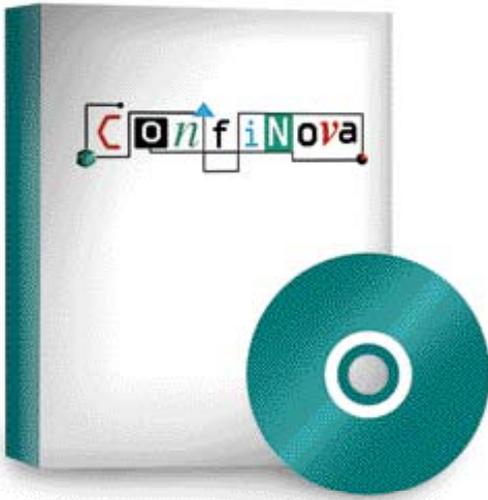Future Solutions

COMPANY

ConfiNova

The process of selling complex machines, services or plants requiring long negotiations and great flexibility in the deals is treated in a unique integrated application system.

THIS APPLICATION IS STRUCTURED IN SEVERAL MODULES, WHICH ALLOW THE MANAGEMENT IN A COMPLETELY INTEGRATED MANNER OF THE FOLLOWING ITEMS:

CUSTOMERS

The archive of customers and prospects is fed by every salesman or manager. It may be classified in many different ways to allow marketing analysis. Every reference may have several addresses and contacts. Customer can have pre-defined sales conditions to speed up the generation of offers.

NEGOTIATIONS

Negotiations are monitored on a success probability basis. The competition, present in every Negotiation is monitored too. Evolutions of Offers and Orders automatically reflect on Negotiations. The Budget module takes its data from Negotiations for building Budget and Rolling Forecast and for instant reporting.

ACTIVITIES AND NOTES

Different types of scheduled activities or notes can be created for any customer or negotiation. Activities may be notified to other users in the form of an invitation or of simple information. Alerts can be set by any user with a personalized time advance. Activities and Notes can be defined private or public.

PRODUCT CONFIGURATION

The Configurator is very simple to use for the sales force. Its use is the closest to a catalog, free paging, using pictures and drawings to drive the user. The Configurator designer has extremely powerful tools for solving configuration problems, but it is user friendly to design and maintain.

OFFERS AND ORDERS

Offer and Order Management is flexible, because its structure is easily adapted to every specific request by a parametric definition of commercial terms. This module works in integrated mode with the Product Configurator.

SALES BUDGET AND ROLLING FORECAST

The Sales Budget is generated from Negotiations in function of their success probability. In the same way a Rolling Forecast is generated periodically. Reporting can be obtained at any moment on screen or on printouts.

MARKETING ANALYSIS

It's possible to create an unlimited number of queries for marketing analysis. The result is displayed in form of charts. The desired shape for the chart is selected for every query. The result of the query and the related chart are exportable to MS Excel®.

STAND OFF AND INTERNATIONAL FEATURES

The system can be installed on notebooks or on desktops, in local or remote company sites. A proprietary synchronization procedure keeps the remote installations aligned to central servers. All screen labels and data descriptions can be shown in any language. Different date and decimal notations are supported. Exchange rate may be local or centralized.

MAILING LISTS

It is possible to create lists of Companies, of Contacts, of Negotiations applying filtering criteria or by simple association determined by sales events.
Every user can create his own private lists or public lists can be created to be used by other users. From those lists it is easy to generate mailing lists or marketing action plans.

INSTALLED BASE

An important foundation for sales and marketing is the knowledge of machines installed at the customer, either Company's machines or competition machines.
This knowledge is a great help in developing the after-market business or to focus specific actions in the promotion of new machines. The Installed Base may be created initially importing the data from existing files and then will be fed automatically by the result of the negotiations: the company machines from negotiations won and the competition machines from negotiations lost.

![Future Solutions Company logo] ![ConfiNova logo]

THE NEGOTIATION MODULE

Negotiations may last months without arriving to a formal offer. Central Sales Departments need to monitor the expected business volume, the probability of success, the presence of each Competitor.

Negotiation records contains information about:
- Customer data
- Market data (Area, Salesman, Manager, Dealers)
- Forecast dates (Order and Shipment)
- Probability percentages (purchase and winning)
- List of customer's contacts with their role in the project
- List of products and prices
- List of bidding Competitor.

The Negotiation module allows Salesmen and Area Managers to input information locally and then inform the Central Site, updating also any other installations which share the same information. Negotiation records are generated by the Sales Force on their own PC's. The Synchronization procedure transfers the information to the Central Site. Lost orders require the input of information on winning competitor and the reason of the loss.

Analysis by charts may be done on:
- Orders by areas and their trends in time
- Lost orders by reason and competitor
- Market share and redemption ratios.

Scheduled activities can be linked to every negotiation and notified to the other users involved:
- List of people invited or informed
- Alert time intervals are set by the single user.

Notes can be linked to every negotiation tracing the history of the negotiation. Defining private and public notes allows one to have both personal remarks and a shared history.
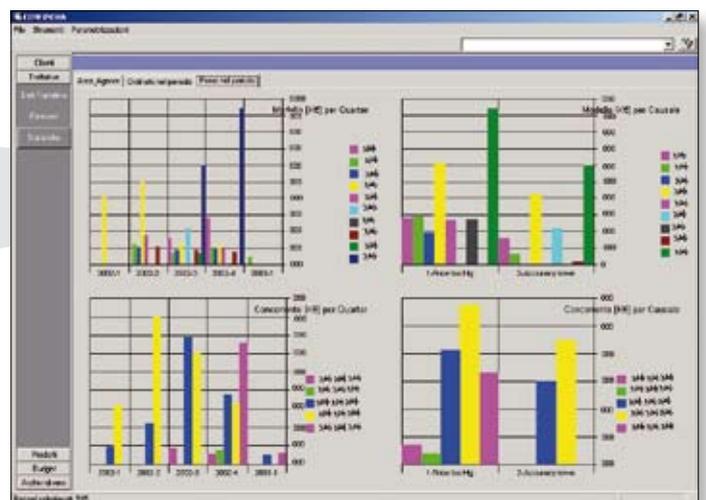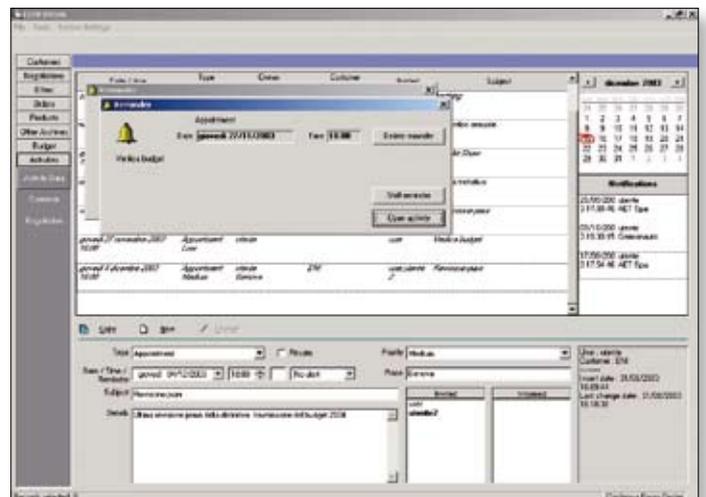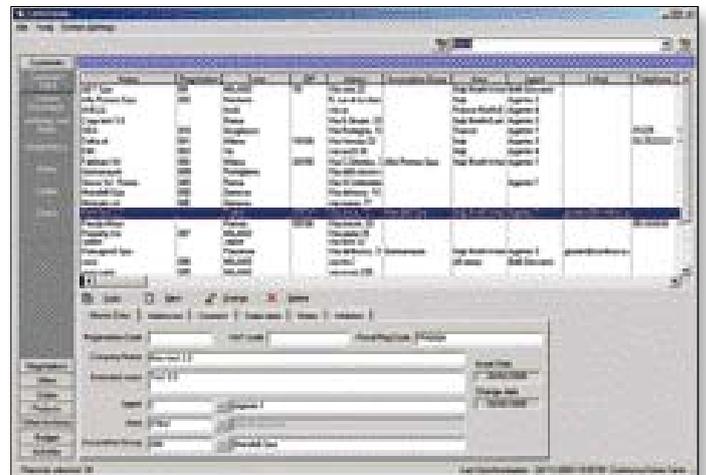
THE OFFER AND ORDER MANAGEMENT MODULE

The challenge for a universal offer management system is to answer an indefinite number of different requests for sale terms in the offer. Defining a common set of sale terms and giving the user the possibility to add a free list of commercial and technical parameters (question and answers) has solved this problem.

Any Company can easily customize the Offer/Order management procedure by adding to the common sale terms its own list of technical and commercial terms.

Catering for an industrial environment where commercial dealings are complex with maximum flexibility was our main concern.
This flexibility was achieved by:

Allowing adjustments for each offer on:
* the entire Price List
* the exchange rate for quotations in currencies different from the Price List currency
* the price at the level of single option, item total, offer total.

Allowing adjustments for each offer on:
* Offer/Order header and items
* each configuration option
* technical or commercial terms.

Allowing the addition to the configured product from the Configurator control of:
* spare or loose parts
* uncoded parts or services
* proposed accessories not affecting the quotation total amount.

Quotation must be fully described by texts and drawings, but their graphical appearance must be at the highest standard. As a consequence our printouts are generated in MS Word® or MS Excel®.
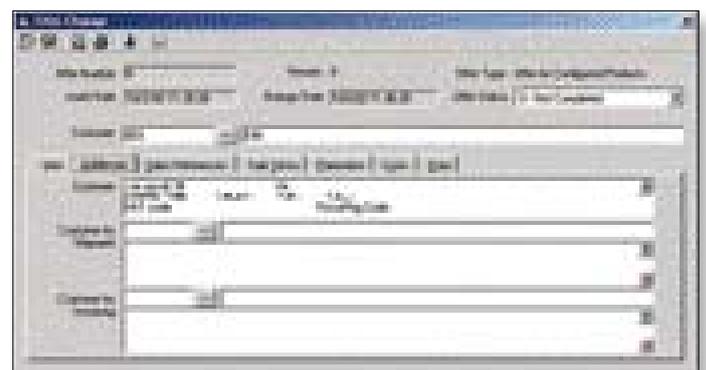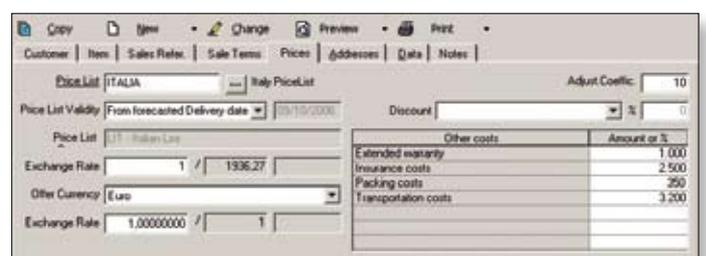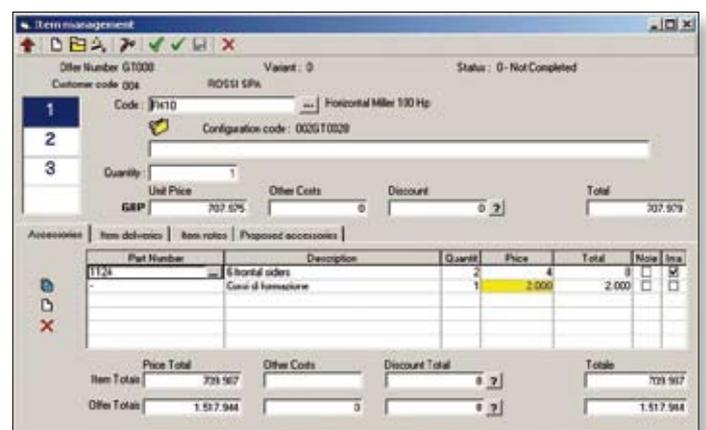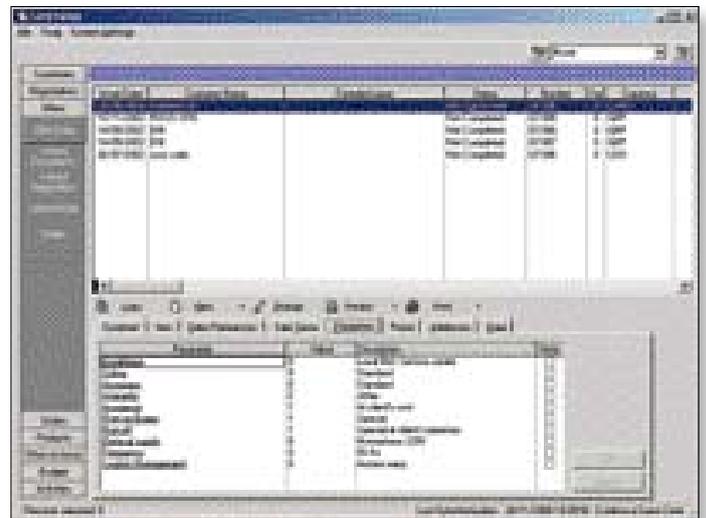
The Configurator has been conceived to be as easy to use as a printed catalog, containing technical data and images (pictures or drawings) of the product. For this reason it has been structured by page, where pages are opened for any specific group of options and each option can have extended technical description and images.

The predefined answers to a configuration question are easily selected opening the associated combo list. Where the answers are better explained by **images**, the combo list allows the selection by images.

You can display for each option the associated image, clicking the Image icon. You can consult for each option the associated technical description, clicking the Clipped Note icon.

You can add your own remarks for each option or question.

You can force, if permitted, the single option price.

The configuration process is simplified, showing only those questions and options which must be selected by the Salesman. All other components required to determine the price and to give **Production Department** its unit build list are automatically selected, and kept invisible to the user.

The main feature that makes the use of the Configurator very easy is the possibility of paging freely backwards and forwards without loosing the selections already done. Consistency between selections is assured by a Check function, which can be activated at any moment during the configuration process.
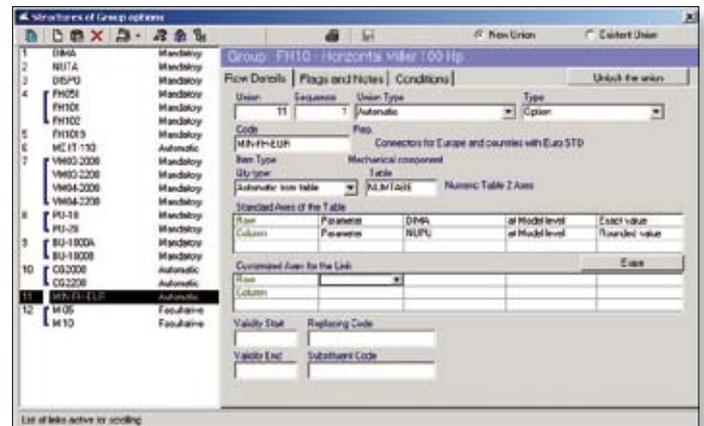
Configurator Design:

The main target in developing the tools to design the Configurator was to make it easy to write rules and page layouts.

You define your own questions and answers, entering them into the Parameter Table. In this table answers can be represented by images. Values of answers can be obtained automatically from multi-dimensional array tables.

Every option or question in the page can be conditioned by rules, which may make reference to other options or **answers** to questions or **results** of math formulas.

The generation of the Budget and the Rolling Forecast can be done at different levels of aggregation either for the product classification (product line, family etc.) or the sales structures (sales areas, salesmen). Aggregation rules allow the desired granularity in the generation of the budget and in its subsequent control.

The system makes the construction of the budget easy, proposing forecasts based on the probabilities assigned to negotiations and offers. In the same easy way a Rolling Forecast can be generated with the desired periodicity (quarterly or monthly).

Remote installation management: The remote instal-lations are created in this module, defining the filters to apply in the generation of the database and during the synchronization. The synchronization filters allow the maintainance in the remote database only of that information that concerns the local users.

The synchronization of the remote databases is done on line through an HTTP connection. Synchronization is performed in about one minute. Every installation connects and synchronizes with a server. A main server holds the central database, but second-level servers are possible in areas with connection performance problems.

Through this module the system administrator can generate new installation CD-ROMs. The administrator can monitor continuously the last synchronization time for each installation and the version of the program files. An automatic procedure maintains the installations aligned to the last program version.

The administrator defines users and their permissions for modules or single functionalities.
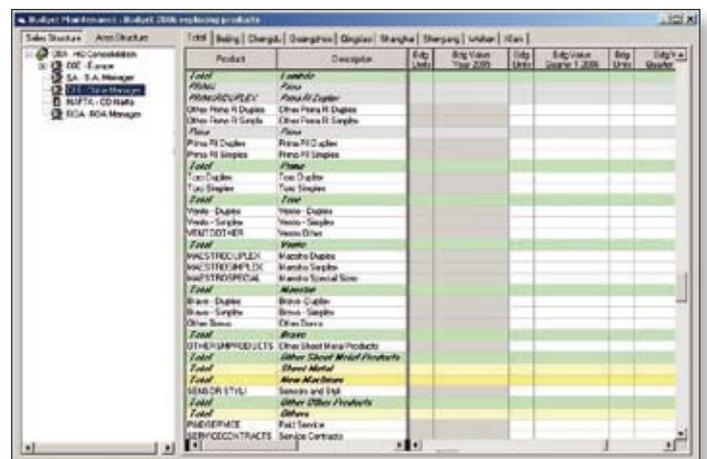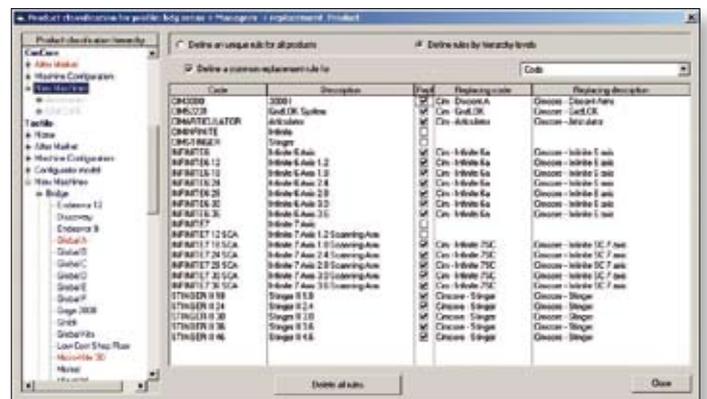
Multi language:
The software has been conceived for use in different countries. The screen language is selected and changed at any moment for each single user. The language is selected from the list of available languages. In the Offer/Order Management module the printing language is defined for each document and can be changed at any moment.

New languages can be added. The user must provide the translations in the new language for screen labels and system messages. The Translation procedure allows translating screen and printout labels, parameter and option descriptions, system flags and messages.