# **Section VI**

Quotes

# **Quotes Module**

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File	Edit	Orders	Invoices	Commissions	Quotes	Forecasts	Reports	Maintenance	Everyone Out!	Fax/EDI	Navigation	Window	Help	
					New /	Change / De	lete							
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There are many similarities between Quotes and Orders. A single form is used to create a new quote, edit and existing quote or delete a quote. To work on a quote, click the Quotes pad on the main menu then click the New/Change/Delete option on the drop-down submenu. A blank form will appear.

🕲 Quote	_ [_] ×
Quote <u>H</u> eader	Quote Items (SKUs) Quantities and Prices Comments & Conditions Results Preview - Print - Save
Quote Number	Entered by Quote Status
Quote Title	Quote Date / /
Customer	Expire Date //
Salesman	×
Authority	
New	End
New	Eind

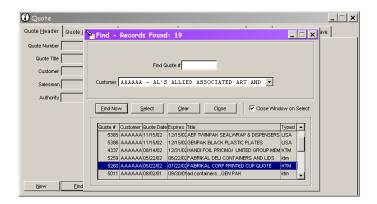
#### New Quote

To create a new quote, click the New button at the lower left corner of the form. A new quote record will be created with the next available quote number and the logged-in user's name or initials filled in. By default, the quote's status will be Open.

🕲 1: Quote	#5629									_ 🗆 X
Quote <u>H</u> eader	Quote <u>I</u> tems	s (SKUs)	<u>Q</u> uantiti	ies and Prices	Commer	its & Cor	ditions	<u>R</u> esults	Preview - Print	- <u>S</u> ave
Quote Number	5629	Entered by	LW	Quote Status	Open	•				
Quote Title						_		Quote Date	11	
Customer						•		Expire Date	11	
Salesman						•				
Authority										
				Proceed	⊻oid		Close			

# Find Quote

To edit an existing quote, click the Find button near the lower left corner of the form just to the right of the New button. A form will appear that allows you to enter a quote number and/or select a customer.



Enter the Quote Number or select the customer for the quote you want to edit and press the Enter key or click the Find Now button with your mouse. If no such quote is on file, a message box will display and you can try entering another number or customer. If a quote with your entry is on file, summary information will be displayed. Press the Enter key or double-click on the highlighted line or click the Select button with your mouse. The form will close and the selected record will be displayed on the Quote form. Note that the Customer field is disabled. Once a quote is entered and saved, the customer associated with the quote cannot be changed.

🕲 1: Quote	#5260 /	ААААА						_ 🗆 🗙
Quote <u>H</u> eader	Quote <u>I</u> tem	s (SKUs) Quant	ities and Prices	<u>C</u> omments	& Conditions	<u>R</u> esults	Preview - Print -	Save
Quote Number	5260	Entered by KTM	Quote Status	Open	•			
Quote Title	FABRIKAL CO	ORP PRINTED CUP QU	IOTE		_	Quote Date	05/22/02	
Customer	AAAAAA -	AL'S ALLIED	ASSOCIATED	ART AND .	-	Expire Date	07/22/02	
Salesman	6 - FRE	D FRANKLIN			-			
Authority	LISTS							
		Delete	Proceed	⊻oid	Close			

## Enter Quote Data

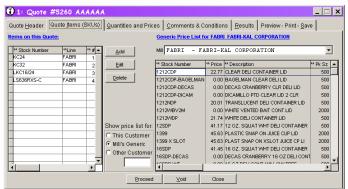
Enter the remaining data on the Quote Header tab. The Quote Title can contain any text. The Customer must be an existing customer on file. Once you select a customer an move on to another field, that customer's salesman will automatically appear in the Salesman field. Fill in the Authority, Quote Date and Expiration Date for the quote. (See the section on Date Fields at the beginning of this document for hints on entering dates.)

#### Quote Items (SKUs) Tab

The Quote Items tab, and the process of entering items on a Quote, are very similar to their counterparts on an order. The **BIG** difference is that you must select a mil before adding items. Unlike an Order, which is for **one** customer and **one** mill, a Quote can include prices for items from many mills.

🕄 1: Quote	#5630								_ 🗆 🗙
Quote <u>H</u> eader	Quote įtems (	SKUs)	Quantities and Price	es	Comments & Co	onditior	ns <u>R</u> esults	Preview - Print - Sav	e
<u>Items on this Qu</u>	<u>iote:</u>			<u>Sel</u>	lect Mill from dro	pdown	list:		
** Stock Number	**Line	** # ^	Add	Mill					
			Edit	** S	tock Number	** Price	** Description		** Pk Sz 🔺
		-	Delete						
_									
			Show price list for: This Customer						
			C Mill's Generic						
-		-	C Other Customer						<b>_</b>
•	1	Þ		•					Þ
			Proceed		Void	Close	,		

Once you have selected a mill and moved off the dropdown, a price list for that mill will be available. If there are customer-specific prices for the customer on this quote, those prices will appear. If not, the mill's generic price list will appear.



As with orders, you can switch between customer-specific and generic prices using the option buttons at the bottom of the form. You can drag-and-drop order items from the price list to this quote's list or type the item numbers. If this quote will include items from more than one mill, make sure the stock number matches the mill and that you select the new mill from the dropdown before you begin entering items for a different mill.

Unlike entering orders, item quantities will be entered on the tab where you enter prices, not the stock numbers. Once you have added all the items required for this quote, press the Proceed button (or ALT + p) to move to the Quantities and Prices tab. Your list will be checked at this point to make sure all of the items are valid SKUs for the mill they are listed with.

uote <u>H</u> eader	Quote Items (	SKUs)	Quantities and Prid	ces Comments &	Condition	ns   <u>R</u> esults   Preview - Print - <u>S</u> av	e
ems on this Qu	<u>iote:</u>			Generic Price List	t for GENP	AK GENPAK CORPORATION	
** Stock Number KC24	**Line EABRI	** # 🔺	Add	MII GENPAK -	GENPAK	CORPORATION	•
KC24 KC32	FABRI	2	Edit	** Stock Number	** Price	** Description	M Pk Sz
LKC16/24	FABRI	3		10500S		SESAME 5 COMPT. SCHOOL TRAY	500
LS636RXS <sub>2</sub> C	FABRI	4	Delete	10600	20.41	WHITE 6 COMPT. SCHOOL TRAY	500
106005	GENPAK	5		10600S	20.41	SESAME 6 COMPT. SCHOOL TRAY	500
				10K	19.65	10-3/4X5-3/4X2 WHITE TRAY	250
				10KG	19.65	10-3/4X5-3/4X2 GREEN TRAY	250
				10KR	19.65	10-3/4X5-3/4X2 ROSE TRAY	250
				10KY	19.65	10-3/4X5-3/4X2 YELLOW TRY	250
			Show price list for	10S	24.10	10-3/4X5-3/4X1/2 WHITE TRAY	500
			C This Customer	10SB	24.10	10-3/4X5-3/4X1/2 BLUE TRAY	500
			Mill's Generic	10SBK	26.51	10-3/4X5-3/4X1/2 BLACK TRAY	500
			C Other Customer	10SH	28.30	10-3/4X5-3/4X1/2 WHITE HVY TRY	500
			o uner customer	10SHY	28.30	10-3/4X5-3/4X1/2 YELLOW HVY TRY	500
	1			1100		40 DAVE DAVA D DOOF TOAM	- m

## **Quantities and Prices Tab**

The only columns you can edit on the Quantities and Prices tab are (surprise!) Qty and Price. The price on file for the item you selected, whether generic or customer-specific, is used as the default price. No quantity is required for items on a quote.

		,		s and Prices Comments & Conc		-	- 1
.ine	** Stock Number	Qty	Price	** Description	Units	Pack Size	<u>^</u>
FABRI	KC24	84	53.50	24 OZ CLEAR CUP	CASE	600	
FABRI	KC32	165	43.25	32 OZ KAL CLEAR CUP	CASE	300	
FABRI	LKC16/24	0	25.50	KAL-CLEAR LID (KC16S & KC 24)	CASE	1000	
FABRI	LS636RXS-C	0	16.70	32ozCLR LID/5-BTN/X/FK32/KC32	CASE	500	
GENPAK	10600S	0	20.41	SESAME 6 COMPT. SCHOOL TRAY	CASE	500	
							*

Once you have entered the data on this tab, press the Proceed button to move to the Comments and Conditions tab.

#### **Comments and Conditions Tab**

Comments and Conditions corresponds to and behaves like the Comments on an order. A list of canned comments can be developed to save time and speed entry. This list is presented at the bottom of the form. Highlighting the comment in the list and clicking the Insert button (or Alt + I) adds it to the Comments field below any existing comments. Additional comments can be typed in the edit box that fills most of the page.

	te #5260 AAAAAA		Comments & Conditions	le ule conce	1
te <u>H</u> ead	er Quote Items (SKUs) Q	uantities and Prices	Comments & Conditions	Results Preview - Print - Sa	ave
MININ	NUM TO PRINT 50M PER	SIZE NOTE CAS	E PACKS		*
LEAD	TIME 4-6 WEEKS				
NO AF	RT AND PLATE IF DUPLI	ICATION			
3 COL	OR JOB				
PRICE	S FIRM FOR 4 MONTHS				
PRICE	ES FIRM FOR 4 MONTHS				
PRICE	ES FIRM FOR 4 MONTHS				
PRICE	ES FIRM FOR 4 MONTHS				
PRICE	ES FIRM FOR 4 MONTHS				-
					T
Number	Title	Author	DEL APPT REQUIRED 48 H		V
Number 9	Téle PALMER FOODS	SUZIE	POLICY FOR LATE/MISSE	IRS FRIOR DANO APPT IS \$250 CHARGE & \$25	¥
Number 9 10	Title PALMER FOODS SOFCO AEP	SUZIE SUZIE	POLICY FOR LATE/MISSEI PER PALLET	D/NO APPT IS \$250 CHARGE & \$25	Y
Number 9 10 11	Title PALMER FOCOS SOFCO AEP SPWANY TRADEX	SUZIE SUZIE SUZIE	POLICY FOR LATE/MISSEI PER PALLET	DINO APPT IS \$250 CHARGE & \$25	
Number 9 10 11	Title PALMER FOODS SOFCO AEP	SUZIE SUZIE	POLICY FOR LATE/MISSEI PER PALLET DO NOT SHIP VIA NEW PE	DINO APPT IS \$250 CHARGE & \$25	> • •

## **Results** Tab

Information can be added to Results when the quote is accepted or finalized with the customer or to note any changes required in subsequent discussions following submission of the quote. In practice, this tab is seldom used.

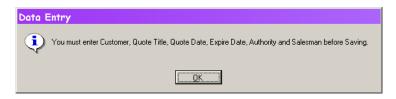
🕲 1: Quote #	¢5630					_ 🗆 ×
Quote <u>H</u> eader	uote įtems (SKUs)	Quantities and Prices	Comments & Conditions	<u>R</u> esults	Preview - Print - Sav	e .
						<u> </u>
						<b>T</b>
				_		
		Proceed	<u>⊻oid</u> Close			

#### **Preview – Print - Save Tab**

Use the Preview Quote button to view a copy of the quote to check the contents before saving. Use the Print Quote button to produce a hard copy printout of the quote. Once you are satisfied that all data related to the quote is complete and correct, press the Save button.

🕽 1: Quote	#5630				
ລuote <u>H</u> eader	Quote [tems (SKUs)	Quantities and Prices	Comments & Conditions	<u>R</u> esults	Preview - Print - Save
		44			
		Preview Quote	Print Quote		
	Sav	e	⊻oid Close		

If any required information is missing, a message will let you know what else is required and return you to the appropriate page and item.



# **Print Remote Quotes**

If your site supports Salesmen entering quotes by connecting from an off-site location, you may want to print the quotes in the main office as well. Quotes entered remotely are flagged and a list is available from the Quotes menu and the Transmission Status form. You can print all the quotes in the list at once (Print All) or highlight one and print it (Print One). Once the quote is printed, the flag is reset so the quote does not appear again on this list. (If you need to print the quote again after the flag is reset, use the Print Quote button on the last tab of the New/Change/Delete form.)

*Quote #	**Quote Date	**Customer		**Salesmn	Entered by	Expire Date	Status	Remote?
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## **Quote Reports**

To get a listing report of quotes on file, select Quote reports from either the Quotes menu option or the Report Menu option. Currently there is only one Quote report. Run it from the list.

Quote Listing	<u>é</u>
	=
Output Destination	
Print Preview	
C Send to Printer	Run
C Send to Text File	Close
C Send to HTML	<u>0</u> 088

The Quote List report can be run by Principal (for a single mill or all mills), by Customer (for a single customer or all customers), or by Salesman (for a single salesman or all

salesmen). You can include all quotes or only those whose status is Open. You can include the content of the Results field (Usually this is empty!). The Summary Report Only option does not include a listing of the items, descriptions and prices on the quote.

Quote List Specifications:
🕫 By Principal 🛛 C By Customer 🗠 By Salesman
MH ** - &11 Mills
Status C Ali C Open
Show Results
Sort options not available for Guide Listings
Customer > Principal A
<
Run Cancel