



ACUMEN GROUP

Intelligent Distribution Management

Trusted Partner and
Valued Implementer

infor

Bid Prep for Infor CloudSuite Distribution

Automate Your Proposal Process to Generate More Quotes in Less

Enable your Sales team to engage in more opportunities overall by automating the creation, tracking and fulfillment of your bids. Embedded within CSD, proposal management just got a whole lot easier.

Business Requirements for the Bid Prep Module

If any of the following scenarios apply to your company, Bid Prep is for you!

- ⑥ Supply to contractors, aerospace companies, or other organizations that require formal bids, RFQ's, or proposals
- ⑥ Need an easy way to prepare bids for prospects and customers while cutting down on preparation time
- ⑥ Need to be able to tie related documents to the bids/RFQ's/proposals
- ⑥ Need to manage the bids across your organization and tie them to the associated vendor quotes
- ⑥ Want to be able to select the vendor to supply each item, maybe based on best cost, and in an easy format
- ⑥ Put out large bids and want to consolidate, group, and/or choose how you want the proposal to be laid out

Bid Prep in Action

Large Industrial Parts Distributor

Problem

The company was using their Order Entry tool, which supports quick quote-to-order conversions, to also manage longer cycle job quotes.

Impact:

The job quotes, which stay open for longer periods of time and don't always convert, were surfacing in status reports and skewing the data. The company also lacked the ability to analyze the job quotes properly as they existed in their Order Entry tool.

Solution: Bid Prep

"With the addition of Bid Prep, we are able to enter, track and evaluate long term job quotes/bids independently vs our quick QU quotes that may get converted to a sales order. Additionally, the Bid Prep System allows us to create and track revisions that the customer requests, or that become necessary due to price changes or quote expiration. This has made our operation more streamlined and allows us to separate the two worlds."

- VP Operations & GM



Bid Prep - Embedded within Infor CloudSuite Distribution

Never Leave the Application You Love

Centralized Bid Creation

Create one quote for all customers and prospects bidding on the same job/prospect. Print personalized proposals for each customer bidding. Multiple reps can work on the same jobs if needed. Maintain all related supporting materials in one location associated with the appropriate record. Auto-creation of orders upon approval/award from customer.

Formatted Quotes

Easily format your bid with headings/titles, groups of products, and unlimited descriptions. Use a preformatted bid to speed up the bidding process, or start with a blank sheet.

Automated Vendor Request for Quote

Email associated requests for vendor costing. Compare the cost of each item by vendor and select vendor of choice.

Release in Phases

Release products in phases as the customer needs them. The system keeps track of what you have released. If the customer needs more of a product than the bid calls for, you have the option to sell it to them at the same quoted price or at the system price.

Automated PO Creation

A Purchase Order is automatically created at the same time the order is created, and the products are ordered within the product lead time to get to the customer at the right time.

Reporting

Bid Prep reports help you analyze vendor quotes, view open and expiring bids, and understand why certain products were removed from the bid and not purchased. This data will help you get better vendor rates and improve customer service. Includes a summary

Lien Tracking and State Document

Advanced Lien Statistics and issuing of State specific documentation

ION Compatible

Whether you use all Infor solutions or not, Bids can automatically issue BODs and support your 360 degree view of your customers and/or prospects

The Acumen Difference - ERP Solutions for Importers, Wholesalers and Distributors

With over 30 years of Distribution experience, Acumen understands the importance of adapting and evolving along with ever shifting market conditions. As a consulting firm, we offer extensive industry experience matched with the deep technical knowledge required to consistently deliver successful Distribution ERP projects on time and on budget.

Founded by Former Distribution Owners • 2013 Infor Western Region Partner of the Year Referenceable Client Base

• Strong Project ROI • 2017 Infor President's Award Winner Full Service Management and Delivery Consulting • 2020 Infor Q5 MVP Award Winner

Talk to us,
scan to book
a meeting

