

Supercharge Your ERP

Because every job starts with a quote.



Introduction

ERP systems are powerful tools purpose-built to manage the shop floor and the resources in your business, not sales and quoting in the front office. By design, they are rigid to ensure all data can flow through the system in a repeatable and predictable manner. This is a great approach for managing inventory or compliance reporting, but it's not particularly well suited for blending the art and science of estimating and quoting or managing collaboration amongst the different teams that are involved with quoting.

Today, most shops are leveraging their ERP quoting modules in one of two ways:

- 1 They are estimating and quoting with pen and paper, entering numbers into their ERP system and then sending the quote through their ERP system.
- 2 They are calculating their quotes in robust master Microsoft Excel and then manually entering everything into their ERP once an order is won.

This process is riddled with time-sucking, error-prone manual effort that can be dramatically improved through modern quoting software like Paperless Parts, which combines the flexibility of Excel, the power of automation, and eliminates tedious double-data entry.

Quoting, Reimagined.

“Paperless Parts gives us a competitive edge; we no longer quote based on ‘feel,’ but on data-driven calculations that get us to a quote faster.”
— Leech Industries

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Limitations of Quoting Through Your ERP

ERPs are not designed to streamline the quoting workflow or automate any of the manual steps that generally take minutes, hours, or even days. The typical quoting process involves sorting through emails to find Request for Quotes, downloading files, renaming them, saving them on shared drives, logging in a quote tracking document, setting up costing templates (either in Excel or your ERP), printing out PDFs, opening and reviewing models in CAD software, costing individual line items, then manually adding mark-ups. Ninety percent of that process is done outside of your ERP, which means all of that data needs to be manually typed into your ERP.

In addition, a large percentage of ERP systems are not in the cloud and run on software that is outdated and not supported by modern operating systems. This is a major cybersecurity risk. It also makes it hard to securely share files and communicate with customers without needing to purchase additional solutions like FTP sites for file sharing. In addition, this means that manufacturers cannot access data remotely to answer RFQs from anywhere at any time without needing to set up VPNs for remote access. These options are expensive, inefficient, and unnecessarily risky.

Adding additional drag on the business, the reality is that even top-performing shops only win about 30% of the new business they quote, which means that 70% of all those clicks, downloads, file transfers, emails, and keystrokes aren't going to translate into new revenue. A quoting platform that combines AI-driven automation, geometric interrogations for 3D models, PDF data extraction, and state-of-the-art workflow management tools can dramatically streamline this process – saving minutes, hours, days, and even weeks and translating into more profitable growth.



One Source Manufacturing's former ERP system lacked key aspects of the shop's internal operations and did not meet the shop's quoting needs.

OSM had been quoting all of its jobs manually, printing RFQs out and assembling folders to be passed around to internal stakeholders. With the previous ERP system in place, the team had to go through the arduous process of transferring data for quoting into the ERP system.

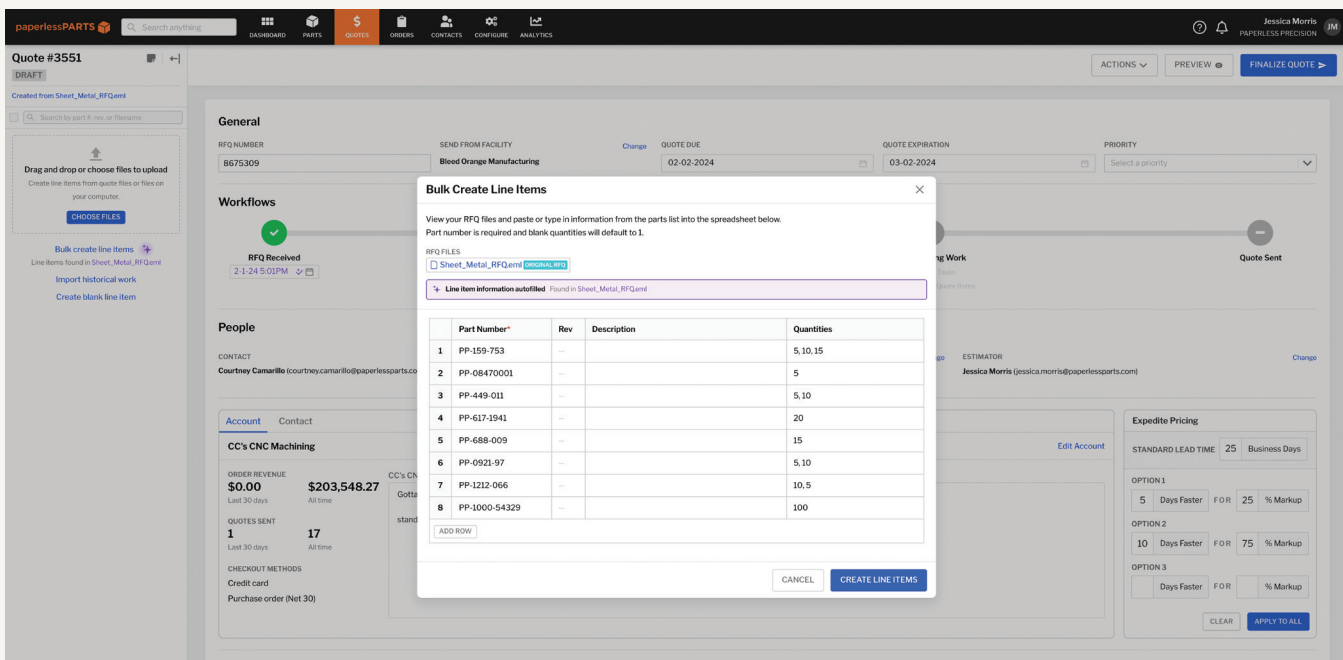
This approach offered little value in the long run, as it did not cover key aspects of the shop's estimating such as freight items or expedite times. Tim Schnieder, OSM's Vice President of Operations, recognized that the shop was poised for significant expansion that the former ERP system and quoting process would not be able to accommodate.

"The old ERP system wasn't helping us with our quoting because all of the data we had to load into the ERP system was lost on jobs we didn't win. That made it hard to be efficient and focus on growing our customer base."

How do you know your ERP system isn't cutting it?

Look for these telltale signs:

- 1 People use Excel spreadsheets to manage specific processes:** Excel is great for its flexibility and ability to write costing formulas. That said, every time you have to manually enter data from a spreadsheet into your ERP, you're introducing risk to your business.
- 2 There are stacks of folders sitting on every desk and Post-It notes dangling from every computer screen:** Writing notes on physical printouts can be useful, but only if those printouts make it onto the shop floor once a job is won—which may not end up happening. Information stuffed away in filing cabinets does little to help your team operate more efficiently.
- 3 You live out of your email inbox for quote tracking and prioritization of quoting efforts:** When using email for quote tracking and prioritization, it can cause a single point of failure when people are out of office. It also creates a risky situation where work can fall through the cracks, causing quotes to be missed.
- 4 Fields in your ERP no longer represent the functionality they were originally meant for:** Most ERP systems are designed to support a wide variety of users in different industries, thus having generic description fields that end up getting used in different ways depending on the type of manufacturer. This makes it really hard to drive consistency and searchability of data and also breaks a lot of the ERP's intended resource planning functionality.
- 5 You still use out-of-the-box fields and logic, rather than ones customized to your business:** Very rarely does out-of-the-box functionality match how your shop actually operates, but customizing your ERP can take months or even years and cost thousands of dollars. It's not uncommon for shops to give up and live with less-than-perfect implementations.



Extend the Functionality of Your ERP System to Win New Business and Drive Profitability

Paperless Parts is designed not to replace your ERP system (which would be a huge nightmare) but rather to integrate seamlessly with it and drive new levels of automation, workflow management, and quoting excellence. We do this in a few key ways:

- 1 **Workflow management tools tailored to your business:** From the second an RFQ is received to the minute an order is placed, Paperless Parts automates and streamlines the workflow steps your shop needs to operate at maximum efficiency.

Our AI-powered automated quote setup functionality allows you to simply forward an RFQ email into Paperless Parts, prepopulate key details (e.g., customer contact information, quantity breaks, part description, etc.), unzip files, bulk create line items, and automatically match parts to associated line items. This process can reduce the time it takes to set up a quote by 90% or more and can be done by anyone in your shop—not just your most experienced (and expensive!) estimators.

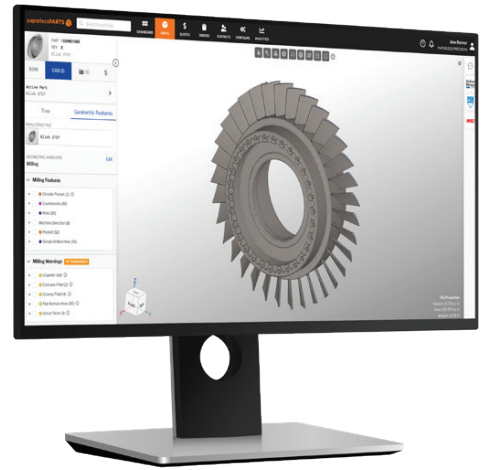
In-app collaboration tools and our free 3D viewer allow any user with permission to access part files—including your customers and outside vendors—to communicate in the specific context of the part you're quoting, ensuring that notes don't get lost in filing cabinets or email inboxes.

Intuitive dashboards are automatically updated to show the status of individual line items, such as "Waiting on Quote from Outside Vendor" or "Ready for Review," enabling everyone in your shop to be on the same page and see where every line item in a quote is in the process. Unlike preset values in your ERP, Paperless Parts is fully customizable so your process is accurately reflected inside of the system.

By unifying data and workflow activities into a central platform, all critical information is accessible to those who need it, when they need it. Users no longer need to have multiple software systems (Adobe, SOLIDWORKS, ERP, Excel, etc.) all open at the same time simply to quote a job.

2 Automatic costing and pricing logic customized to your shop:

Leveraging Paperless Parts' patented geometric interrogation engine, simply upload 3D models and Paperless Parts will automatically break out your Bill of Materials, and extract tree structures from CAD files, identify and cost subcomponents, and convert components to purchased hardware quickly and accurately. Apply fully customizable costing templates to each line item that reflect how your shop truly thinks about manufacturing parts. Through Paperless Parts' easy-to-use coding language, you can customize your Paperless Parts instance as easily as you can build an Excel formula.



Paperless Parts also analyzes 3D CAD models based on various manufacturing processes like CNC machining or sheet metal fabrication to identify potential issues like tight corners, deep holes that require special tooling, and bend reliefs. The manufacturability detection thresholds can be customized to your shop's capabilities to provide critical insight into how you want to price a specific part.

3 An unrivaled (and secure!) buying experience: Time-sensitive buyers likely won't tell you they are willing to pay more for their parts sooner, but oftentimes, if you're able to communicate the trade-off of speed and cost with one click, users will select faster lead times—even at a higher price. This translates to better margins for your shop. Paperless Parts makes it easy to present a wide variety of lead times and quantity breaks in a clean, professionally branded digital quote.

In addition, quoting through Paperless Parts is a strong signal to your buyers that you care about the security of their part files and intellectual property. Paperless Parts is FedRAMP Moderate Equivalent, CMMC-Compliant, and ITAR-Registered, making it the preferred quoting platform for the Defense Industrial Base.

4 Seamless integration into your existing tech technology investments your ERP: Best part of all, Paperless Parts' API-based platform allows you to integrate seamlessly with other critical systems in your tech stack, including your ERP system, Customer Relationship Management (CRM) software, accounting software, and more. No more double-data entry or risk of a misplaced decimal point that could cost you thousands of dollars. With a single click, Paperless Parts will push all of the quote data directly into the corresponding fields of your ERP.

Want to see it in action?

Visit paperlessparts.com/integrations/ to learn more about the specific ERPs we integrate with. Don't see your ERP on the list? Custom integrations are available.

Request a demo today