



DNav Commercial Quote Manager (DNav-CQM) Factsheet

DNav-CQM is a device responsive, browser based application that enables companies to track commercial job quotes from inception to completion.

Key features of DNav-CQM include:

Contact:

Track the key influencers, decision makers, and design personnel that are involved with an opportunity. Along with application supplied data elements, user defined data elements can be added at the contact level to track key data elements that are deemed important and are required for reporting purposes. Documents can be added at the contact level for subsequent retrieval, along with the ability to see which opportunities, job quotes, and orders have been placed by contact. Contacts do not require a purchasing account with the company to be included within the DNav-CQM application.

Accounts:

For customers that do have a purchasing account, it is possible to add details of such customers that are bidding on an opportunity in the DNav-CQM. In a similar manner to contacts, these Accounts may also store user defined data elements can be added to track data that is deemed important and required for reporting purposes. It is also possible to attach documents at the Account level. It is also possible to view which opportunities, job quotes, and orders have been placed by an Account.

Opportunities:

Contacts and accounts may be added to an opportunity. It is possible to define the sales cycle stages at the opportunity level, along with the probability factor for converting the Opportunity to a sale. In a similar manner to Accounts and Contacts, attachments, job quotes, and orders placed can be accessed at the Opportunity level.

The products that are to be targeted are defined within the Opportunity, together with the estimated/actual value of the opportunity. Opportunity details can either be manually keyed or may be imported from spreadsheets.

Job Quotes:

For each Opportunity, Job Quotes can be issued to all the bidders for a particular project. Pricing for the Job Quote can be fixed for all quotes, or may default to the price levels that are currently set for the Account. It is possible to include company branding Job Quotes e.g. corporate logo and color scheme, and these may be distributed via email from DNav-CQM directly. All Job Quotes for an Account are accessible in Navigator for ease of converting the Job Quote in to an order.

Dashboard:

Dashboard reporting is supplied in the application showing total opportunities by sales person, estimated value of the opportunities, value of those forecasted to close in the next 90 days, the total number of actual orders created from job quotes, as well as the value for each opportunity and each stage the opportunity is at.

About Kerridge Commercial Systems (KCS)

KCS provides advanced, fully integrated business systems, installation and support services for the manufacturing, wholesale and distributive markets. The company has over 40 years of extensive knowledge and experience of working with wholesalers, distributors and manufacturers across many sectors. The company's class leading solutions are functionally rich and highly flexible.

The KCS product solution set has a track record of delivering wide-ranging benefits including greater operational efficiency, cost savings and resource and asset utilization, together with real-time information for management decision making.

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