### Selling customizable products made easy!

**CIS** CONFIGURATOR

CIS Configurator is a web-based quote management • application that is ideal for organizations who want to automate the quoting process for its internal and external sales personal, resellers, dealers and customers.

Quotes containing configured and stock items are created, edited, revised and copied quickly and all stored in one centralized location.

- Configure Price Quote
- Cloud or Client Server Deployed
- Rules based Configurator
- Quotes generated in minutes
- Centralized lookup for all quote activity
- Professional quotes in PDF format instantly
- Uses product knowledge stored in CIS



### **Replace Spreadsheet Sales Quoting**

## Rules are easy to add and maintain!

**CIS** CONFIGURATOR

CIS Configurator is connected to SAGE 300 ERP and synchronizes the items into the ModelBuilder, allowing your Product Expert to create complex rules!

Questions and Answers are created and conditioned using Exceptions and Relationships, which can be added to a spreadsheet and imported for product rules and future maintenance.

- Items flow from SAGE 300 to CIS
- Import Questions, Answers,
- Rules & Dependencies
- Assign Graphics to Answers, Static images or Transparency's Supported
- Send BOM's to SAGE 300

| ModelBuilder for sage 300  |      |                          |               |   |                        | CISCONFIGURATOR                   |  |  |  |
|--|------|--------------------------|---------------|---|------------------------|-----------------------------------|--|--|--|
| Model Builder  |      |                          |               |   |                        | Steve Tomkins<br>V5.0 Build: 1555 |  |  |  |
| 🕞 Save   🍃 Save & Exit   🍃 Export   퉛 Undo   🔒   | Cano | el 🛛 🚕 Fields 🛛 🎲 Test N | odel          |   |                        | 🔒 Log Out                         |  |  |  |
| Questions  |      | Attributes Exception     | Calculations  | Relationships                             | 5 Tables               |                                   |  |  |  |
| 😢 🚜 🗅 🤤 🗄 🗉 🛕 🖦 📝 🧛  |      | Default:                 | efault Answer |   |                        |                                   |  |  |  |
| Trailer Configurator   | •    | Numeric Value: 0         |               |   |                        |                                   |  |  |  |
| <ul> <li>Gelect a trailer type</li> <li>✓ Tautliner</li> <li>✓ Van</li> </ul>  |      | Item List Label: Item    | ist           |   |                        | Requires Question                 |  |  |  |
| I Flat bed   |      | Quote Report Label:      | Report        |   | Requires Question      |                                   |  |  |  |
| <ul> <li>2: Select an Axle type</li> <li>A Double (Twin wheeled 2X2)</li> <li>A Single (Single wheeled 2X1)</li> <li>3: # of Double Axles</li> </ul> |      | Thumbnail Image:         | Roport        |   |                        |                                   |  |  |  |
| - A 2<br>- A 3<br>- A 4<br>- A 4<br>- A 4  |      |                          | <b>F</b> 610  | i a la l |                        |                                   |  |  |  |
| - <b>A</b> 2<br>- <b>A</b> 3<br>- <b>A</b> 4   |      |                          |               |   | 0                      | 0                                 |  |  |  |
| i⊒ 😪 5: Heavy Wheels<br>I⊐ 🐼 6: Standard Wheels  | •    | Items:                   |               | Part Segment                              | Resource Quantity From |                                   |  |  |  |

#### <u>CIS Configurator</u> Lake Forest, IL 60045 USA +1 (847) 235 2188

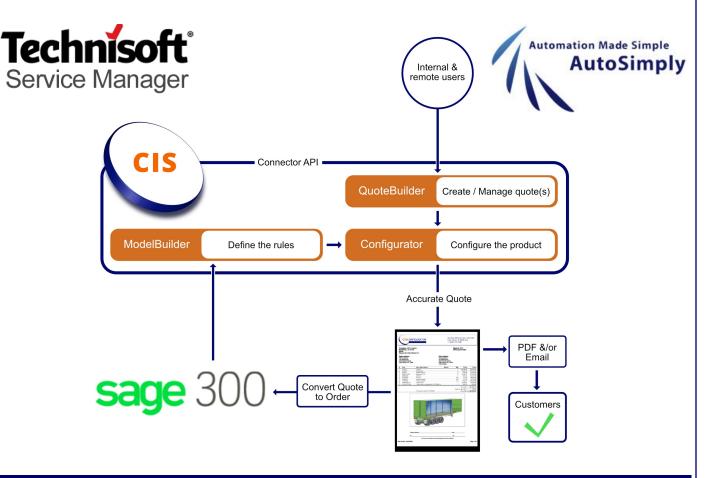
# **sage** 300

## **Configure Price Quote with CIS Configurator**

If you have a diverse product line, which has many variables, adding CIS Configurator allows you to add logic and rules, whilst using the core items and pricing from SAGE 300

Extend the quoting capabilities to your Sales team, Resellers and Customers whilst connected to SAGE 300. Inv Control and Accounts Receivable, required.

- Integrated with SAGE 300
- Integrated with AutoSimply
- Integrated with Technisoft Service Manager
- Convert accurate quotes to SAGE 300 Orders
- Creates Bills of Materials
- Only accurate orders created



#### **Create Accurate Quotes and Orders**

# **sage** 300

## Orders flow from CIS Configurator to SAGE 300

Accurate Quotes created in CIS Configurator can be copied, Submitted, Revised and Ordered appearing in SAGE 300 together with the correct item list and quantities (BOM's if required)

Orders contain configured products with the correct items, submitted by the logic added by your Product Expert; assuring only accurate products can be sold.

- Integrated with SAGE 300, AutoSimply, Service Manager
- Rules based Configurator SAGE 300 Items
- Logic Builder You maintain the rules
- Convert accurate quotes to SAGE 300 Orders
- Pricing maintained in SAGE 300
- Product knowledge stored in CIS

| Hama   | ASMINC - O/E  | Order Entry   |   |                 |                           |                 |                 |          |             |                         |         | - [                         | ⊐ ×    |
|--|---|---|---|-----------------|---------------------------|-----------------|-----------------|----------|-------------|-------------------------|---------|-----------------------------|--------|
| Open Close Page<br>Company Company Setup<br>File             | Order No.<br>Customer No.                           | ORD000000000  | Image: Wight of Shipments     0     Last Shipment No.       Image: Coastal Electric Company     Last Invoice No.  |                 |                           |                 |                 |          |             |                         |         |                             |        |
| Intelligence Reportir  | Ord <u>e</u> r C <u>u</u> stomer 1<br>Template Code | ACTIVE  | ales Splįt   T <u>o</u> tals  <br>PO No.  | P0-01           |                           |                 | Status          | : Posted |             |                         | Entered | I By: ADMIN                 |        |
| ✓ Inventory Control<br>I/C Items and Pr<br>I/C Periodic Proc | Order Date<br>Order Type                            | 04/19/2021  | On Hold From Multiple   | e Quotes        | <b>1</b>                  | Job R           |                 |          | Project     | Invoicing               |         | Retainage                   |        |
| I/C Physical Inve<br>I/C Price/Sales A                       | Ship-To Location<br>Deliver By                      | Q4/30/2021 	☐                                       | 4 04/30/2021  |                 | Port of San Fancisco      |                 |                 |          |             |                         |         |                             |        |
| I/C Setup<br>I/C Setup Repor<br>I/C Statistics anc           | Ship Via<br>Description                             | CCT 🔍   | Frucking Lines  |                 | Tracking No.<br>Reference |                 | QuoteID = 10018 |          |             |                         |         |                             |        |
| I/C Stock Contro   | Lin Type<br>1 Item                                  | Item No.7 M<br>#CAMARO                              | Conta de la contacta | Kit/BOM<br>4    | Description               | Q<br>CIS        | Price List      | ۹ ا<br>4 | _ocation    | Deliver By<br>4/30/2021 |         | Exp. Ship Date<br>4/30/2021 | ^      |
| <ul> <li>Pricing</li> <li>Manufacturing</li> </ul>           | BOM Components                                      |   |   |                 |                           |                 |                 |          |             | — E                     | C       | <                           |        |
| > Manufacturing Lot  | Component Item Numb                                 | Number Description                                  |   | Unit of Measure |                           | Qty. Ordered Qt |                 | Qty. Sh  | nipped Comp | onent's [               | ^       |                             |        |
| ✓ Order Entry  | CAM245R9  | Camaro Std Wheels                                   |   | Ea              |                           | 4.0000          |                 | 0        | .0000       |                         |         |                             |        |
| O/E Forms  | GBA   | PAINT - BLACK                                       |   | Ea              |                           |                 | 1.0000          |          | 0.0000      |                         |         |                             |        |
| O/E Periodic Pro   | AY6<br>DSS  | AISIN WARNER AY6<br>Dual Stainless Polished Exhaust |   |                 | Ea<br>Ea                  |                 | 1.0000          |          | 0.0000      |                         |         |                             | >      |
| O/E Reports  | RKE   | REMOTE KEYLESS ENTRY                                |   | Ea              |                           |                 | 1.0000          |          |             |                         |         |                             |        |
|  | V6  | 3.6L V-6 DI VVT                                     |   | Ea              |                           | 1.0000          |                 |          | 0.0000      |                         |         | ty. Available<br>0.0000     |        |
| O/E Setup  | 0101LS  | 1 LS PACKAGE  |   | Ea              |                           | 1.0000          |                 | 0.0000   |             |                         |         |                             |        |
| O/E Statistics an  | -   |   |   |                 |                           |                 |                 |          |             |                         |         | 0.0000                      | )      |
| O/E Transactions   |   |   |   |                 |                           |                 |                 |          |             |                         |         | _                           |        |
| > Production Planning  | <   |   |   |                 |                           |                 |                 |          |             |                         | >       | 35,2                        | 281.12 |
| sage For Help, press F1                                      |   |   |   |                 |                           |                 |                 |          |             |                         |         |                             |        |

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