



List of Features | Version 1.0

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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.

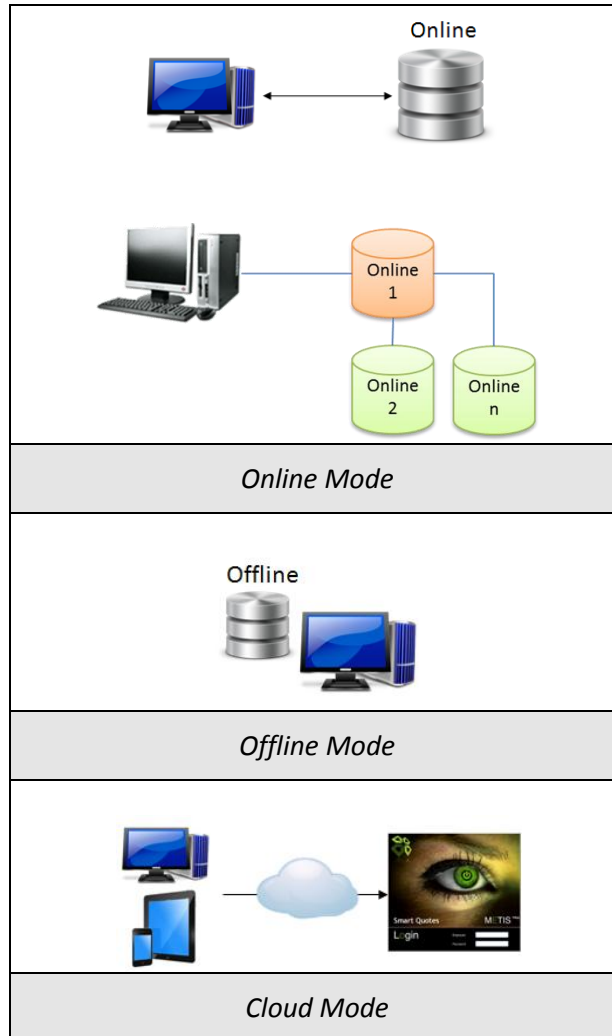
This document aims at describing the functionalities and the features of METIS Smart Suite.

2. ARCHITECTURE

2.1 Operating modes

2.1.1 METIS Smart Modeling

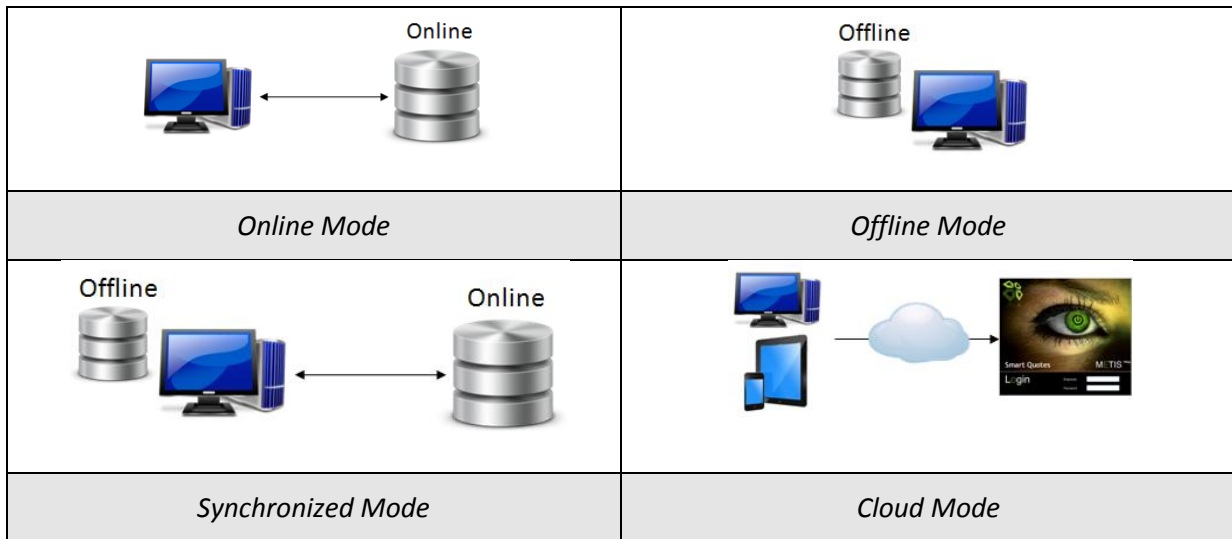
METIS Smart Modeling works in the following modes:



- 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:

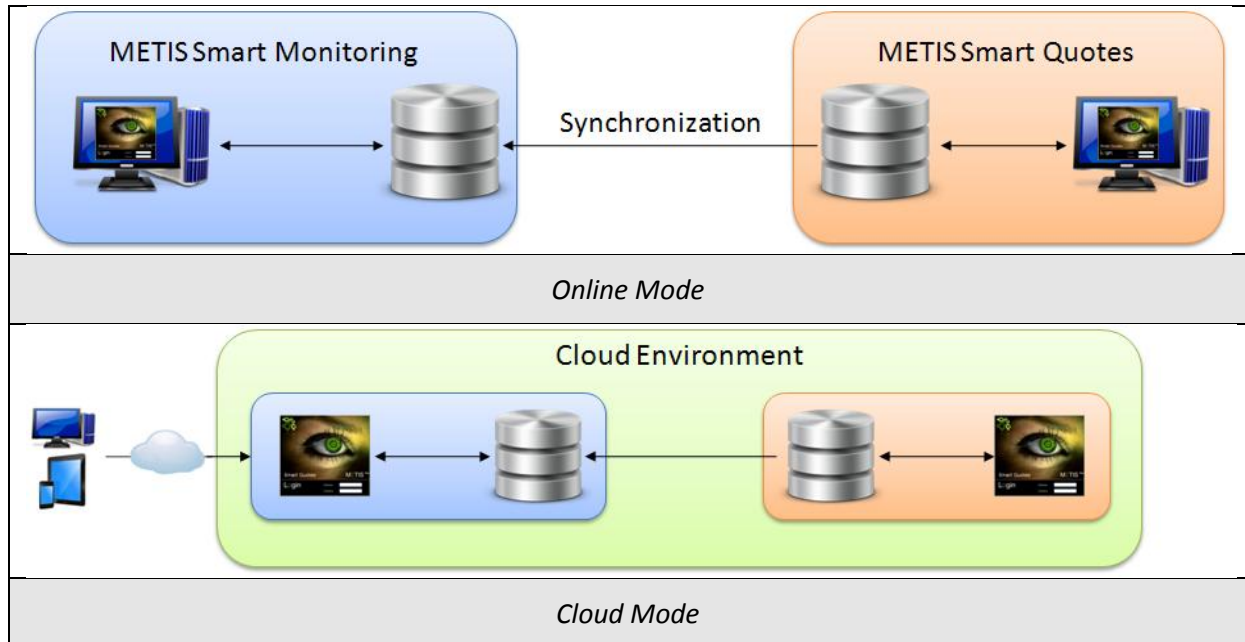


- Online: Smart Quotes is always connected to a central database.
- Offline: Smart Quotes is connected to a local database only.
- Synchronized: A mix of the online and offline modes. Offers are saved locally but they can be synchronized with a central database.
- Cloud: Smart Quotes is accessible via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

2.1.3 METIS Smart Monitoring

METIS Smart Monitoring is a Web application.

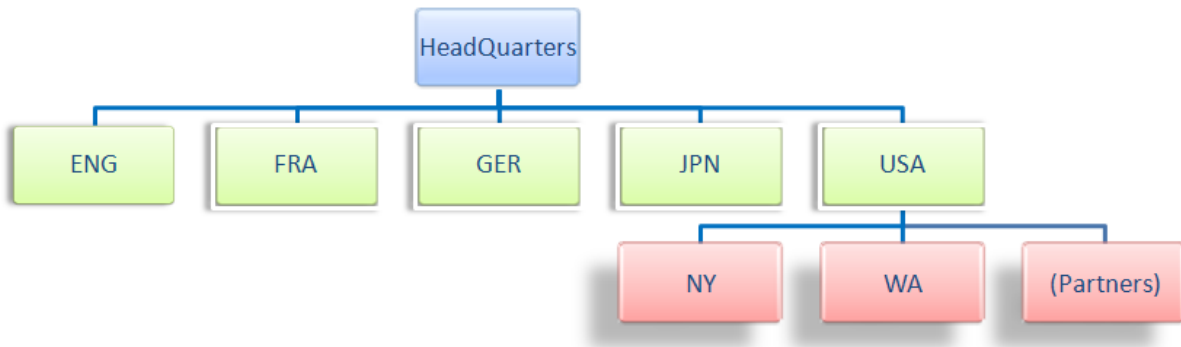
METIS Smart Monitoring can work as shown in the following diagrams:



- 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.

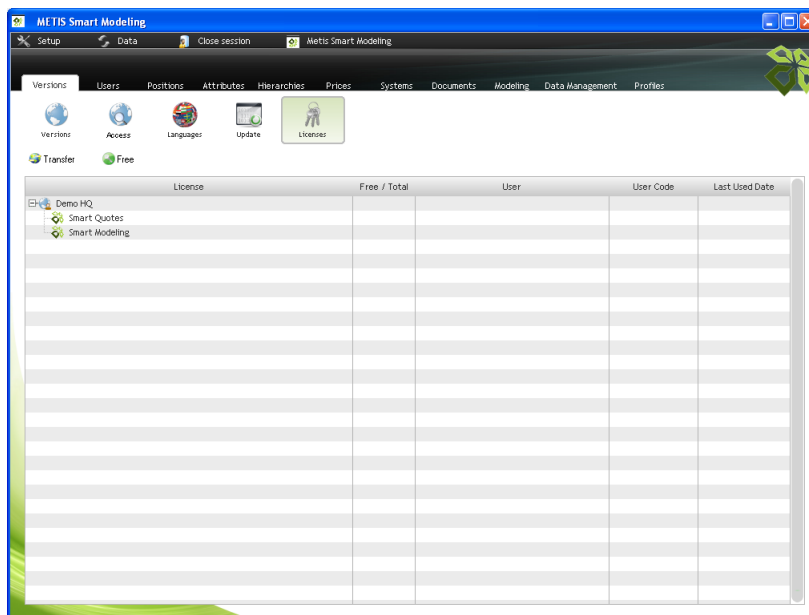
However, “HeadQuarters” cannot control the contents of “NY”, “WA” or of the US official resellers. A version can only control the contents of its direct sub-versions. Based upon the above example, “HeadQuarters” can only control the contents of its direct sub-versions which are ENG, FRA, GER, JPN and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



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

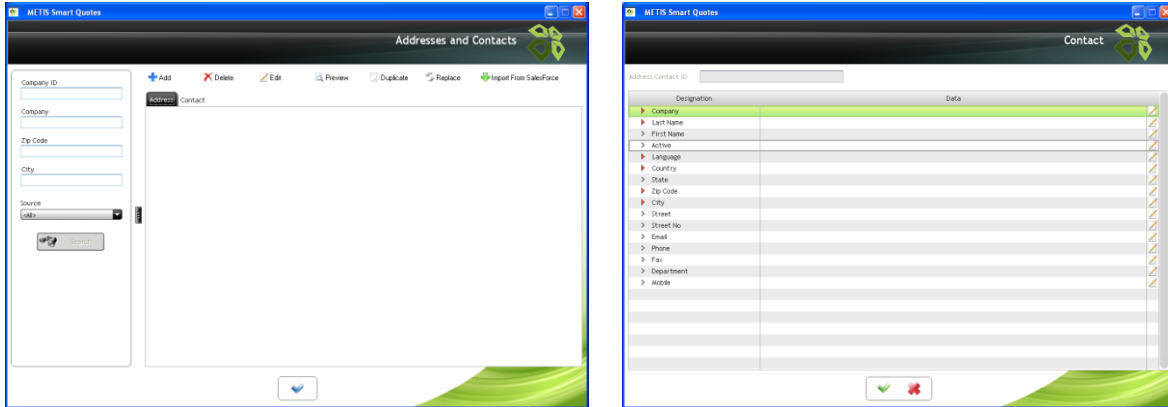
To select a preferred language for using METIS Smart Modeling, Smart Quotes & Smart Monitoring.



- 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.



- 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.

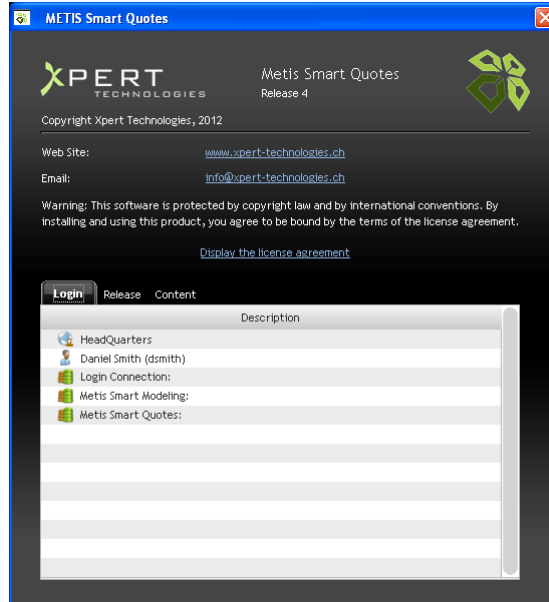
3.5.3 Synchronization of data (Smart Monitoring)

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

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



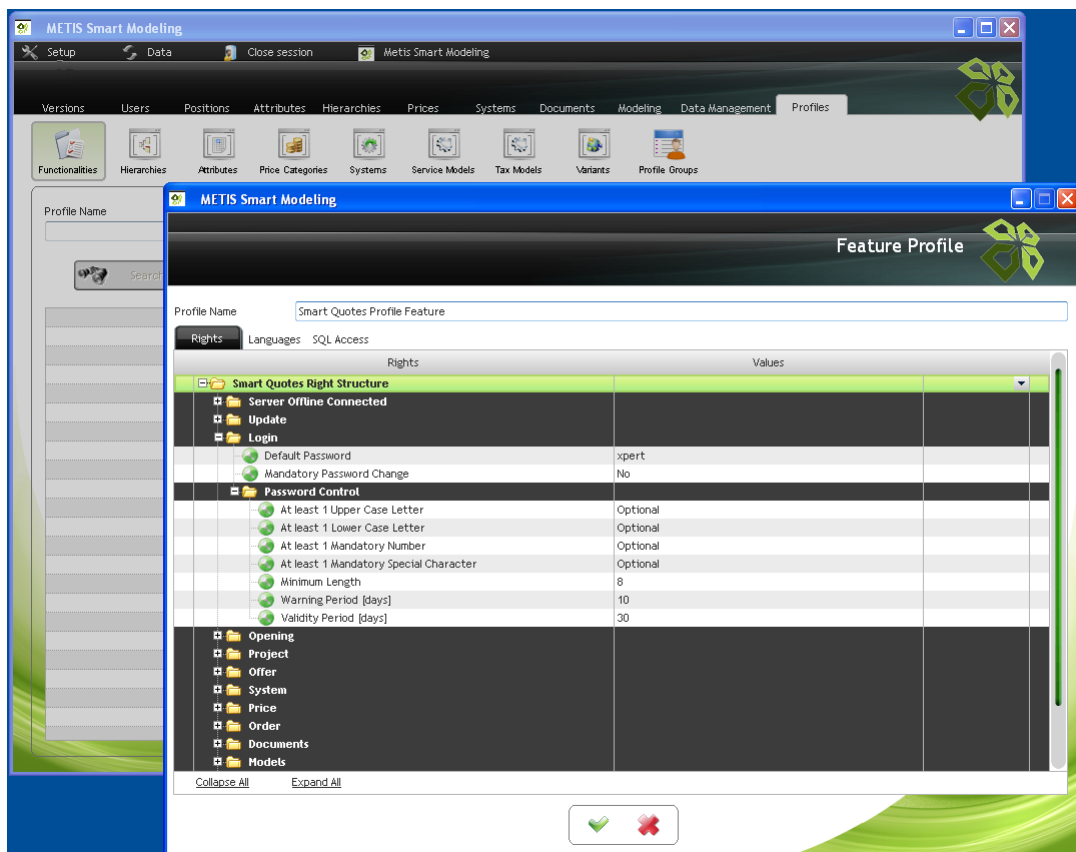
- Access to the Software License agreement
- Details about the logged-in user and database(s) to which the user is connected
- Details about the installation (release date, version of the components, etc.)
- Details about the contents granted to the user (e.g. Smart Quotes user) by the administrator

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.



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.

The screenshot shows the 'User Setup' window in the METIS Smart Quotes application. The window has a title bar with 'METIS Smart Quotes' and standard window controls. Below the title bar, there are three tabs: 'User Data', 'Parameters', and 'Exchange Rate'. The 'User Data' tab is active, showing a tree view of user information. The tree is expanded to show the following sections:

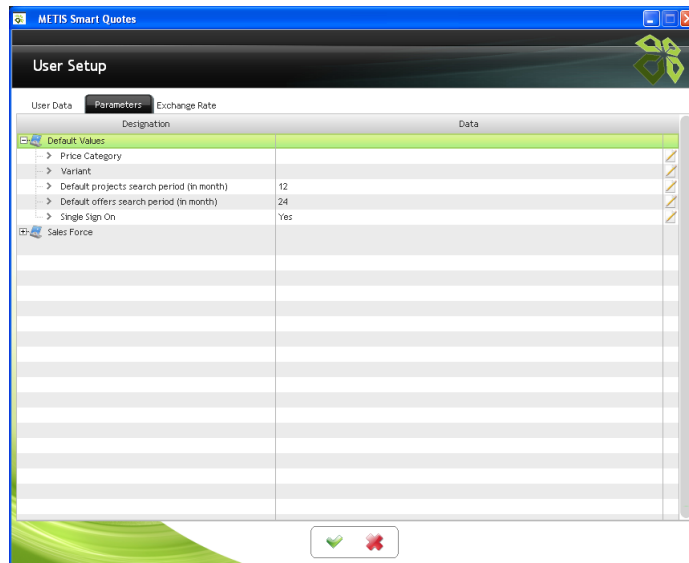
- Main**
 - Employee Code: dsmith
 - Last Name: Smith
 - First Name: Daniel
 - Language: English
 - Password: *
 - Customized Field: (empty)
- Company**
 - Company 1: Xpert Technologies
 - Company 2: (empty)
 - Department: IT
- Contact**
 - Email: daniel.smith@xpert-technologies.ch
 - Fax: +41264222780
 - 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 two buttons: a green checkmark and a red X.

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

5.1.2 User preferences

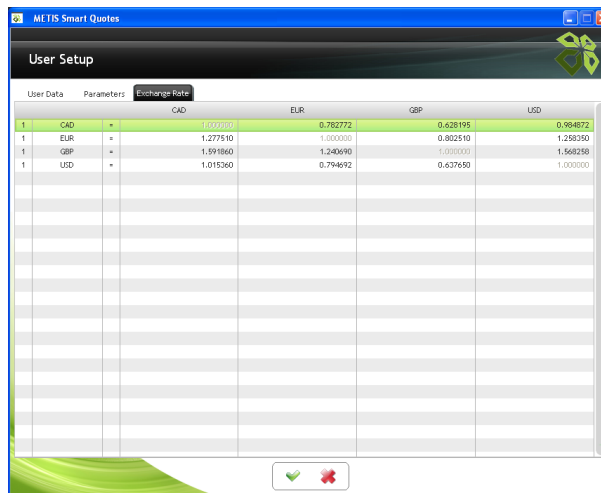
To define some default parameters applicable to the Smart Quotes user only.



- 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.



- 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

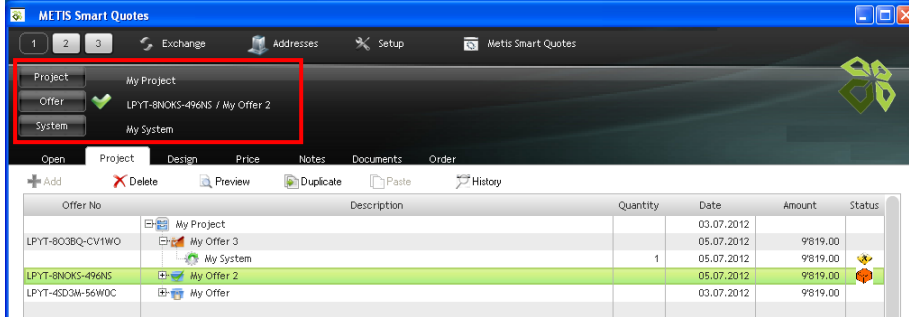
To see at a glance the amounts or the status of an offer, a system or a sub-system, in METIS Smart Quotes.

Offer No	Description	Quantity	Date	Amount	Status
LPYT-803BQ-CV1W0	My Project		03.07.2012		
	My Offer 3		05.07.2012	9819.00	
	My System	1	05.07.2012	9819.00	
LPYT-BNOKS-496NS	My Offer 2		05.07.2012	9819.00	
LPYT-4SD3W-56W0C	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

5.2.2 Header

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

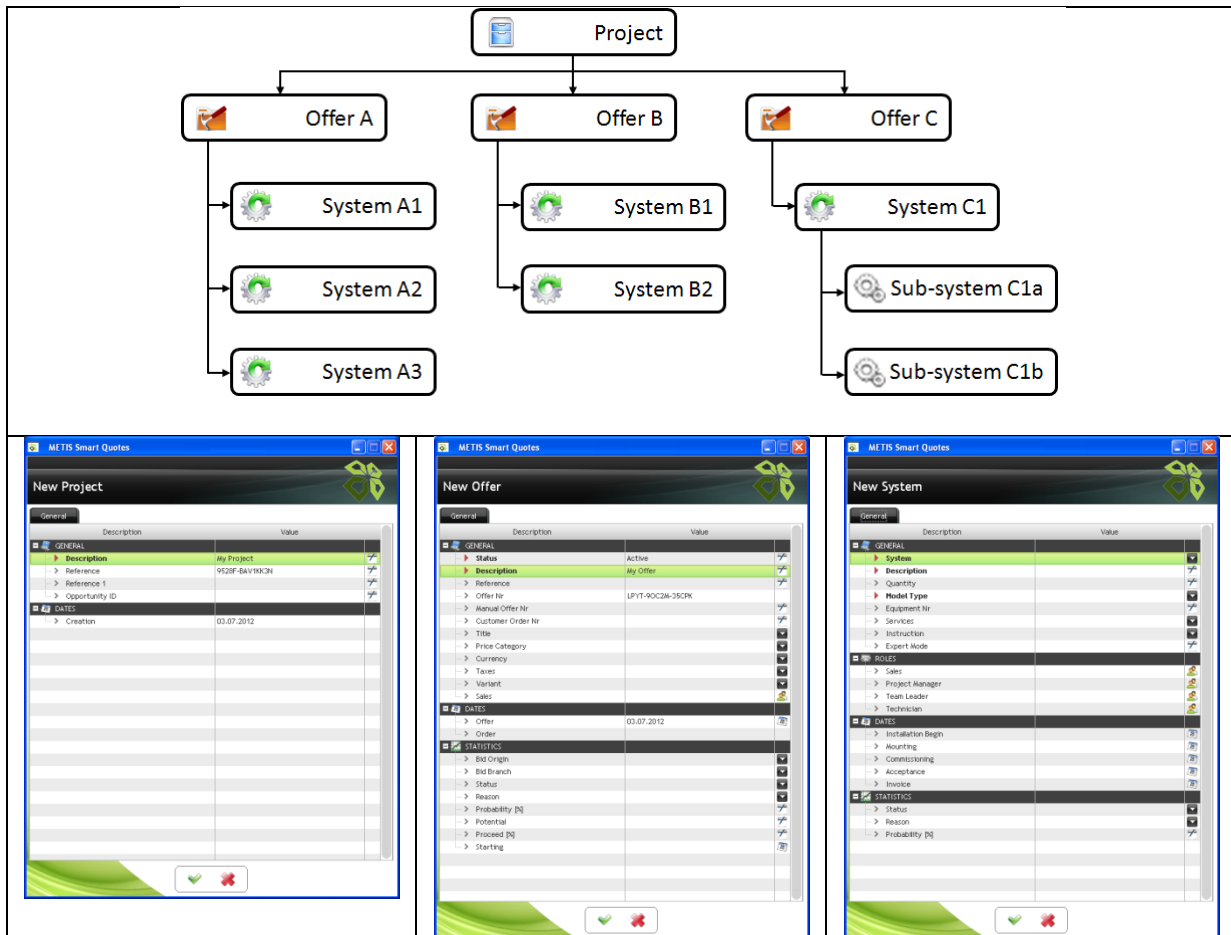


- Display of the currently opened project and offer
- Display of the offer status
- Display of the currently selected system or sub-system
- Opening of the window with the properties of the project, offer, system or sub-system

5.3 Project & Offer Definition

5.3.1 Offer creation & structure

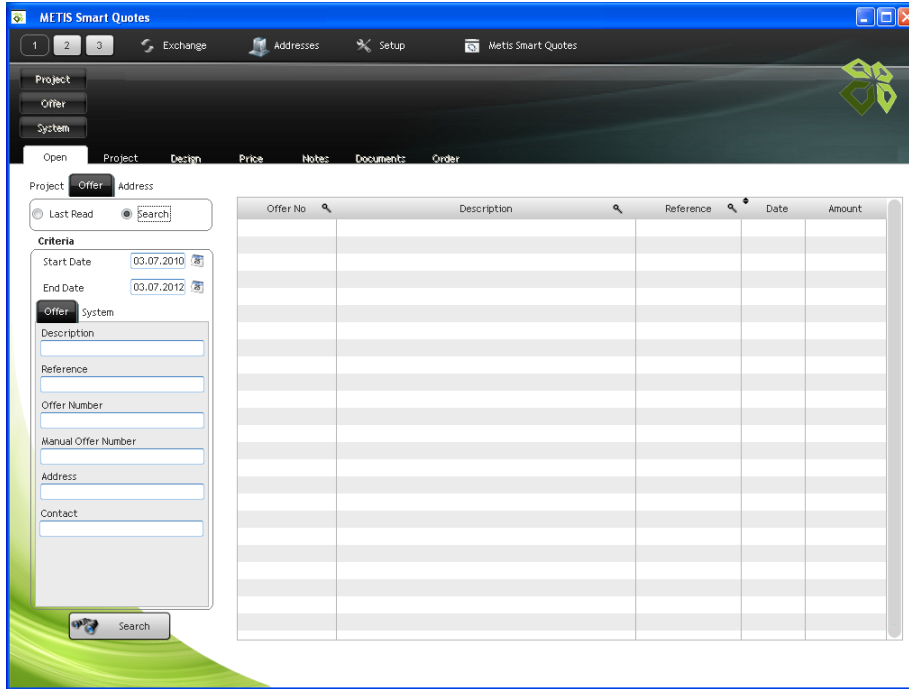
When creating an offer with METIS Smart Quotes, the only condition is that a project must be created first. Then, offers offer can be linked to a project:



- 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

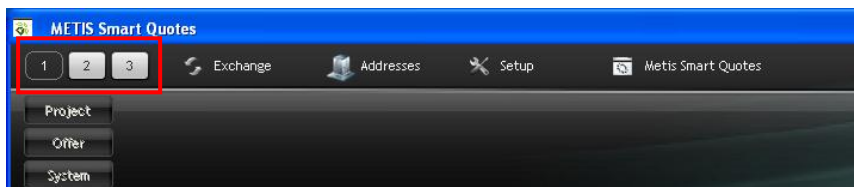
To search for a project or an offer to open up in METIS Smart Quotes.



- 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

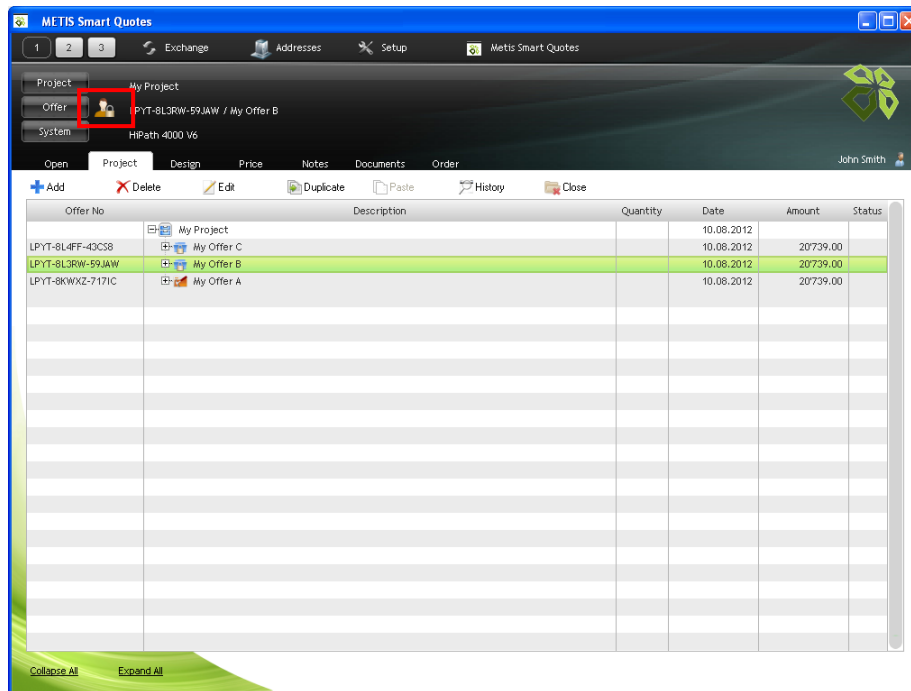
5.3.3 Multiple offers


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



5.3.4 Automatic locking of open offer

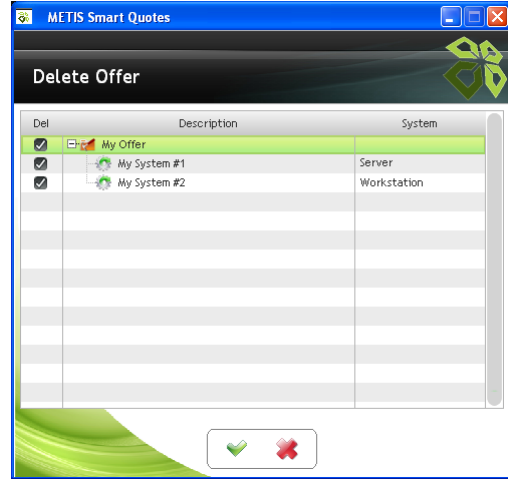
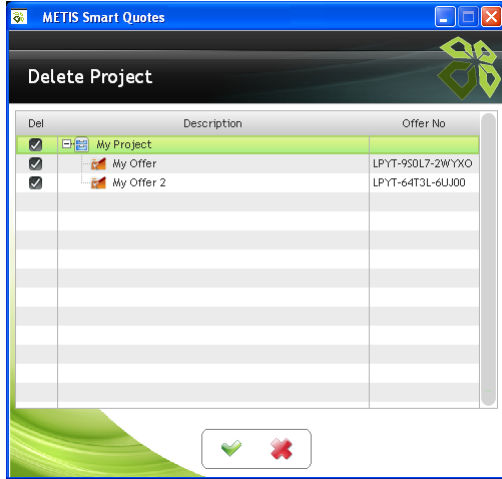
To prevent simultaneous edition of the same offer in METIS Smart Quotes.



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

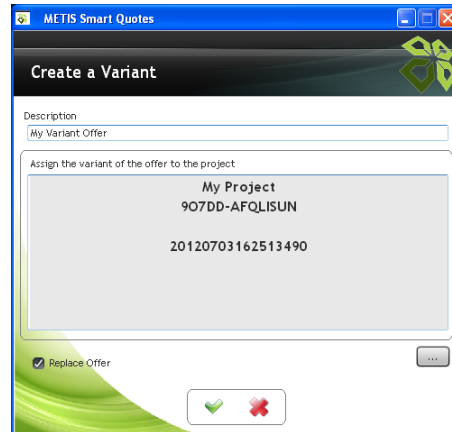
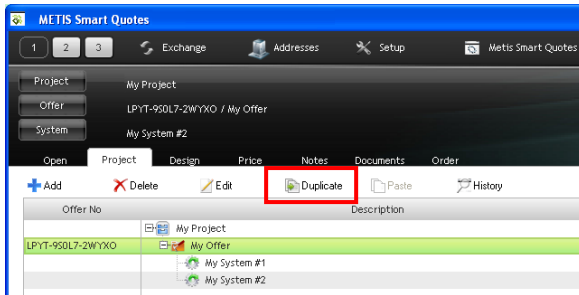
5.3.5 Deletion of project / offer / system

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



5.3.6 Variant offer

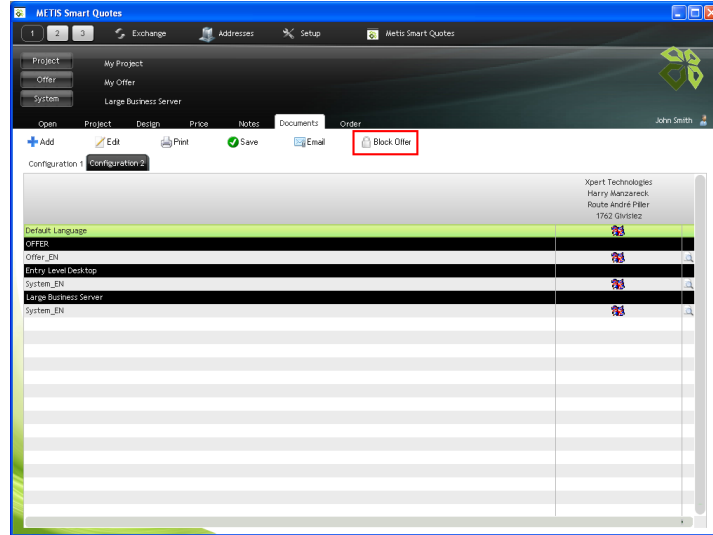
To create a copy of an offer (also named a "variant" offer) in METIS Smart Quotes.



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

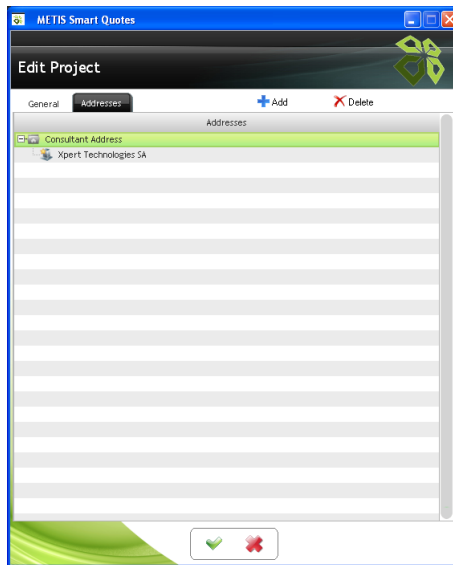
5.3.7 Locking of offer

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



5.3.8 Address assignment

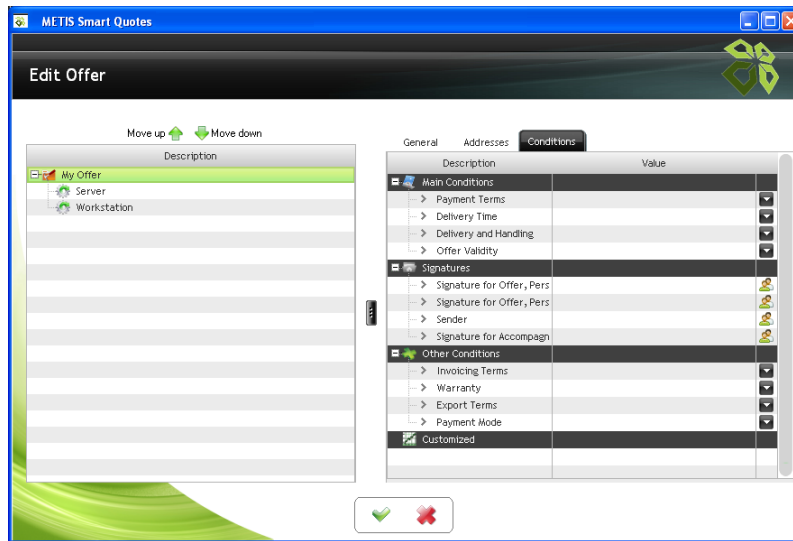
To assign a company and /or a contact person to the project, offer, system and sub-system levels, in METIS Smart Quotes:



- 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

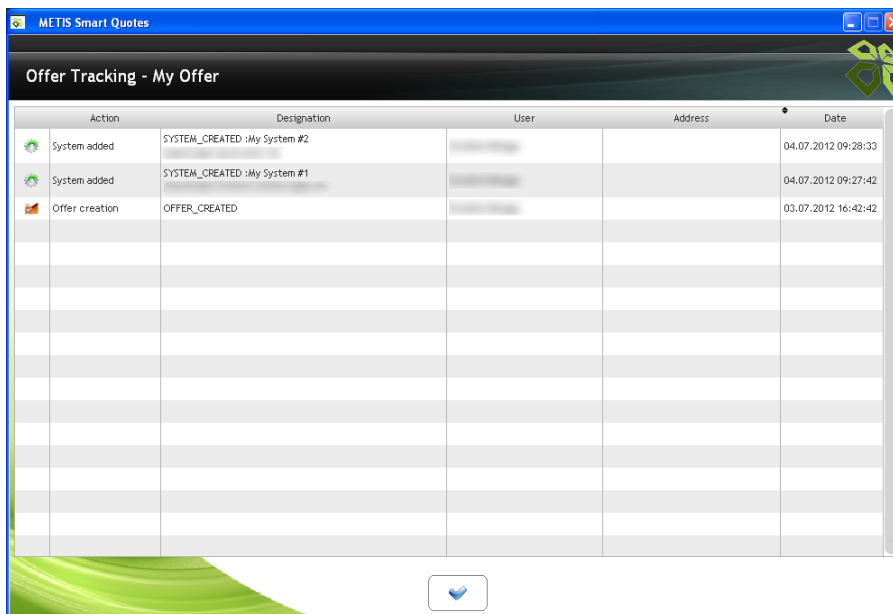
To define the commercial conditions for each offer in METIS Smart Quotes.



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

5.3.10 Offer history

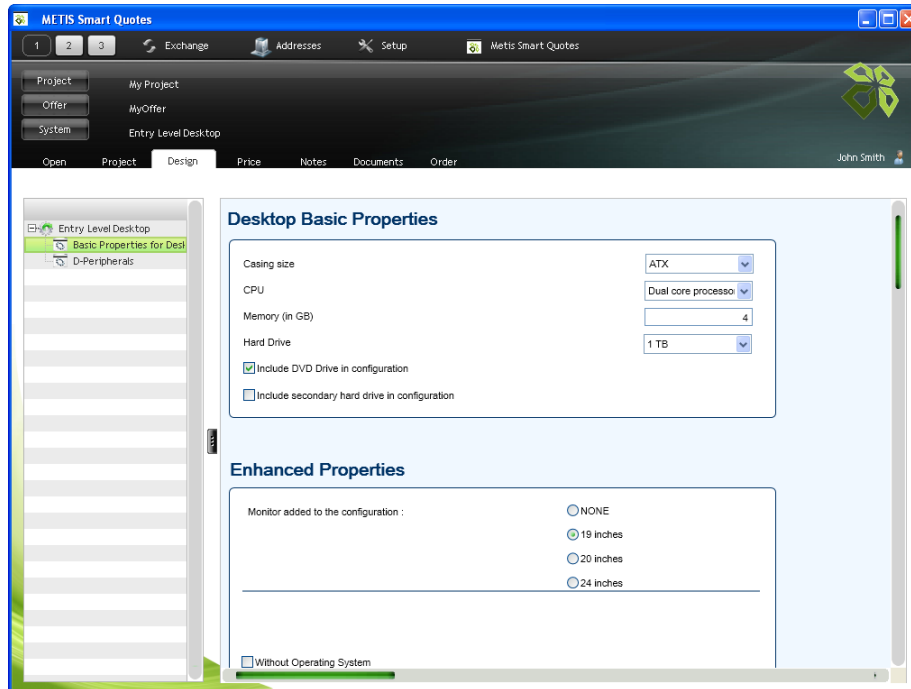
To see at a glance some actions performed within an offer in METIS Smart Quotes.



5.4 System Configuration & Validation

5.4.1 Configuration masks

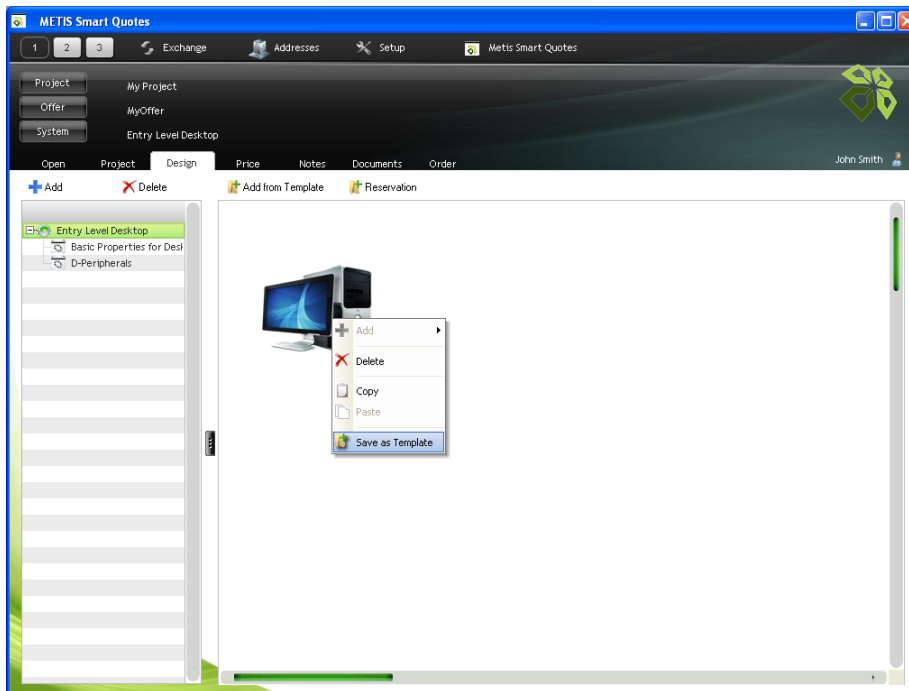
To configure graphically the properties of a system / sub-system via configuration masks in METIS Smart Quotes.



- 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

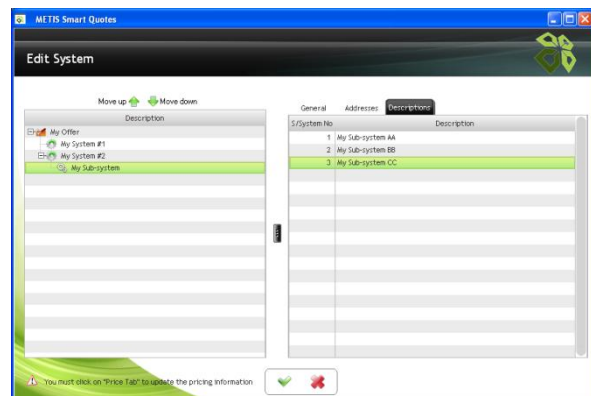
To create or use templates of a system or of a sub-system in METIS Smart Quotes.



- 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

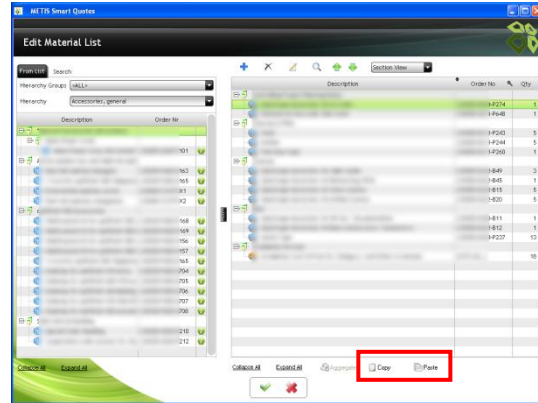
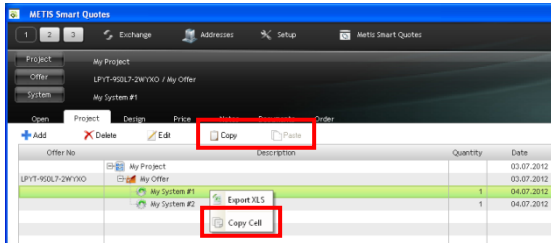
5.4.3 Multiple instances of a sub-system

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



5.4.4 Copy / paste

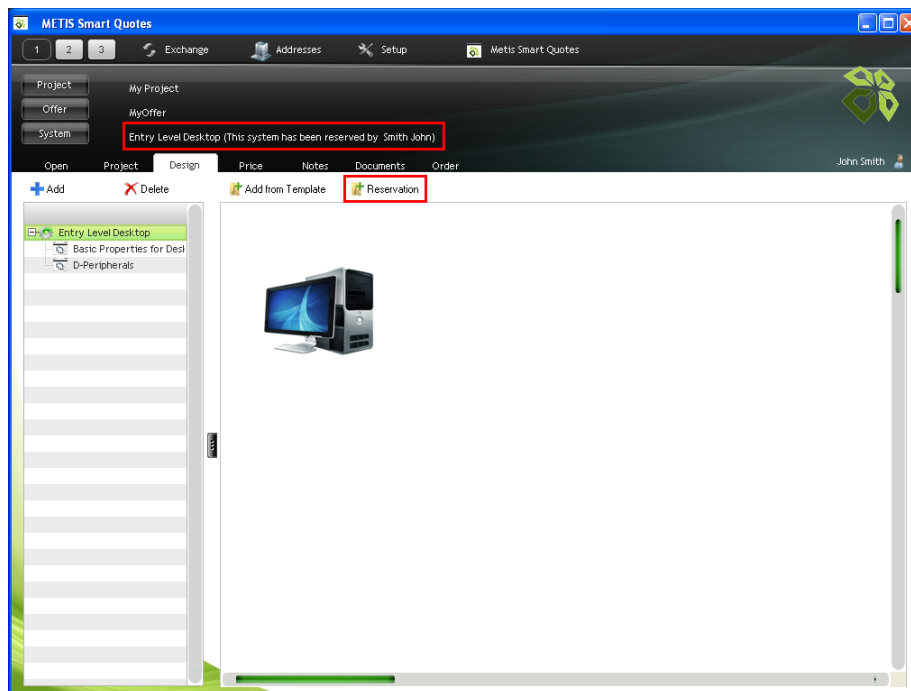
Copy and paste of different elements in METIS Smart Quotes.



- 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.

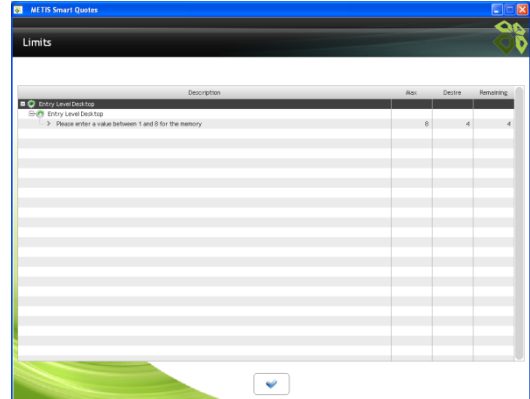
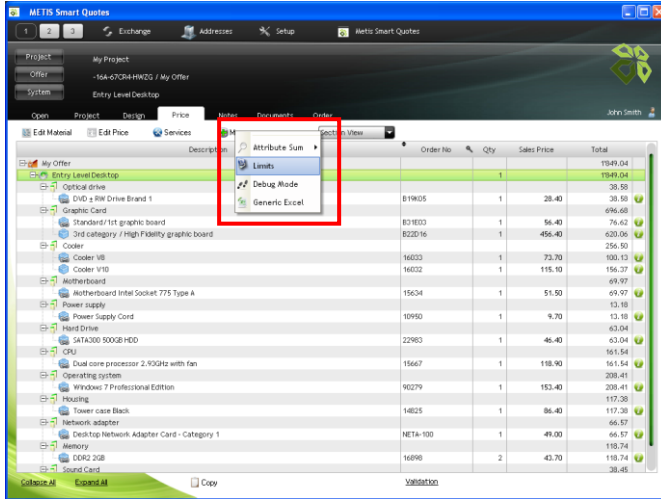


5.4.6 System validation

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

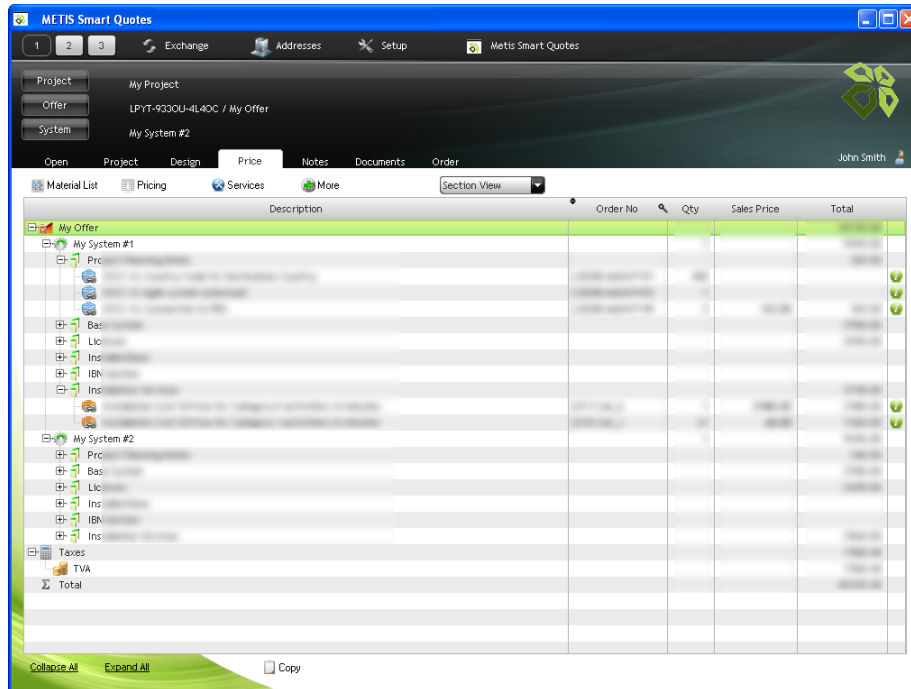
To see the list of limitations defined per system that prevents the running of the automatic calculation (i.e. errors detected within the configuration masks), in METIS Smart Quotes.



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.



- 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

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

The screenshot shows the 'Price Editor' window in METIS Smart Quotes. The interface includes a 'Reset Prices' button, an 'Add a Discount' button, and a 'Factor' input field. The main table displays a hierarchical list of items with columns for Admin Lock, User Lock, Description, Order No, Qty, Cost Price, Sales Price, Discount [p], Discount Level [p], Discount Item [p], Total, Margin, and Markup. The table is organized into sections like 'My Offer', 'My System #1', 'Main Building', 'Floor 1', 'Floor 2', and 'My System #2'. Some cells in the 'Sales Price' column are highlighted in green, indicating they are editable. At the bottom, there are 'Collapse All' and 'Expand All' buttons, and a small icon of a green checkmark and a red X.

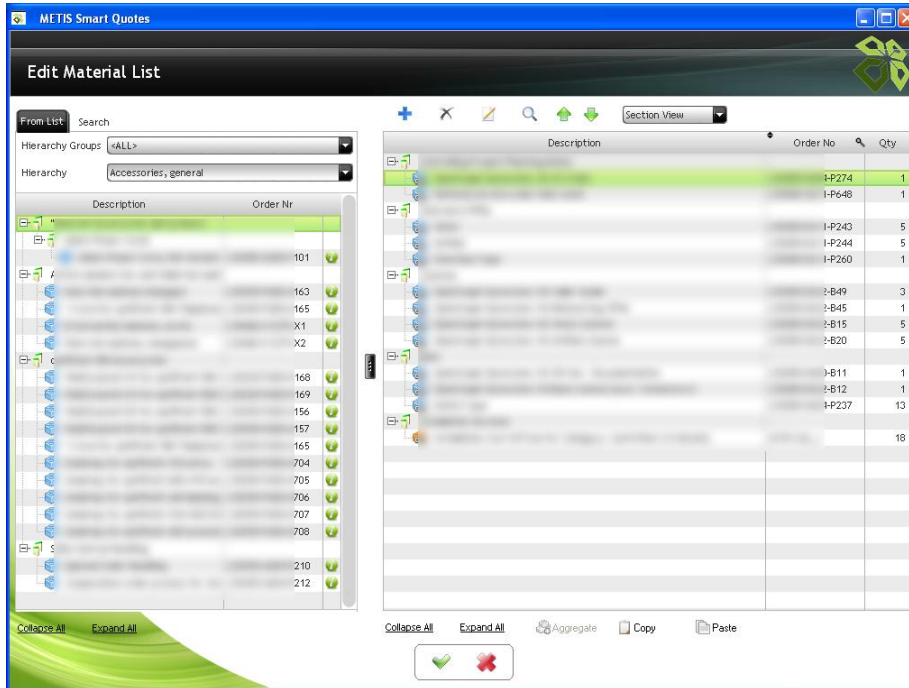
Admin Lock	User Lock	Description	Order No	Qty	Cost Price	Sales Price	Discount [p]	Discount Level [p]	Discount Item [p]	Total	Margin	Markup
		My Offer			26268.00					54980.00	51.59	34.03
		Sub Total MAT			34518.00					48942.00	41.38	29.27
		Sub Total SRV			1550.00					6038.00	265.94	72.67
		My System #1		1	26268.00					45284.00	24.86	19.91
		Sub Total MAT			34518.00					43106.00	24.52	19.69
		Sub Total SRV			1550.00					2178.00	32.00	24.24
		Main Building			26268.00					45284.00	24.86	19.91
		Sub Total MA			34518.00					43106.00	24.52	19.69
		Sub Total SRV			1550.00					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			1550.00					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								5986.00		

- 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

5.6 Parts List

5.6.1 Edition of the material list

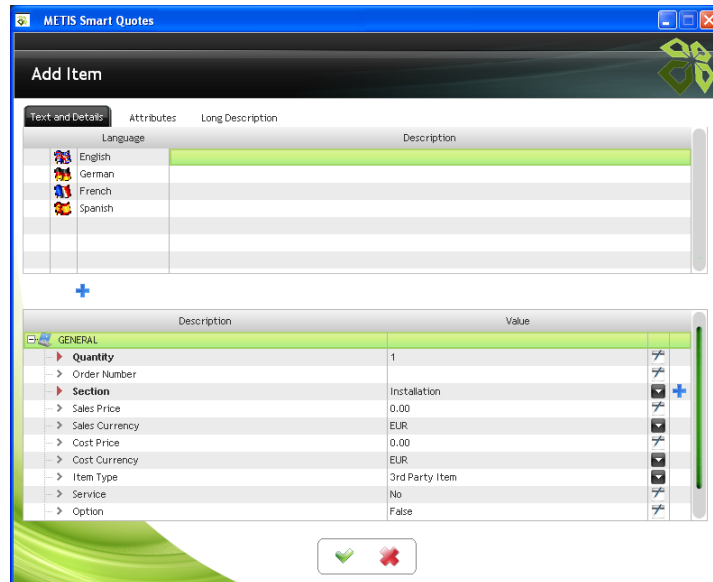
To perform some changes to the material list in METIS Smart Quotes.



- 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

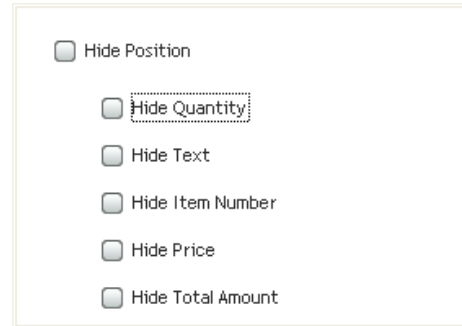
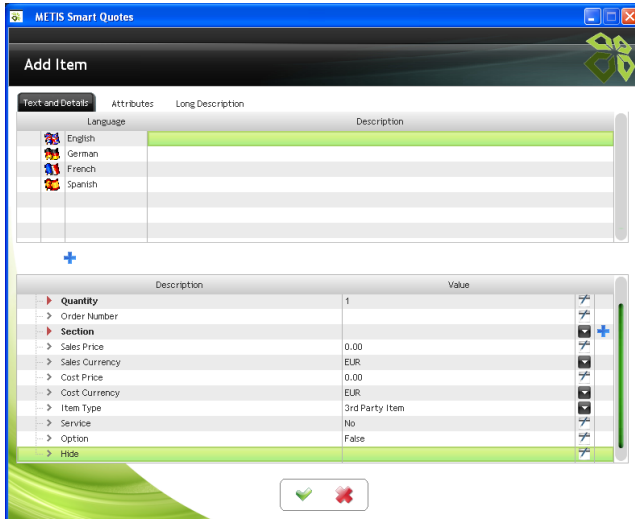
To manually create an item (as opposed to an item from product portfolio) and to add it to the material list, in METIS Smart Quotes.



- 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)

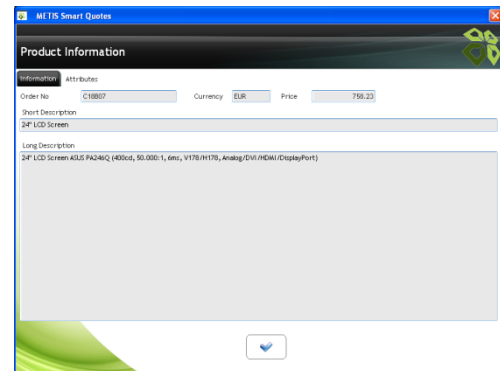
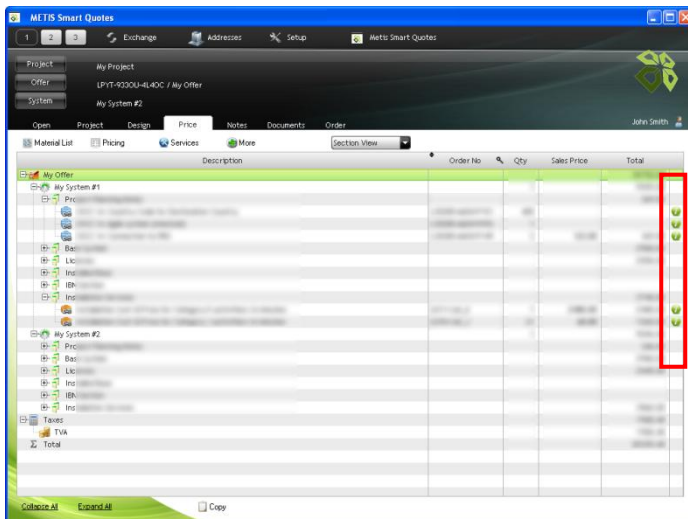
To hide some or all of the properties of an item and to discard an item from the price calculation, in METIS Smart Quotes.



- 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

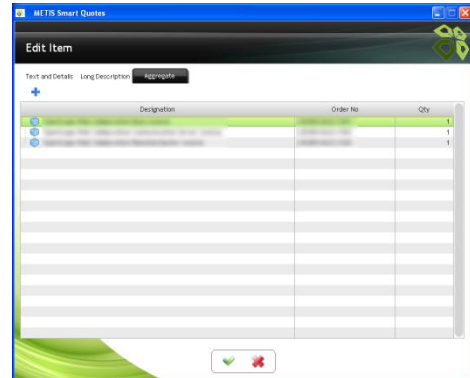
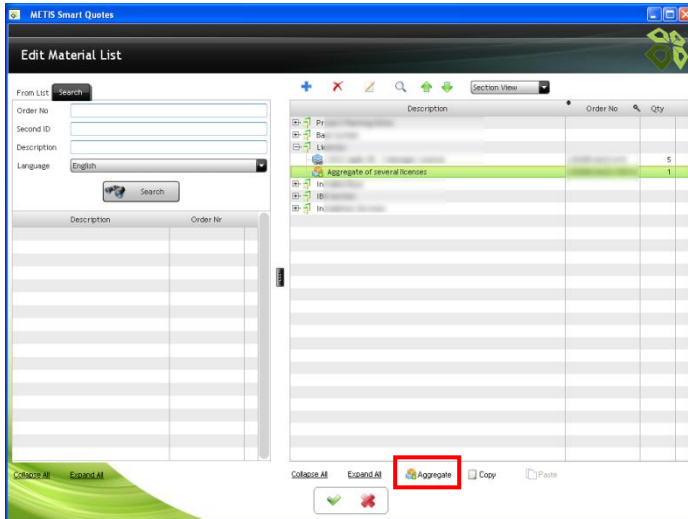
5.6.4 Product information

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



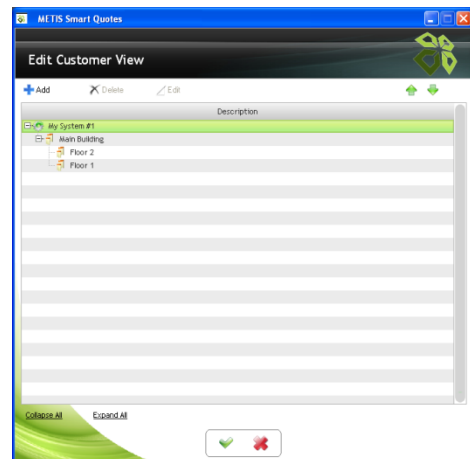
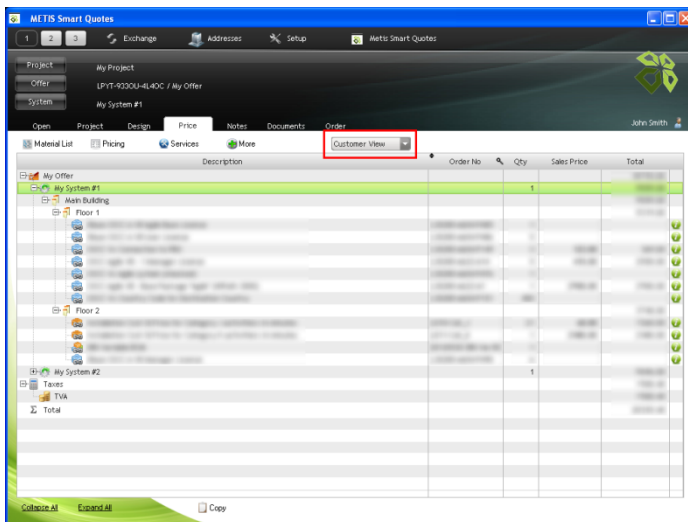
5.6.5 Aggregate items

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



5.6.6 Customer view

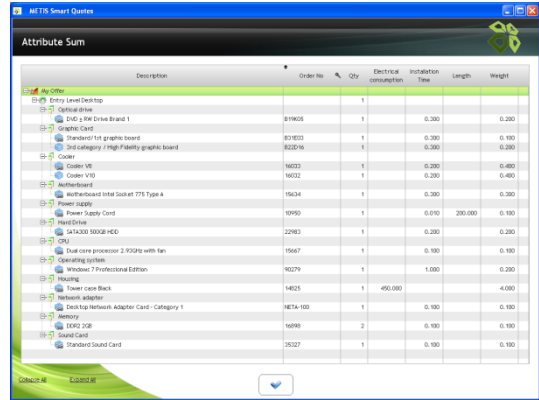
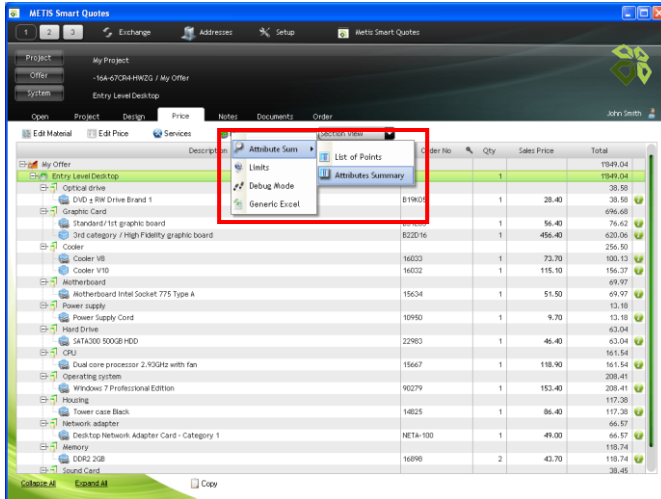
To arrange the items from the material list in a customized hierarchical structure, in METIS Smart Quotes.



- 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

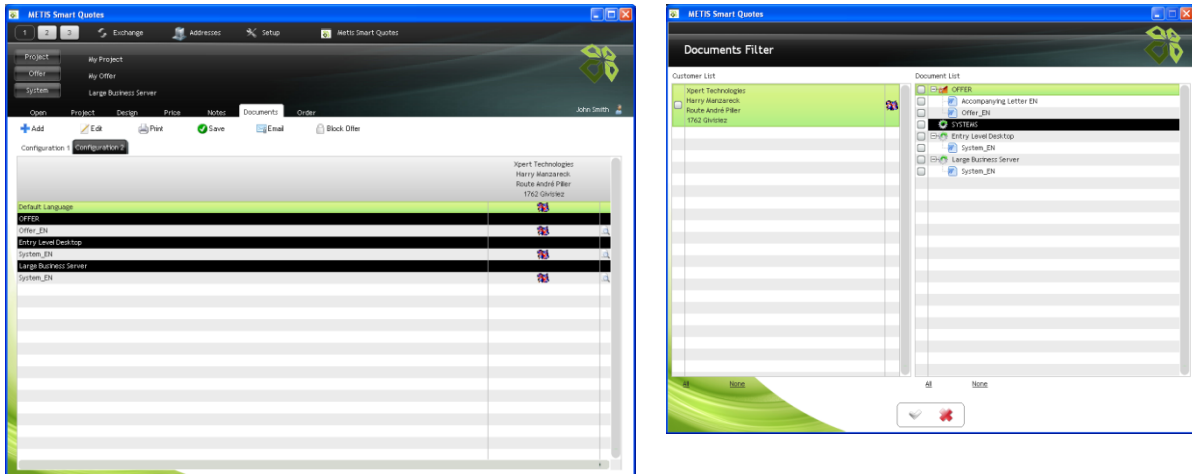
To display the attributes values or an aggregate of some attribute values, in METIS Smart Quotes.



5.7 Documents & Notes

5.7.1 Document generation

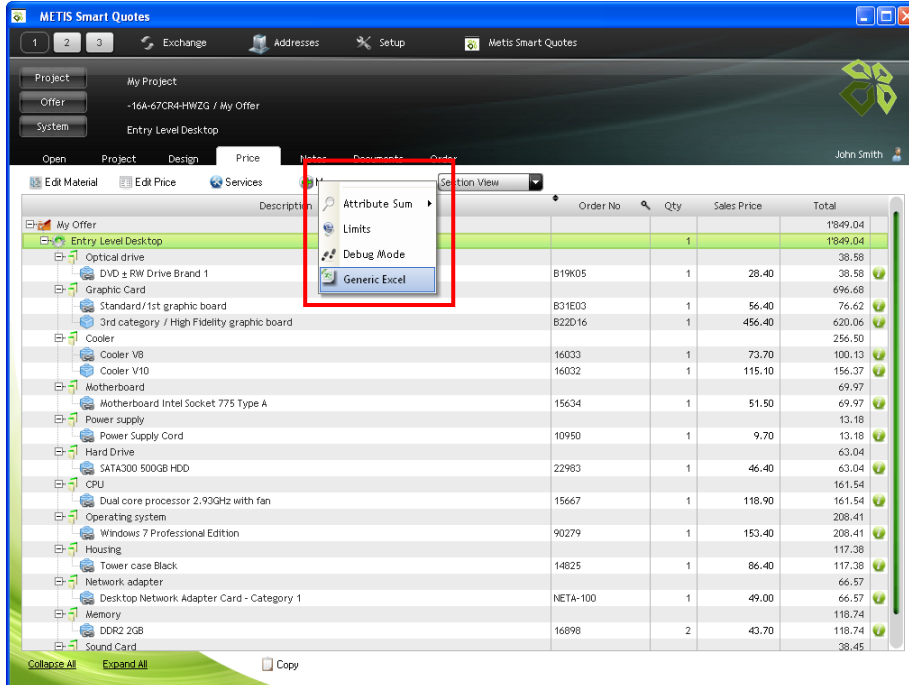
To process documents related to an offer or a system / sub-system in METIS Smart Quotes.



- 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.

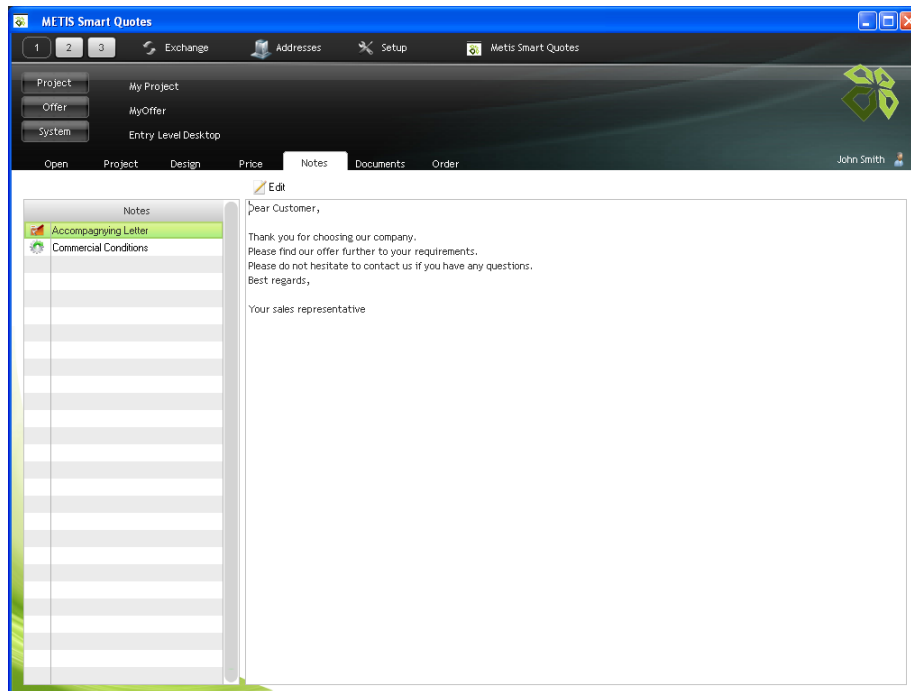


Data in the Generic Excel file includes:

- 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

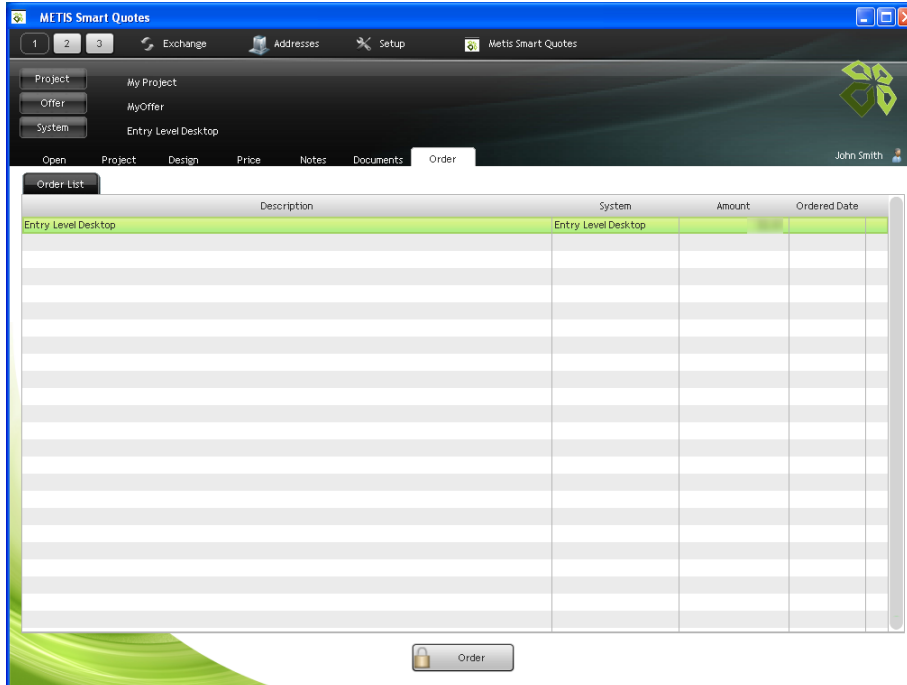
To type-in a text or notes related to the offer or a system / sub-system in METIS Smart Quotes.



- 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.

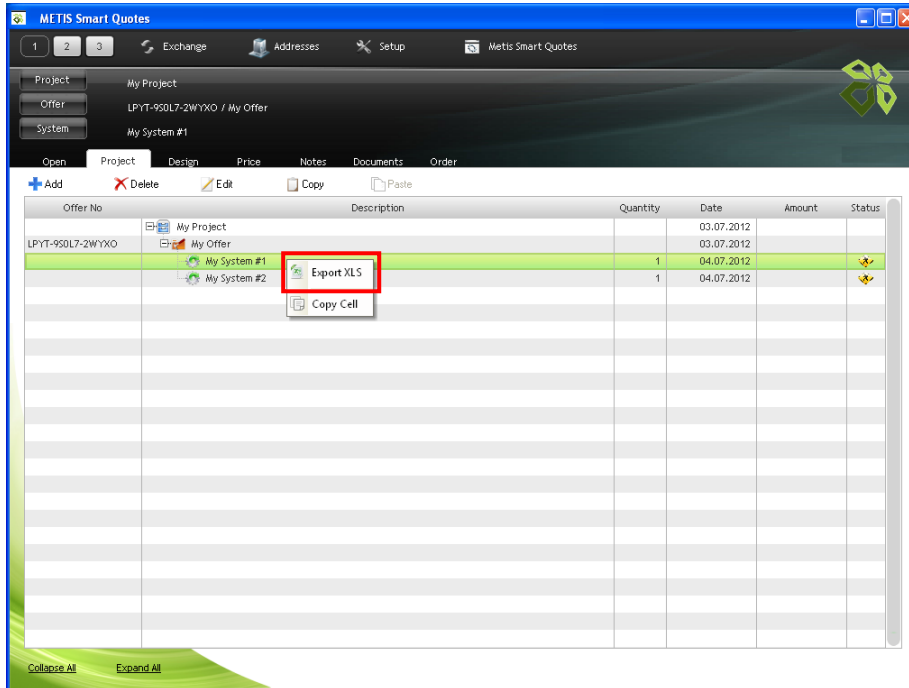


- Definition of an order status for statistics purpose
- Generation of an XML order file
- Generation of a second and comprehensive order file for further use (e.g. document generation using Crystal Reports)

5.9 Import / Export

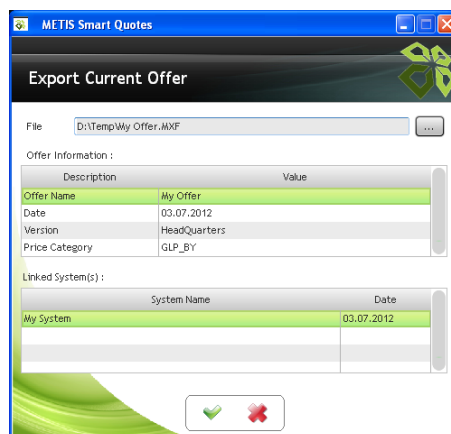
5.9.1 Export to Excel

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



5.9.2 Import / export of offer

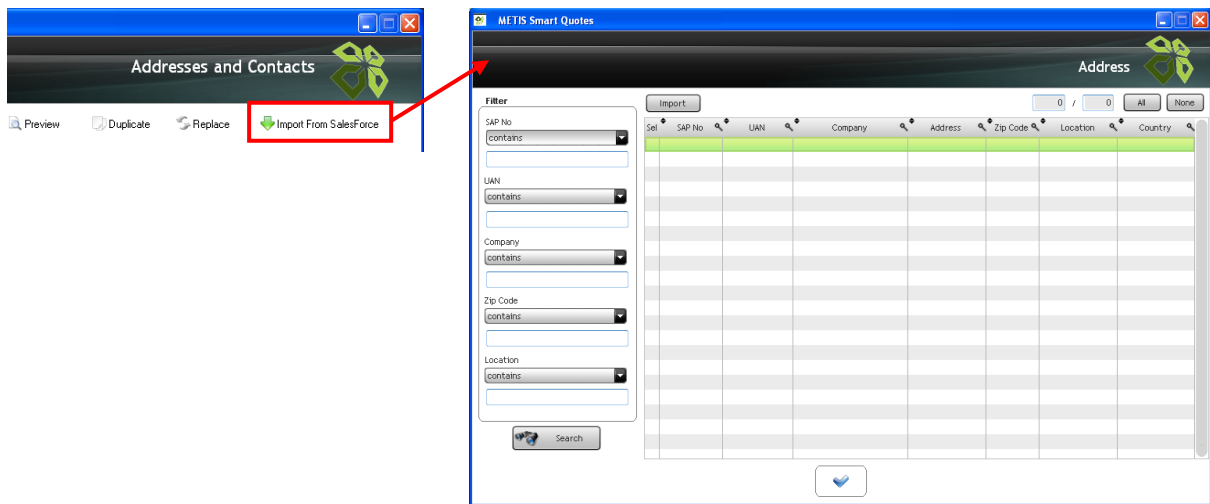
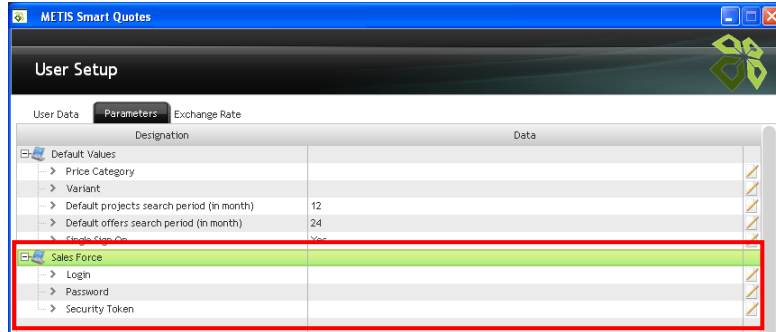
To share offers between Smart Quotes users.



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

5.10 Interface with Salesforce (clients & contacts)

To import clients into METIS Smart Quotes.

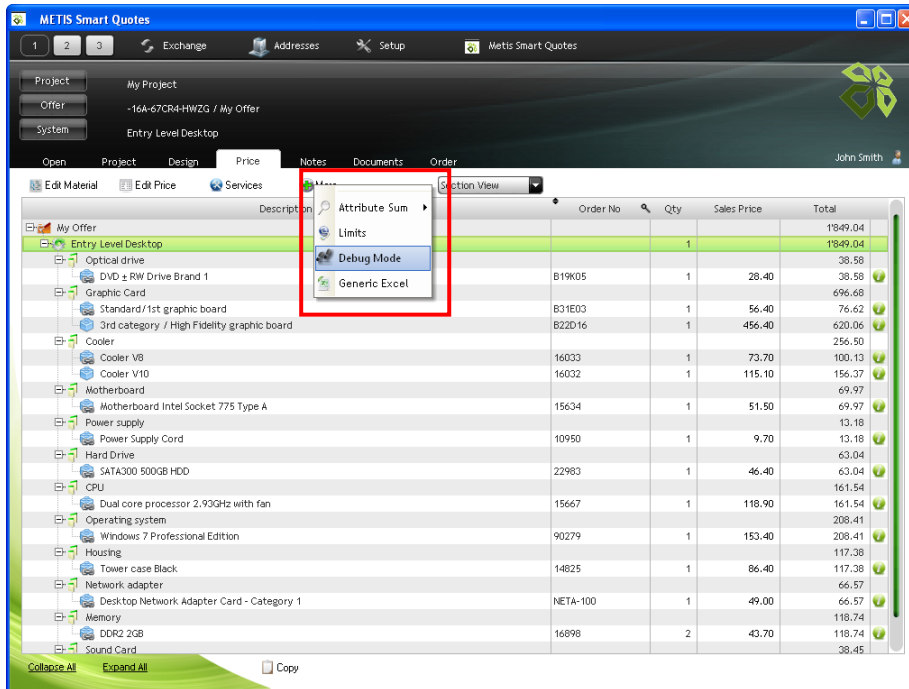


- Definition of the Salesforce login credentials
- Import of clients and contact persons
- Maximum number of clients that can be imported at the same time

5.11 Troubleshooting

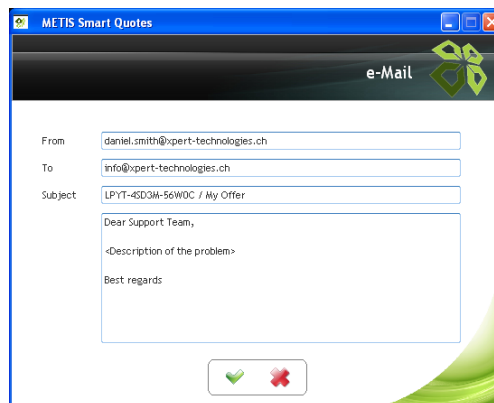
5.11.1 Debug mode

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).



5.11.2 Send to support

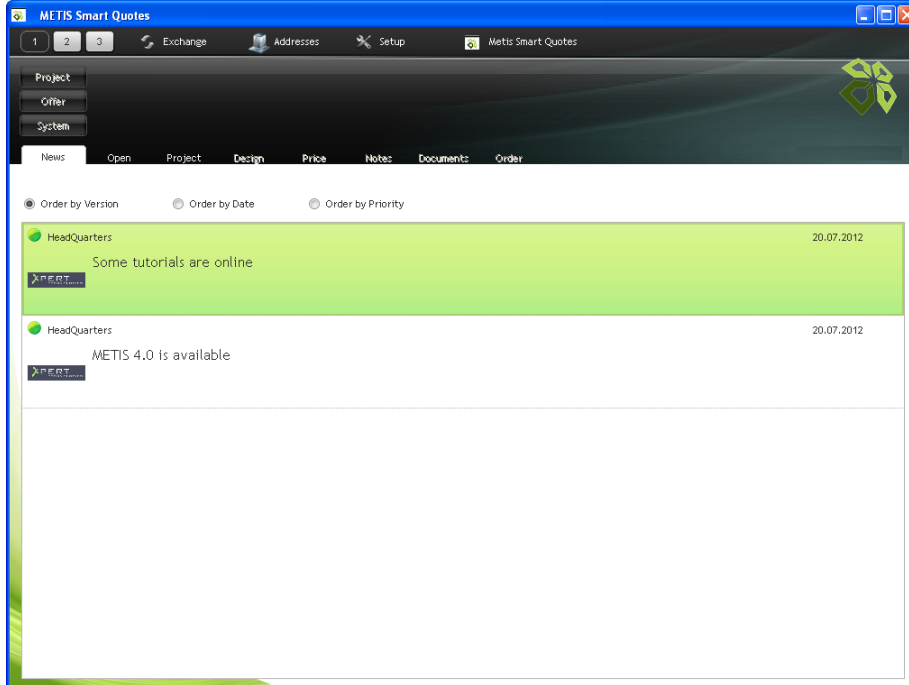
To send support requests by e-mail to a pre-defined recipient, in METIS Smart Quotes.



- 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)

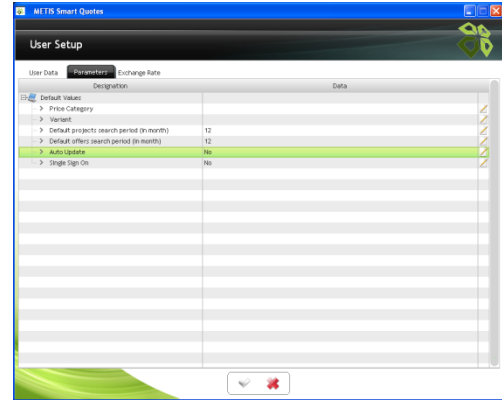
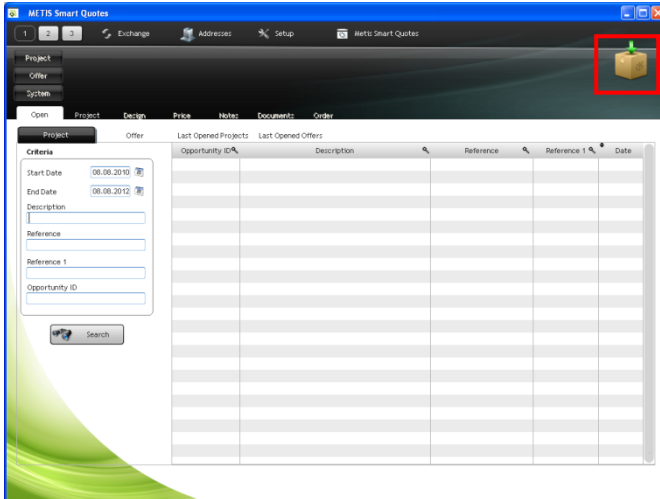
5.12 News

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



5.13 Synchronization of data & Update of the offline installation

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

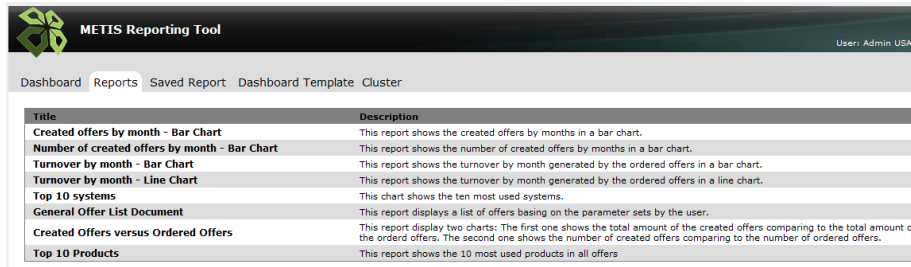


- Update process managed via a Web Service
- Update of the set of data of the offline installation (i.e. retrieval of data from the user's version and from the parent version(s))
- Update of the release of the offline installation
- Manual or automatic launching of the update process

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.



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 of the ordered 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

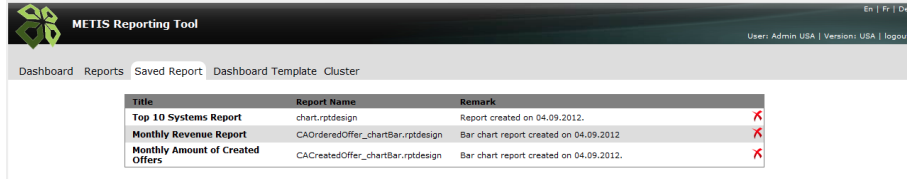
From a single report, it is possible to display the data in various ways (line chart, bar chart, table, etc.), in METIS Smart Monitoring.

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.



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.

- 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

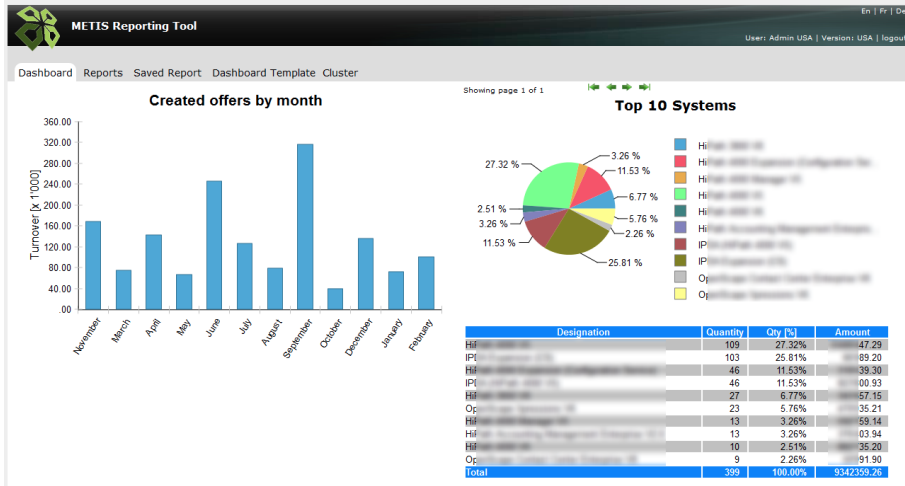
To generate reports from various input parameters or filters in METIS Smart Monitoring.

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

- 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

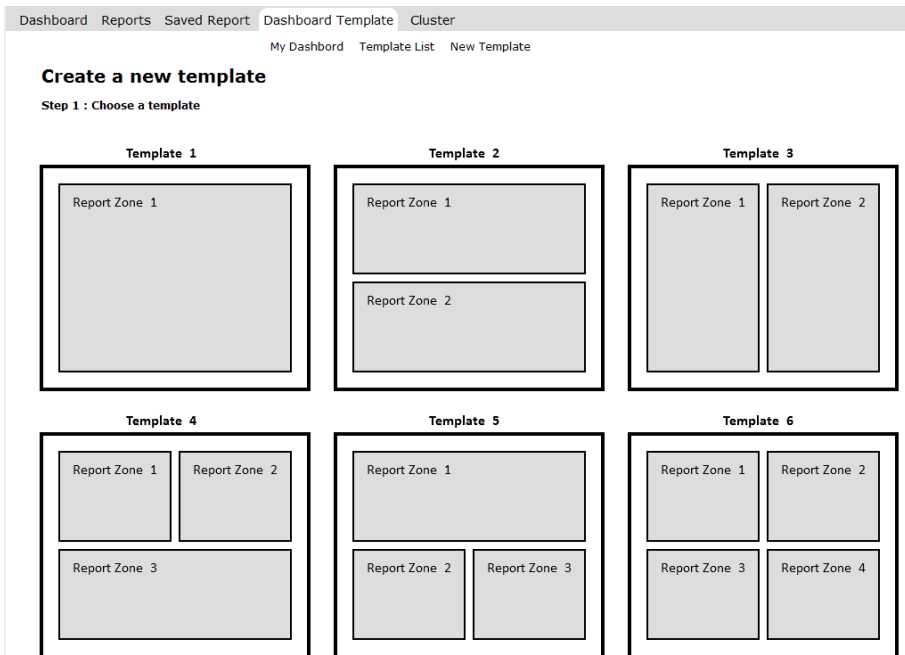
6.5 Dashboard

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



6.6 Dashboard template

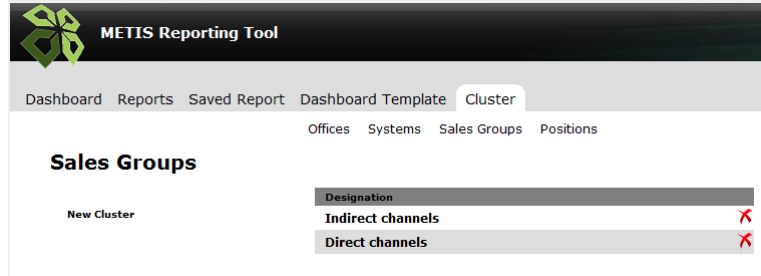
To create or use personal dashboard templates in METIS Smart Monitoring.



- 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.



- 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	✍
Send By Mail		✍

- 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.