

# <SynEngin/>

Client: Kinley Systems Ltd

Sector: Manufacturing  
/Construction

Project Type: Bespoke  
Software Development



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## OVERVIEW

We were brought in by Kinley to look at several IT projects within their business. One of these was to look at their estimating process.

They're a manufacturing company and whilst they have a product line, they are predominantly building bespoke products in terms of dimensions. This made producing accurate estimates very time-consuming.

Many estimates were from clients at a design stage, just looking to get an idea of price. The amount of these which would turn into actual work was limited but the estimates needed to be accurate, without taking up too much time.

Producing an accurate quote could take several hours. With lots of enquiries coming in and a target of responding to enquiries within 24 hours, meant any growth in the business would require an increase in headcount or risk losing projects due to a failure to respond quickly enough.

There was also an issue with the process for pricing some products being very complex. This resulted in several products only being able to be priced by a small number of staff.

### PROBLEMS

- Time to produce an accurate estimate.
- The existing pricing process was complex for some products. Which meant only a limited number of staff could produce estimates for these products.

### GOALS

- Increase the team's efficiency.
- Reduce the amount of time to create an accurate estimate.
- Simplify the process.
- Automate as much of the process as possible.

## PHASE ONE

Reduce the time to produce an accurate estimate and simplify the process.

We broke down the products Kinley produced into categories and worked out the manual process used to get a price for each category.

Once we knew what these processes were, we worked in Excel using VBA to produce what was known as the quote calculator.

This allowed staff to go through each item required then enter details via dropdowns and enter dimensions in Excel. This would calculate the relevant costs.

Each product in the estimate was added to a running total and then a final total price was produced.

This process made it possible to turn an estimate around in a few minutes and allowed staff with limited training to produce prices for all product types.

However, there was still a manual process required to take the information from the Excel calculator and add it to the sales system (Zoho). Zoho would then be used to produce a formal estimate and issue it to the client. There was still a further manual process involved in updating product pricing.



## PHASE TWO

Move to Web application and integrate with Zoho ERP.

### Problems to solve

Phase one of the project had been a success and achieved its goal of allowing the sales team to quickly turn around estimates. However, there were still several manual processes and problems.

- Pricing updates had to be manually brought into the spreadsheet
- There was a manual process to create the estimate in Zoho (Kinley's sales system)
- There were lots of copies of the calculator flying around, some with out-of-date pricing

### Goals for Phase 2

The goal of phase two was to improve the efficiency of the process further and reduce the risks.

We wanted to have a single source of all pricing data, it made sense for this to be Zoho.

We also wanted to automate the process of creating an estimate in Zoho, to prevent double handling of data and allow the team to get estimates out quicker to clients.



### Approach

- Provide a simple interface to allow the sales team to quickly generate accurate pricing.
- Integrate with Zoho via API to reduce double handling of data and get accurate and consistent pricing data.

## SOLUTION

The solution we went with was to build a bespoke web application. This application linked to Zoho using the Zoho API. Product pricing was taken from Zoho, making Zoho the only source of product prices.

We rebuilt the process for pricing each product category in the web application. The look and feel of the app were designed to be responsive like Excel, with data changes auto-updating fields in the same way as happens in Excel.

An estimate of various products would be created in the web application, with options to PDF, create revisions or push into Zoho.

We used the Zoho API to create the estimates in Zoho with only a couple of clicks.

## IMPACT

This has had a major impact on the business. The team now uses the new estimating system to generate an accurate quote in a few minutes, automatically push this into the Zoho sales system and issue to a client directly.

The double handling of data is gone. The pricing is all based on a central source, meaning there are no out of date pricing documents knocking around.

But most importantly, the team can now deal with many more enquiries.

## RESULT

- Significant reduction in time to create an accurate estimate.
- Automated estimate creation in Zoho.
- Reduced risks of outdated pricing and inconsistencies.