



Infor Configure Price Quote for HVAC Distributors

As a distributor of large scale heating, ventilation, and air conditioning (HVAC) systems, you play a pivotal role in a complex supply chain. On the upstream, you're working with manufacturers that produce systems with thousands of possible configurations. On the downstream, your customers expect you to quickly understand their equally complex requirements and recommend a system that matches their exact needs—then deliver it at a competitive price.

It's challenging to be the intermediary in the supply chain for large HVAC systems. To succeed, everyone on your sales staff—even new reps—must be conversant in your suppliers' complex product lines. And they need easy-to-use yet sophisticated tools to configure systems that meet unique customer requirements in a profitable way. Infor® Configure Price Quote (CPQ) has been designed to help you manage the complexities inherent in configuring and selling large scale, configured HVAC systems. With Infor CPQ, you'll be able to sell complex HVAC systems in greater numbers, more efficiently, and more profitably.

Infor CPQ gives your salesforce the powerful capabilities they need to increase the business you quote and the orders you win. Your reps will be able to quickly and easily configure the thousands of individual components required to create an HVAC system that meets a customer's performance demands and efficiency rating requirements.

Boost sales performance. Infor CPQ can significantly reduce the learning curve for new sales reps, helping them to demonstrate the level of knowledge that customers expect. With Infor CPQ, you'll be able to create a streamlined selling approach, so everyone on your sales staff can successfully guide a buyer through all the options and make the sale, which can improve your quote-to-order ratio.

Present a single integrated quote. Infor CPQ makes it easy to quote your own product and service add-ons and present a single integrated quote to the customer. Your sales staff will be able to use a 24X7 self-service online order configuration and management system to

reach more customers and deliver a better combination of products and services.

Help customers visualize their order. With Infor CPQ, your sales reps will have access to visualization tools in the quoting process, so customers can see realistic images of their options and the complete system they're ordering. Sales reps will also be able to display other relevant information, such as the system's energy efficiency and various performance metrics.

Upsell more effectively. Sales reps receive tools to help them offer high-margin options that improve your profit-per-sale. As the order is configured, even new reps are able to see the projected profit, so they can make timely suggestions that meet margin objectives and customer requirements.

Reduce costs

With Infor CPQ, you'll be able to improve order accuracy and eliminate manual processes, which can help you to better manage inventory and your relationships with supply chain partners. The end result: You'll be able to reduce costs and speed sales.

Deliver the perfect order. Customers can use Infor CPQ to visually confirm the configuration of their HVAC system during the order process. You can be confident the specifications you submit to the manufacturer reflect the customer's exact specifications, are on time, and arrive at the expected costs. Use Infor CPQ to help produce the perfect order and you'll avoid the time, effort, cost, and customer frustration caused by delivering the wrong product.

Automate your role in manufacturing. Infor CPQ can dynamically create bills of materials (BOMs) and manufacturing instructions for each system you sell. Easily integrate this information with enterprise resource planning (ERP) systems and store these instructions with production orders. You can also generate 2D drawings and 3D models of products, so manufacturers can reduce costly errors.

Reduce labor requirements. With Infor CPQ, you can

dramatically reduce the labor required to fulfill an order. You'll be able to create a rules-based bill of materials process to avoid labor-intensive creation of thousands of configured part numbers. After an order is configured in the quote system, you won't have to rekey it into your enterprise resource planning solution or produce multiple versions of the manufacturing instructions.

Because pricing and product descriptions are part of the Infor CPQ sales interface, you'll be able to eliminate the production of price books. You'll also more effectively manage inbound and outbound shipments, and coordinate more closely with the installation contractors.

Hold the right inventory. Infor CPQ gives you greater insight into the orders you've taken and where they stand in the manufacturing process, so you can more precisely manage the inventory you need to deliver a complete system.

Strengthen your brand

With Infor CPQ, you can differentiate your company from competitors by automating operations, which allows shorter cycle times, more accurate orders, and a greater ability for sales to provide high-value consultative support. You'll make the customer ordering process smooth and hassle-free, while increasing process efficiency and accuracy. You can deliver exact orders—on time.

Empower customers. You'll strengthen your brand when customers see they can play a more active role in the order process. They can configure their own HVAC systems and accessories online, using the same rules set as inside sales to see component availability and price.

Create a consistent buying experience. Customers may interact with a wide variety of people on your extended team when ordering. Whether they're exploring on the web, picking features on a tablet with a sales rep, or talking with a customer service rep on the phone, Infor CPQ ensures products are represented the same way, every time. When your sales and customer service teams work together, buyers are reassured of your company's quality.

Deliver quality. Delayed or inaccurate deliverables can drive customers to competitors. Infor CPQ makes it possible to attain the same level of quality for selling configured HVAC systems that customers expect from mass-produced products. First, Infor CPQ perfectly captures the requirements and presents them for customer approval. In addition, Infor CPQ automates the creation of the bill of materials and manufacturing instructions for building each product, so your manufacturing partner knows exactly what to produce.

Companies that specialize in distributing large configurable heating, ventilation, and air conditioning systems can use Infor CPQ to increase sales, reduce costs, and differentiate their brand.



641 Avenue of the Americas
New York, NY 10011
800-260-2640
infor.com

About Infor

Infor is fundamentally changing the way information is published and consumed in the enterprise, helping 73,000 customers in more than 200 countries and territories improve operations, drive growth, and quickly adapt to changes in business demands. To learn more about Infor, please visit www.infor.com.

Copyright© 2015 Infor. All rights reserved. The word and design marks set forth herein are trademarks and/or registered trademarks of Infor and/or related affiliates and subsidiaries. All other trademarks listed herein are the property of their respective owners. This document is provided for informational purposes only and does not constitute a commitment to you in any way. The information, products and services described herein are subject to change at any time without notice. www.infor.com.
INF-1446797-EN-US-0215-2