XPERT TECHNOLOGIES

RELEASE 4 - METIS SMART SUITE





List of Features | Version 1.0



TABLE OF CONTENTS

1.	I	ntrod	uction	. 5
2.	A	Archite	ecture	. 6
2	.1	Ope	rating modes	. 6
	2.1	.1	METIS Smart Modeling	. 6
	2.1	.2	METIS Smart Quotes	. 7
	2.1	.3	METIS Smart Monitoring	. 8
2	.2	Vers	sion concept	. 9
3.	Ν	VIETIS	Smart Suite Common Features	10
3	.1	Lice	nse management	10
3	.2	Logi	n	11
3	.3	Lan	guage	11
3	.4	Add	resses	12
3	.5	Syne	chronization	12
	3.5	.1	Synchronization of offers (Smart Quotes)	12
	3.5	.2	Automatic synchronization of offers (Smart Monitoring)	12
	3.5	.3	Synchronization of data (Smart Monitoring)	12
3	.6	Abo	ut METIS	13
4.	Ν	METIS	Smart Modeling Features	14
5.	Ν	METIS	Smart Quotes Features	15
5	.1	Setu	ıp	15
	5.1	.1	User personal data	15
	5.1	.2	User preferences	16
	5.1	.3	Exchange rates	16
5	.2	Gra	ohical User Interface	17
	5.2	.1	Status and other pieces of information at a glance	17
	5.2	.2	Header	18
5	.3	Proj	ect & Offer Definition	19
	5.3	.1	Offer creation & structure	19
	5.3	.2	Opening up of a project / offer	20
	5.3	.3	Multiple offers	20
	5.3	.4	Automatic locking of open offer	21



Į	5.3.5	Deletion of project / offer / system	. 22
ļ	5.3.6	Variant offer	. 22
ļ	5.3.7	Locking of offer	. 23
ļ	5.3.8	Address assignment	. 23
ļ	5.3.9	Offer commercial conditions	. 24
ļ	5.3.10	Offer history	. 24
5.4	Syst	em Configuration & Validation	. 25
ļ	5.4.1	Configuration masks	. 25
ļ	5.4.2	System / sub-system template	. 26
ļ	5.4.3	Multiple instances of a sub-system	. 26
ļ	5.4.4	Copy / paste	. 27
ļ	5.4.5	System reservation	. 27
ļ	5.4.6	System validation	. 27
Į	5.4.7	Limits	. 28
5.5	6 Pric	ing	. 29
Į	5.5.1	Automatic generation of the material list & prices calculation	. 29
ļ	5.5.2	Edition of the prices	. 30
5.6	6 Part	s List	. 31
ļ	5.6.1	Edition of the material list	. 31
Į	5.6.2	Addition of manual item	. 32
Į	5.6.3	Item properties (hide & option)	. 33
Į	5.6.4	Product information	. 33
Į	5.6.5	Aggregate items	. 34
Į	5.6.6	Customer view	. 34
Į	5.6.7	Attribute sum	. 35
5.7	Doc	uments & Notes	. 36
Į	5.7.1	Document generation	. 36
Į	5.7.2	Generic Excel	. 37
Į	5.7.3	Notes	. 38
5.8	8 Plac	ement of an order	. 39
5.9) Imp	ort / Export	. 40
ļ	5.9.1	Export to Excel	. 40
Į	5.9.2	Import / export of offer	. 40



	5.10	Inte	erface with Salesforce (clients & contacts)41	L
	5.11	Tro	publeshooting	2
	5.2	11.1	Debug mode	2
	5.2	11.2	Send to support	2
	5.12	Ne	ws	3
	5.13	Syr	nchronization of data & Update of the offline installation	ł
6.		METIS	S Smart Monitoring Features	5
	6.1	List	t of embedded reports	5
	6.2	Ou	tput formats	5
	6.3	List	t of saved reports	5
	6.4	Rep	port parameters & filters 46	5
	6.5	Das	shboard	7
	6.6	Das	shboard template	7
	6.7	Clu	ıster	3
	6.8	E-n	nailing of reports	3
	6.9	Sch	neduler	3
7.		Furth	er customizations upon request)



1. INTRODUCTION

METIS Smart Suite consists of the following modules:



- METIS Smart Modeling which is the administration tool
- METIS Smart Quotes which is the configurator and the offers creation tool
- METIS Smart Monitoring which is the reporting tool

METIS Smart Quotes is intended to the sales representatives. It makes the quotes creation process fast, easy and intuitive.

METIS Smart Monitoring is mainly intended for managers such as sales, product or marketing managers.

The contents and features made available in METIS Smart Quotes and METIS Smart Monitoring is managed by administrators using METIS Smart Modeling.

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

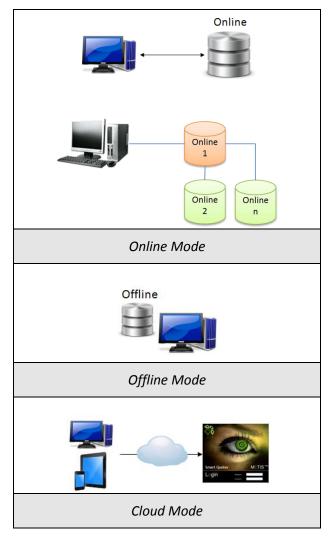


2. ARCHITECTURE

2.1 Operating modes

2.1.1 METIS Smart Modeling

METIS Smart Modeling works in the following modes:

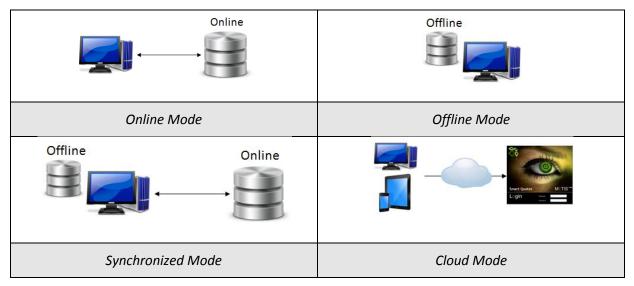


- Online: Smart Modeling is always connected to a central database. The administrator can work in another database if desired.
- > Offline: Smart Modeling is connected to a local database only.
- Cloud: Smart Modeling is accessible via the web. The environment is managed by Xpert Technologies.



2.1.2 METIS Smart Quotes

METIS Smart Quotes works in the following modes:



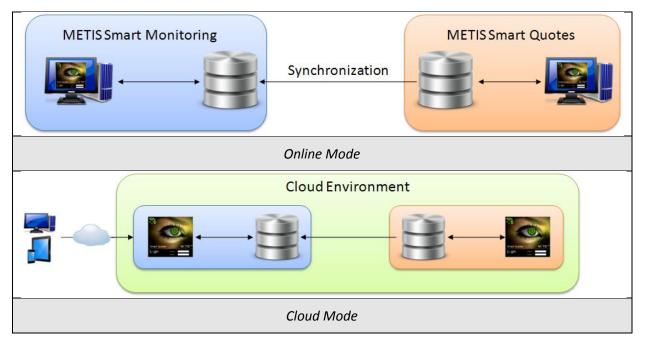
- > Online: Smart Quotes is always connected to a central database.
- > Offline: Smart Quotes is connected to a local database only.
- Synchronized: A mix of the online and offline modes. Offers are saved locally but they can be synchronized with a central database.
- Cloud: Smart Quotes is accessible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



2.1.3 METIS Smart Monitoring

METIS Smart Monitoring is a Web application.

METIS Smart Monitoring can work as shown in the following diagrams:

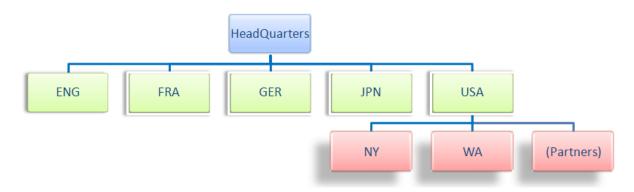


- Online: Offers made with Smart Quotes by the sales representatives are stored on a central database. Each time a Smart Monitoring user launches the execution of a report, offers are automatically synchronized from the Smart Quotes database to the Smart Monitoring database to always have up-to-date data.
- Cloud: The operating mode is identical to the online mode except that the Cloud environment is managed by Xpert Technologies. Smart Monitoring is accessible via the web.



2.2 Version concept

Versions can be compared the various sales divisions or the different markets of a company. Each user of Smart Modeling, Smart Quotes or Smart Monitoring 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.



3. METIS SMART SUITE COMMON FEATURES

3.1 License management

To see the number of licenses currently activated for Smart Modeling, Smart Quotes and/or Smart Monitoring, to whom, or when the user launched the application for the last time.

	irt Modeling									
Setup	💪 Data	👔 Close	session	🔮 Metis S	mart Modeling					
										Ę
Versions	Users	Positions Atte	ibutes Hie	rarchies Pr	ices Systems	Documents Hodeling	Data Management	Profiles		2
() Versions	O Access	San Languages	Update	Licenses						
🕽 Transfer	Free									
		License			Free / Total	User		User Code	Last Used Date	
Hong Demo H										
😽 Smar	t Quotes									
😽 Smar	t Modeling									



3.2 Login

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



- User access to one, two or the three applications of the METIS suite (i.e. Smart Modeling, Smart Quotes and/or Smart Monitoring)
- 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.)
- Single sign-on (i.e. to automatically launch the application without having to enter a login and a password)

3.3 Language

To select a preferred language for using METIS Smart Modeling, Smart Quotes & Smart Monitoring.



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



3.4 Addresses

To manage the clients and contact persons portfolio in METIS Smart Quotes & Smart Modeling.

METTS Smart Quotes		METTS Smart Quotes	
	Addresses and Contacts		Contact 💸
Company ID + Add X Delete Z Edit	🖹 Preview 🔍 Duplicate 🛸 Replace 😽 Import From SalesForce	Address Contact ID	
Address Contact		Designation	Data
Company		Company	
		Last Name	Z
		> First Name	
Zip Code		> Active	2
		Language	
City		Country	Ζ
		> State	2
		Zip Code	
Source		City	
 (Ab) 		> Street	4
		> Street No > Email	
Search Search		> Email	4
		> Frax	
		> Department	4
		> Acbie	
		7 10015	Z
(•		* *

- 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

3.5 Synchronization

3.5.1 Synchronization of offers (Smart Quotes)

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

3.5.2 Automatic synchronization of offers (Smart Monitoring)

Each time a report is generated in METIS Smart Monitoring, then, beforehand, the offers made by the Smart Quotes user are automatically synchronized to the Smart Monitoring database. This task is performed as a background process.

3.5.3 Synchronization of data (Smart Monitoring)

The set of data of the Smart Monitoring users is automatically updated and synchronized with the settings defined by the administrator. This task is performed as a background process.

However, if a piece of information has been deleted from the actual Smart Quotes database and that it is still in use in the offers present in the Smart Monitoring database (e.g. a sales person, a system, a product etc.), this piece of information is not deleted from the Smart Monitoring database (e.g. for use in sales history reports).



3.6 About METIS

MEISSmart Quotes

Image: Construction

Actis Smart Quotes

Copyright Xpert Technologies, 2012

Copyright Xpert Technologies, 2012

Image: Copyright Xpert Technologies, 2013

Web Site:

Image: Copyright Xpert Technologies, 2017

Image: Copyright Xpert Technologies, 2017

Web Site:

Image: Copyright Xpert Technologies, 2017

Image: Copyright Xpert Technologies, 2017

Web Site:

Image: Copyright Xpert Technologies, 2017

Image: Copyright Xpert Technologies, 2017

Operating:

Image: Copyright Xpert Technologies, 2017

Operating:

Image: Copyright Xpert Technologies, 2017

Operating:

Image: Copyright Xpert Technologies, 2017
Image: Copyright Xpert Technologies, 2018
Image: Copyright Xpert

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 user (e.g. Smart Quotes user) by the administrator



4. METIS SMART MODELING FEATURES

METIS Smart Modeling is the feature and content management module.

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 Modeling, Smart Quotes or Smart Monitoring users are managed by an administrator with METIS Smart Modeling.

💓 ME	TIS Smar	t Modeli	ng											
🗙 Setu	up	💪 Dat	a 🧕	Close session	👷 Meti	is Smart Model	ing							
Vers	ions	Users	Positions	Attributes H	ierarchies	Prices	Systems D	ocuments	Modeling Data	Management	Profiles			
		Hierarchies		Price Categories	Systems	Service Models		Variants	Profile Groups					
			METIS	Smart Modelin	,								ſ	
Prof	'ile Name				5									
							_				Fea	ture Pro	file 💛	
	93	Search												\mathbf{V}
			Due file Marrie	Constant	0									
			Profile Name		Quotes Profile I	reature								
			Rights	Languages SQL	Access					Values				
			⇒r⊃ Sr	nart Quotes Righ		103				values	,		-	- 1
				Server Offline (
				Update Login										
				Default Passv	ord				xpert					
				🜏 Mandatory Pa		э			No					
			=	Password Cc					Ophiopal					
				-	Upper Case Let Lower Case Let				Optional Optional					_
					Mandatory Nur				Optional					
				-	Mandatory Nun Mandatory Spe		r		Optional					
				- Ainimum L					8					
				- 🕢 Warning F	-				10					
				Validity Pe					30					
			😐 🧰	Opening										
				Project										
				Offer										
				System										
				Price										
				Order Documents										
				Models										
			Collapse 4		All									
													and the second second	
									2					

To summarize, using METIS Smart Modeling, an administrator can manage the following main features:

- The user and version profiles,
- > The models,
- The systems / sub-systems,
- > The product portfolio,
- > The prices,
- > The documents,
- > The client portfolio,
- ► Etc.



5. METIS SMART QUOTES FEATURES

5.1 Setup

5.1.1 User personal data

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

METIS Smart Quotes		
User Setup		V
User Data Parameters	Exchange Rate	
Designation	Data	
🗖 📙 Main		
Employee Code	dsmith	
- 🕨 Last Name	Smith	2
 First Name 	Daniel	
> Language	English	2
Password	*	
 Customized Field 		
🗖 🕌 Company		
 Company 1 	Xpert Technologies	
— > Company 2		<u> </u>
> Department	T	<u> </u>
🗖 🕌 Contact		
🕨 Email	daniel.smith@xpert-technologies.ch	<u> </u>
Fax	+41264222780	
> Mobile	+41789999999	
> Tel	+41264222770	
🖬 📙 Address		
Address	Route André Piller 33a	
> Building	Tour Nord	
> Zip Code	1762	
└-> City	Givisiez	

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



5.1.2 User preferences

User Setup		
User Data Parameters Exchange Rate		
Designation	Data	
E default Values		
Price Category		/
> Variant		/
 Default projects search period (in month) 	12	-
 Default offers search period (in month) 	24	
Single Sign On	Yes	2
⊞- 🧶 Sales Force		

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

- > 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)

5.1.3 Exchange rates

To define, in METIS Smart Quotes, exchange rate values different from those defined by the administrator.

Us	er Seti	qu				
Jser	r Data	Parameters	Exchange Rate			×.
			CAD	EUR	GBP	USD
	CAD	-		0.782772	0.628195	0.984872
	EUR	-	1.277510	1.000000	0.802510	1.258350
	GBP		1.591860	1.240690		1.568258
	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



5.2 Graphical User Interface

5.2.1 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, in METIS Smart Quotes.

METIS Smart Q	uotes							
2 3	💪 Exchange	addresses 🎩	🗙 Setup	📆 Metis Smart Quotes				. .
roject	My Project							26
Offer 🚽 💙	LPYT-8NOKS-496NS /	My Offer 2						\bigtriangledown
lystem	My System							
Open Proj	ect Design	Price Notes	Documents	Order				
Add 💙	🔨 Delete 🛛 🗎 Pi	review 💿 Duplic	ate 🗋 Paste	🏸 History				
Offer No			Description		Quantity	Date	Amount	Status
	E 🔡 My Project					03.07.2012		
T-803BQ-CV1W0						05.07.2012	9'819.00	- 65
T ONOVE 40 (NE	My S				1	05.07.2012	9'819.00 9'819.00	*
T-8NOKS-496NS T-4SD3M-56W0C						03.07.2012	9819.00	
1 45050M 50470C	E g my one	,1				03.07.2012	7017.00	

- > 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



5.2.2 Header

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

METIS Smart Quot		_						
1 2 3	💪 Exchange 🧾	Addresses	🔧 Setup	👿 Metis Smart Quo	ites			. .
Project My	y Project							25
Offer ؇ LP	YT-8NOKS-496NS / My Offer							
System Mx	y System							
Open Project		Notes	Documents	Order				
		Notes		Order 第History				
					Quantity	Date	Amount	Status
Add 🗙 D			Paste		Quantity	Date 03.07.2012	Amount	Status
Add XD	relete 🗋 Preview		Paste		Quantity		Amount 9/819.00	
Add XD	elete 🔍 Preview		Paste		Quantity	03.07.2012		
Add 🗙 D	elete Review		Paste		Quantity	03.07.2012 05.07.2012	9'819.00	*

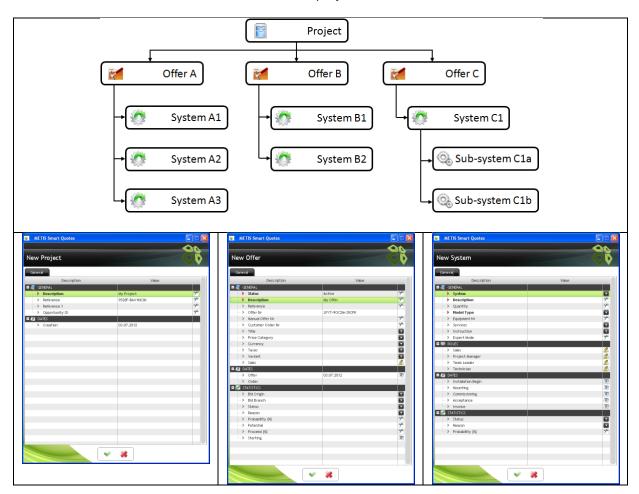
- > Display of the currently opened project and offer
- Display of the offer status
- > Display of the currently selected system or sub-system
- > Opening of the window with the properties of the project, offer, system or sub-system



5.3 Project & Offer Definition

5.3.1 Offer creation & structure

When creating an offer with METIS Smart Quotes, the only condition is that a project must be created first. Then, offers offer 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



5.3.2 Opening up of a project / offer

To search for a project or an offer to open up in METIS Smart Quotes.

2 3	💪 Exchange	🧸 Addresses	🛠 Setup	😽 Metis Smart Quotes					
Project		_							2
Offer									Ų
System									
Open Proje	ct Design	Price Notes	Documents (Order					
roject Offer Ad	ldress								
🛛 Last Read 🛛 🌘) Search	Offer No 🔍		Description	٩	Reference 🔍	 Date 	Amount	
Criteria									
Start Date	03.07.2010 🗃								
End Date	03.07.2012 🛞								
Offer System									
Description									
Reference									
Offer Number									
Manual Offer Numb	er								
Address									
Contact									
Se Se	arch								

- 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

5.3.3 Multiple offers

To open and work with multiple offers at the same time in METIS Smart Quotes.

METIS Smart Q	uotes				
1 2 3	💪 Exchange	🎩 Addresses	🗙 Setup	🧑 Metis Smart Quotes	
Project					
Offer					
System					



5.3.4 Automatic locking of open offer

To prevent simultaneous edition of the same offer in METIS Smart Quotes.

2	3 🦿	;Exchange 🏾 🍠	Addresses	🔧 Setup	👸 Metis Si	mart Quotes				
Project Offer System		roject -8L3RW-59JAW / My Offer th 4000 V6	в				_	-		9 8
Open			Notes		Order				Jo	hn Smith
Add Offer		ste 🗾 Edit	💽 Duplicate	Description	🟸 History	🙀 Close	Quantity	Date	Amount	Status
Otter		High My Project		Description			Quantity		Amount	status
YT-8L4FF-4		Here Wy Project						10.08.2012 10.08.2012	20'739.00	
YT-8L3RW-5		Hy Offer B						10.08.2012	20'739.00	
YT-8KWXZ-7		🕀 🛃 My Offer A						10.08.2012	20'739.00	

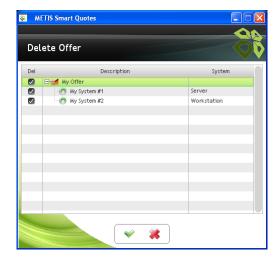
- > Offer in read-only mode for the other users
- Blocking of the opening of the same offer in the others panes (



5.3.5 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 subsystem(s)), in METIS Smart Quotes:

😽 M	ETIS Smart Quotes	
Del	ete Project	
Del	Description	Offer No
	EH My Project	
	🛛 🚰 My Offer	LPYT-9S0L7-2WYXO
	My Offer 2	LPYT-64T3L-6UJ00
	* *	



5.3.6 Variant offer

To create a copy of an offer (also named a "variant" offer) in METIS Smart Quotes.

- Assignment of the variant offer to the current project
- > Assignment of the variant offer to another project



5.3.7 Locking of offer

To prevent an offer from being edited (generally after the offer has been sent to an end customer), in METIS Smart Quotes.

METIS Smart Quotes						
1 2 3 5	Exchange 🦼	Addresses	⅔ Setup	👸 Metis Smart Quotes		
Project My Pro	iject					<u>90</u>
Offer My Of	er					
System Large	Business Server					
Open Project	Design Price	Notes	ocuments	Order		John Smith
🕂 Add 🛛 📈 Edit	🚔 Print	🕑 Save	Email 🔤	Block Offer		
Configuration 1 Configurat	ion 2					
					Xpert Tec	
					Harry Ma Route And	Iré Piller
					1762 G	
lefault Language					â	
)ffer_EN					a	<u>à</u>
ntry Level Desktop						
ystem_EN arga Business Server					3	<u>d</u>
ystem_EN					3	<u>à</u>

5.3.8 Address assignment

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

🍋 METIS Smart Quotes				
				00
Edit Project				
General Addresses		🕂 Add	XDelete	
	Addresses			
Consultant Address				
Spert Technologies SA				
		*		
	<u> </u>			

- 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



5.3.9 Offer commercial conditions

To define the commercial conditions for each offer in METIS Smart Quotes.

METIS Smart Quotes						
Move up 🛖 😽 Move down		General	Addresses	Conditions		
Description		0	escription		Value	
🖃 🚮 My Offer		🖬 🎝 Main				
🔅 Server			yment Terms			
- 💮 Workstation			- livery Time			
			livery and Handl	ing		
		> Of	fer Validity	-		
		🖬 👼 Signat	tures			
		> Sig	nature for Offei	, Pers		2
		> Siş	gnature for Offer	, Pers		ୟ ୟ ୟ ୟ
	1	> Se				\$
			gnature for Acco	mpagn		\$
		🖬 🔷 Other				
			voicing Terms			- E
			arranty			
			port Terms			
			yment Mode			
		📈 Custo	mized			
		o () ()	1			
	· · · · · · · · · · · · · · · · · · ·	/ 🚜				

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

5.3.10 Offer history

To see at a glance some actions performed within an offer in METIS Smart Quotes.

Dff	er Tracking	- My Offer			
	Action	Designation	User	Address	• Date
8	System added	SYSTEM_CREATED : My System #2			04.07.2012 09:28:33
•	System added	SYSTEM_CREATED :My System #1			04.07.2012 09:27:40
1	Offer creation	OFFER_CREATED	1 - 10 - 10 - 10 - 10 - 10 - 10 - 10 -		03.07.2012 16:42:42



5.4 System Configuration & Validation

5.4.1 Configuration masks

To configure graphically the properties of a system / sub-system via configuration masks in METIS Smart Quotes.

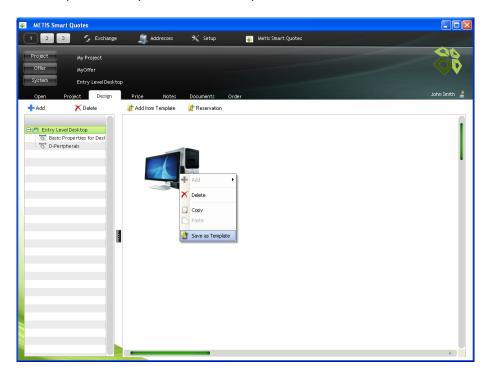
METIS Smart Quotes			
1 2 3 🗘 Exchange	🎊 Addresses 🛛 🕺 Setup	8 Metis Smart Quotes	
Project My Project		_	
ingonial			
			John Smith 🙎
Open Project Design	Price Notes Documents Order		John Shirth 🎽
🖃 🍈 Entry Level Desktop	Desktop Basic Properties		1
Basic Properties for Desi D-Peripherals	Casing size	ATX	
No. 6 Location	CPU CPU		
		Dual core processo	
	Memory (in GB)	4	
	Hard Drive	1 TB 👻	
	Include DVD Drive in configuration		
	Include secondary hard drive in configuration		
	<u></u>		
	Enhanced Properties		_
	Monitor added to the configuration :	ONONE	
		19 inches	
		20 inches	
		24 inches	
	Without Operating System		
			,

- > 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



5.4.2 System / sub-system template

To create or use templates of a system or of a sub-system in METIS Smart Quotes.



- 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

5.4.3 Multiple instances of a sub-system

To configure only once a sub-system and indicate the required quantity of that sub-system, in METIS Smart Quotes:

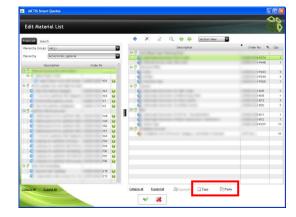
S METTS Smart Quotes	METIS Smirt Quotes	
Edit System	Edit System	88
Move up 🔶 😽 Move down	Conensi Addresses Descriptions Move up 🔶 🏺 Move down General Addresses Descriptions	
Decorption Poor My Offer → @ My System 71 → . My Sub-system → . My Sub-system	Concretion C	
\hat{D} . You must click on "Price Tab" to update the pricing informat	ston 💉 🗱	



5.4.4 Copy / paste

Copy and paste of different elements in METIS Smart Quotes.

1 2 3	🍫 Exchange 🖉	Addresses		Metis Smart		
Project	My Project	_				
Offer	LPYT-958L7-2WYXO / My Offe					
System	My System #1					
Open Proj						
				Order		
+Add ?	K Delete 🛛 🖉 Edit	Copy	Paste			
Offer No			Description		Quantity	Date
	🕀 🔯 My Project					03.07.2012
LP1/T-950L7-2W1/KO	🕀 📶 My Offer					03.07.2012
	💮 Wy System #	1			1	04.07.2012
	- 🖑 Wy System #	2 🖄 Export)	als		1	04.07.2012
		Copy C				



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

5.4.5 System reservation

To mark a system or a sub-system as reserved by a certain user, in METIS Smart Quotes.

🚳 METIS Smart	Quotes				
1 2 3	💪 Exchange	I Addresses	⅔ Setup	👸 Metis Smart Quotes	
Project Offer System	Wy Project WyOffer	p (This system has been res	awood by Smith Jaho)		
	oject Design	Price Notes		der	John Smith 🤰
+ Add	X Delete	Add from Template	the Reservation		
⊡ Entry Level □ Basic Pre □ 0-Periph	perties for Desl				

5.4.6 System validation

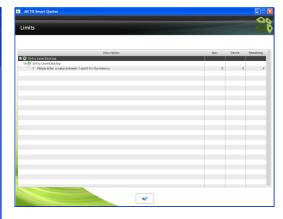
For the systems for which a mandatory control must be performed in METIS Smart Quotes, to force the validation of the configuration of a system by a supervisor or by an external program before the placement of the order.



5.4.7 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), in METIS Smart Quotes.

🗌 🙎 🕄 🗲 Exchange 🎵 Addresses 💥 Setup	8 Hetis Smart Quotes			
roject My Project				
Offer -16A-67CR4-HWZG / My Offer				
ystem Entry Level Desktop				
				John Smit
Open Project Design Price Notes Documents Order				3011138810
Edit Material 🔃 Edit Price 😪 Services 🐉 M 🛛 🔤 Secto	n View			
Description 🔎 Attribute Sum 🕨	Order No	Qty	Sales Price	Total
My Offer				1849.04
Entry Level Desktop		1		1849.04
E Optical drive // Debug Mode				38,58
Generic Eccel	B19805	1	28.40	38,58 📢
Graphic Card				696.68
- 🎧 Standard/1st graphic board	831603	1	56.40	76.62 🍕
Srd category / High Fidelity graphic board	B22D16	1	456.40	620.06
🕀 🖥 Cooler				256.50
- 🍪 Cooler VB	16033	1	73.70	100.13 🎈
- Cooler V10	16032	1	115.10	156.37 📢
E Motherboard				69.97
- 😪 Wotherboard Intel Socket 775 Type A	15634	1	51.50	69.97 📢
Power supply				13.18
- Se Power Supply Cord	10950	1	9.70	13.18 🎈
⊖ 7 Hard Drive				63.04
SATA300 500GB HDD	22983	1	46.40	63.04 📢
Er 🚽 CPU				161.54
Bual core processor 2.90GHz with fan	15667	1	118.90	161.54
Operating system System	90279	1	153.40	208.41
E E Housing	902/9	1	153.40	117.38
Croit Housing	14825	1	86.40	117.30
E T Network adapter	1402.5		00.40	66.57
Besktop Network Adapter Card - Category 1	NETA-100	1	49.00	66.57
E-5 Memory	NETA-100		47.00	118,74
- CDP2 2G8	16898	2	43.70	118.74
E-1 Sound Card	10070		42110	38,45
lapse Al Expand Al	Validation			





5.5 Pricing

5.5.1 Automatic generation of the material list & prices calculation

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

METIS Smart	Quotes								
1 2 3	💪 Exchan	e• 🎩	Addresses 🕺	Setup 🧕	🐻 Metis Smart Quot	es			
Project	My Project								22
Offer	LPYT-9330U-4L	.40C / My Offer							\mathbf{V}
System	My System #2		_						
Open P	roject Design	Price	Notes Doc	uments Order					John Smith 🛔
题 Material List	Pricing	🐼 Services	🌐 More	Section					
mod u au		D	escription			Order No	Qty	Sales Price	Total
Hy Offer	:m #1							-	
Et 🗍 Pro									
		- 10							0
⊞- <mark>-</mark> 1 Bas ⊞- <mark>-</mark> 1 Lic									
🕀 🗍 Ins	and the second se								_
E≻ 🚽 IBN ⊡≻ 🚽 Ins									-
- 😪 🛛								100.0	0
— 🧟 ⊡- 🧑 My Syste	em #2								•
🕀 ᆌ Pro	e : Theory defer								100.00
⊕-¶ Bas ⊕-¶ Lic								-	
⊞- <mark>-</mark>] Ins ⊞- <mark>-</mark>] IBN	B 10-0								
									100.0
Taxes									
- 🔐 TVA Σ Total									
Collapse All E	xpand All		Сору						

- 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)
- Calculation of the prices based upon the product segment
- Icons to distinguish the different types of items within a material list



5.5.2 Edition of the prices

Pric	e Ec	litor										Ø
强 Re	eset Pri		Discount						Factor			
Admin Lock		 Description 	Order No 🔍	Qty	Cost Price	Sales Price	Discount [%]	Discount Level [%]	Discount Item [%]	Total	Margin	Markup
		🖃 💅 My Offer			36'268.00					54'980.00	51.59	34.03
					34'618.00					48'942.00	41.38	29.27
		E Sub Total SRV			1'650.00					6'038.00	265.94	72.67
		🕀 🧑 My System #1		1	36'268.00					45'284.00	24.86	19.91
		∑ Sub Total MAT			34'618.00					43'106.00	24.52	19.69
		∑ Sub Total SRV			1'650.00					2478.00	32.00	24.24
		🕀 ᆌ Main Building			36'268.00					45'284.00	24.86	19.91
		- E Sub Total MA			34'618.00					43'105.00	24.52	19.69
		- E Sub Total SRV			1'650.00					2'178.00	32.00	24.24
		🕀 🀬 Floor 1			33'280.00					41'600.00	25.00	20.00
					33'280.00					41'600.00	25.00	20.00
		- 🗵 Sub Total										
				400	80.00	100.00				40'000.00	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
			CORPORE AND A DESCRIPTION OF A DESCRIPTI	1	80.00	100.00				100.00	25.00	20.00
		🖻 🗐 Floor 2			2'988.00					3'684.00	23.29	18.89
		∑ Sub Total			1'338.00					1'506.00	12.56	11.16
0		- ∑ Sub Total			1'650.00					2'178.00	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
0		- (21	75.00	99.00				2'079.00	32.00	24.24
			and the second second	1	813.00	813.00				813.00		
		Hy System #2		1						9'696.00 5'836.00		100.00

To perform some changes to the automatically calculated prices in METIS Smart Quotes.

- 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



5.6 Parts List

5.6.1 Edition of the material list

To perform some changes to the material list in METIS Smart Quotes.

METTS Sr	nart Quotes									
Edit Ma	terial List									Ű 🖗
From List Se	earch			+	X 🛛 🕹	् 🔶 🗸	Section Vie	ew 🔽		
Hierarchy Gro	ups <all></all>					Description	n		• Order No 🔍	Qty
	[BA						
Hierarchy	Accessories, general			6					1-P274	1
	Description	Order Nr		B- 1					I-P648	1
₽ , 1 "				6					I-P243	5
D-F				6					1-P244	5
Land		101	•	6	descent of the				1-P260	1
₽ 7 /				B- 🗍						
6		163	•	6					2-B49	З
		165	•	6					?-B45	1
-6		X1	•	G					?-B15 ?-B20	5
		X2	•						:-D20	2
₽ う ¢)-B11	1
		168	•						2-B12	1
E S		169 156		6					1-P237	13
é		156		B-7						
e		165	ŏ							18
é		704	ŭ						1	
-e		705	ŏ							
ě		706	ŭ							
6		707	õ							
L.C.		708								
Brants										
-6	and the second second	210	•							
-6		212	9							
		- P								
Collapse All	Expand All			<u>Collapse</u>	NI Expand A	I & Aggregate	🚺 Сору	Paste 📄		

- > 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")



5.6.2 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, in METIS Smart Quotes.

	tem		
ext and	Details Attributes Long Description		
	Language	Description	
- 35	English		
	German		
	French		
- 2	Spanish		
	+		
- GET	Description	Value	
	Quantity	1	7
	Order Number		7
>		Installation	■ •
	Section		7
	Sales Price	0.00	/
>		0.00 EUR	
>	Sales Price		7
> > >	Sales Price Sales Currency	EUR	 ✓ ✓
	Sales Price Sales Currency Cost Price	EUR 0.00	 ✓ ✓
··· > ··· > ··· > ··· > ··· >	Sales Price Sales Currency Cost Price Cost Currency	EUR 0.00 EUR	✓

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



5.6.3 Item properties (hide & option)

To hide some or all of the properties of an item and to discard an item from the price calculation, in METIS Smart Quotes.

	em		
ext and D	etails Attributes Long Description		
	Language	Description	
	English		
	German		
- 33	French Spanish		
100	Spanish		
	+ Description	Value	
	Juantity	1 Value	
	order Number	1	7 7 7 7 7 7 7 7 7 7 7 7
	ection		• +
	ales Price	0.00	7
	ales Currency	EUR	
	lost Price	0.00	7
	lost Currency	EUR	
	tem Type	3rd Party Item	
	ervice	No	7
	ption	False	+
≯ C			

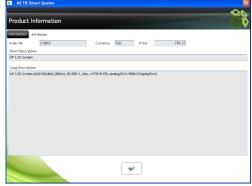
Hide Position
Hide Quantity
🔲 Hide Text
🔲 Hide Item Number
Hide Price
Hide Total Amount

- > 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

5.6.4 Product information

To see the properties of a product in METIS Smart Quotes.

Project Offer	Wy Project	4L4OC / Ny Offer							б
System		alaoc 7 my offer							
system	My System ≢2								
Open F	Project Desig	en Price	Notes Document	ts Order				John Smi	ith 🛔
Material List	Pricing	Services	More	Section View	-				
		De	escription		Order No 🔍	Qty	Sales Price	Total	
My Offer								-	
🕀 👘 My Syst								1000	
E T Pro	and particular series								
		and the subscription							
6									
					100000-0000-000				
Bas								-	
⊕ ¶ Lic ⊕ ¶ Ins									
E IBN									
E Insi								-	
							1000		0
6						-	-	-	
E-My Syst	tem #2							-	~
+ T Pro									
🕑 🗐 Bas									
E Lici								-	
🕀 🚽 Ins	And Address of Concession								
ABI F-E									
								1000	
Taxes								- 1993	8 C
😸 TVA								100.0	
Σ Total								-	10 C





5.6.5 Aggregate items

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

Edit Ma	iterial List								9
rom List 🕏			+	XZ	Q 👍 👵	Section View			
Drder No Second ID Description Language	econd ID escription		Pr Ba Lk Sa Aggregate of seven In				Order No 🍳	Qty	
	Description Search	order Nr	(+)	iB In					
			1						
					-	1			
Napre All	Expand Al		Collap	se Al Expand Al	Se Aggregate	Сору	Paste		

dit Item		V
at and Details Long Description		
Designation	Order No	Qty
	100 00 00	1
0		i

5.6.6 Customer view

To arrange the items from the material list in a customized hierarchical structure, in METIS Smart Quotes.

oject My Project		-	44	Edit Customer View	
ffer LPYT-9330U-4L4DC / My Offer				∔Add X Delete ∠Edit	÷ ÷
			John Smith 🙎		Description
Open Project Design Price Notes Documents Order			John Smith 🞽	My System #1 Ann Building	
Material List 🔝 Pricing 😪 Services 🌒 More Customer View				Floor 2	
Description	Order No 🔍	Qty Sales Price	Total	Floor 1	
My Offer			101101-001		
Hy System #1		1	100000		
E 7 Main Building			1000.00		
Er 🗗 Floor 1			10000		
		-	•		
			ő		
	CONTRACTOR OF THE OWNER OWNER OF THE OWNER OWNER OWNER OWNER OWNER OWNER OWNE	-			
E Floor 2			1000		
	10000-000-0	-			
- 😪		1 1000.00	U		
	and the second second second		•		
			2		
My System #2		1	1000.00		
Taxes			1000.00		
🚽 TVA			1000.00		
Total			10000	Collapse All Expand All	
					(🖌 🗶)

- 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



5.6.7 Attribute sum

To display the attributes values or an aggregate of some attribute values, in METIS Smart Quotes.

📔 2 📑 🍃 Exchange 🛛 🗸 Address		👸 Wetis Smart Quo	tes				
roject Mr. Project							٢
							T
Offer -16A-67CR4-HWZG / My Offer							2
System Entry Level Desktop							
Diriy Controlation							
Open Project Design Price N	otes Documents	Order				John Sm	it?
Edit Material 📰 Edit Price 😡 Services		Esection view	_				
Descriptor	Attribute Sum		C der No	Otv	Sales Price	Total	
		List of Points	Cider No	 Qty 	Sales Price		
My Offer	👷 Linits	Attributes Summary		-		1849.04	
Entry Level Desktop	Debug Mode	Accountes Summary		1		1849.04	
Optical drive Optical drive Optical drive Optical drive Optical drive Optical drive Optical O			99/05	1	28.40	38,58	
Graphic Card	Generic Excel	D	1981.0.5		20.40	696.68	1
Graphic Card Gard				1	56.40	76.62	
- 3rd category / High Fidelity graphic board		R	2016	1	456.40	620.06	
E f Cooler			10 10		100:10	256.50	P
Cooler VB		16	033	1	73,70	100,13	
Cooler V10		16	032	1	115.10	156.37	ĩ
E- 1 Motherboard						69.97	
- 🍘 Wotherboard Intel Socket 775 Type A		15	634	1	51.50	69.97	ę
E 7 Power supply						13.18	
- 🍪 Power Supply Cord		10	1950	1	9.70	13.18	۲
E 5 Hard Drive						63.04	
- 🍔 SATA300 500GB HDD		21	983	1	45.40	63.04	٤
EH T CPU						161.54	
Bual core processor 2.93GHz with fan		15	667	1	118.90	161.54	٤
⊖ 🔂 Operating system						208.41	
- Sa Windows 7 Professional Edition		90	1279	1	153.40	208.41	
⊖-7 Housing			1825	1		117.38	
- Ga Tower case Black		14	825	1	86.40	117.38	1
Network adapter Desktop Network Adapter Card - Category 1		L.I.	TA-100	1	49.00	66.57 66.57	1
Besittop Network Adapter Card - Category 1		N	18-100	1	-14.00	118,74	ľ
Crist Memory		44	896	2	43.70	110.74	l,
		10	1070		43.70		ľ
E Sound Card						38.45	

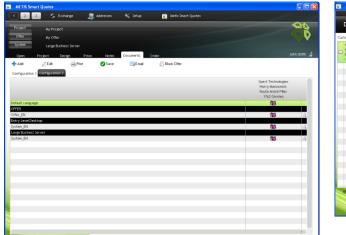
Attribute Sum							
Description	• Order Na	৭ ৫৮	Electrical consumption	Installation Time	Longth	Weight	
Engl My Otter							
Entry Level Desktop		1					
Er 🕤 Optical drive							
DVD ± RW Drive Brand 1	B 19605	1		0.000		0.200	
E- 7 Graphic Card							
- 🎧 Standard/1st graphic board	801E03	1		0.300		0.100	
Strid category / High Fidelity graphic board	822D16	1		0.300		0.200	
B- 🗿 Cooler							
- 🎧 Coder V0	16033	1		0.200		0.400	
Coder V10	16032	1		0.200		0.400	
- Aotherboard							
- 🎧 Hotherboard Intel Socket 775 Type A	15634	1		0.000		0.000	
E- Power supply							
Rower Supply Cord	10950	1		0.010	200.000	0.100	
E- 1 Hard Drive							
SATA300 SOOGE HED	22983	1		0.200		0.290	
B-T CPU							
G Dual care processor 2.93GHz with fan	15667	1		0.100		0.100	
E Operating system							
Windows 7 Professional Edition	90279	1		1.000		0.290	
E Housing							
Tower case Black	14825	1	450.000			4.000	
- Network adapter							
Desk top Network Adapter Card - Category 1	NETA-100	1		0.100		0.100	
B Nemory							
- G D0F2 2G8	16898	2		0.100		0.100	
E Sound Card							
- 🎇 Standard Sound Card	35327	1		0.100		0.100	

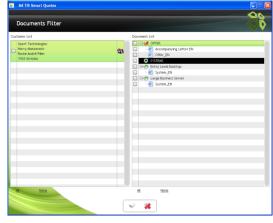


5.7 Documents & Notes

5.7.1 Document generation

To process documents related to an offer or a system / sub-system in METIS Smart Quotes.





- > 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



5.7.2 Generic Excel

To generate an Excel file with some pieces of information about current the offer in METIS Smart Quotes.

📃 2 3 🍃 Exchange 🎵 Addresses 💥 Setup 💈	Metis Smart Quotes			
Project My Project				
System Entry Level Desktop				
Open Project Design Price Nator Documents Order				John Smith
Edit Material 📰 Edit Price 😪 Services 🏟 Material Section				
Description 🔎 Attribute Sum 🔸	Order No	A Qty	Sales Price	Total
💋 My Offer 😔 Limits				1'849.04
Entry Level Desktop		1		1'849.04
Debug Mode				38.58
Generic Excel	B19K05	1	28.40	38.58 📢
E- J Graphic Card	504500		57.40	696.68
Standard/1st graphic board	B31E03 B22D16	1	56.40 456.40	76.62
□ □ □ Cooler	622016		450.40	256.50
Cooler V8	16033	1	73,70	100.13
Cooler V10	16032	1	115.10	156.37
- 1 Motherboard	10052		115.10	69.97
A Motherboard Intel Socket 775 Type A	15634	1	51.50	69.97
Power supply				13.18
Rower Supply Cord	10950	1	9.70	13.18 📢
E- 1 Hard Drive				63.04
SATA300 500GB HDD	22983	1	46.40	63.04 📢
Er 🚽 CPU				161.54
- 🍘 Dual core processor 2.93GHz with fan	15667	1	118.90	161.54 🥑
🕞 🚽 Operating system				208.41
- 😪 Windows 7 Professional Edition	90279	1	153.40	208.41 📢
E-7 Housing				117.38
- 🙀 Tower case Black	14825	1	86.40	117.38 划
E- 7 Network adapter				66.57
😪 Desktop Network Adapter Card - Category 1	NETA-100	1	49.00	66.57 📢
E 7 Memory				118.74
- leg DDR2 2GB E⊢ 1 Sound Card	16898	2	43.70	118.74 划 38.45

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)



5.7.3 Notes

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

METIS Smart Quotes				
1 2 3 🍃 Exchange	🛒 Addresses	⅔ Setup	👸 Metis Smart Quotes	
Project My Project Offer MyOffer System Entry Level Desktop	~			
Open Project Design	Price Notes	Documents	Order	John Smith 🙎
open riegeet besign	ZEdit	bocanenta		-
Notes Accompagning Letter Commercial Conditions	þær Customer, Thank you for choos Please find our offer Please do not hestta Best regards, Your sales represen	further to your requ te to contact us if yo	drements. u have any questions.	

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



5.8 Placement of an order

To complete the sales process by ordering an approved offer in METIS Smart Quotes.

1 2 3	💪 Exchange	I Addresses	⅔ Setup	Si Me	tis Smart Quotes			
Project	My Project							
Offer	MyOffer							
System	Entry Level Desktop							
Open Pr	oject Design	Price Notes	Documents	Order				John Smith
Order List								
		Description				System	Amount	Ordered Date
try Level Desktop	p				Entry I	Level Desktop		
			(Order				

- > Definition of an order status for statistics purpose
- Generation of an XML order file
- Generation of a second and comprehensive order file for further use (e.g. document generation using Crystal Reports)



5.9 Import / Export

5.9.1 Export to Excel

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

🚳 METIS Sma	art Quote	25							
1 2	3	💪 Exchange 🛛 🧸	Addresses 🕺	Setup 😨	Metis Smart Quotes				
Project	Мv	Project	_		_				-
Offer		rT-9S0L7-2WYXO / My Offer							
System		System #1							
Open	Project			uments Order					
Offer N		elete 🗾 Edit		Paste		Quantity	Date	Amount	Status
Otter N		🖃 🔛 My Project	Desc	npcion		Quantity	03.07.2012	Amount	status
LPYT-9S0L7-2W		Ered My Offer					03.07.2012		
		- My System #1				1	04.07.2012		
		- My System #2	🖄 Export XLS			1	04.07.2012		*
			🕞 Copy Cell	f					
									_
									_
									-
Collapse All	Expan	nd All							

5.9.2 Import / export of offer

To share offers between Smart Quotes users.

2	METIS	6 Smart Quotes				
	Expor	t Current O	Iffer			ÌÌ
	File Offer Info	D:\Temp\Wy Offer	.MXF			
	De	escription		Value		
	Offer Name		My Offer			
	Date		03.07.2012			
	Version		HeadQuarters			
	Price Cate	gory	GLP_BY			
	Linked Syst	tem(s) :				
		S	ystem Name		Date	
	My System				03.07.2012	
1000000			🖌 💥)		

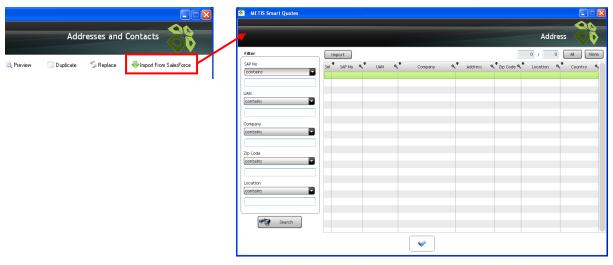
- > Export of an offer (as a proprietary ".MXF" file format for confidentiality reason)
- Import of an offer



5.10 Interface with Salesforce (clients & contacts)

To import clients into METIS Smart Quotes.

METIS Smart Quotes			
User Setup			
User Data Parameters Exchange Rate			
Designation		Data	
- E Default Values			
Price Category			
> Variant			
 > Default projects search period (in month) 	12		4
 Default offers search period (in month) 	24		
Single Sign On	Ver		
🛃 Sales Force			
> Login			
Password			
Security Token			



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



5.11 Troubleshooting

5.11.1 Debug mode

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

METIS Smart Quotes					
🛛 💈 🍫 Exchange 🍂 Addresses 🗙 Setup 👸	Metis Smart Quotes				
roject My Project			-		Į,
					1
Offer -16A-67CR4-HWZG / My Offer					
ystem Entry Level Desktop					
Open Project Design Price Notes Documents Order				John Sm	nith
		•			
Description 🔎 Attribute Sum 🔸	Order No	🔍 Qty	Sales Price	Total	
My Offer 🕒 Limits				1'849.04	-
Br Doptical drive		1		1'849.04	-
Debug Mode Debug Mode Debug Mode	B19K05	1	28,40	38.58 38.58	
Generic Excel	B19K05	1	20.40	696.68	1
Standard/1st graphic board	B31E03	1	56.40	76.62	1
Standardy ist graphic board	B22D16	1	456.40	620.06	
E A Cooler	022010		430.40	256.50	P
Cooler V8	16033	1	73,70	100.13	6
Cooler V10	16032	1	115,10	156.37	
- J Motherboard				69.97	1
Kotherboard Intel Socket 775 Type A	15634	1	51.50	69.97	6
E 7 Power supply				13.18	1
Rower Supply Cord	10950	1	9.70	13.18	6
🕀 🚽 Hard Drive				63.04	
- 😪 SATA300 500GB HDD	22983	1	46.40	63.04	
⊖- ⁻				161.54	
- 🍔 Dual core processor 2.93GHz with fan	15667	1	118.90	161.54	6
다 🕣 Operating system				208.41	
- 🍪 Windows 7 Professional Edition	90279	1	153.40	208.41	۲
🕀 🚽 Housing				117.38	
- 🙀 Tower case Black	14825	1	86.40	117.38	6
🕀 🚽 Network adapter				66.57	
😪 Desktop Network Adapter Card - Category 1	NETA-100	1	49.00	66.57	1
Er 🗗 Memory				118.74	
- 😪 DDR2 2GB	16898	2	43.70	118.74	
EH = Sound Card				38.45	

5.11.2 Send to support

To send support requests by e-mail to a pre-defined recipient, in METIS Smart Quotes.

<u>%</u>	METIS Sn	nart Quotes
		e-Mail
	From	daniel.smith@xpert-technologies.ch
	То	info@xpert-technologies.ch
	Subject	LPYT-4SD3M-56W0C / My Offer
		Dear Support Team,
		<description of="" problem="" the=""></description>
		Best regards
		• *

- 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)



5.12 News

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

8	METIS Smart Quotes	
	1 🔽 3 🍫 Exchange 🏨 Addresses 💥 Setup 👸 Metis Smart Quotes	
	Project Offer System	
	News Open Project Destijn Price Notes Documents Order	
۲	Order by Version Order by Date Order by Priority	
	HeadQuarters Some tutorials are online	20.07.2012
	HeadQuarters METIS 4.0 is available	20.07.2012



5.13 Synchronization of data & Update of the offline installation

In offline or offline connected mode, to update a METIS Smart Quotes offline installation:

METIS Smart Quo							
2 3	🗲 Exchange	🌉 Addresses 🔌	🤇 Setup	🕤 Hetis Smart Quotes			
voject							1
Offer							
lystem							
Open Project	Decign	Price Note: D	cument: Order	Constant States of States			
Project	Offer	Last Opened Projects La	ist Opened Offers				
Criteria		Opportunity ID%	Descrip	tion ۹	Reference	Refe	rence 1 🔍 🃍 Dati
itart Date 0	3.08.2010 🗿						
Ind Date 0	3.08.2012 🕅						
Description							
Reference							
Reference 1							
Opportunity ID							
111							
🌱 🦣 Sea	rch						

User Setup			
User Data Paramaters Exchange Rate			
Designation		Data	
E- & Default Values			
Price Category			
Variant			
 Default projects search period (in month) 	12		
 Default offers search period (in month) 	12		
-> Auto Update	No		
Single Sign On	No		
	🥪 😫		
	· · · · · · · · · · · · · · · · · · ·		

- > 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



6. METIS SMART MONITORING FEATURES

6.1 List of embedded reports

To see the various types of reports that a Smart Monitoring user can generate by default.

METIS Reporting Tool	User; Admin US
ashboard Reports Saved Report Dashboard Te	mplate Cluster
Title	Description
Created offers by month - Bar Chart	This report shows the created offers by months in a bar chart.
Number of created offers by month - Bar Chart	This report shows the number of created offers by months in a bar chart.
Turnover by month - Bar Chart	This report shows the turnover by month generated by the ordered offers in a bar chart.
Turnover by month - Line Chart	This report shows the turnover by month generated by the ordered offers in a line chart.
Top 10 systems	This chart shows the ten most used systems.
General Offer List Document	This report displays a list of offers basing on the parameter sets by the user.
Created Offers versus Ordered Offers	This report display two charts: The first one shows the total amount of the created offers comparing to the total amount the orderd offers. The second one shows the number of created offers comparing to the number of ordered offers.
Top 10 Products	This report shows the 10 most used products in all offers

- Line and bar charts
- Output of the "N" most used systems ("N" being a number defined by the Smart Monitoring user)
- Output of the 10 most used products
- > Output of the revenue of all created offers per month
- > Output of the amount of created offers per month
- > Output of the turnover generated from the amount of ordered offers per month
- Output of the revenue generated from all created offers versus the revenue generated from all ordered offers
- > Output of the number of created offers versus the number of ordered offers
- Output of customized reports

6.2 Output formats

From a single report, it is possible to display the data in various ways (line chart, bar chart, table, etc.), in METIS Smart Monitoring.

The reports can be generated in the following formats:

- Excel
- HTML
- PDF



6.3 List of saved reports

To see at a glance the list of reports saved by the Smart Monitoring user.

METIS Reporting Tool	En [Fr] De METIS Reporting Tool User: Admin USA Vension USA Segov				
Dashboard Reports Saved Report Dashboard To	emplate Cluster				
Title	Report Name	Remark			
Top 10 Systems Report	chart.rptdesign	Report created on 04.09.2012.	×		
Monthly Revenue Report	CAOrderedOffer_chartBar.rptdesign	Bar chart report created on 04.09.2012	×		
Monthly Amount of Created Offers	CACreatedOffer_chartBar.rptdesign	Bar chart report created on 04.09.2012.	×		
ondis					

- Saving of the parameters of a report
- Re-run of a saved report at any time
- Usage of these reports within a dashboard template

6.4 Report parameters & filters

To generate reports from various input parameters or filters in METIS Smart Monitoring.

Description	Value	
Output Format	HTML	/
Send By Mail		Z
Creation Date	Today	/
Office		Z
Include only active offer		/
Include only ordered offer		Z
Amount greater than or equal to		1
Amount lower than or equal to		Z
System		1
Offer Type		\mathbf{Z}
Sales Group		1
Client		Z
Margin greater than or equal to [%]		1
Margin lower than [%]		Z
Markup greater than or equal to [%]		1
Markup lower than [%]		\mathbf{Z}
Ordered Date		1
Included Positions		Z

- > Filter to include only offers created during a specific period
- > Filter to include only offers ordered within a specific period
- Filter to include only offers for which the amount is comprised between a specific range
- Filter to include only offers for which the margin is comprised between a specific range
- > Filter to include only offers for which the markup is comprised between a specific range
- Filter to include only active or ordered offers
- > Filter to include only offers containing a specific system
- > Filter to include only offers containing a specific product
- > Filter to include only offers with a specific model type (generally new or extension offers)
- Filter to include only offers made by users belonging to a specific sales group
- Filter to include only offers made by users belonging to a specific office
- > Filter to include only offers that include a specific customer



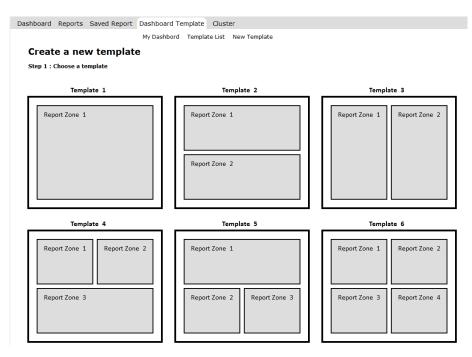
6.5 Dashboard



To see at a glance up to four reports at the same time in METIS Smart Monitoring.

6.6 Dashboard template

To create or use personal dashboard templates in METIS Smart Monitoring.



- Creation of personal dashboard templates
- Display of the list of created dashboard templates
- > Selection of a default dashboard from a list of personal dashboard templates



6.7 Cluster

To create a set of parameters in METIS Smart Monitoring.

METIS Reporting Tool		
Dashboard Reports Saved Report	Dashboard Template Cluster	
	Offices Systems Sales Groups Positions	
Sales Groups		
	Designation	
New Cluster	Indirect channels	X
	Direct channels	X

- Usage of a set of parameters as input for the reports
- Creation of one or several set of offices
- Creation of one or several set of systems
- Creation of one or several set of sales groups
- Creation of one or several set of positions

6.8 E-mailing of reports

To send METIS Smart Monitoring generated reports by e-mail.

Description	Value	
Output Format	HTML	2
Send By Mail		2

- Sending of the report automatically, upon generation of the report
- Sending of reports to oneself or to defined recipients

6.9 Scheduler

To plan the automatic execution of reports in METIS Smart Monitoring.



7. 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.