

Overview

Surado CRM includes a standard Inventory and Quoting module that can be used to manage detail product inventory and create line item quotes. Surado CRM even allows you to turn quotes into sales orders and transfer them to back-office systems when used in conjunction with other integration modules. Although, the standard quoting features provide functionality that would support most businesses, some business may require advanced inventory and quoting features for more complicated configuration and settings.

As the name suggests, Surado CRM Advanced Quoting Module has advanced capabilities for creating quotes which includes price levels by quantity sold, price by location, discount price, kit pricing, multiple extended product descriptions and file attachments to mention a few. Advanced quote module also gives a wealth of information about the product like OEM, Manufacturer, manufacturer's part number etc..

Advanced Product/Inventory Tracking

Surado CRM offers a fully-featured inventory system for creating product line items that can appear on Quotes. In addition to basic fields for tracking part numbers, descriptions and quantities, Surado CRM also offers detailed tracking of vendors, multiple price levels and an "audit trail" of changes to product records. Unlike other records, products are not directly linked to Contacts. Instead, product line items are added to Quote records. Contacts can then be filtered according to the products that appear on their linked Quotes.

Using modules from the Surado Integration for Financials series, products can also be integrated with third-party systems, including QuickBooks and Microsoft Great Plains and may be used on more advanced transactions, such as purchase orders and invoices.

Major Features Include:

- Track Detail Inventory Information
- View Sales Transactions from Inventory
- Multiple Price Levels
- Pricing by Geographic Business Location
- Quantity Discounts
- Line Item Discounts
- Inventory Balance Information
- Product Kits
 - Link multiple products into one package with one package pricing
 - Save time creating quotes with one package ID that lists multiple product line items in quote
 - Automatically deduct product balance when package selected
- Attach 3rd Party Document to Each Product
- Detail Vendor/Supplier Information

The screenshot shows the 'Product / Inventory' window with the following details:

- Product ID:** R155 (Active)
- Description:** 5 Port Router - R155
- Item Type:** Sales Inventory | **Category:** Wigi Products
- Mfg Part#:** R155-135-55 (NSN)
- OEM/Vendor Part#:** 10-5675 (DESI)
- Custom Part# 1:** R155 | **Custom Part# - 2:** []
- Manufacturer:** Apex Technologies | **Date Code:** 08
- Condition:** New
- Site:** [] | **Location:** USA | **Bags:** 0
- Qty On Hand:** 20 | **Allocated Qty:** 2 | **Available Qty:** 18 | **Qty On Order:** 12 | **Min:** 10 | **Max:** 30
- Options:**
 - Show In Customer Support Drop-Down Menu
 - Allow Price Change During Quote Creation
 - Show Kit Components on Quote
 - Show Kit Price | Show Component Prices
- Pricing Info Table:**

Price Level	UofM	Price	Start Qty	End Qty
1	1	69.99	1	10
2	1	64.99	11	50
3	1	59.99	51	999999
- Cost:** 34.79 | **Sales Tax Option:** Taxable
- Footer:** Created by: scmadmin On 03/16/2007 10:35:47 AM | Updated by: scmadmin On 03/16/2007 10:36:39 AM

**Advanced Inventory and
Quoting** for complex
Business **Processes**

Create Product Kits (Product Packages)

Surado Advanced Quote Module can be used for both finished products and individual component parts. Individual component parts can be associated to a Product Kit or Product Package. Product can even be linked to represent groups of products Packages or Kits that need to appear on Quotes. For many companies that do not sell products but service, the same holds true; You can create a group of services that are linked to one "Service" Kit and priced appropriately. The reason for doing this may vary from company to company but one reason to do this is to be able to track each individual service that is being performed as part of a package.

Product ID	Mfg Part Number	Description	Quantity	Price	Tax	Total	Date Code
K23	K23	Bundle Router, Cable and In: 1	1	\$299.99		\$299.99	
999		Installation and Configuration		\$0.00		\$0.00	
C10	C5-10	10' Cat 5 Cable		\$0.00		\$0.00	
R155	R155-135-55	5 Port Router - R155		\$0.00		\$0.00	

Subtotal	\$299.99
Trade Discount	\$0.00
Freight	\$0.00
Misc	\$0.00
Tax Rate	
Tax	\$0.00
Total	\$299.99

Attaching Documents to Products

When a product has detail specifications, it may not be prudent to include all the information in the description. With document attachments, each product can have multiple documents with detail specifications attached to the product. By doing this, when a quote is created with the product that has an attachment, the detail specifications will be available to the sales representative and it can be printed.

The benefit of attaching detail information to products will be evident for many companies that have detail specifications and these specifications must be printed when the quote is printed. With this option, your reps will be able to decide if the detail specifications (attached document) need to be printed when a quote is created. The end result is less errors, time savings and accurate quotes being presented to your customers.

About Surado

Surado Solutions, Inc., founded in 1995, is a privately held company that provides a full spectrum of Customer Relationship Management (CRM) products and services.

As an emerging innovator in CRM software, Surado is committed to providing powerful, versatile and sensible solutions that help companies know their customers and keep them for life. Surado's CRM Solutions help organizations increase sales, build customer loyalty and reduce costs while providing better customer service.

Our CRM solutions serve a wide range of vertical markets including financial services, healthcare, government, technology and manufacturing.

MORE INFORMATION

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