



# eXalt Order

## Streamlined Quoting Process and Enhance Competitiveness

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### Benefits

#### Eliminate Quoting and Order Processing Errors

The configuration module insures that only legal options can be selected eliminating the need for manual checking and verification of Quotes. Contract pricing is built into the module removing confusion over corporate pricing policies. Finally, information from back-end ERP systems can be tied in to provide up-to-date availability status. When Quotes are accepted by the customer a simple automated interface forwards the Bill of Materials to the corporate Order Entry System without the need for manual retyping and potential for error.

#### Reduce Risk with Increased Visibility and Control

With eXalt Suppliers have visibility of Channel Activity for the first time. Reports detail the usage of each channel partner and exactly what proposals have been issued. Improved forecasting is at the suppliers fingertips! Suppliers are given early warning of shifts in demand.

#### Reduce Quoting and Order Processing Costs

The Quoting and Ordering process is plagued with manual intervention driving up transaction costs for suppliers. Quotes and Orders of complex products must be manually checked for correctness of configuration and pricing before being entered into backend ERP systems. When this is all done each order can cost \$120 to process. With an automated rules engine, eXalt BOM and Quoting dramatically reduces the transaction processing costs per order from \$120 to \$10-20 each.

#### Generate Proposals in a Fraction of the Time

Unlike consumer products, complex technical products are not just sold by preparing a simple one page quote. Because each product is often designed-into a larger system extensive documentation must be created in the sales process:

- **Design Rules Checks** for Power, Thermal or other characteristics
- **Bid Submittal Books** detailing Warrantee, Installation documentation, Photos, Specification Sheets.
- **Detailed CAD Drawings** of the Configured System

Today this is a manual process that can take weeks. With an eXalt Powered Process each of these documents are built with a single mouse click slashing Proposal Times from Days to Minutes!

#### Improve Sales Productivity and Increase Sales

With Simplistic Spreadsheet based systems, Procurement, Sales, Channel Partners and Support spend countless hours on the phone and email trying to verify quotes, orders and re-entering content instead of selling more products. Numerous iterations occur due to errors - eroding productivity further. With eXalt, suppliers give distribution sales personnel an enormous productivity dividend. This dividend will result in incremental sales focus for suppliers who have made their products easier to sell and support.

#### Expanded Reach and Collaboration

With an eXalt Powered Sales Process existing sales personnel, channel partners and customers can be kept up-to-date instantly. Collaboration on proposals is simplified by accessing a secure repository. Cumbersome email and fedex based collaboration on Bid Submittals Documents is eliminated. New personnel and partners can be added with ease without distributing spreadsheets or activating difficult to use intranet tools.

#### Improve Customer Satisfaction

Customers are often impacted by inconsistent information from multiple partners for the same supplier. Competing VARs and Installers can quote inconsistent part numbers, availability, configuration information for the same RFP or Job because of access to outdated, inconsistent or erroneous data. Ultimately the supplier loses to competition that has managed the information flow correctly and controlled the accuracy of information flow to all of its partners to support the configuration, quote and order process. eXalt enables distribution channels to gain access to the information they need to place correct orders for your customers.

*"I can double the Number of Proposals and Bid Submittals I generate with an eXalt Powered Sales Process while reducing costly errors."*

*.....Leading VAR*

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### Features

#### User Created Templates for Re-Order

Users can create an unlimited number of Bill of Materials (BOM) of products under template names. Each of these templates can be password protected for secure viewing by multiple people and organizations. If the items are subject to frequent reorder they can be easily converted into an order with a single mouse click.

#### Supplier Created Global Templates

The eXalt Templates allow suppliers to create standard yet customizable solutions for use by sales professionals and channel partners. This approach enables the sale of a complete solution, allowing the supplier to capture a higher percentage of the sale dollars and increase the line items per order. Sales success in key vertical markets will be enhanced with preconfigured templates.

#### Multiple Price Lists

eXalt supports pricing between suppliers and multi-tier channels. Support of channel or geography specific pricing is supported. Pricing can be pulled from ERP systems and updated regularly removing load on critical back-end systems.

#### Hierarchical Bill of Material Supports Hardware, Software and Services

eXalt presents BOMs in an indented hierarchical list indicating all options and subassemblies for every line item. All types of hardware, software, service and maintenance items can be added to an order.

#### Multiple Part Numbering Schemes

eXalt supports full cross referencing of part numbering schemes. Supplier to Channel part number cross references can be built and maintained or competitive part numbering schemes. Often companies must maintain multiple part numbers for the same part due to multiple divisions or recent acquisitions.

#### Multiple Custom Quote and Proposal Formats

eXalt allows suppliers to create custom Quote and Proposal formats. Since all content is stored in XML multiple versions of documentation can be created and customized to each suppliers requirements. Examples of documents that can be created and automatically generated for users include:

- **Bid Submittal Documents:** Multi-page eBooks in Adobe PDF format incorporating all reference materials for parts in the proposal. eXalt automatically builds an entire eBook with proper pagination.
- **Custom Quote Formats:** Quoting Documents in Adobe PDF format, excel, XML or other formats. Suppliers can specify the entire look and feel of the document.
- **Specialized Proposal Summary Documents:** Specialized Reports can be created for a proposal such as a Thermal Analysis Report, Equipment Summary Report, Price to Gross Margin Report.

eXalt can generate multiple report types for a supplier for use by its sales personnel or channel partners.

#### Version Control for Quotes, Proposals, Bid Submittals and Specialized Reports

eXalt stores every version of a quote, Proposal, Bid Submittal or Custom Report. As the Bill of Material changes the prior versions are kept secure and easily accessed.

#### Secure Centralized Access for All Quotes and Proposals

With proper security permissions users can view and collaborate on Quotes and Proposals. Supplier Sales and Support Personnel, Channel Partners and End Users can all collaborate on common opportunities.

#### Seamless Integration for Import of Information

Web Services Support allows integration with other corporate systems:

- Import of Customer Information from CRM
- Retrieval of Pricing and Availability from ERP systems

#### Buy Now Facilitates Easy Conversion from Quote to Order

eXalt provides Web Services Support to easily convert a Quote to an Order via a Buy Now Interface:

- Export of Materials List to ERP Order Entry
- Export to Supplier managed Credit Card Gateway
- Export to eXalt managed Credit Card Gateway and/or Merchant Account
- Forward of Bill of Material to Channel Partner or Distributor for Purchase

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### System Requirements

#### Prerequisites

- **Select:** Catalog

#### ABOUT EXALT SOLUTIONS

*eXalt Solutions, Inc., is a market and technology leader in providing on-demand, Web-based services for solutions sales enabling suppliers of complex technical products and their channel partners to sell more product more profitably. The eXalt Powered Solutions Sales Platform (TM) incorporates a suite of modules tailored to the intricacies of the complex technical product sales/support process including Product Selection and Configuration, System Configuration, Design and Visualization, BOM Collaboration, Quote/Proposal Management and Product Support.*

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