M3 Equipment Quotation Management User Guide

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Version Log

The version log describes the changes between versions of this document.

Part Number	Release Date	Description
EQMUG-14110	2010-10	First version of Equipment Quotation Management
EQMUG-14120	2011-05	Updated for GA version
EQMUG-15100	2013-05	Updated for GA version
EQMUG-15200	2013-12	Updated with compatibility information on M3 CLM
EQMUG-1530	2015-03	Updated to reflect new functionality
EQMUG-1540	2016-09	Enhanced functionality and certification with M3 13.4

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About this Guide

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Contents

M3 Equipment Quotation Management User Guide provides an overview of basic functionalities in EQM and instructions on creating and managing quotations.

Knowledge Prerequisites

In order to understand this user guide thoroughly, you will need an understanding of:

- Infor Smart Office or Ming.le operation.
- The basic principles of M3 including inventory, sales, equipment, warranty, maintenance agreements, maintenance work orders and maintenance customer orders.

For further information on EQM installation, refer to the *M3 EQM Installation Guide* available on the product download page.

Overview

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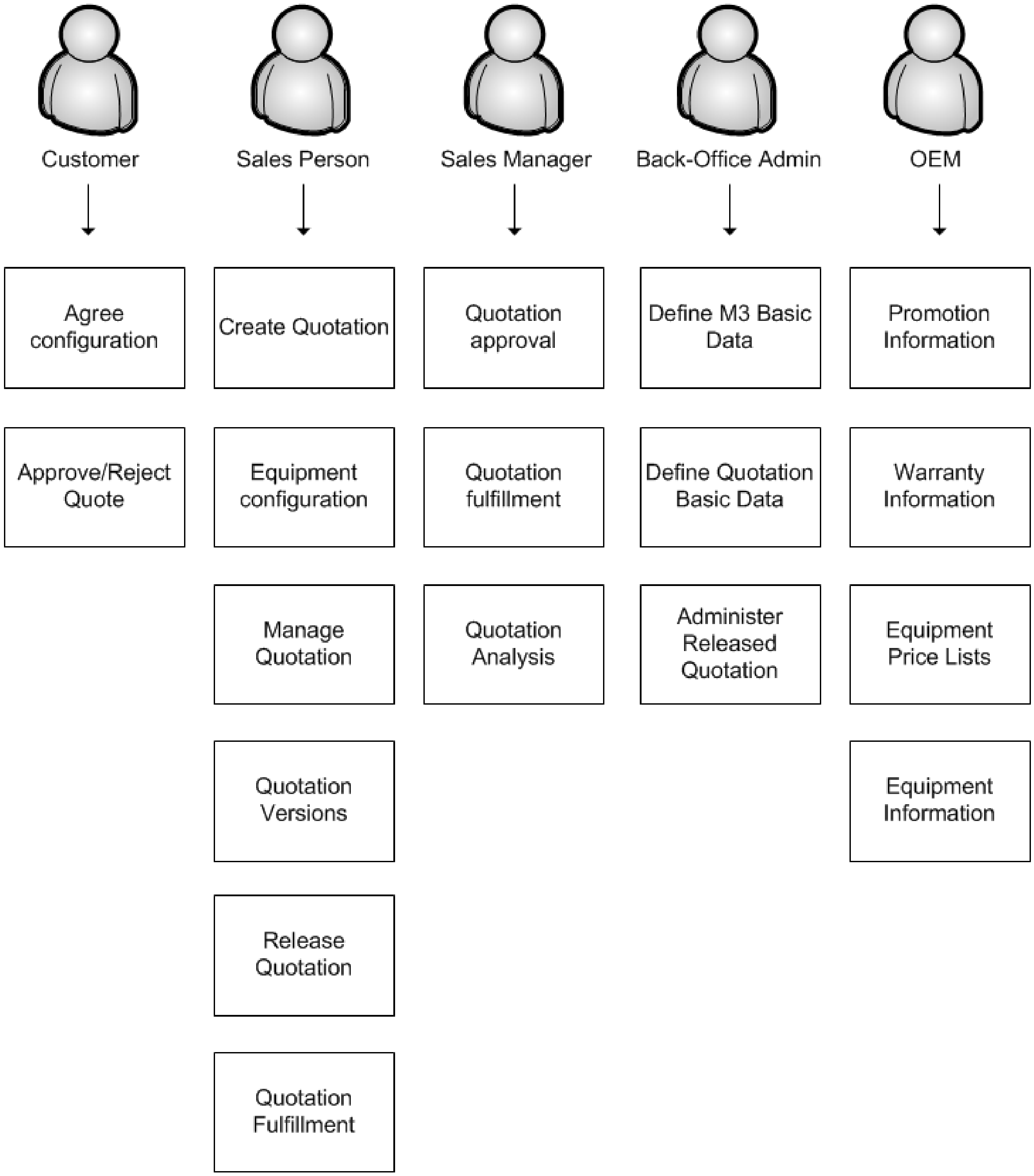
M3 Equipment Quotation Management (EQM) is a solution that is designed for creating quotations for the sale of complex equipment and related services. M3 EQM also includes the M3 EQM Configurator which is designed to simplify the selection of attributes associated with complex equipment. EQM also supports rental and after-market sale of parts and services.

Equipment Quotation Management Overview

M3 EQM is a solution designed to bring together resources from across the organization who will prepare data for use within the quotation process and then manage the quotation process from initiation to final delivery of the equipment.

Figure 1. Resources and tasks in EQM



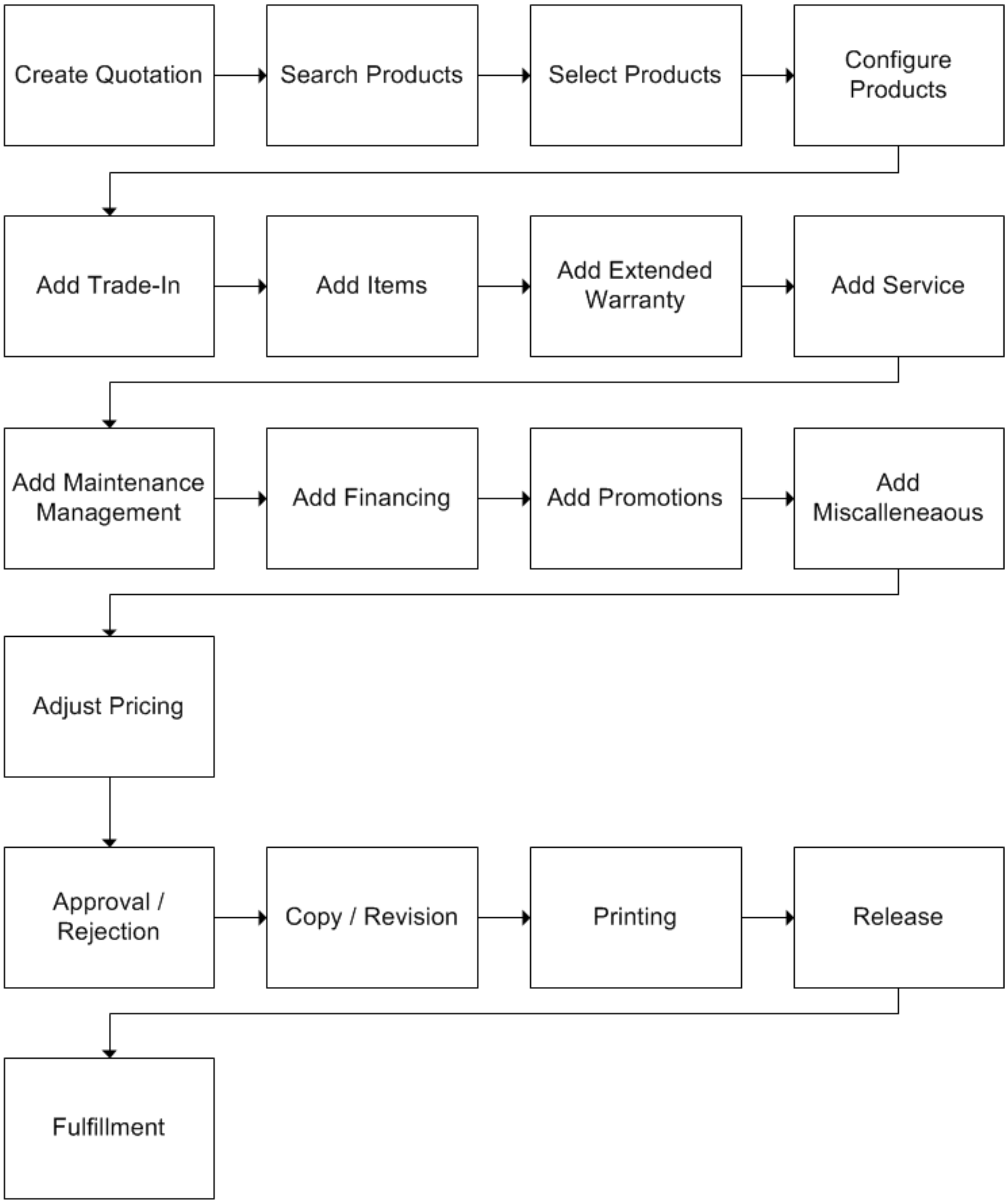
M3 EQM supports:

- Creation of quotations from the EQM mashup;
- Creation of quotations headers from M3 CLM;
- Adding one or more equipment (Products) to the quotation;
- Equipment reservation;

- Configuring the equipment with attributes;
- Sales and cost price calculations;
- Configuring EQM with basic data for allowed warranties, services etc;
- Sale of equipment spare parts;
- Equipment trade-ins;
- Extended warranties;
- Commissioning work orders;
- Maintenance customer order agreements;
- Promotions;
- Financing;
- Miscellaneous
- Sales price adjustments;
- Quotation status control;
- Conversion of the quotation to sales orders, maintenance customer orders, work orders and equipment;
- Creation of marketing claims
- Quotation fulfillment.

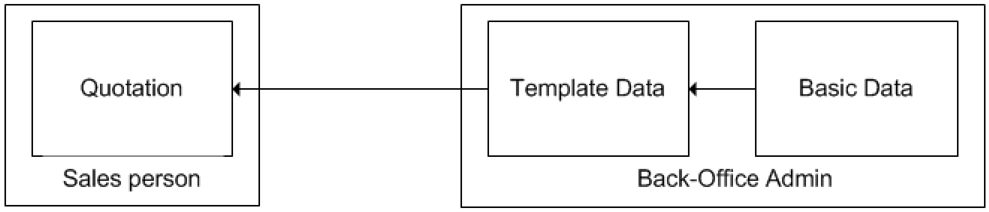
M3 EQM requires some modules of the M3 Business Engine to be licensed. Optionally, M3 EQM can be used with Infor Document Management and M3 CLM.

Figure 2. Workflow in EQM



Equipment Quotation Management is usually supported by back-office or administration staff who will maintain the basic tables such as the equipment, service and maintenance agreements. It's likely that these resources will also manage the 'template' data within EQM. Template data is designed to simplify the quotation process for the salespersons by providing them with pre-approved and filtered information. These templates could, for example, be a list of service records for commissioning the equipment or approved promotions.

Figure 3. By filtering information, template data simplifies the work for salespersons



M3 EQM Basic Data Setup

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This chapter explains the basic data that should be defined in order to work with the quotation processes. These processes will typically be implemented by an administrator who will define the rules that the sales executive will then use whilst creating quotations.

Equipment and Attributes

Use these steps below to associate basic data with the equipment and its attributes.

Important: If the basic data associated with the equipment and its attributes (including the attributes cost and pricing information) is not configured correctly, the quotation process will not operate as designed.

1. Define the attribute model in 'Attribute Model. Open' (ATS050). This attribute model is linked to the equipment in 'Item. Open' (MMS001)
2. Link the attributes (such as engine size or gearbox type) in 'Attribute Model. Connect Attributes' (ATS051).

- Grouping of attributes for display in the Equipment Configurator is based on the display group associated with the equipment configurator in ATS051.
- Display options control if you want radio button or drop-down lists as a display in the Equipment Configurator

  To set a display group, use 'Display Group .Open' (ATS014).

3 Define the attributes in 'Attribute. Open' (ATS010).

It is recommended to have attribute values set as items. In that case, set the check-box 'Item attribute' on the attribute in ATS010.

4 Define the value for each attribute in 'Attribute Matrix. Enter Values' (ATS022).

Attribute values for a fuel tank might be for example the item number for "standard", "fast-fill" etc.

5 To configure dependencies between attributes open 'Attribute-Dependent Objects. Open' (ATS040) and navigate to 'Attribute-Dependent ID. Open' (ATS041).

In ATS041, define which attributes are dependant on each other (for example engine and gearbox). This will allow you to define the actual values in 'Attribute-Dependent Values. Open' (ATS042).

6 To set up default attributes values, go to 'Item. Connect Alias Number' (MMS025). Using alias number in EQM makes it possible to directly retrieve a pre-configured equipment.

Quick entry of attributes

Attribute setup for equipment is time consuming.

Programs 'Attribute Template. Open' (QUS060) and 'Quick add equipment attributes. Open' (QUS050) can be used to make the setup quicker and easier.

Sales and Cost Prices

- "Equipment Sales Prices" on page 16
- "Sales and Cost Prices for Related Quotation Information" on page 17

Equipment Sales Prices

This section provides basic information on how the sales and the cost price of the equipment is retrieved.

The set up of equipment sales prices differs depending on the equipment being priced per its components or as a lump sum for the complete configuration. A lump sum can typically be applicable for used equipments. For new equipment sales, the sales prices can be related to the specific configuration choices, i.e. the components.

To drive pricing per equipment component, the kit functionality is used. The equipment is the kit header and the selected components are the kit lines. The kit lines retrieve the sales prices (including discounts) and sums up to the kit header. The sales price can also be retrieved to the kit header, although there is no support to drive pricing via markups for multiple attribute values. Therefore it’s recommended that the kit pricing is done for the kit lines. The kit pricing functionality is controlled via the ‘pricing method’ parameter in ‘Product Structure. Open’ (PDS001).

To define a lump price for individual equipments, the serial number based pricing functionality can be used. The serial number based pricing information is defined and maintained in the program ‘Serial Number Based Pricing. Open’ (MMS250). For used equipments sales where the serial number is specified on the order transaction and a sales price exists in MMS250, no kit information is generated in ‘Customer Order Entry. Open’ (OIS100). The sales price is retrieved for the equipment item- and serial number combination.

Local options of equipment retrieve sales price via the service price list in ‘Service – Enter Prices’ (MOS306).

The purchase prices of equipments are recommended to be defined in ‘Purchase Agreement. Open’ (PPS100). The kit functionality is introduced to drive purchase pricing, i.e. the purchase price is then defined for the components (kit lines) and sums up to the equipment (kit header).

For an equipment dealer the sales price for ‘new’ equipment sales might be based on the information retrieved via a machine price interface. Dynamic pricing supports sales price calculation based on the recommended list price, with regards to the attribute. It’s therefore possible to set up the sales prices via the price origin ‘C - dynamic pricing’.

That is, the equipment price interface will only update the purchase agreement with the recommended list price as the purchase gross price. The purchase prices in the purchase agreements are defined per attribute model and attachment indicator. These objects will be used when retrieving the purchase price as the sales price calculation base for the kit lines. The attribute model used is the attribute model on the equipment i.e. the kit header item.

It is possible to use customer price list for the components (kit lines) instead of dynamic pricing. The price lists will in that case be setup per attribute model.

Sales and Cost Prices for Related Quotation Information

This section provides basic information on how the sales and the cost price of the various equipment related quotation information (such as warranty, service etc.) are retrieved.

Item

- *Cost price for Item* is retrieved from the standard price (for standard priced items) or average price (for average priced items) in the item/facility record in 'Item. Connect Facility' (MMS003).

  Note: *Cost price for Item* is not the default price from the purchase price in the item master (even if it is entered).

- *Sales price for Item* is calculated according to the price list on the quotation header. The list price code is retrieved from the customer record in 'Customer. Open' (CRS610). Alternatively, the sales price will default from the item master in 'Item. Open' (MMS001).

Trade-in

- *Cost price for Trade-in* is retrieved from the trade-in field within the trade-in record.
- *Stock value for Trade-in* is retrieved from the evaluation value field within the trade-in record.

  For additional information, refer to "Equipment Trade-In" on page 57.

Warranty

- *Cost price for Warranty* is the same as the calculated purchase price.
- *Sales price for Warranty* is retrieved from the extended warranty item. The price list on the quotation header is used to drive the sales price

Standard warranties are automatically linked to the quotation if configured to do so and could affect the quotation's sales price or cost price. For further details, see .

Service

- *Cost price for Service* is retrieved from the service costing associated with the service record ('Service. Open' – MOS300) and is created when 'Product Costing. Calculate Service' (PCS235) is run. For a commission service with an internal customer will the cost price be defaulted from the service price list. The cost price in this case can be edited.
- *Sales price for Service* is defaulted from the service price list and is only valid for commission services without internal customer. Configuration service and commission service with internal customer does not affect the quotation's sales price.

Maintenance Agreement

- If the pre-payment item number is entered, a sales line will be created. This will affect the total sales price but not the margin (as there is no initial cost).
- The maintenance agreement and costing are managed separately by the maintenance agreement functionality as such.

Financing

Financing will not affect the sales and cost prices for the quotation. The sales and cost price will only be used as an input when a Rental or Leasing Agreement is created at a later time.

Promotions

- *Cost price for Promotions* (i.e the discount amount or discount percentage) is retrieved from the promotion setup in 'Quotation. Add Promotion' (QUS117). The discount percentage will only consider the price of the product and not other line types.
- *Sales price for Promotions* will match the cost price if the parameter 'Quotation. Add Promotion' (QUS117) is set to on. If the actual discount amount is changed when the promotion is linked to the quotation, the difference (plus or minus) will be reflected in the sales price.

Miscellaneous costs

- *Cost price for Miscellaneous costs* is retrieved from the miscellaneous cost definition in 'Quotation'. Add 'Miscellaneous costs' (QUS118) on records containing an item. In this case, the cost price will come from that items cost price as defined against its item / facility record in 'Item. Connect Facility' (MMS003).

- *Sales price for Miscellaneous costs* that are linked to an item the default sales price will come from the item master record in 'Item. Open' (MMS001). These records can be defined with a charge code defined in 'Order Line Charge. Open' (CRS275) as described above.

Batch Order Parameters

When a quotation is released, sales lines will be created through the customer order batch entry.

1. Add a new record in 'M3 Settings – Batch orders' (OIS278).
2. Set the Source for the batch order to F = EQM Quotation.
3. Set the field Source sales price on the E panel to "2 – Yes, even is zero".
4. Set the field Severity level on the E panel to '20 - No messages', to prevent the quotation from getting stuck in the 'Batch Customer Order. Open' (OIS275) due to a warning only.
5. Set the document class parameters in order to get the text information transferred from the quotation to the customer order.

Number Series

Two number series must be set up in 'Number Series. Open' (CRS165) on a blank division.

1. Set up number series for EQM Quotation using Number Series Type equal to **QU** and choose a Number Series.
2. Set up number series for Maintenance Agreement using Number Series Type equal to **MA** and choose a Number Series.

Overall Settings for Quotation

A settings function 'Settings – Quotations' (CRS732) controls overall settings that are used within EQM.

The option 'Item not used' controls if the item number field should be hidden in EQM when creating and managing product lines. It is recommended to always have this parameter set on.

The option 'Price list table' can be used to manage an estimated price on a configuration, before the customer has been selected.

Note: This setting affects the processes where item number is mentioned as an available parameter.

- "Quotation Order Types" on page 20
- "Quotation Permissions" on page 21
- "Quotation Status Update" on page 22

Quotation Order Types

EQM order types control a number of attributes associated with a quotation. Quotation order types are defined in 'Quotation Type. Open' (QUS020).

1. Enter the new order type and press New.
2. Enter a brief description of the order type and optionally a name.
3. Enter a sales customer order type, this is used as a default on the quotation header, but may be changed when the quotation header is edited. The customer order type is defined in 'CO Type. Open' (OIS010).
4. Enter the quotation numbering series.
5. Define the maintenance agreement numbering series. This is used when the quotation is released and a maintenance agreement is created in 'Maint Agrmnt. Open' (COS410).
6. Use the Private option to restrict the quotation to the users specified by the responsible, sales person and sales manager fields within the quotation header. The quotation will not be available in the list of quotations outside this group of users. Again, this provides an additional level of security and control.
7. Enter optionally parameters related to Trade-in and Rental Purchase Option (RPO).
8. The fields 'Validity period' and 'Delivery period' are used for calculating the default 'Valid to date' and 'Requested delivery date' on a quotation.
9. The fields 'Retrieve equipment text' and 'PO line text' are used for retrieving text from the Equipment master (MMS240) and the Purchase order line (PPS201) to the quotation.
10. The 'days pr expire' field allows you to specify how many days before the expiry date of the quotation should the application send out reminders to the sales executives to follow-up on the quotation. To generate these messages, you must run the 'Quotation Status Update' (QUS920) function.
11. The 'Direct delivery' field is used to support a customer sale with direct delivery from the supplier.
12. If the quotation needs to be approved, the status remains at 20 and must be approved before it can move on in its cycle.
13. Quote approval controls if the quotation approval should carried out on the header level and on the individual line levels. If the quotation is set on the header level you can continue to select the additional parameters defined below.
14. If the quote approval parameter is set, you can define which records must be individually approved. Quotation approval or line approval is carried out in EQM Manager mashup > My Quotations> Approval.

Control of approval is defined in 'Settings. Quotation Approval' (QUS155).

- Product;
- Item (parts);
- Warranty;
- Configuration service;
- Comissioning service;
- Maintenance agreement;
- Financing;
- Promotion;
- Miscellaneous (costs);
- Trade-in.

15 Click Next to save the record.

Quotation Permissions

To manage user permissions in 'Settings. Quotation Permissions' (QUS155), you can

- define if the cost and cost margin is displayed or changeable for the user in all EQM functions;
- control what line types the user is allowed to add.
- control if a user is allowed to directly create an order from a quotation, without any approval steps

You can authorize the user to the following options:

- Product (sales lines)
- Items (spare parts)
- Warranty (extended)
- Configuration service
- Comissioning service
- Maintenance agreement
- Financing
- Promotion
- Miscellaneous costs
- Trade-in's

Quotation Status Update

The function 'Quotation Status Update' (QUS920) is a batch program that will check to each quotation to evaluate if it is coming to the end of its valid date range. If so, this function will trigger application messages that can be viewed in 'Application Message. Open' (CRS420). Further details of the messages and who they sent to is defined in the "Application Messages" on page 23 section below.

Messages can be sent before the actual expiry date of the quotation which can be useful as it provides extra time to follow-up the quotation. In that case, the quotation status will be set to Expired (status 95). The number of days prior to expiry is controlled by each quotation order type (QUS020) using the parameter 'days pr expire'.

Sales Roles in EQM

Salesperson

The user in EQM (QUS155) should also be setup as a salesperson. Salespersons are defined in 'Sales Person. Open' (CRS100).

Salespersons are used to define each sales executive that will create quotations. Salespersons are linked to sales managers.

Sales Manager

Sales managers are defined in 'Sales Manager. Open' (QUS150) and are linked to the quotation header and are used for a number of activities including quotation approval. The user profile being defined as a sales manager must already exist in the user profile table 'User. Open' (MNS150).

- Enter the sales manager identity and click New to create the record. No further changes can be made, press Enter to save the new record.

Sales Manager per Salesperson

You can link individual salespersons to a sales manager. This link allows the sales manager to manage quotations from their salespersons and also provides defaults when the quotation header is created. The link between sales manager and salesperson is created in 'Sales Manager per Salesperson' (QUS151). It is possible to link a salesperson to more than one sales manager, in this scenario you will get the first manager in the list.

1. Enter the name for the salesperson and click New to create the record.

   No further changes can be made.
2. Press Enter to save the new record.

Target Margin

You can define the target margin for a combination of fields in 'Target Margin' (QUS160). The fields that you can use are any combination of product, product group, customer and customer group.

1. Press the new button in 'Target Margin' QUS160
2. Enter any combination of product, product group, customer and customer group. At least one field must be entered
3. You must enter a description. If left blank, the description will be copied to the name.
4. Enter the target margin that applies.

Application Messages

Application messages provide a proactive way in which system messages can be sent to your M3 message box or, alternatively, can be forwarded to your own e-mail system. Application messages are viewed in 'Application. Message. Open' (CRS420).

The following application messages can be activated in 'Settings. Application Messages' (CRS424).

Message ID	Description	Sent to which user
850 - EQM quotation is ready for approval	The quotation is ready for approval, its status has been raised to 20 'Awaiting Approval'	The message is sent to the sales manager specified on the quotation header.
851 - EQM quotation approved	The quotation has been approved and the status is now 30 'Approved'	The message is sent to the salesperson defined on the quotation header.

Message ID	Description	Sent to which user
852 - EQM quotation rejected	The quotation has been rejected and the status is now 15 'Rejected'.	The message is sent to the salesperson defined on the quotation header.
853 - CO created from EQM quotation	The quotation has been released. The record will either be in OIS100 or alternatively in the batch order entry function waiting to be corrected.	The message is sent to the sales manager specified on the quotation header.
854 - Valid to date close to expire	The quotation expiry date has nearly been reached. The number of days before expiry is defined in the quotation order type. 'Quotation Status Update' (QUS920) must be run to trigger this message	The message is sent to the salesperson defined on the quotation header.
855 - EQM quotation expires	The quotation expiry date has passed. This message is triggered by QUS920.	The message is sent to the salesperson defined on the quotation header.
856 - Equipment quotation line ready for approval	The quotation line is ready for approval, this is a message to the responsible person.	The message is sent to the responsible person on the quotation line.
857 - Equipment quotation line approved	The quotation line has been approved, this is a message to the responsible person.	The message is sent to the responsible person on the quotation line.
858 - Equipment quotation line rejected	The quotation line has been rejected, this is a message to the responsible person.	The message is sent to the responsible person on the quotation line.
859 - Trade-in work order is closed.	The pre-inspection work order for the trade-in has been closed.	The message is sent to the salesperson specified on the quotation header.

Message ID	Description	Sent to which user
860 - Trade-in item does not exist.	The quotation has been accepted and the status is now 50 'Accepted'. But the item number for the trade-in is missing in item master (MMS0001).	The message is sent to the responsible specified on the trade-in record.

Warranty, Service and Maintenance in EQM

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- "Service Records" on page 26
- "Customer Variations" on page 28
- "Maintenance Agreement Records" on page 28

Warranty Records

This section describes how to configure the basic data for warranty records for quotations.

EQM takes care of both standard and extended warranties. Warranty records are initially defined in 'Warranty Type. Open' (MOS710), where they are marked as standard or extended warranties.

Standard warranties are pre-configured in 'Warranty Type. Connect to Objects' (MOS700), where you define which standard warranties should be applied to an equipment or groups of equipment. When a product is linked to a quotation, it is checked if standard warranty is applicable. If so, a standard warranty will be automatically added to the quotation.

Standard warranties don't have a sales or a cost price as these are given by the OEM. Basic data for Warranties used in EQM is defined in 'Quotation. Add Warranty' (QUS113).

❏ Configuring the basic data for warranty records

___1 Enter the product number, or select the warranty to apply to.

___2 Enter, or select the warranty type to use.

___3 Click New to create the record.

- Set the status of the record to 20 to allow the sales executives to use this record when creating the quotation.
- Leave the status at 10 if the record is still being prepared.
- If status is set to 90, the record has expired or is no longer required.

___4 To control when the extended warranty should start, you can use the following options:

- the standard warranty start date
- the standard warranty end date
- the requested delivery from the quotation header

___5 Additional fields are displayed from the warranty basic data in MOS710, but cannot be edited from here.

___6 Select the field 'Default record' if the warranty should be automatically added to the quotation upon creation.

___7 Click Next to save the record.

When a quotation is released, the standard warranty will be inserted into the granted warranty fields on the sales order line for the equipment in 'Customer Order. Open Line' (OIS101). In case of extended warranty, one or several warranty records can be linked to a product in a quotation. The extended warranty will create sales order line or lines in OIS101. If several extended warranties exist, only the first order line in OIS101 will be linked to the product’s order line. The other order lines will be treated as a separate sale of extended warranty.

Service Records

This section describes how to configure the basic data for service records for use with quotations.

The following service records can be defined:

- Configuration service

  A configuration service is used to configure the equipment with additional options. A configuration service will be automatically added to the quotation only if the service is linked to the equipment in 'Item. Open' (MMS001/J). The configuration service you are linking here are therefore the ones that you want to manually apply to the quotation.

  Important: The configuration service must be linked to the product/equipment in 'Item. Open' (MMS001/J).

- Commissioning service

  A commissioning service can be used to manage on-site work after the equipment has been delivered to the customer. This may, for example, be commissioning or for on-site training.

Note: You can only link one configuration service to a quotation, but you can link many commissioning services.

Service data is defined in 'Service. Open' (MOS300). The sales and the cost price for a commission service are setup in 'Service. Enter Prices' (MOS306) using two different service price lists: one external for the sales price and one internal for the cost price.

When a quotation is released, a configuration service will create a work request in 'Work Request. Open' (MOS170) and a commissioning service will create a maintenance customer order/line in COS100/COS101. Quotation service basic data is defined in 'Quotation. Add Service' (QUS114). Related options from this function allow you to access service basic data and also agreement lines (if an agreement number has been entered against a record).

❑ Configuring the basic data for service records

___1 Enter the product number together with the structure type (if used) and the service name and select New.

___2 Set the status of the record to

- 20 to allow the sales executives to use this record when creating the quotation.
- 10 if the record is still being prepared.
- 90 to indicate if the record has expired or is no longer required.

The responsible field indicates who is responsible for maintaining this record. This field is for information purposes only.

___3 Optionally, enter a maintenance customer order agreement number. This is used for the install service and the install service should normally be linked to a valid MCO agreement. Generic MCO agreements (that is agreements not linked to a customer) can also be used. If the field is not used the commission service will be linked to the quotation's Maintenance Agreement record.

___4 The internal customer field is used on the maintenance customer order and moved to the payer field for internal billing purposes. There is a check on this field to make sure a customer type seven is used.

___5 A configuration service will be automatically added to the quotation only if the service is linked to the equipment in 'Item. Open' (MMS001/J).

___6 Select the field 'Default record' if the service automatically should be added to the quotation upon creation.

If selected, the 'OEM Code Details' from the service definition (MOS300/J) are displayed.

___7 Click Next to save the record.

Customer Variations

Customer variations are customer specific requirements that are rarely used. The customer variations are based upon a template service definition in 'Service. Open' (MOS300) as a base. The default template service can be defined within the F13 Settings.

Customer Variations are maintained in 'Customer Variations. Open' (QUS119). In QUS119 you can filter these requirements per Product and OEM Codes. You can define up to ten OEM Codes in 'OEM Code Connect Numbering System' (MOS986). OEM codes are user defined.

❑ Add Customer Variations

___1 Enter a description and optionally a product and customer and select New.

___2 If not defaulted, enter the structure type and service name for the template service definition.

___3 Enter the field New Service if a service should be created based on information from the template service and the data entered in QUS119. If the field is left blank the template service will be connected to the quotation.

___4 Enter the different price and cost fields.

___5 Optionally enter an agreement number. If no agreement is entered, a maintenance agreement must be added to the quotation via 'Quotation. Add Maintenance Agreement' (QUS115).

___6 Add a responsible for the customer variation.

___7 Enter OEM codes. These fields will be used to filter among the customer variations.

___8 Click Next to save the record.

Maintenance Agreement Records

This section describes how to configure the basic data for maintenance agreement records to use with quotations.

The maintenance agreement records are usually used to define how you will work with your customer and equipment once the equipment is delivered. This might be for example, what work you will carry out on that equipment. Maintenance agreement data is defined in 'Maint Agrmnt. Open' (COS410). When a quotation is released, the maintenance agreement record in the quotation will create a maintenance agreement in COS410. Basic data for Maintenance agreement used in EQM is defined in 'Quotation. Add Maintenance Agreement (QUS115). Related options from this function allows you to access agreement lines.

To configure the basic data for maintenance agreement records, complete the steps below.

❑ Configuring the basic data for maintenance agreement records

___1 Enter the product number together the agreement number and select 'New'.

Note: It is recommended to use an agreement number with agreement type '1 - Specific' in 'Maint Agrmnt. Open' (COS410). When this is used the customer on the template agreement will be replaced by the customer on the quotation upon quotation release.

___2 Set the status of the record to

- 20 to allow the sales executives to use this record when creating the quotation.
- 10 if the record is still being prepared.
- 90 to indicate if the record has expired or is no longer required.

___3 The responsible field indicates who is responsible for maintaining this record and is for information purposes only.

The price agreement is for display only.

___4 Enter the time period (number of months) the agreement should be valid for.

___5 If the initial payment item number is entered, a sales line in 'Customer Order. Open Line' (OIS101) will be created when the quotation is released. The item in 'Item. Open' (MMS001) should be classed as not inventory accounted.

Note: This will affect the total sales price but not the margin (as there is no initial cost).

___6 Select the field 'Default record' if the Maintenance Agreement record automatically should be added to the quotation upon creation.

___7 Click Next to save the record.

Financing, Promotions and Miscellaneous Records in EQM

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- "Promotion Records" on page 31
- "Miscellaneous Cost Records" on page 33

Financing Records

This section describes how to configure the basic data for the following financing types:

- **Leasing** (Financing type '0 -Leasing')

When a quotation is released, the financing option will display a record under Fulfillment tab in EQM mashup. The record will be connected to a Leasing agreement. To get the leasing agreement created correctly, you must ensure that the equipment exists in 'Open Service Supplement' (SOS001).

- **Rental Purchase Options (RPO)** (Finacing type '1 - RPO')

  A rental rate is calculated based on sales price, rental charges, interest rate and the estimated residual value at the end of the rental period. When a quotation is released, 'Rental Agreement. Create' (STS085) opens up. Pressing next in STS085 creates both a rental agreement and an internal customer order.
- **Rental** (Finacing type '2 - Rental')

  The rental rate is fetched via standard rental price calculation. When a quotation is released, 'Rental Agreement. Create' (STS085) opens up. Pressing next in STS085 creates both a rental agreement and an internal customer order.
- If the equipment is already a rental equipment no internal customer order will be created. A rental equipment is defined by the field equipment group which needs to have equipment group category '01 - Rental' in MMS240.

Important: Only one financing record can be linked to a quotation.

❑ Configuring the basic data for financing records

___1 Enter the financing code and optionally the product number and select New. Financing records without a product number can be used generically.

___2 Enter Description. Entering the Name is optional; if left blank it will be copied from the Description field.

___3 Set the status of the record to

- 20 to allow the sales executives to use this record when creating the quotation.
- 10 if the record is still being prepared.
- 90 to indicate if the record has expired or is no longer required.

The responsible field indicates who is responsible for maintaining this record. This field is for information purposes only.

___4 Enter a valid date range to identify when the financing will be used. These dates will be checked against the quotation from and to dates when the financing record is linked to a quotation.

___5 For financing type '0 - Leasing', you can assign an ID number to the financing record that can be used as a reference for external leasing or financing company.

___6 For financing type '0 - Leasing', enter the funder to identify which company will be responsible for the financing.

The funder must be a valid customer record in 'Customer. Open' (CRS610).

___7 For financing type '1 - RPO' and '2 - Rental', enter the internal customer who is the owner of the equipment during the rental period.

The internal customer must be a valid customer record in 'Customer. Open' (CRS610).

___8 For creating a Leasing or a Rental Agreement, you must enter an agreement order type; these are defined either in 'LTR Agreement Order Type. Open' (LTS020) or 'STR Agreement Order Type. Open' (STS020).

___9 For financing type is '0 - Leasing', enter the kit number. Kits are defined in 'LTR Agreement Kit. Open' (LTS450).

___10 Specify the number of periods which is the number of months the leasing or rental agreement will last.

___11 You can optionally define the residual value of the equipment as a percentage. This is the expected percentage at the end of the financing period, that is after the number of periods defined above.

___12 The interest type is defined in 'LTR Interest Rate Type. Open' (LTS402) and identifies the interest percentage. This is used as default to be able to create leasing or rental agreement. The field is not visible for financing type '2 - Rental'.

___13 You can modify the interest rate here, if needed. Interest rate is retrieved from the interest type and is used to be able to create leasing or rental agreement. Item group, product group, industrial application, environment, customer and customer group can be entered against the record and are used as search criteria when looking for financing by, for example, the type of equipment.

___14 Select the field 'Default record' if the financing record automatically should be added to the quotation upon creation.

___15 Click Next to save the record.

Promotion Records

This section describes how to configure the basic data for promotion records for use with quotations.

Promotions (sometimes called campaigns) provide a way of proving discount to the equipment (product) on the quotation. It is possible to have more than one promotion on a quotation.

Two types of promotions exist, claimable and non-claimable. Claimable indicates that the promotion will be refunded by an internal or external payer. When a quotation is released a one-time supplier rebate will be created, if the promotion is claimable. Quotation promotion basic data is defined in 'Quotation. Add Promotion' (QUS117).

❑ Configuring the basic data for promotion records

___1 Enter the promotion code and optionally a product number and select New. Promotions without product number can be used generically.

___2 The description must be entered, the name is optional and will be copied from the description if left blank.

___3 Set the status of the record to

- 20 to allow the sales executives to use this record when creating the quotation.
- 10 if the record is still being prepared.
- 90 to indicate if the record has expired or is no longer required.

The responsible field indicates who is responsible for maintaining this record and is for information purposes only.

___4 Enter a valid date range to identify when this promotion can be used. These dates will be checked against the quotation from and to dates when the promotion record is linked to a quotation.

___5 Enter a discount amount (or percentage), or a discount model. These values are used to discount the equipment (product) when the promotion is liked to the quotation.

Tip: The discount base defines how the discount value will be calculated when a discount percentage is used. It allows you to use either the sales price, or the cost price as the basis of the discount calculation. The example below shows the effects of a promotion based on percentage and value and taking into account discount base and the reclaim parameter.

Scenario	Sales Price	Sale Price Diff.	Cost Price	Cost Price Diff.
No promotion	$100		$90	
$10 promotion, reclaimable from OEM	$90	-$10	$80	-$10
$10 promotion, non-reclaimable	$90	-$10	$90	$0
20% promotion on sales price, reclaimable	$80	-$20	$70	-$20
20% promotion on sales price, non-reclaimable	$80	-$20	$90	$0
20% promotion on cost price, reclaimable	$82	-$18	$72	-$18
20% promotion on cost price, non-reclaimable	$82	-$18	$90	-$0

___6 Enter the currency.

___7 If the claimable flag is set, enter an internal customer, defined in 'Customer.Open' (CRS610) or a supplier, defined in 'Supplier.Open' (CRS620).

- A non-claimable promotion will not influence the cost price but indirectly on the margin as the sales price will be reduced. A claimable promotion will reduce the cost price (with the discount amount) and will also, by default, reduce the sales price with the discount amount. This is possible to change, that is, the customer is not awarded the full promotion discount.

  Note: An internal promotion affects the cost price.

- When creating a claim record, the supplier identifies who will take responsibility for funding the promotion if it is reclaimable.

___8 You can assign an ID number to the promotion record that can be used, on the one-time supplier rebate, as a reference by the OEM. The one-time supplier rebate is then applied when a claim is made for reimbursement of the cost of the promotion.

___9 Enter Item group, product group, supplier, industrial application, environment, customer and customer group for the record. You can use these pieces of information as search criteria when looking for promotions.

___10 Select the field 'Default record' if the promotion record automatically should be added to the quotation upon creation.

___11 Click Next to save the record.

Miscellaneous Cost Records

This section describes how to configure the basic data for miscellaneous cost records for use with quotations.

Miscellaneous costs are used to add costs such as transportation and shipping to the quotation. It is possible to have more than one miscellaneous cost per quotation.

Quotation miscellaneous cost basic data is defined in 'Quotation. Add Miscellaneous costs' (QUS118).

❑ Configuring the basic data for miscellaneous cost

___1 Enter the miscellaneous cost code and optionally a product number and select New. Miscellaneous costs without product number can be used generically.

___2 Enter a description. Entering a name is optional. If left blank, the name will be copied from the description field.

___3 Set the status of the record to

- 20 to allow the sales executives to use this record when creating the quotation.
- 10 if the record is still being prepared.
- 90 to indicate if the record has expired or is no longer required.

The responsible field indicates who is responsible for maintaining this record. This field is for information purposes only.

___4 Enter a charge code in 'Order Line Charge. Open' (CRS275) or an item code in 'Item. Open' (MMS001). This information will define where the cost and sales prices will be taken from.

___5 Set the item name manually. Item name is displayed when the miscellaneous cost is linked to the quotation.

___6 Select the field 'Default record' if the miscellaneous record automatically should be added to the quotation upon creation.

___7 Click Next to save the record.

EQM mashup

4

The EQM mashup is an application running within Infor Smart Office or Ming.le, designed to serve as the primary working space for the sales executive. Quotations created via the EQM mashup will get quotation category 'Equipment quotation'. Only equipment quotations are displayed in the EQM mashup.

The application designed for bid managers or sales managers is called the EQM Manager mashup. For more information, see "EQM Manager mashup" on page 48.

EQM mashup

The EQM Mashup provides a number of buttons and tabs to manage the quotation process from creation through to release, including post release follow-up inquiries. The EQM Mashup provides the following levels, buttons and tabs.

Level	Button	Tabs
	My Quotations	Dashboard
		Search
		Related
		Grouped
		Reservation
		Approval
		Fulfillment
		Deal Review

Level	Button	Tabs
	All Quotations button	Search Related Grouped Fulfillment Deal Review
EQM Mashup	Customer button	Customer window
	Equipment button	Search and connect Select and configure Reservation
	Print Studio Button	Quotations
Equipment Quotation Detail	Quotation	Product Trade-in Item Service Maintenance agreement Warranty All
	Summary	
	Equipment	
	Print Studio	
	Fulfillment	
	Deal review	
	Related	
	Grouped	

- "EQM Mashup" on page 37
- "Equipment Quotation Detail level" on page 47
- "Equipment Quotation Detail line level" on page 48

EQM Mashup

My Quotations button

Dashboard tab

This tab provides various views for tracking the quotations.

From each of the views you can double-click on a quotation and access the Equipment Quotation Detail screen where further information can be accessed including details of the products, individual quotation lines. Management of a quotation will typically be done from the equipment quotation detail function.

Available views	Description
In Progress and Rejected	This view shows quotations in status 10 and 15. Highlighting a record and choosing related options allows you to access: • Addresses • Create new versions • Change the status • Update the reason text • Change • Copy • Delete • Display.
Waiting for Approval	This view shows quotations in status 20. Highlighting a record and choosing related options allows you to access: • Addresses • Create new versions • Change the status • Update the reason text • Change • Copy • Delete

Available views	Description
Display Approved	This view shows quotations in status 30. Highlighting a record and choosing related options allows you to: • Print • Change the dates (valid from and to and requested delivery) • Change the status • Update the reason text • Copy • Delete • Display.
Sales Proposal and Accepted	This view shows quotations in status 40 or 50. Highlighting a record and choosing related options allows you to: • Print • Create the sales order • Change the quotation dates • Make a marketing claim • Change the status • Update the reason text • Copy • Display.

Search tab

The search tab provides selection criteria to find quotations, the criteria includes:

- Enterprise Search on quotations
- Customer code
- Customer name (using * characters to act as wildcards)
- Salesperson
- From and to status
- From and to entry date
- From and to valid to date
- Quotation group
- Quotation type

- Sales manager
- Customer order number
- Related quotation number.

Open related options available include the following options

- Print
- Addresses
- Create sales order
- Work with sales order
- Follow up
- Change dates
- Create new version
- Change status
- Reason text
- Sales tax (if used)
- EQM Tax Transaction Details (if used)
- Change (depending on the status of the quotation)
- Copy (depending on the status of the quotation)
- Delete (depending on the status of the quotation)
- Display.

Related tab

The related tab provides functionality to relate quotations to each other.

Grouped tab

The grouped tab provides functionality to group together quotations.

Reservation tab

The reservation tab provides functionality around reservation.

Approval tab

The approval tab provides functionality to review and approve quotations. Under the Review list you can set a quotation ready for approval, while in the Approve list you can approve a quotation. Rejecting a quotation is possible both in Review or in Approve.

Status tab

The status tab provides two graphical representations, one showing the number of quotations in a certain status and a second one showing the value of those quotations. The value is sales price in local currency. The views are filtered by salesperson.

Fulfillment tab

The fulfillment tab provides a view of my released quotations and is designed to track the status of the various records associated with a quotation. The screen shows the quotation headers and the quotation lines.

From the quotation header you can:

- Create a marketing claim

From the quotation line you can access:

- Work requests
- Maintenance agreements
- Long term rental agreements
- Leasing agreements
- Rental agreements
- Maintenance customer orders.

Deal review tab

The Deal review tab provides a view of the actual outcome of my released quotations. It is possible to compare the quoted sales and cost price with the invoiced price and actual cost.

All Quotations button

From this button you can manage the following features:

Search tab

The search tab provides selection criteria to find quotations, the criteria includes:

- Enterprise Search on quotations
- Customer code
- Customer name (using * characters to act as wildcards)
- Salesperson (During search, salesperson field is left blank here).
- From and to status
- From and to entry date
- From and to valid to date
- Quotation group
- Quotation type
- Sales manager
- Customer order number
- Related quotation number.

Open related options available include:

- Print
- Addresses
- Create sales order
- Work with sales order
- Follow up
- Change dates
- Create marketing claim
- Create new version
- Change status
- Reason text
- Change (depending on the status of the quotation)
- Copy (depending on the status of the quotation)
- Delete (depending on the status of the quotation)
- Display.

Grouped tab

The grouped tab allows you to create new quotation groups, manage quotations that are connected to each group and to view a full list of quotations. The features include:

Groups

This view provides a list of all quotation groups. The options available are:

- New quotation groups
- Change
- Copy
- Delete
- Display.

Connected Quotations

This view provides a list of quotation linked to a particular group. The options available are:

- New quotation version
- Change status
- Remove from quotation group.

Quotations

This view provides a list of all quotations and can be used to link into a particular group. The options available are:

- Add to group
- Change (depending on the status of the quotation)
- Copy (depending on the status of the quotation)
- Delete (depending on the status of the quotation)
- Display.

Related tab

The related tab has three views that allows you to create new quotation relation groups, manage quotations that are connected to each relation group and to view a full list of quotations. The features include:

Relations

This view provides a list of all quotation relation groups. The options available are:

- New quotation relation groups
- Change
- Copy
- Delete
- Display.

Related Quotations

This view provides a list of quotation linked to a particular relation group. The options available are:

- New quotation version
- Change status
- Remove from quotation relation group.

Quotations

This view provides a list of all quotations and can be used to link into a particular group. The options available are:

- Add to relation group
- Change (depending on the status of the quotation)
- Copy (depending on the status of the quotation)
- Delete (depending on the status of the quotation)
- Display.

Fulfillment tab

The fulfillment tab provides a view of my released quotations and is designed to track the status of the various records associated with a quotation. The screen shows the quotation headers and the quotation lines.

From the quotation header you can create a marketing claim.

From the quotation line you can access:

- Work requests
- Maintenance agreements
- Long term rental agreements
- Leasing agreements
- Rental agreements
- Maintenance customer orders.

Deal review tab

The deal review tab provides a view of the actual outcome of my released quotations. It is possible to compare the quoted sales and cost price with the invoiced price and actual cost.

Customer button

From this button you can manage quotations based on the customer. The customer button shows a list of customers and a number of tabs displayed detailed customer information.

Available views	Description
Customer	The customer window shows a list of all customers. The following options are available: • Addresses • Create a new quotation • Change • Copy • Delete • Display • Text.
Basic information	This tab displays address information for a customer.
Locations	This tab displays a list of customer sites with information around the site address.
Customer Details	This tab displays a detailed customer information like customer group, currency, delivery terms etc.
Financial information	This tab displays customer financial data like payment terms and credit limits.
Invoices	This tab displays a lists of all invoices related to a customer.
Text	This tab displays all text information connected to a customer.

Available views	Description
Quotation	This tab display all open quotations for a customer. Most of the options related to a quotation are possible from here.

Equipment button

The equipment button provides two key features, the ability to search for equipment to include in to the quotation and also to create or modify an equipment configuration using the equipment configurator. In addition, the equipment search tab contains additional tabs that provide information on an equipments configuration, basic equipment detail including meter values and price and an equipment text tab.

Search and Connect tab

The search and connect tab provides a wide range of selection criteria to find the right equipment to include into a quotation or to create a new quotation based on the selected equipment.

Available options	Description
Record types	You can decide what types of record you want to display. • On-hand (equipment which already exists in stock) • Purchase order (equipment already on order from the OEM) • Customer order (equipment on a sales order) • Item/Warehouse (only the basic data record exists) • Rental (equipment which is classified as rental equipment).

Available options	Description
Record selection	Selection criteria includes: • Attribute model • Item number and name • Serial number • Five individual warehouses • Warehouse group • Five attributes ID's with from and to selection criteria • Item type • Item group • Product group • Equipment group • PO number.
Related options	Related options includes: • Create new quotation • Create quotation line (available from within an existing quotation)

Attribute tab

The attribute tab displays the attribute details of the selected equipment. This tab also contains an option to activate the equipment configurator in order to review the configuration in detail or to reconfigure it if it is connected to a quotation.

Equipment tab

The equipment tab displays information from three different sources, its displays basic data from 'Equipment. Open' (MMS240), price information from 'Equipment Price. Open' (MOS278) and meter readings from 'Equipment. Open Meter readings' (MMS241).

Text tab

The text tab displays the text block from the equipment 'Equipment. Open' (MMS240) or from the purchase order line.

Select and Configure tab

This tab activates the equipment configuration process. For details on configuration, see "Configuring the Product" on page 56.

Print Studio button

Quotations tab

This tab provides features to display a list of quotations that are in a status ready to print or greater and also allows access to view quotations that have been printed and are stored in Infor Document Management.

Infor Document Management is licensed separately.

Available views	Description
Quotation	The quotation view displays a list of quotations and also allows them to be printed (using the print button). Filter options are available to restrict the list of records, the criteria includes: • Customer code • Customer name (using * characters to act as wildcards) • Salesperson • From and to status (defaulted to the range 30 – 90) • From and to entry date • From and to valid to date • Quotation group • Quotation type • Sales manager • Customer order number • Related quotation number. Open related option available is for Change status.
Product Document	The product document view displays the product associated with the quotation. Related options include: • Display
Top Image	In the top image view you can display the printed quotation document and optionally edit it using a word processor capable of editing a rich text format (RTF) document. You can press one of three buttons to change the view, these are details, thumbnail and card. Detail provides a list of the electronic documents and their attributes. The thumbnail button provides small images from each electronic document. The card options displays a large picture of each record together with attributes.

Available views	Description
Bottom Image	In the bottom image view you can see images that are indexed against the product on the quotation lines. These could for example be pictures, PDF documents etc. You can press one of three buttons to change the view, these are details, thumbnail and card. The electronic document can also be opened up.

Equipment Quotation Detail level

It is likely that the quotation will be built up from the quotation detail function. This can be accessed from many places within the EQM mashup such as from the Dashboard or Search tabs by double-clicking on a quotation header. A number of buttons exist from the equipment quotation detail and these will, in many cases, restrict the view of data to the quotation that you are currently working with. These buttons are:

- Quotation;
- Summary;
- Equipment;
- Print studio (only available if Infor Document Management is installed);
- Fulfillment;
- Deal Review;
- Related;
- Grouped;

The equipment quotation detail panel has a number of tabs to manage the quoted product, the trade in's and the items (spare parts). The 'All' tab displays all quotation transactions in one screen. In the Product tab, you can select a product and this will activate the lower tabs where you can see and manage each transaction type within the quotation. By double clicking a list line in Product tab, the line details dialog will open.

The lower tabs are:

- Configuration;
- Warranty;
- Service;
- Maintenance Agreement;
- Financing;
- Promotion;
- Miscellaneous.

Each tab operates in a similar way (except the Configuration tab) and offer the ability to add and edit records (depending on the status of the quotation).

Equipment Quotation Detail line level

This level can be accessed from the product line of the quotation detail. The available buttons in this level are the following:

- Equipment

In the Equipment tab it is possible to connect an item to an existing quotation line and to all the search possibilities from the equipment search.

EQM Manager mashup

The EQM Manager mashup is an application designed to provide an overview of the quotation process and could be used by sales or bid manager. The EQM Manager mashup provides a number of buttons and tabs to review on-going quotations, won/lost quotations, approve quotations and deal review of released quotations.

The EQM Manager mashup provides the following buttons and tabs:

1. **Ongoing button**

   From this button the sales manager can see the status of quotations where they are the sales manager on the quotation header. This button provides a number of tabs including:

   - **Total value tab**

     This tab provides a list of quotations. Status's from in-progress (10) to accepted (50) are displayed in the tab.

   - **Value per sales person tab**

     This tab provides a list of salespersons reporting to the sales manager.

2. **Won/Lost button**

   From this button the sales manager can see statistical information on the ratio between won and lost quotations. A won quotation is at status sales order created (80) whilst a lost quotation is at status 90. This button provides a number of tabs including:

   - **Order created tab**

     This tab provides a list of quotations that have been released to sales orders.

   - **Lost sale tab**

     This tab provides a list of quotations which are marked as being lost sale.

3 Approval button

From this button the sales manager can access quotations which are awaiting approval (status 20) and optionally edit the quotation details. The approver has the option to approve or reject the quotation. If the quotation is rejected then text can also be entered as well which is useful for explaining why its been rejected.

4 Deal Review button

From this button the sales manager can review orders created for released quotations. This button provides a two tabs including:

- **Fulfillment**

  This tab provides a list of quotation lines displaying the order status of each line.

- **Sales Analysis**

  This tab provides a list of quotation lines displaying the difference between the sales and cost price on the quotation and the actual invoice values

The Quotation Preparation Process

5

This section describes the process of preparing a quotation. This scenario uses the EQM mashup as the basis for the process.

There are a number of ways to create a quotation. One way is to create the quotation header and then assign the equipment to it, an alternative way is to search for the equipment and then create a quotation on the found equipment.

- "Create a Quotation" on page 50
- "Select or Search the Product" on page 54
- "Configure the Product" on page 56
- "Add Warranty, Service and Maintenance to the Quotation" on page 60
- "Add Financing, Promotions and Miscellaneous Cost Records to the Quotation" on page 62
- "Text Flow in EQM" on page 63
- "Additional tasks" on page 64

Create a Quotation

- "Creating a Quotation" on page 50
- "Updating the Quotation Header" on page 52
- "Adding the Product" on page 53
- "Updating the Product" on page 54

Creating a Quotation

Use this process to create the quotation header.

1 From the My Quotations > Search tab, click the 'New quotation' button.

Note: Quotations can also be created from the following tabs:
- All Quotations > Search
- Customer
- Equipment > Search and connect, or

  Equipment > Select and Configure

  For further details on, see "Create a quotation line using Equipment Select and Configure" on page 55.
- From M3 CLM

The program 'Quotation. Create' (QUS090) opens up.

The salesperson will default from the user who is logged on to the solution.

The sales manager will default to the relationship defined by the connected salesperson. For further details on Quotation Order Types, see "Quotation Order Types" on page 20.

2 Enter a brief description of the quotation, a default can be defined within the F13 Settings.

3 Enter valid from and to dates. The dates can be defaulted from the quotation type.

These dates are used used to determine when the quote is valid. They are also used to check that information such as maintenance agreements are valid within the date range of the quotation. in a number of different ways.

4 Enter a customer. This can be a valid customer at status 20.

If it is a a temporary customer group, it creates a temporary customer in CRS610.

5 Enter the date that the equipment has been requested to be delivered to the customer. The requested delivery date can be defaulted from the quotation type. This is used as a default when certain information such as spare parts are linked to the quotation.

6 Optionally, you can connect the quotation to a related quotation group or a quotation group.

7 If required, enter the details of the product, including the serial number details, if required.

Entering details here will automatically create a quotation line for that equipment.

Note: Alternatively, these fields can be left blank and created at a later stage.

Item number may also be displayed depending on the settings in 'Settings - Quotation' (CRS732).

8 If required, enter the industrial application. This is used for searching for financing records or promotions.

9 If required, enter the Environment. This is used for searching for financing records or promotions.

10 Enter the order quantity. If you enter a quantity greater than one, then a matching number of sales order lines will be created.

The main facility and warehouse for the division will be defaulted but may be changed. If QUS090 has been called via Search and connect, the facility and warehouse will be set and protected.

11 Click Next to save the record and return back to My Quotations tab. Click Refresh to display the newly created record.

Updating the Quotation Header

This process is used to update the quotation header once the quotation has been created. Updating the quotation header allows additional, default information associated with the quotation to be updated.

1 You can update quotation header from the following tabs:

- My Quotations > Dashboard
- My Quotations > Search
- All Quotations > Search
- Customer

Press Change or right-click the tab and select Change.

2 In addition to those fields completed during the creation stage, you now have the option to update many additional fields including:

- Planned delivery date;
- Probability (the likelihood of winning the deal);
- Forecasting (if this quote should be included in forecasting calculations);
- Payer;
- Invoice recipient;
- Quotation group which is used to group together related quotations;

  Note: Related quotation number is used to relate quotations together. This can be done manually here or from the related tab.

- Customer contact and address details;
- General control fields, such as currency, payment terms, delivery terms, etc;
- Addresses.

3 Click Next to save the changes and return to the quotation detail screen.

Adding the Product

You can add the product to the quotation in a number of different ways. This section describes how to add the product manually to an already existing quote.

The product is the main equipment being sold as part of this quotation. If it was not added at the time of creating the quotation then it should be added now. The product will create a sales line on the sales order when the quotation is released. If the product is not in stock then a configuration work request will also be triggered. Products create quotation line type zero.

1 The product can be added from the following tabs:

- My Quotations > Dashboard
- My Quotations > Search
- My Quotations > Approval
- All Quotations > Search
- Customer

From any of these tabs you can select a quotation and double click it to open the quotation detail screen.

2 From the quotation detail screen, click the New Sales Model button.

The responsible will default to the current user. This can be changed if, for example, another user will be responsible for the trade-in.

3 Enter the product number. The serial number is optional if the product number is entered, but usually the serial number may not be allocated until later in the process or quite often, after the order has been placed.

Note: Item number may also be displayed depending on the settings in 'Settings – Quotation' (CRS732)

It is however not recommended to use an item number without a pProduct number. Ensure the check box 'Item not used' is checked in CRS732.

4 The reference order details are display only and will show, for example, a purchase order number.

5 Optionally add the industry application and Environment codes. These typically describe use of the vehicle such as forestry or mining.

6 The requested and planned delivery dates will be automatically defaulted from the requested delivery date on the quotation header but may be changed here. These provide a more accurate indicator of when the equipment is likely to be delivered (which could be earlier or later than requested).

7 Click Next to save the changes and return to the quotation detail screen.

Updating the Product

Once the product has been added, you can edit the record to change the details and add additional information.

1. From the equipment quotation detail screen, press the 'Change' icon or choose 'Related options' and 'Change'.

   The first panel displayed allows you to update the fields available during the creation of the product record. Click Next to display an additional panel displaying price and cost information.

2. You can manually update the product with a VAT/sales tax amount, VAT/sales tax currency, exchange rate type and exchange rate.

   Note: These fields are for information only but can be printed on the quotation output.

3. You can also manually update the product with a new sales price if the equipment is in stock.

   Note: This field will be locked if configured via the equipment configurator.

4. Click Next to save the changes and return to the quotation detail screen.

Select or Search the Product

- "Equipment Search and Connect" on page 54
- "Equipment Select and Configure" on page 55
- "Equipment Reservation and Allocation" on page 55

Equipment Search and Connect

The Equipment Search and Connect function allows you to find the equipment that you want to include in the quotation. For further information on this function, see .

Note: When you select an equipment to include into the quotation, a reservation is created.

Equipment Select and Configure

The Equipment Select and Configure function allows you to select and configure the equipment that you want to include in the quotation.

Equipment Select and Configure is divided into the following parts:

- **Product group:** Select a product group. Only product groups with the flag ‘Configuration’ set in ‘Product Group. Open’ (CRS035) are displayed.
- **Model:** Select an attribute model connected to the selected product group.
- **Item:** Select an equipment connected to the selected model.
- **Configure:**Configure the equipment and create a quotation or a quotation line.

❑ Create a quotation line using Equipment Select and Configure

Use this task to add new quotation line to an existing quotation header.

___1 Open **Equipment Quotation Detail** for an existing quotation.

___2 Select **Equipment > Select and configure**.

___3 Select product group, model and item to configure the equipment.

___4 When the configuration steps are completed, click **Create Quote** to open 'Quotation. Create' (QUS090).

___5 Press **Next** in QUS090 to create a quotation line.

To get back to the quotation detail overview, click ‘Quotation’ in the tab list.

❑ Create a new quotation using Equipment Select and Configure

Use this task to create a new quotation header and quotation line from Equipment Select and Configure.

___1 Open **EQM mashup**.

___2 Select **Equipment > Select and configure**.

___3 Select product group, model and item to configure the equipment.

___4 When the configuration steps are completed, click **Create Quote** to open 'Quotation. Create' (QUS090).

___5 Press **Next** in QUS090 to create a quotation line.

To get back to the quotation detail overview, click ‘Quotation’ in the tab list.

Equipment Reservation and Allocation

Equipment in stock can be reserved and allocated using a quotation.

An allocation in the quotation will reserve the equipment so that it is not available for sale via a customer sales order, or move with a distribution order or requisition order, or other available transactions.

A reservation is performed when an Item serial number is associated with a quote line. A reservation will also be done if you manually add an item serial number on the quotation line.

The equipment will stay reserved on a quotation until you manually remove the serial number reference on the quotation line. In that case the reservation will be automatically moved from the earlier connected equipment to the new. In addition, if a new version of the quote is created the reservation will be moved to the new version.

When a quotation is approved and processed into an Order, the reservation is transferred to the customer order (or work order, if created).

Equipment on a purchase order, that does not yet have a serial number, can be connected and reserved to a quotation.

Configure the Product

Configuring the Product

One of the most important activities within the quotation cycle is to configure the equipment with the various attributes that will determine what the final equipment will look like. The Equipment Configurator is used to complete this process from either the Equipment Quotation Detail > Configure button, or from the Equipment Search and Connect > Configuration button.

Note: When reconfiguring the equipment, existing information such as promotions are not recalculated automatically.

1. The Equipment Configurator shows an overview of the configured equipment including its sales and cost price. You can use the drop-down fields to select the various attributes that the customer requires. The options and defaults are pre-determined by the product setup. As new attributes are selected then the sales and cost prices will be updated.

   Note: Cost price is shown only if the user settings are configured accordingly.

2. The Equipment Configurator shows the list of attribute display groups and the list of attributes connected to the selected display group.

By right-clicking in the attribute area of the Equipment Configurator, you can decide which columns should be visible.

3 When an attribute in the list is selected, its content is expanded and can be selected or edited.

   a Available values for string attributes are displayed in a list from which the desired value can be selected. To remove an earlier selection without changing to a new value, select the attribute to expand the list and click Delete.

   b Numeric attributes are displayed with an edit box where the desired value can be entered. While moving the cursor over a box a tool tip is displayed with from / to, multiple value and number of decimals, if defined.

Note: If the Equipment Configurator is started from anything but an editable quotation, it will run in View mode. The text View is shown the lower left-hand corner and actual attribute values are displayed. These attributes cannot be changed.

4 If there are images defined in the Infor Document Management, connected to attribute values, those will be displayed as miniatures in the value list and will be enlarged if placing the cursor over the miniature.

5 Whenever an attribute value is changed, it will be validated and any conflicts (e.g. defined dependencies between attributes/values) will be indicated with a yellow warning sign.

Note: A conflict is indicated for the attribute defined as a result attribute in a dependency relation.

6 Text that is attached to an attribute is defined with an icon containing an image of a letter 'i'. Select the icon to open the attachment.

7 Click Save to save the configuration.

Note: Before saving the configuration, it is possible to go back to the start point (or to the latest saved point) at any time by clicking Revert.

Equipment Trade-In

Important: You cannot add 'Equipment Trade-In' to a quotation if 'Financing Type 1 - RPO' or 'Financing Type 2 - Rental' is used.

Equipment trade-in is used when the customer has one or more existing equipment that they wish to trade-in and therefore off-set the cost against this quotation. If the equipment is not currently in your M3 Business Engine database (that is you have not sold or maintained it before) then the trade-in record will create various records in M3 Business Engine when the quotation is released to become an order. These include records in 'Equipment/Serialized Item. Open' (MMS240) and 'Equipment. Update History' (MOS290) and a sales order line in 'Customer Order. Open Line' (OIS101) with a quantity of minus one. Equipment trade-ins create quotation line type ten, and they will appear in the 'Equipment Search and Connect' function.

1. From the quotation detail screen, click the Trade-in tab and then press the New Trade-in button or from the All tab simply click the New trade-in button.
2. The related field will default from the user who is logged on, but may be changed.
3. Enter the item number of the equipment being traded-in. If this is an equipment that you have sold or maintained in the past then the item number will already exist.

   Tip: It is possible to create the trade-in record even if this is an item number that you have not been associated with before. Before releasing the quotation the item needs to be defined in the item master in 'Item. Open' (MMS001) though.

4. Enter the lot or serial number. This is necessary to ensure that the equipment record that is created when the quotation is released is valid. The lot number can already exist in the M3 Business Engine database if it is a vehicle that you have maintained in the past.
5. Enter the trade in value. This is the price that you have offered the customer for his used equipment.
6. Enter the evaluated value, that is how much the trade-in equipment is worth to you. This could be more or less than the trade in value. If the evaluated value is less than the trade in value then you will be making a loss on the trade-in, likewise if its more, then you are making a profit on the trade-in, indicating that you think you can sell it on to another customer at that price and make a profit.
7. Enter the warehouse and location that the trade-in will reside. Defaults for these values can come from the quotation header.
8. The manufactured date, warranty date, manufacturer, manufacturer's serial number and year model are used to update the trade-in's equipment record in 'Equipment/Serialized Item. Open' (MMS240) when the quotation is released.
9. The time-since-new values are used to update the equipment's record in 'Equipment. Update History' (MOS290) when the quotation is released.
10. Optionally enter up to ten used defined fields. These fields are defined in 'Settings - User defined EQM fields' (QUS980).
11. Service fields for a pre-inspection service are defaulted from the quotation type. Optionally create a work order for the pre-inspection by pressing the button 'Create Work Order'.
12. Click Next to save the record and return to the quotation detail screen. The trade-in records can be edited by double-clicking on them.

Items

Important: You cannot add Items to a quotation if 'Financing Type 1 - RPO' or 'Financing Type 2 - Rental' is used.

Items (for example spare parts) can be added to the quotation. Items could include consumable items used in the everyday operation of the equipment or kits used in routine customer maintenance. Items could also include components or sub-assembles that the customer may want to keep locally at his facility and used for any service work that he should want to carry out. Items are linked to the quotation header and do not refer to any particular product line.

Items are added as lines to the sales order when the quotation is released and create quotation line type one.

1. From the quotation detail screen, click the 'Part' tab and then press the 'New part' button or from the 'All' tab simply click the 'New part' button.

   The sequence number can be used to sort the quotation lines.
2. The responsible field will be automatically populated but can be changed.
3. The warehouse will default from quotation header, but may be changed.
4. Enter a valid item number for the spare parts.

   The serial number can be entered for serialized spare parts.
5. Enter the a quantity of parts required.
6. The requested and planned delivery dates will be automatically defaulted from the requested delivery date on the quotation header but may be changed here. These provide a more accurate indicator of when the equipment is likely to be delivered (which could be earlier or later than requested).
7. The product number allows you to connect the item to an equipment, this information will then be transferred to the customer order.
8. The serial number is used in conjunction with the field above and allows you to connect the item to an equipment, this information will then be transferred to the customer order.
9. Optionally enter the Industry Application and Environment codes. These typically describe use of the vehicle such as forestry or mining.
10. Click Next to save the record and return to the quotation detail screen. Click Refresh to update the display. The spare parts records can be edited by double-clicking on them, when editing a spare part record, a second screen with detailed cost and price information will be displayed. The VAT/sales tax and sales price may be adjusted in these screens.
11. To remove an items (for example spare parts records) from the quotation, right-click the record and choose Delete.

The cost and sales price for the spare parts will be retrieved from M3 Business Engine according to the rules governing these records.

For more information on how to quote items for equipment in the customer's install base, refer to "Product Support in EQM" on page 77.

Add Warranty, Service and Maintenance to the Quotation

Warranty

Warranty records create quotation line type three. Depending on the rules and configuration within M3 Business Engine, a standard warranty may be created automatically when a product line is added.

1. From the quotation warranty tab, press the 'New Warranty' button or from the 'All' tab highlight the product and choose open related and 'Add Warranty'.
2. From the quotation detail screen, highlight the product and choose related option Warranty. A browse window will be displayed.
3. Select an extended warranty from the list, and click Refresh to update the display. If the warranty you want is not displayed, the basic data needs to be adjusted.
4. Double-click to edit the warranty record.

   You can control when the extended warranty should start. The following options are available here:

   - the standard warranty start date
   - the standard warranty end date
   - the requested delivery from the quotation header

   The sales price is updated manually.
5. To remove a warranty from the quotation, right-click the record and choose Delete.

For additional information, refer to "Warranty Records" on page 25.

For information on how to quote extended warranties for equipment in the customer's install base, refer to "Product Support in EQM" on page 77.

Services

You can link commissioning and configuration services to the quotation. A configuration service may be automatically added to the quotation based on the equipments basic data setup.

You can delete the standard configuration service and add your own if required. A configuration service record creates quotation line type four. Commissioning services create quotation line type four.

1 From the 'Quotation Service' tab, press the 'New Service' button, or from the 'All' tab highlight the product and choose Open related > Add Services.
2 Select a service from the list, and click Refresh to update the display. If the service is not displayed, adjust the basic data.
3 Double-click on the service record to manually update the sequence number, responsible and the sales price. The remaining fields will be calculated based on the cost price.
4 To remove services from the quotation, right-click the record and choose Delete.

For additional information, refer to "Service Records" on page 26.

For information on how to quote commissioning services for equipment in the customer's install base, refer to "Product Support in EQM" on page 77.

Customer variations

You can link customer variations to the quotation that will result in a commissioning service , creating quotation lines of line type nine

1 From the 'Quotation Service' tab, press the button 'Add Customer Variation'.
2 Select an existing or new service from the list and click Refresh to update the display.
3 Double-click on the service record to manually update the record.
4 To remove services from the quotation, right-click the record and choose Delete.

For additional information, refer to "Customer Variations" on page 28.

For information on how to quote customer variations for equipment in the customer's install base, refer to "Product Support in EQM" on page 77.

Maintenance Agreement

Maintenance customer order agreement records create quotation line type five.

1 From the Quotation maintenance agreement tab, press the 'New Agreement' button or from the 'All' tab highlight the product and choose Open related > Add Maintenance Agreement.
2 Select a maintenance agreement from the list, and click Refresh to update the display. If the agreement is not displayed, adjust the basic data.
3 Double-click on the maintenance agreement record to manually update the sequence number, responsible, number of periods, valid to and from dates and sales price. The number of periods is

used for information only, whilst the valid date range is used for when the maintenance agreement header is created.

4 To remove maintenance agreements from the quotation, right-click the record and choose Delete.

For additional information, refer to "Maintenance Agreement Records" on page 28.

Add Financing, Promotions and Miscellaneous Cost Records to the Quotation

Financing

Financing records create quotation line type six.

1 From the quotation financing tab, press the 'New Financing' button or from the 'All' tab highlight the product and choose open related and 'Add Financing'.

2 Select a finance record from the list, and click Refresh to update the display. If the finance option is not displayed, adjust the basic data.

3 Double-click on the finance record to manually display the record, you can update the record by taking pressing the icon 'Change'.

4 To remove a finance record from the quotation, right-click the record and choose Delete.

For additional information, refer to "Financing Records" on page 29.

Promotion

Promotions records create quotation line type seven. Promotions should normally be added after the equipment has been configured.

Note: If the equipment is reconfigured then you need to adjust or recreate the promotion.

1 From the quotation promotion tab, press the 'New Promotion' button or from the 'All' tab highlight the product and choose open related and 'Add Promotion'.

2 Select a promotion from the list, and click Refresh to update the display. If the promotion is not displayed, adjust the basic data.

3 Double-click on the promotion record to manually update the sequence number, campaign identification and the actual discount amount. If you enter an actual discount which is different than the original discount and the claimable flag is on, then the profit margin on the promotion line will be the difference between the original discount and the actual discount. This is because you should be able to reclaim back the original amount. If the claimable flag is off, then the whole of the promotion will become a cost thereby influencing the margin.

   The original discount amount and percentage come from the basic data setup. The actual discount amount is manually entered in this process.

4 To promotions from the quotation, right-click the record and choose Delete.

For additional information, refer to "Promotion Records" on page 31.

Miscellaneous cost

Miscellaneous records create quotation line type eight.

1 From the quotation miscellaneous record tab, press the 'New Miscellaneous' button or from the 'All' tab highlight the product and choose Open related > Add Miscellaneous.

2 Select a miscellaneous record from the list, and click Refresh to update the display. If the miscellaneous cost is not displayed, adjust the basic data..

3 Double-click on the miscellaneous record to manually update the sequence number, responsible, item number associated with the cost price, the sales price and the cost price.

4 To remove a miscellaneous record from the quotation, right-click the record and choose Delete.

For additional information, refer to "Miscellaneous Cost Records" on page 33.

Text Flow in EQM

Text Handling

Text from the template records flows through when the records are linked to the quotation.

The following table illustrates text flow in EQM from Template to Quotation and to Release Quotation (when applicable).

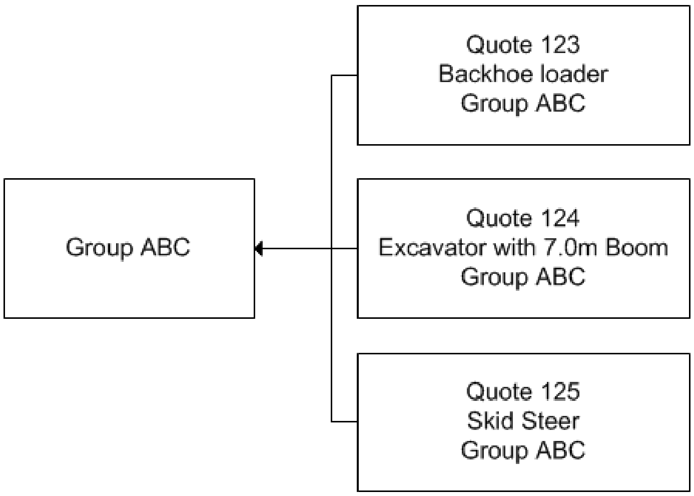
	Template	Quotation	Released Quotation
Quotation		Product	Sales Line (OIS101)
Items		Items (QUS101)	Sales Line (OIS101)
Trade-In	Service (MOS300)	Trade-In (QUS110)	Sales Line (OIS101)
Warranty	Warranty (QUS113)	Warranty (QUS103)	Sales Line (OIS101)
Service	Service (QUS114)	Service (QUS104)	Work Request (MOS170)
Maintenance Agreement	Maint. Agr. (QUS115)	Maint. Agr. (QUS105)	
Financing	Financing (QUS116)	Financing (QUS106)	
Promotion	Promotion (QUS117)	Promotion (QUS107)	
Miscellaneous	Miscellaneous (QUS118)	Miscellaneous (QUS108)	Sales Order (OIS101) Order Change (OIS103)

Additional tasks

Grouping Quotations

Quotations can be linked together using the grouping feature. Quotation groups are created from 'Quotation Group. Open' (QUS121).

Figure 4. Example for grouping quotations in EQM



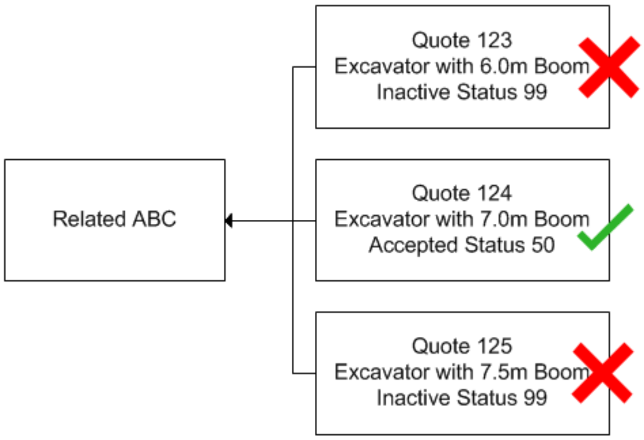
You can also create quotation groups from 'All Quotations' button. Go to Grouped tab > Group and press the 'New group' button.

The connection to the group code is made either via editing the quotation header and adding the group code, or from the All Quotations > Grouped tab > Quotations, using the 'Add' button. Grouped quotations can be seen from All Quotations > Grouped tab > Connected quotations.

Related Quotations

Quotations can be related together using the related feature. The related functionality is used when, for example, a customer asked for two quotations with different equipment configurations but will only go for one in the end. When one of the quotations in the relationship is accepted then all other quotations in that relationship will automatically have their status set to inactive (status 99).

Figure 5. Example for relating quotations in EQM



Quotation relationships are created from 'Related Quotation. Open' (QUS120).

You can also create quotation relationships from 'All Quotations' button. Go to Related tab > Related and press the 'New relation' button.

The connection to the related code is made via All Quotations > Related tab > Quotations, using the 'Add' button. Related quotations can be seen from All Quotations > Related tab > Related quotations.

Addresses

You can view and manage the delivery address, quotation address and invoice addresses associated with the quotations. You can maintain address using the EQM mashup and a variety of tabs including the Dashboard and Search, then selecting a quotation and choosing open-related 'Addresses' – 'Quotation.

From QUS112, you can click one or more of the change flags to allow you to maintain the three addresses. If you select more than one address, then you will come back to the summary screen after each address change, the flag from the previous address change will then be removed leaving the remaining change flags.

The Quotation Management Process

6

This section describes a typical quotation flow, once the basic quotation has been created. This flow might involve, for example, adjusting the quotation price, changing the quotation status or creating quotation versions. This scenario uses the EQM mashup as the basis for the process.

Product Price Adjustment

The price adjustment function allows you to adjust the sales price of the equipment (Product) at the equipment level or at the individual attribute level. The sales price cannot be changed after the quotation has been approved (status 30 or greater).

Price adjustments are made in 'Quotation. Adjust Price' (QUS102), this function can be accessed from the Equipment Quotation Detail function by highlighting the product and using the open related option 'Adjust Price'.

In the header of the function, you can select to either work with the currency of the quotation line or the local currency (i.e. the currency that is connected to the division on the facility associated with the quotation). If you switch between the two currencies all values will be recalculated.

Other values that can be seen or changed include:

- **Discount** - this comes from the discount model connected to the quotation header;
- **Target margin** - this comes from 'Target Margin' (QUS160);

- **Cost** - this is normally not changeable, a sum of the cost of all options. The cost can be changeable though, if the user has the field 'Display cost margin' in 'Settings - Quotation Permissions' (QUS155) set to '2 - Cost price will be displayed and editable'.
- **Original sales price** - this is not changeable, a sum of all configuration line sales prices;
- **Original Profit** - this is calculated as the difference between total sales price and total cost;
- **Original margin** - this is a percentage calculated as original profit/original sales price. If original sales price is zero then the margin will also be zero;
- **Adjusted sales price** - this can be changed. It is a sum of the sales prices of the configuration lines before promotions are considered;
- **Adjusted profit** - this is editable and saved in the database. The default is calculated as the difference between total adjusted sales price and total cost;
- **Adjusted Margin** - this is a percentage calculated as modified profit / modified sales price;
- **Promotion sales price** - this is not changeable, a sum of all configuration line sales prices minus discounts given for promotion;
- **Promotion Profit** - this is calculated as the difference between promotion sales price and the cost after promotion. Note, the promotion can be claimable and have impact on the cost. The cost after promotion is not visible in this function but is visible in the F-panel of the quotation line (QUS101);
- **Promotion margin** - this is a percentage calculated as promotion profit / promotion sales price.

The list contains a lock function. If this switch is on the 'other fields on', the line are not interchangeable. This line is not recalculated after all the lines are recalculated.

Note: It is important to understand the hierarchy of the change fields. If for example both sales price and margin are changed, the program will just care about the sales price and recalculate a new margin accordingly.

The hierarchy is stated as:

1. Adjusted sales price
2. Adjusted profit
3. Adjusted margin

When you click enter or apply in the header, the function distributes the adjusted values proportionally among the lines that have not been locked. Reset replaces the adjusted values with the original values. Locked lines will also be replaced by the original values.

Quotation Price Adjustment

Price adjustments on the quotation header level are made in 'Quotation. Adjust Price' (QUS122), this function can be accessed from the Equipment Quotation Detail function by pressing the button 'Adjust Price' at the top of the screen.

The adjustment screen for the header level (QUS122) looks and works very similar to the adjustment screen for the product (QUS102). The different is that it is possible from the header level to make adjustments for everything connected to the quotation.

Important: The sales price cannot be changed after the quotation has been approved (status 30 or greater).

Allocation or Deallocation of Equipment

Whilst building a quotation, you may want to reserve a particular serial number to it without actually locking that serial number until you are sure that the customer will buy it. Within the quotation you can therefore allocate an equipment and alternatively, deallocate to release it again.

Sales Tax

If the company is using Sales Tax, it will be possible to calculate an estimate by taking related option 'Sales Tax' from EQM mashup.

Once the Sales Tax has been calculated, the estimated tax values can be displayed via related option 'EQM Tax Transaction Detail' both from EQM mashup and from Equipment Quotation Detail.

Quotation Status

The status of the quotation can change as it goes through its cycle.

The quotation status must be changed from the EQM mashup using related option 'Change status'. There are internal controls which govern how a quotation can proceed from one status to another.

Status	Description
10	This is the status that a new quotation receives and a quotation will typically stay in this status until the quotation is ready to be reviewed internally by, say a sales manager. A status 10 order can be set to status 20 or 30. If the quotation order type is defined as preliminary, then it must go to status 20 first before status 30 can be set.
15	Status 15 signifies that the quotation has been rejected by the internal reviewer such as the sales manager. A status 15 quotation would be a signal to the salesperson preparing the quotation that they need to review it before re-submitting it. A status 15 order can be set to status 20 or 30 (depending on the rules mentioned above).

Status	Description
20	Status 20 can be used to signify that a quotation is ready for approval. When changing a quotation status from 10 to 20, a warning will be issued if the quotation margin is less that the margin pre-defined against the quotation order type. A status 20 order can be set to status 10, 15 or 30.
30	Status 30 signifies that it approved internally to become a sales proposal. A status 30 order can become status 10, 15, 20, 40 or 50.
40	The quotation can be issues to the customer as an approved sales proposal. Printing can be printed between status range 30 - 50 A status 40 quotation can become status 50, 90, 95 or 99.
50	The quotation has been accepted by the customer and can be turned into a real sales order. The quotation is released by using the related option 'Create CO'. Once the sales order has been created then the status will be set to 80. A status 80 quotation can only be set to status 95.
80	The quotation has been released to become a sales order. This is described in more details below.
90	A lost sale, this information will be used by M3 CLM to analyze lost sales. A quotation can always be moved to this status from any other status.
95	An expired quotation, this information will be used by M3 CLM to analyze lost sales.
99	An inactive quotation, this is one that has been copied to a new version, or was deleted as part of the a related quotation process.
Transaction reason	This information will be used by M3 CLM to analyze lost sales.
Reason text	Reason text allows you to update a text block with additional information. This can be used for example when updating the status.

Quotation Approval

Approval of a quotation can be carried out from the following locations:

- EQM mashup > My Quotations > Approval tab;
- EQM Manager mashup > Approval tab;
- via related option '25 - Change status' on a quotation record.

Quotation approval can be done on the following levels:

- quotation header level;

- quotation line level 'Product', 'Item' or 'Trade In';
- quotation details level connected to a ‘Product’, such as 'Warranty' and 'Promotion'.

A quotation line always has a responsible. The default responsible is the user id connected to the salesperson in 'Settings. Quotation Permission' (QUS155). Quotation details can also get the default responsible from the template records.

A quotation line and its details can be set to 'Ready' (status 20) or 'Approved' (status 30) in EQM Mashup > My Quotations > Approval > Approve. A quotation header is approved in EQM Manager mashup > Approval > Approve or via related option '25 – Change status' on a quotation record.

Depending on the settings in 'Quotation Type' (QUS020), quotation approval can carried out in the following different ways:

1 If Quotation approval is not set for the 'Quotation Type' (QUS020), set the quotation header to 'Approved' directly via related option '25 – Change status'. All connected quotation lines and details will be approved.

Optionally, quotation line can be approved by the line responsible in EQM mashup > My Quotations > Approval > Ready. All connected quotation details will be approved.

Quotation detail can also be approved by the line responsible in EQM mashup > My Quotations > Approval > Ready.

2 If Quotation approval is set for 'Quotation Type' (QUS020) but Product is not, the quotation header must be approved by the Sales Manager in Equipment Quotation Manager Space > Approval > Approve. All connected quotation lines and details will be approved.

Optionally, quotation line can be approved by the line responsible in Equipment Quotation Space > My Quotations > Approval > Ready. All connected quotation details will be approved.

Quotation detail can also be approved by the line responsible in Equipment Quotation Space > My Quotations > Approval > Ready.

3 If Quotation approval and Product are set for 'Quotation Type' (QUS020) but no quotation details like Warranty or Promotion are set, the quotation header must be approved by the Sales Manager in Equipment Quotation Manager Space > Approval > Approve. The quotation will not be visible for the Sales Manager until all quotation lines that require approval are actually approved.

A quotation line must be approved by the line responsible in two steps. First it needs to be approved in Equipment Quotation Space > My Quotations > Approval > Ready. Then it has to be approved in Equipment Quotation Manager Space > Approval > Approve. All connected quotation details will be approved.

Optionally, quotation detail can also be approved by the line responsible in Equipment Quotation Space > My Quotations > Approval > Ready.

4 If Quotation approval, Product and at least one of the quotation details (Warranty, Promotion, etc.) are set for the 'Quotation Type' (QUS020), the quotation header must be approved by the Sales Manager in Equipment Quotation Manager Space > Approval > Approve. The quotation will not be visible for the Sales Manager until all quotation lines that require approval are actually approved.

A quotation line must be approved by the line responsible in two steps. First it needs to be approved in Equipment Quotation Space > My Quotations > Approval > Ready. Then it has to be approved in Equipment Quotation Manager Space > Approval > Approve. Only those quotation details connected to that quotation line will be approved which have the same responsible or do not require additional approval.

Tip: It is possible to exclude the 'Ready' step in the approval flow. Set the quotation status 'Awaiting approval' via related option '25 – Change status' for a quotation.

It is possible to reject a quotation header, line or detail during the quotation approval process. A rejected quotation (status 15) will indicate to the responsible that more work is required. The sales manager or the responsible can add a text to the quotation header or line indicating why it was rejected.

Quotation Versions - Copy a Quotation

A quotation can be copied into a new version or copied into a totally new quotation number.

When a quotation is copied to a new version, the previous version is automatically set to status 99. If a quotation is copied to a new quotation number, the original is not affected.

Creating a new quotation version and copying a quotation is very similar. The main difference is that the new version retains the same quotation number but gets a new version number. The copy process leaves the original quotation and creates a new separate quotation with a new quotation number. During the copy process you can decide which data should be copied over.

Printing Quotations

The print option is available from the Equipment Quotation Space using related option 'Print'. A quotation must be in status 10 or 30 through to 50 to be printed.

1. Enter a document variant, defined in 'Standard Document. Open' (CRS027).
2. Choose from the following options the content to be sent to the streamfile for printing.
   - Warranty;
   - Service (configuration service);
   - Agreement;
   - Financing;
   - Promotion;
   - Miscellaneous costs;
   - Service (commissioning service);
   - Attributes.

Note: If you have Infor Document Management installed and configured, the quotation document will be automatically stored there. For further information on how to configure Infor Document Management for EQM, refer to the *M3 EQM Installation Guide* available on the product download page.

Releasing a Quotation

7

This section describes the effects of releasing a quotation once the order has been won. A released quotation not only creates a sales order, but, based on its content can also create work order requests, maintenance customer orders and equipment.

Whilst a quotation can be released when the status is 'Accepted' (status 50), where the user has the flag 'Quick entry allowed' set in QUS155, it is also possible to release a quotation in status 'In progress'.

- "Effects of Releasing a Quotation " on page 74
- "Deal Review" on page 75
- "Quotation Fulfillment" on page 75

Effects of Releasing a Quotation

1. **Sales Batch Order Entry (OIS275)**

   The quotation elements that will create a sales order in 'Customer Order. Open' (OIS100/101) will initially pass through sales batch order entry (OIS275) here, any error will be trapped and must be corrected before a sales order and sales order lines are created.

2. **The Sales Order**

   The product, spare parts, extended warranty, promotion, miscellaneous costs, maintenance agreement pre-payment and trade-in will create data and records on the sales order. The standard warranty will update the 'given warranty' field.

3. **The Service**

   The configuration service will trigger a work request into Work Request. Open' (MOS170). The work request will either be used to build the Product, or to re-configure an already existing Product. If local options have been added to the quotation by the Equipment Configurator, related services connected to the configuration service will be created. The commission service will trigger a maintenance customer order in 'Maint CO. Open' (COS100) and maintenance customer order line in COS101.

4. **Maintenance Agreement**

   The maintenance agreement will will create a maintenance agreement in 'Maint Agrmnt. Open' (COS410).

5 Equipment

The trade-in will create an equipment record in 'Equipment/Serialized Item. Open' (MMS240) and a record in 'Equipment. Update History' (MOS290) if it does not already exist.

6 Warranty Records

Warranty records will be created for both the standard and extended warranties from the quotation.

7 Promotion

For a claimable promotion, claims gets automatically created. The records created can then be further processed in 'Warranty Claim. Open' (MOS750).

8 Financing

If the financing type is either '1 - RPO' or '2 - Rental', a rental agreement and an internal customer order will be created.

If financing type is '0 - Leasing', a temporary leasing agreement and a customer order will be created.

Deal Review

You can make a review of the quotation by using the deal review tabs where you can compare the estimated prices and costs from the quotation to the actual invoiced amount from the Customer Order or the Maintenance Customer Order.

Quotation Fulfillment

You can follow-up on a quotation by using the fulfillment tabs. Fulfillment provides access to the following records:

1. 'Customer Order. Open Line' (OIS101) to track:
   - The product;
   - The extended warranty;
   - The miscellaneous costs;
   - Initial payment from the maintenance agreement.
2. 'Maint CO. Open' (COS100) to track:
   - The installation and commissioning service.
3. 'Maint Agrmnt. Open' (COS410) to track:
   - The maintenance agreement.

4 'Work Request. Open' (MOS170)

- Track configuration service.

5 'LTR Agreement. Open' (LTS100)

- Leasing line (manually created using 'Customer Order. Open Line' (OIS101) option 16)

6 'Rental Logistic Toolbox' (STS140)

- Rental line for finanicng type '1 - RPO' or '2 - Rental'.

Product Support in EQM

8

EQM Product Support is an application within Infor Smart Office or Ming.le, designed to serve as the primary work space for the product support sales representative (PSSR). Quotations created via the EQM Product Support mashup will get quotation category 'Aftermarket quotation'. EQM Product Support only displays these aftermarket quotations.

EQM Product Support can either be run standalone or accessed via M3 Customer Lifecycle Management for Equipment. For detailed installation instructions, refer to the *M3 Customer Lifecycle Management for Equipment Installation Guide*.

Note: M3 CLM is licensed separately.

Introduction - EQM Product Support

EQM Product Support

EQM Product Support is the starting panel if the mashup is started standalone. You can find a number of options in 'EQM Product Support' which, in many cases, are the starting point for a certain type of workflow.

These options are the following:

- Customer

  In this workflow, you need to start with selecting a customer. Each step in the workflow has its own tab:

  - Customer
  - Quotations

    Either create a new quote or use an existing one.
  - Search & Create

    Select an equipment belonging to the customer and add quotation lines connected to the selected equipment.
  - Fulfillment

  For more details, see "Customer" on page 79
- Equipment

  In this workflow, you need to start with selecting an already sold equipment. Each step in the workflow has its own tab:
  - Equipment
  - Quotations

    Either create a new quote or use an existing one.
  - Search & Create

    Add quotation lines connected to the selected equipment.
  - Fulfillment

  For more details, see "Equipment" on page 82
- Work Schedule

  In this workflow, you need to start with selecting an open Work Order Operation. Each step in the workflow has its own tab:
  - Work Schedule
  - Quotations

    Either create a new quote or use an existing one.
  - Parts

    Add parts as quotation lines connected to the selected Work Order Operation.
  - Fulfillment

  For more details, see "Work Schedule" on page 82
- MCO quick entry

  Use this workflow is to quickly create Maintenance Customer Order without any quotation.
  - Customer > Equipment
  - All Equipment
- Cash invoice.

  This function handles cash invoice.

- My Quotation

  An overview of the 'Aftermarket' quotations created by the user.
- All Quotations

  An overview of all 'Aftermarket' quotations.

Product Support Workflow

Follow one of the following workflow to work with EQM Product Support:

- Customer
- Equipment
- Work Schedule
- MCO quick entry

Note: The workflow below describes how EQM Product Support is used standalone and not accessed via M3 CLM.

Before you start In order to quote services, warranty, maintenance agreement or customer variations, the following M3 Business Engine programs should include some records to work with:

- QUS113 - 'M3 Quotation. Add Warranty'
- QUS114 - 'M3 Quotation. Add Service'
- QUS115 - 'M3 Quotation. Add Maintenance agreement'
- QUS119 - 'M3 Customer variation. Open'

Customer

The purpose of the workflow is to create an aftermarket sale of parts, service, customer variation or warranty. The starting point is always a customer list.

❑ Customer list workflow

___1 Select a customer from the 'Customer' tab. Related data to the selected customer will be displayed in the bottom tabs.

___2 Switch to tab 'Quotations'. All open quotations connected to the selected customer will be displayed.

___3 Create a new quotation header via the icon 'New quotation' (or use an existing). The newly created quotation will be displayed in the top of the quotation list.

___4 Select a quotation from the quotation list.

___5 Switch to tab 'Search & Create'.

A list of equipment belonging to the selected customer will be displayed under the tab 'Equipment'.

___6 Select an equipment. Related data to the selected equipment will be displayed in different tabs to the right and in the bottom of the mashup.

❑ Customer list - aftermarket sale of parts

Follow these steps to create an aftermarket sale of parts.

___1 Select a quotation from the quotation list.

___2 Switch to tab 'Parts' under the main tab 'Search & Create'.

Find a part via the 'Search and connect' table. Related data to the selected part will be displayed in different tabs to the right. The already created quotation lines will be displayed in the right tab 'Quotation lines'. Create a quotation line via the icon 'New quotation line'. The right tab 'Quotation lines' will be updated with the new quotation line (refresh might be needed).

___3 Transfer the quotation to an order by pressing the icon 'Create order' in the right tab 'Quotation lines'.

___4 Switch to tab 'Fulfillment'.

___5 Select the newly released quotation. Order data related to the selected quotation will be displayed in the bottom list.

___6 Select the quotation line for the part. Take related option '11 – Customer Order. Open Line' to open OIS101.

❑ Customer list - aftermarket sale of services

Follow these steps to create an aftermarket sale of services.

___1 Select a quotation from the quotation list.

___2 Switch to tab 'Parts' under the main tab 'Search & Create'. The predefined services (QUS114) that are available for the selected equipment will be listed under the tab 'Predefined'. The tab 'All' will list all service definitions (MOS300).

___3 Select a service either from the 'Predefined' or the 'All' tab. The product structure for the selected service will be displayed in the bottom tab 'Material/Operation'.

___4 Create a quotation line via the icon 'New quotation line'. The right tab 'Quotation lines' will be updated with the new quotation line (refresh might be needed).

___5 Transfer the quotation to an order by pressing the icon 'Create order' in the right tab 'Quotation lines'.

___6 Switch to tab 'Fulfillment'.

___**7** Select the newly released quotation. Order data related to the selected quotation will be displayed in the bottom list.

___**8** Select the quotation line for the service. Take related option '24 – Maintenance Customer Order. Open' to open COS100.

❏ Customer list - aftermarket sale of customer variation

Follow these steps to create an aftermarket sale of customer variation.

___**1** Select a quotation from the quotation list.

___**2** Switch to tab 'Customer variation' under the main tab 'Search & Create'. The existing customer variations for the selected customer will be listed (QUS119).

___**3** Select a 'Customer variation' record from the list. If needed, take option 'Change' to update the record.

___**4** Create a quotation line via the icon 'New quotation line'. The right tab 'Quotation lines' will be updated with the new quotation line (refresh might be needed).

___**5** Transfer the quotation to an order by pressing the icon 'Create order' in the right tab 'Quotation lines'.

___**6** Switch to tab 'Fulfillment'.

___**7** Select the newly released quotation. Order data related to the selected quotation will be displayed in the bottom list.

___**8** Select the quotation line for the customer variation. Take related option '24 – Maintenance Customer Order. Open' to open COS100.

❏ Customer list - aftermarket sale of warranty

Follow these steps to create an aftermarket sale of warranty.

___**1** Select a quotation from the quotation list.

___**2** Switch to tab 'Warranty' under the main tab 'Search & Create'. The available extended warranties for the selected equipment will be listed (QUS113).

___**3** Select a 'Warranty record from the list.

___**4** Create a quotation line via the icon 'New quotation line'. The right tab 'Quotation lines' will be updated with the new quotation line (refresh might be needed).

___**5** Transfer the quotation to an order by pressing the icon 'Create order' in the right tab 'Quotation lines'.

___**6** Switch to tab 'Fulfillment'.

___**7** Select the newly released quotation. Order data related to the selected quotation will be displayed in the bottom list.

___**8** Select the quotation line for the customer variation. Take related option '11 – Customer Order. Open Line' to open OIS101.

Equipment

The purpose of the workflow is to create an aftermarket sale of parts, service, customer variation or warranty for an equipment. The starting point is an equipment list.

❏ Equipment Workflow

___1 Select an equipment from the 'Equipment' tab. Make sure to select an equipment that has already been sold to a customer. Related data to the selected equipment will be displayed in the right and bottom tabs.

___2 Switch to tab 'Quotations'. All open quotations connected to the equipment's customer will be displayed.

___3 Create a new quotation head via the icon 'New quotation'. The newly created quotation will be displayed in the top of the quotation list.

___4 Select the newly created quotation from the quotation list.

___5 Switch to tab 'Search & Create'.

___6 Add quotation lines via the tabs Parts, Service, Customer variation and Warranty in the same way as described in the 'Customer workflow'.

___7 Select an equipment. Related data to the selected equipment will be displayed in different tabs to the right and in the bottom of the mashup.

___8 Transfer the quotation to an order by pressing the icon 'Create order' in the right tab 'Quotation lines'.

___9 Switch to tab 'Fulfillment'.

___10 Select the newly released quotation. Order data related to the selected quotation will be displayed in the bottom list.

___11 Select a quotation line. For Parts or Warranty take related option '11 – Customer Order. Open Line' to open OIS101. For Service or Customer variation take related option '24 – Maintenance Customer Order. Open' to open COS100.

Work Schedule

The purpose of the workflow is to add material (parts) to an existing Work Order.

❑ Work Schedule workflow

Before you start To run 'Work Schedule', the following filters and columns have to be included in the main Sorting order/View for 'Work Schedule. Open Toolbox' (MOS195):

- Facility (filter field QOFACI)
- Product (filter and column field QOPRNO)

  When filtering this field, use sorting option '40-MMOOPE40' in CRS022.
- Work Order number (column field QOMWNO)
- Lot number (column field QOBANO)
- Customer (column field QHCUNO)

__1 Find and select an open Work Order Operation from the tab 'Work Schedule'. Make sure that the selected work order is connected to a customer.

__2 Switch to tab 'Quotations'. All open quotations connected to the customer for the selected work order will be displayed.

__3 Create a new quotation head via the icon 'New quotation'. The newly created quotation will be displayed in the top of the quotation list.

__4 Select the newly created quotation from the quotation list.

__5 Switch to tab 'Parts'. Find a part via the 'Search and connect' table. Related data to the selected part will be displayed in different tabs to the right. The already created quotation lines will be displayed in the right tab 'Quotation lines'.

__6 Create a quotation line via the icon 'New quotation line'. The right tab 'Quotation lines' will be updated with the new quotation line (refresh might be needed).

__7 Transfer the quotation to an order by pressing the icon 'Create order' in the right tab 'Quotation lines'.

__8 Switch to tab 'Fulfillment'.

__9 Select the newly released quotation. Quotation lines will be displayed in the bottom list.

__10 Select the quotation line for the added part. Press icon 'Work order' to open the program 'Work Order. Open' (MOS100).

Product Support Detail

Product Support Detail is the starting panel if EQM Product Support is accessed via CLM.

You can find a number of tabs and buttons in 'Product Support Detail' which, in many cases, will restrict the amount of data displayed for the quotation you are currently working with.

These buttons are:

- Summary

  An expandable view of the quotations details
- Install Base

  Install Base gives an overview of the customer's equipments and consists of the following areas:
  - Equipment

    List of the customer's equipments.

    From this area, you can access the following functions
    - Equipment

      This panel lists all equipment
    - Parts

      This panel allows you to search and create parts quotation lines connected to a selected equipment.
    - Service

      This panel allows you to search and create service quotation lines for a selected equipment.
    - Customer variation

      This panel allows you to search and create customized service quotation lines for a selected equipment.
    - Warranty

      This panel allows you to search and create warranty quotation lines for a selected equipment.
  - Equipment related data

    Access meter reading, warranty, maintenance agreement, attributes and address for a selected equipment from the equipment list.
  - Equipment related transactions

    Open and closed customer orders, spare parts sale, maintenance orders and service history for a selected equipment from the equipment list.
- Print studio

  Only available if Infor Document Management is installed and configured for EQM.
- Fulfillment

  Follow up the progress of the orders created from the quotation.
- Deal Review

  Compare the sales and cost estimates from the quotation with the actual output from the invoices.

The 'Product Support Detail' panel has a number of tabs to manage the quoted parts, service, warranty and maintenance agreement. The 'All' tab displays all quotation transactions in one screen.

Product Support Detail Workflow

Follow these steps to work with Product Support Detail in EQM.

Note: The workflow below describes how EQM Product Support is used when accessed via M3 CLM.

Before you start In order to quote services, warranty, maintenance agreement or customer variations, the following M3 Business Engine programs should include some records to work with:

- QUS113 - 'M3 Quotation. Add Warranty'
- QUS114 - 'M3 Quotation. Add Service'
- QUS115 - 'M3 Quotation. Add Maintenance agreement'
- QUS119 - 'M3 Customer variation. Open'

1. To create a quotation, choose Quotation > Create Product Support Quote in M3 CLM.
2. After the quote is created in M3 CLM, the 'Product Support Detail' panel in EQM opens with the quotation header automatically created.
3. To create a product support quotation line, go to the 'Search and Create' tab and add quotation lines for parts, service, maintenance agreement, customer variation and warranty.

   Note: You can create a quotation line from any of these panel by clicking 'New quotation line'.

   Quotation lines can be created from 'Product Support Detail' as well.

4. When the quotation line is created, the quotation details are displayed under the 'Quotation' tab in EQM. The original prices for the quotation lines are taken from standard and service price lists specified in M3 Business Engine.

   After the quotation line is created, the opportunity value in M3 CLM is updated and the quote can be sent to the customer.

   Note: You can create several quotes to an opportunity.

After the customer accepts the quotation, the quote is converted to an order in M3 Business Engine and is listed under the 'Fulfillment' tab.

Rental Agreement in EQM

9

EQM Rental is an application that supports the quotation process of rental transactions.

Note: EQM Rental is normally accessed via M3 Customer Lifecycle Management for Equipment, however it is also possible to run EQM Rental stand alone.

For detailed installation instructions, refer to the *M3 Customer Lifecycle Management for Equipment Installation Guide*.

M3 CLM is licensed separately.

EQM Rental

This panel is only used if EQM Rental is ran stand alone. If accessed via CLM, the panel **Rental Agreement** will be opened directly.

The buttons and tabs in EQM Rental are very similar to the ones found under the Customer button in EQM. The major differences are the two tabs Rental and Contract:

- **Rental tab**: Provides a list of temporary rental agreements and rental quotations.
- **Contract tab**: Provides a list of active rental agreements.

A double click action on a record in the Rental or Contract tab will open the panel **Rental Agreement**.

Rental in EQM

The 'Rental Agreement' panel in EQM offers the following tabs and functions:

- **Lines tab**

  Provides an overview of the rental agreement displaying rental lines and rental charges.

- **Totals tab**

  Displays revenue, cost or tax fields for the rental agreement.
- **Equipment search**

  Offers the option to search for equipment and create rental lines.

A rental agreement has the following stages:

1. Temporary - while defining the rental agreement

   Rental agreements created from Customer Lifecycle Management are always created in stage 'Temporary'.
2. Quotation - while quoting the rental agreement
3. Active - after the rental agreement is ready.

Rental Workflow in EQM

Before you start To be able to use Rental Agreement in EQM, you need to complete the standard setup for rental in M3 Business Engine.

Note: The workflow below describes how EQM Rental is used when accessed via M3 CLM.

1. To create a rental quotation, choose Quotation > Create Rental Quote in M3 CLM.

   You can create a rental quote on any opportunity or activity in M3 CLM.
2. After the rental quote is created in M3 CLM, the 'Rental Agreement' panel in EQM opens with an automatically created (temporary) rental agreement header for the customer.
3. To add rental lines to the temporary rental quotation, click Create from the 'Lines' tab. The program 'Rental agreement. Create' (STS085) opens up.

   Note: You can access Create from the 'Equipment search' tab as well. In that case, the program 'Rental agreement. Create' (STS085) will default the selected equipment.
4. Enter the mandatory fields in 'Rental agreement. Create' (STS085) to create rental line for the temporary rental agreement.
5. To add line charges, highlight the rental line and click Create on the 'Line Charges' tab

   To add additional charges, highlight the rental line and click Create on the 'Additional Charges' tab

   To have an overview of the simulated revenue, cost and tax for the temporary rental agreement, select the 'Totals' tab.
6. When all rental lines and charges are added to the temporary rental agreement, you can convert it to either a quotation or an active rental agreement. This can be done by pressing the icons 'Quotation' or 'Contract' in the 'Lines' tab.

Integrating EQM with Other M3 Products

10

This section describes additional functions that are available as part of the M3 EQM suite or as additional licensed products.

- "Infor Enterprise Search for EQM" on page 88
- "M3 CLM Setup for EQM" on page 88
- "Integration with Infor Document Management" on page 89

Infor Enterprise Search for EQM

If you are using Infor Enterprise Search, you have the possibility to use the interest center Equipment quotation to search for quote information. The search will be based on information on the quotation header and line. From the search results you can navigate directly to the quotation detail level.

Note: Infor Enterprise Search is licensed separately.

M3 CLM Setup for EQM

To be able to use the Customer Lifecycle Management extension for Equipment, supporting opportunity management, quotation management and industry specific dashboards, you need to install M3 Customer Lifecycle Management for Equipment. By installing M3 CLM for Equipment, you can access EQM data through CLM.

For detailed installation instructions, refer to the *M3 Customer Lifecycle Management for Equipment Installation Guide*.

Note: M3 CLM is licensed separately.

Integration with Infor Document Management

This section summarizes how to define images in Infor Document Management that can then be displayed in the Equipment configurator, or in Print studio > Product.

Note: Infor Document Management is licensed separately.

1. To start Infor Document Management in Smart Office, select Functions > Infor Document Management > Infor Document Management Client.
2. Select Add Document and choose M3 Document from the drop-down list.
3. Drag the picture where the Drop File Here signs indicate or choose Advanced > File and upload the picture with a standard file dialog.

   Note: The resolution of uploaded pictures affect Infor Document Management performance.

4. As part of the upload, the picture attributes have to be specified.
   - **a** Enter the correct company number in the Company field.
   - **b** Specify the correct Attribute Type
     - Choose ITNO as Attribute Type for the main picture.
     - Choose the attribute id (ATS0110) for the pictures displayed in the list.

       For example, if you want to enter pictures for the attribute id TRACKS which is found in ATS010, enter TRACKS as attribute type.
   - **c** Select Image as Document Type
5. Enter the Attribute Value
   - For Attribute Type ITNO it is the item number (MMS001).
   - For an attribute id it is the value of the attribute id (ATS021, option 12 from ATS010).

     Note: It is possible to have the same picture connected to different attribute values.

6. Save the picture with its attributes.