATE

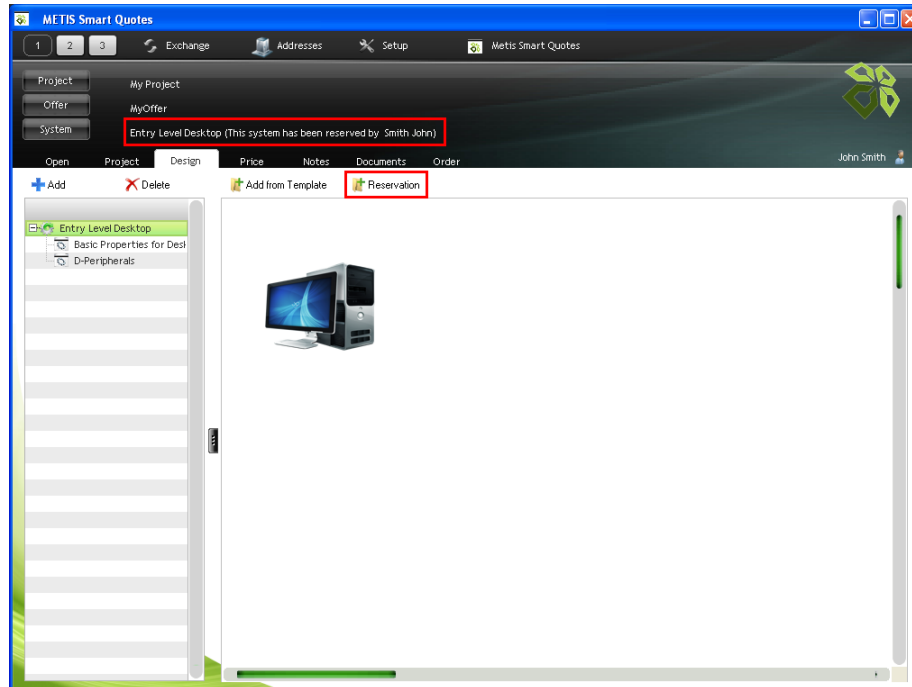
To create or use templates of a system or of a sub-system.



- Saving as a template of all the values entered in a system / sub-system's configuration mask(s)
- Usage of a pre-saved system / sub-system's template to save time during the configuration phase

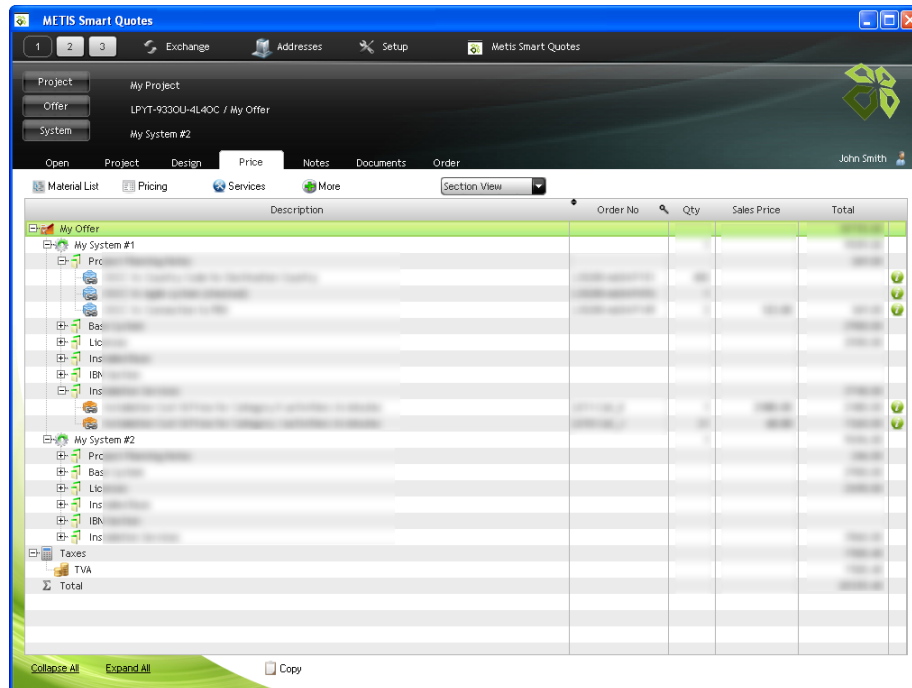
32. SYSTEM RESERVATION

To mark a system or a sub-system as reserved by a certain user.



33. AUTOMATIC GENERATION OF THE MATERIAL LIST & PRICES CALCULATION

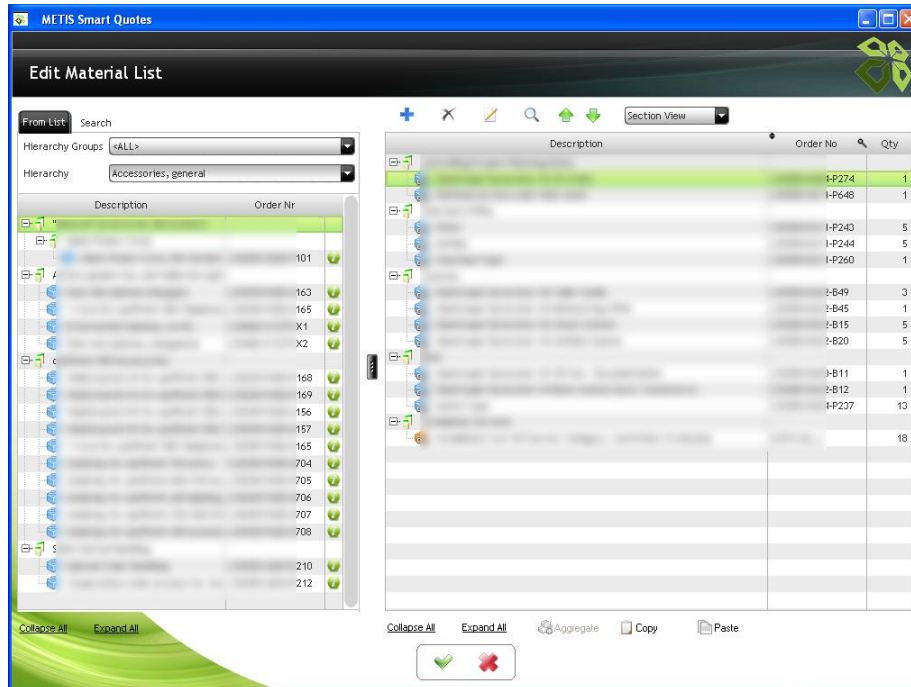
Upon clicking on the Price, Documents or Order menu, automatic generation of the material list and automatic calculation of the prices.



- Check of the configuration (i.e. the data inputted into the configuration masks) and blocking of the access to the Price, Documents or Order menu in case of errors in the configuration
- Generation of the material list from the data inputted into the configuration masks (i.e. execution of the material model, the service model(s) and tax model(s))
- Automatic selection of the best system from the data inputted into the configuration masks
- Calculation of the prices based upon the offer price category
- Calculation of the prices based upon the total amount or the quantity of an item
- Calculation of the prices based upon the sales price of an item
- Calculation of the prices based upon the end customer (i.e. prices per customers)
- Icons to distinguish the different types of items within a material list

34. EDITION OF THE MATERIAL LIST

To perform some changes to the material list.



- Addition of item(s) from the product portfolio (also named “from the list”)
- Searching of item(s) from the product portfolio
- Edition of the product properties
- Searching of item(s) from the material list
- Sorting of the item(s) of the material list
- Creation of manual sections (as opposed to a section from product portfolio)
- Replacing of item(s) from the material list with item(s) from the product portfolio
- Edition of the material list generated by the modeling (mode named as the “Expert mode”)

35. ADDITION OF MANUAL ITEM

To manually create an item (as opposed to an item from product portfolio) and to add it to the material list.

The screenshot shows the 'Add Item' dialog box in the METIS Smart Quotes application. The dialog has three tabs: 'Text and Details', 'Attributes', and 'Long Description'. The 'Text and Details' tab is selected, showing a table for language descriptions and a table for item properties.

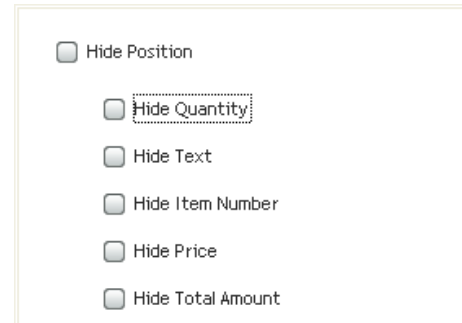
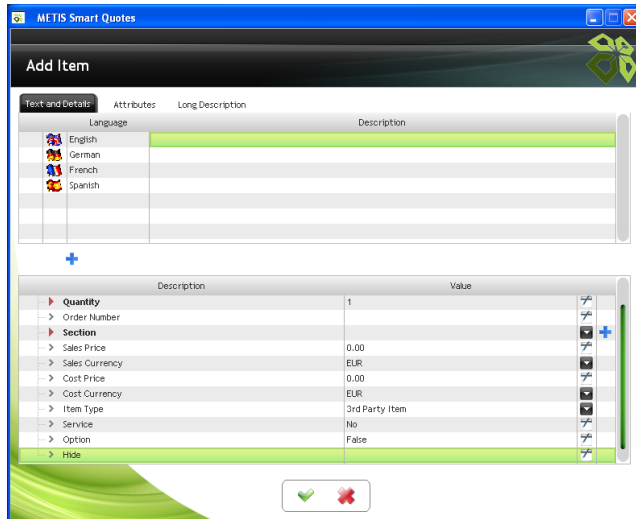
Language	Description
English	
German	
French	
Spanish	

Description	Value	
GENERAL		
Quantity	1	
Order Number		
Section	Installation	
Sales Price	0.00	
Sales Currency	EUR	
Cost Price	0.00	
Cost Currency	EUR	
Item Type	3rd Party Item	
Service	No	
Option	False	

- Creation of material or service items
- Creation of text items
- Saving of an item properties as a template
- Using of template items

36. ITEM PROPERTIES (HIDE & OPTION)

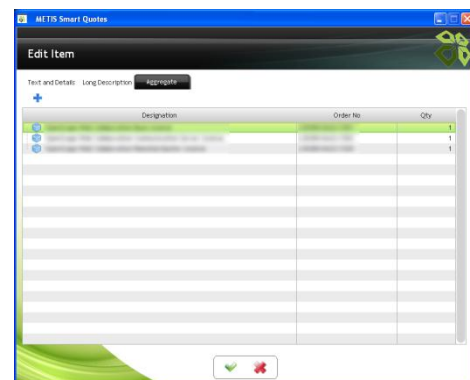
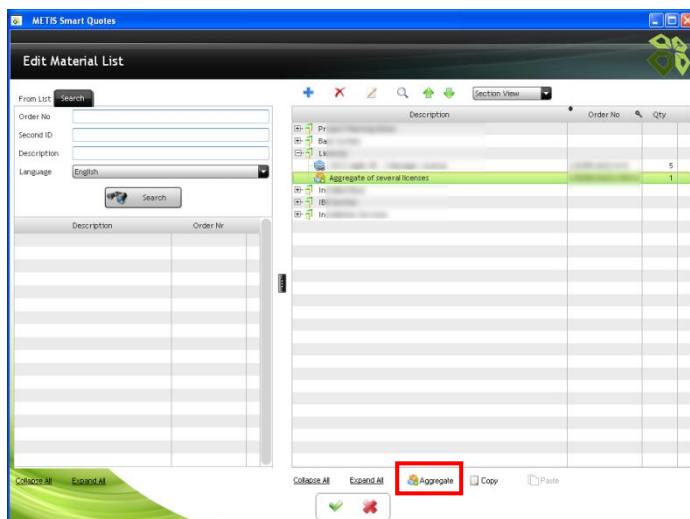
To hide some or all of the properties of an item and to discard an item from the price calculation.



- To hide the whole item
- To hide partial data of the item (i.e. its quantity, description, price etc.)
- To set an item as optional to discard it in the price calculation process

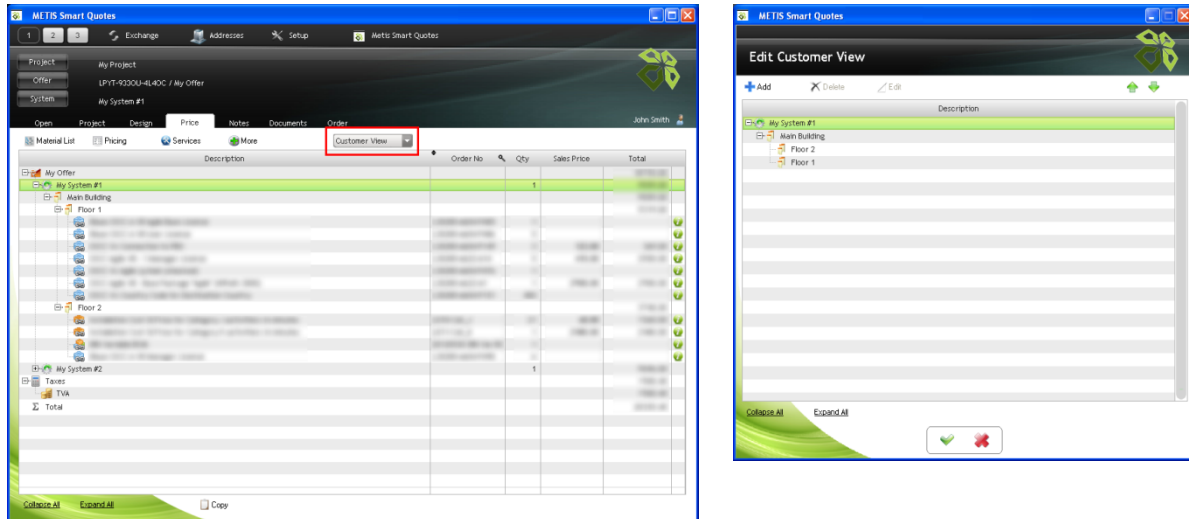
37. AGGREGATE ITEMS

To create compound items (i.e. an aggregate of several items present in the material list).



38. CUSTOMER VIEW

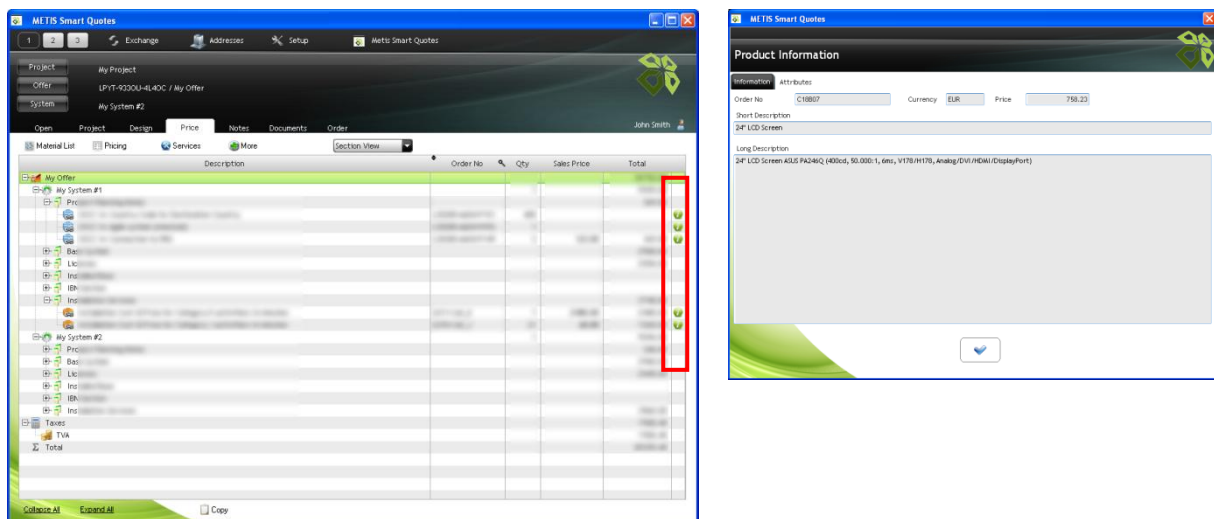
To arrange the items from the material list in a customized hierarchical structure.



- Switching from the “Section View” to the “Customer View” at any time
- Definition of a large number of levels and sub-levels for the “Customer View” structure
- Definition and re-use of “Customer View” templates

39. PRODUCT INFORMATION

To see the properties of a product.



40. EDITION OF THE PRICES

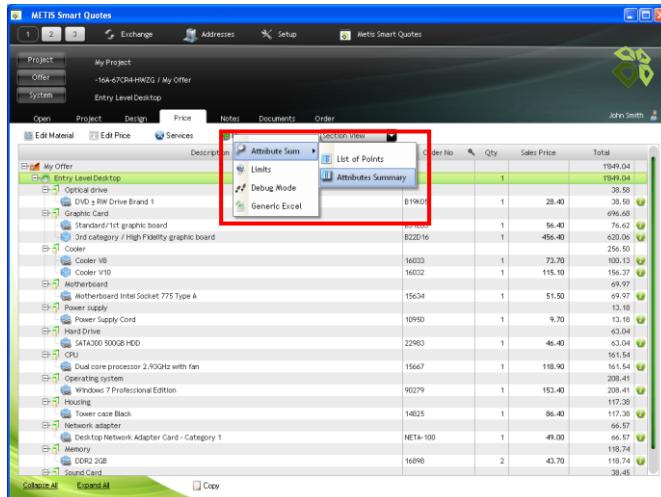
To perform some changes to the automatically calculated prices.

Admin	User	Lock	Description	Order No	Qty	Cost Price	Sales Price	Discount [%]	Discount Level [%]	Discount Item [%]	Total	Margin	Markup
			My Offer			36268.00					54980.00	51.59	34.03
			Sub Total MAT			34518.00					48942.00	41.38	29.27
			Sub Total SRV			1850.00					6038.00	265.94	72.67
			My System #1		1	36268.00					45284.00	24.86	19.91
			Sub Total MAT			34518.00					43106.00	24.52	19.69
			Sub Total SRV			1850.00					2178.00	32.00	24.24
			Main Building			36268.00					45284.00	24.86	19.91
			Sub Total MAT			34518.00					43106.00	24.52	19.69
			Sub Total SRV			1850.00					2178.00	32.00	24.24
			Floor 1			33280.00					41600.00	25.00	20.00
			Sub Total			33280.00					41600.00	25.00	20.00
					400	80.00	100.00				40000.00	25.00	20.00
					1	80.00	100.00				100.00	25.00	20.00
					1	80.00	100.00				100.00	25.00	20.00
					5	80.00	100.00				500.00	25.00	20.00
					3	80.00	100.00				300.00	25.00	20.00
					5	80.00	100.00				500.00	25.00	20.00
					1	80.00	100.00				100.00	25.00	20.00
			Floor 2			2988.00					3684.00	23.29	18.89
			Sub Total			1338.00					1506.00	12.56	11.16
			Sub Total			1850.00					2178.00	32.00	24.24
					6	75.00	99.00				594.00	32.00	24.24
					1	75.00	99.00				99.00	32.00	24.24
					1	75.00	99.00				99.00	32.00	24.24
					21	75.00	99.00				2079.00	32.00	24.24
					1	813.00	813.00				813.00		
			My System #2		1						9696.00	100.00	
			Sub Total MAT								5936.00		

- Highlight of the editable cells (green background)
- Changing of the prices at various levels (item, section, system, etc.)
- Highlight of the changed prices (blue font)
- Application of a price factor
- Locking of the prices at various levels (item, section, system, etc.)
- Reset of the prices back to their original values
- Application of discount(s) at the offer and system levels
- Application of the price change to all occurrences of a product

41. ATTRIBUTE SUM

To display the attributes values or an aggregate of some attribute values.

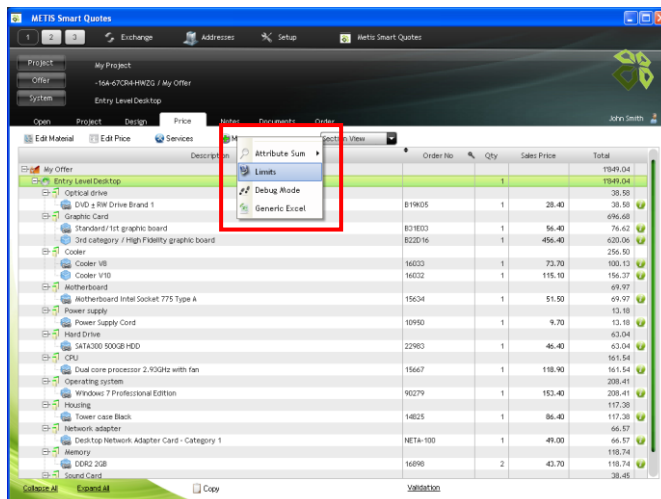


The screenshot shows the 'Attribute Sum' window. It displays a table with columns: Description, Order No., Qty, Electrical consumption, Installation Time, Length, and Weight. The table lists various components and their associated values.

Description	Order No.	Qty	Electrical consumption	Installation Time	Length	Weight
Entry Level Desktop		1				
Optical drive	B19K04	1	0.300		0.250	
DVD ±RW Drive Brand 1						
Graphic Card	B31003	1	0.300	0.100	0.100	
Standard 1st graphic board						
3rd category / High Fidelity graphic board						
Cooler						
Cooler V8	16035	1	0.300	0.400	0.400	
Cooler V10	16032	1	0.300	0.400	0.400	
Motherboard						
Motherboard Intel Socket 775 Type A	15034	1	0.300	0.300	0.300	
Power supply						
Power Supply Cord	10990	1	0.010	200.000	0.100	
Hard Drive						
SATA300 500GB HDD	22983	1	0.200	0.200	0.200	
Operating system						
Dual core processor 2.93GHz with fan	15667	1	0.100	0.100	0.100	
Windows 7 Professional Edition	90279	1	1.000	0.200	0.200	
Routing						
Tower case Black	14025	1	450.000	4.000		
Network adapter						
Desktop Network Adapter Card - Category 1	NETA-100	1	0.100	0.100	0.100	
Memory						
DDR2 2GB	16098	2	0.100	0.100	0.100	
Sound Card						
Standard Sound Card	35207	1	0.100	0.100	0.100	

42. LIMITS

To see the list of limitations defined per system that prevents the running of the automatic calculation (i.e. errors detected within the configuration masks).

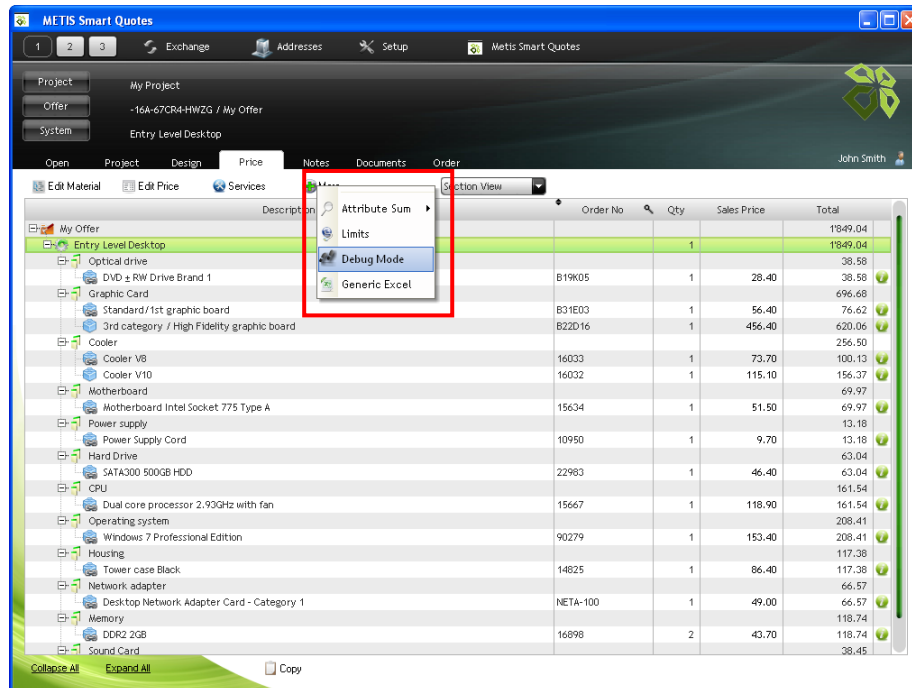


The screenshot shows the 'Limits' window. It displays a table with columns: Description, Max, Desire, and Remaining. The table lists various system limitations and their current status.

Description	Max	Desire	Remaining
Entry Level Desktop			
Optical drive			
DVD ±RW Drive Brand 1			
Graphic Card			
Standard 1st graphic board			
3rd category / High Fidelity graphic board			
Cooler			
Cooler V8			
Cooler V10			
Motherboard			
Motherboard Intel Socket 775 Type A			
Power supply			
Power Supply Cord			
Hard Drive			
SATA300 500GB HDD			
Operating system			
Dual core processor 2.93GHz with fan			
Windows 7 Professional Edition			
Routing			
Tower case Black			
Network adapter			
Desktop Network Adapter Card - Category 1			
Memory			
DDR2 2GB			
Sound Card			
Standard Sound Card			

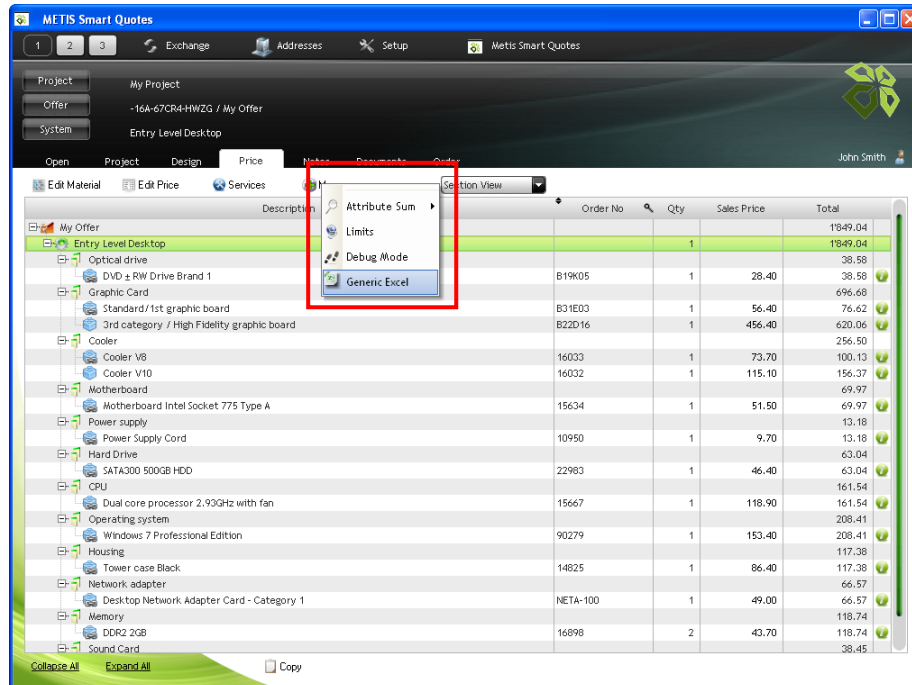
43. DEBUG MODE

To generate a debug file with the modeling data (that can only be read and analyzed by a Smart Modeling user).



44. GENERIC EXCEL

To generate an Excel file with some pieces of information about current the offer.



Data in the Generic Excel file includes:

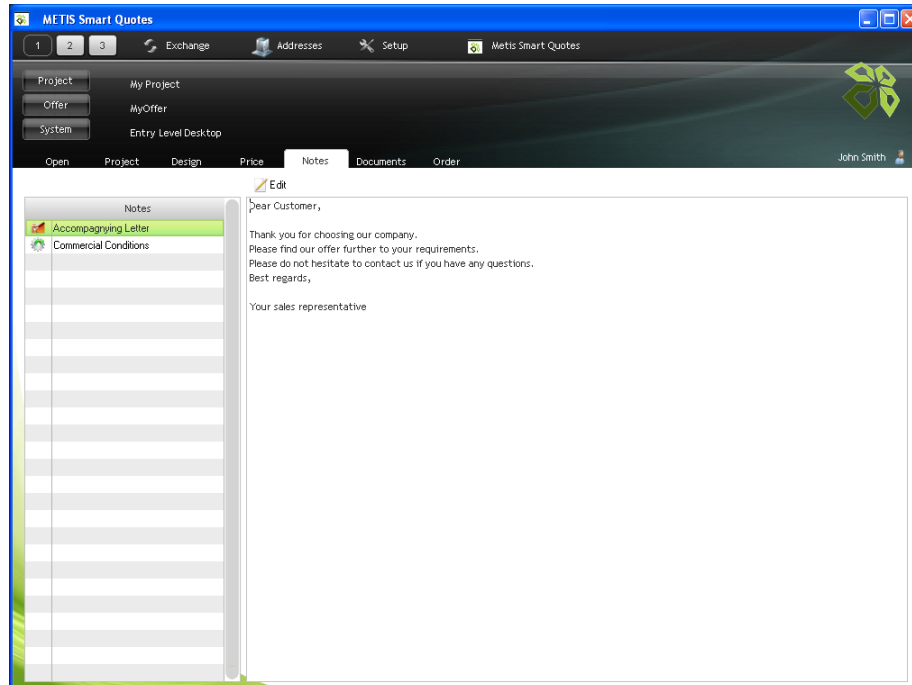
- Pricing information for the offer price category and of up to 4 additional price categories
- General pieces of information about the offer
- General pieces of information about the system(s)
- Material list and its structures (i.e. per section view and per customer view)

45. SYSTEM VALIDATION

For the systems for which a mandatory control must be performed, to force the validation of the configuration of a system by a supervisor or by an external program before the placement of the order.

46. NOTES

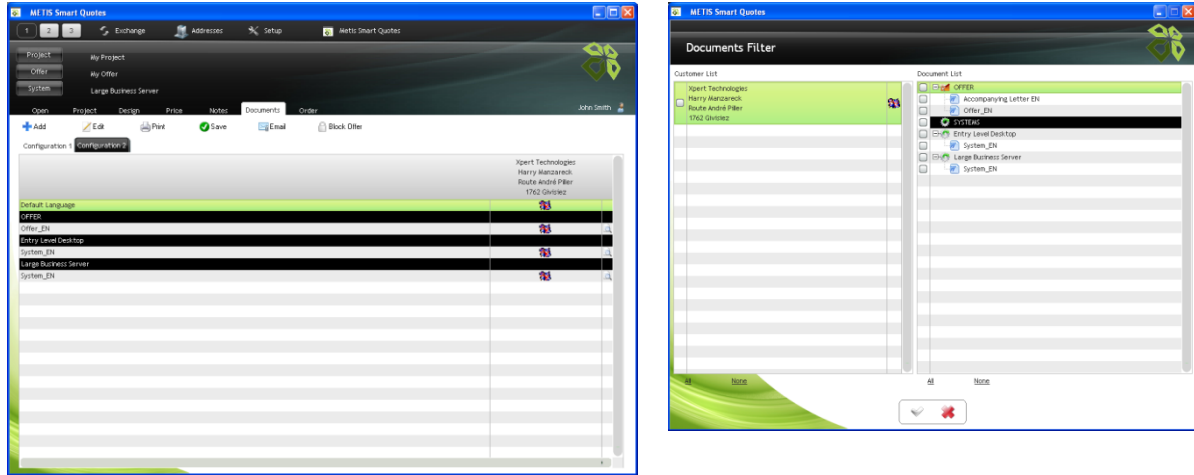
To type-in a text or notes related to the offer or a system / sub-system.



- Definition of a different text for all available languages
- Standard text formatting options
- Import of an RTF file

47. DOCUMENT GENERATION

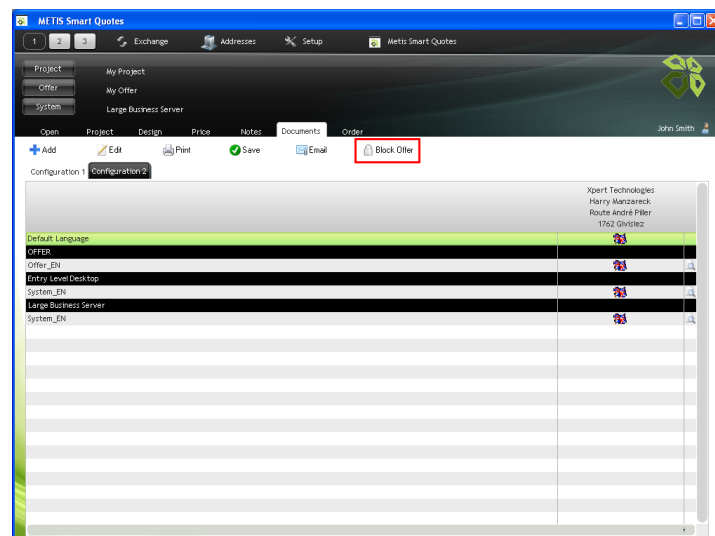
To process documents related to an offer or a system / sub-system.



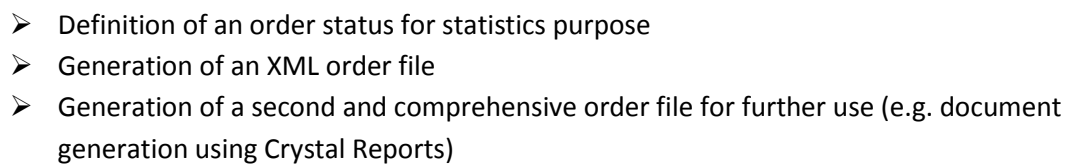
- Definition of up to 3 different document configurations
- Support of various types of formats (Word, Acrobat, Crystal Reports, etc.)
- Handling of multi-lingual document(s)
- Preview of document(s)
- Printing of document(s)
- Saving of document(s)
- Sending of the document(s) by e-mail

48. LOCKING OF OFFER

To prevent an offer from being edited (generally after the offer has been sent to an end customer).



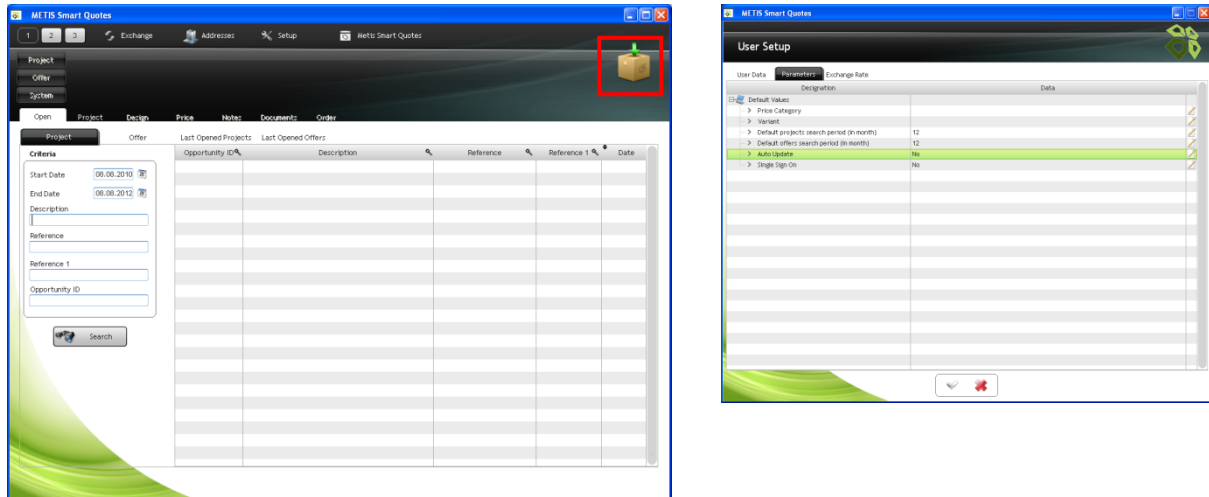
To complete the sales process by ordering an approved offer.



In offline connected mode only, to synchronize offers stored locally with a central database.

51. SYNCHRONIZATION OF DATA & UPDATE OF THE OFFLINE INSTALLATION

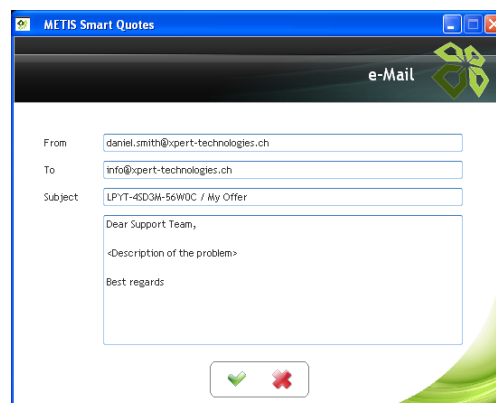
In offline or offline connected mode, to update an offline installation:



- Update process managed via a Web Service
- Update of the set of data of the offline installation (i.e. retrieval of data from the user's version and from the parent version(s))
- Update of the release of the offline installation
- Manual or automatic launching of the update process

52. SEND TO SUPPORT

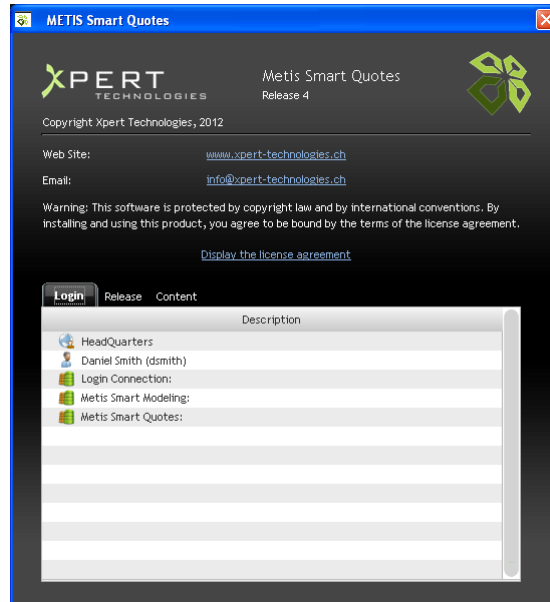
To send support requests by e-mail to a pre-defined recipient.



- Selection between two layouts for the e-mail window (i.e. SMTP or IMAP protocol)
- Automatic generation and attachment of up to 3 files (a file with data about the version, the offer in ".MXF" format and a debug file with modeling data)

53. ABOUT METIS SMART QUOTES

To see details about the release and the user's version.



- Access to the Software License agreement
- Details about the logged-in user and database(s) to which the user is connected
- Details about the installation (release date, version of the components, etc.)
- Details about the contents granted to the Smart Quotes user by the administrator

54. FURTHER CUSTOMIZATIONS UPON REQUEST

Xpert Technologies values the feedback of our customers.

New or additional functionalities can be integrated in METIS according to customer's needs on project basis by the Xpert Technologies development group.