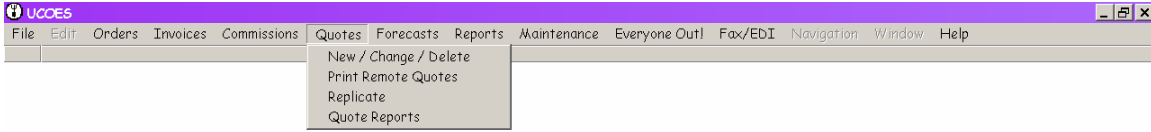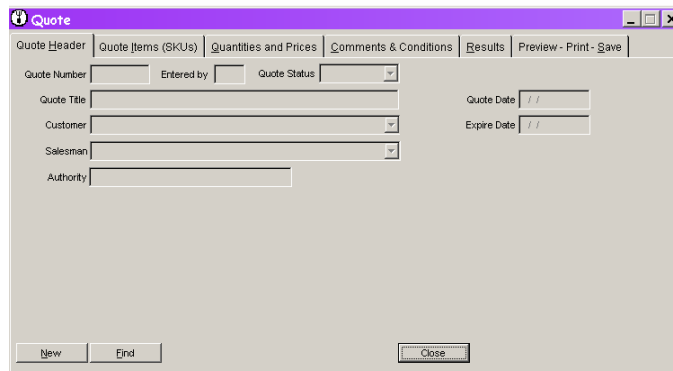# Section VI

Quotes

Quotes Module

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.


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.
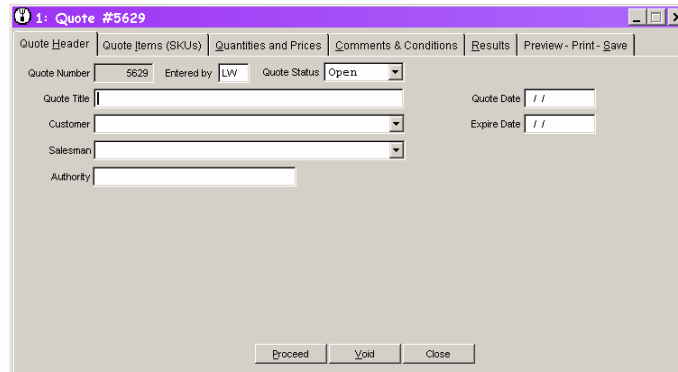

Find Quote

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.
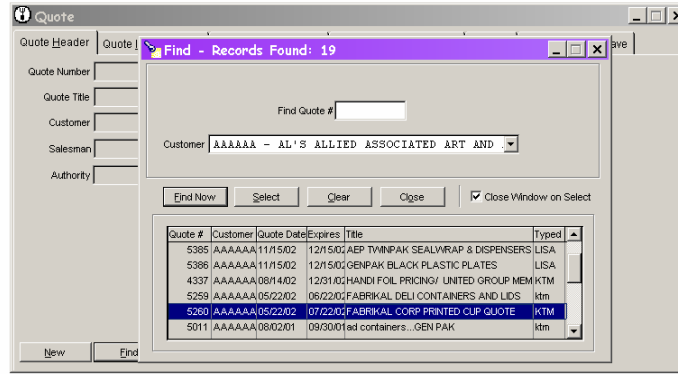
Enter the Quote Number or select the customer for the quote you want to edit and press the Enter key or click the Find Now button with your mouse. If no such quote is on file, a message box will display and you can try entering another number or customer. If a quote with your entry is on file, summary 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.
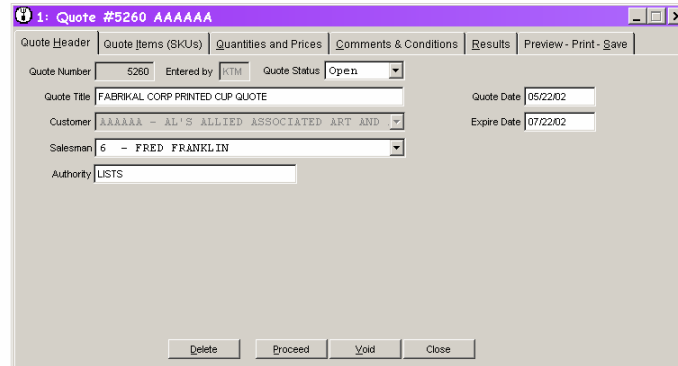

Enter Quote Data

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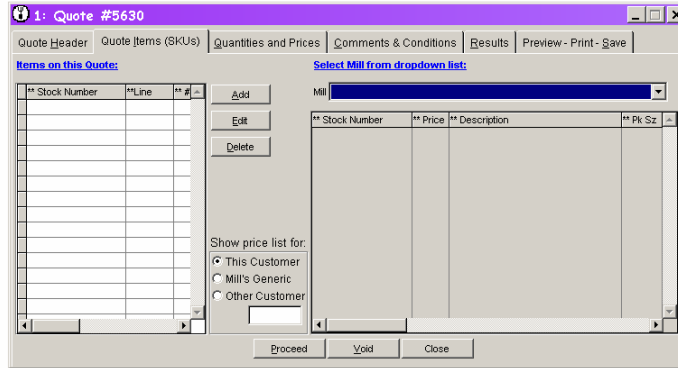
Once you have selected a mill and moved off the dropdown, a price list for that mill will be available. If there are customer-specific prices for the customer on this quote, those prices will appear. If not, the mill's generic price list will appear.
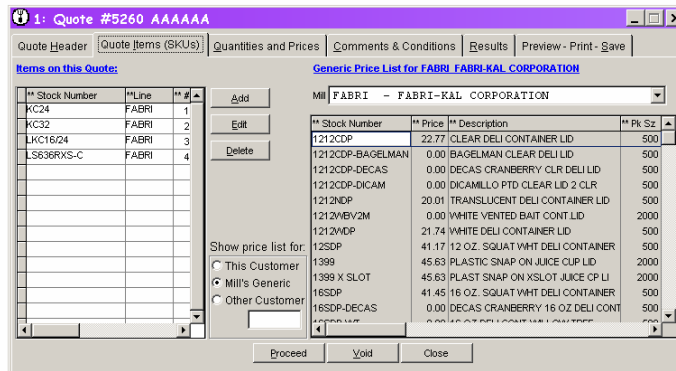

As with orders, you can switch between customer-specific and generic prices using the option buttons at the bottom of the form. You can drag-and-drop order items from the price list to this quote's list or type the item numbers. If this quote will include items from more than one mill, make sure the 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.
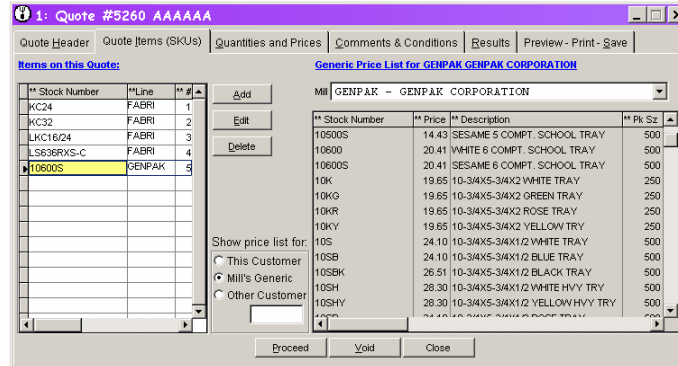
Quantities and Prices Tab

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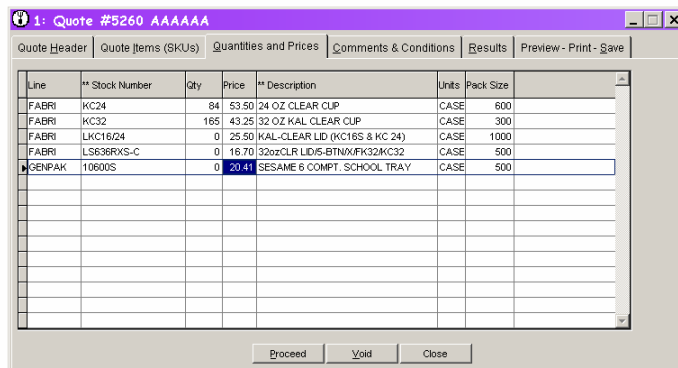
Once you have entered the data on this tab, press the Proceed button to move to the Comments and Conditions tab.

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.
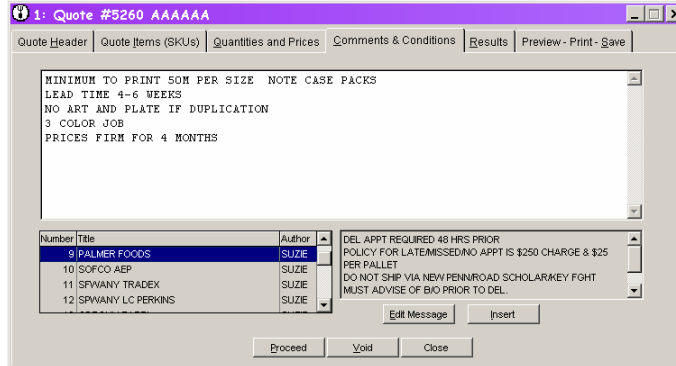
Results Tab

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.
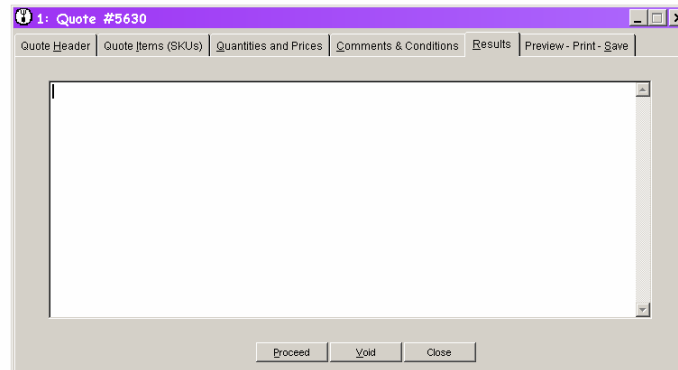

Preview – Print - Save Tab

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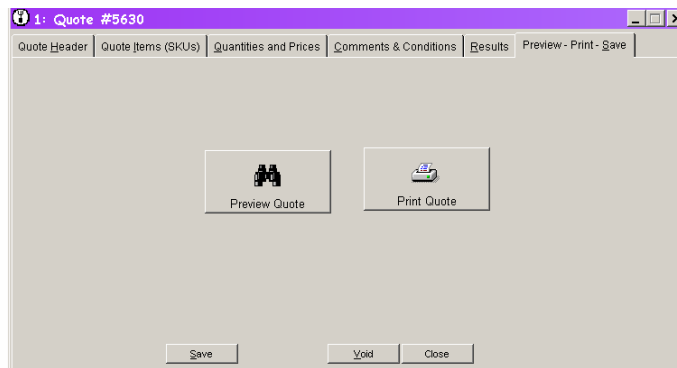
If any required information is missing, a message will let you know what else is required and return you to the appropriate page and item.
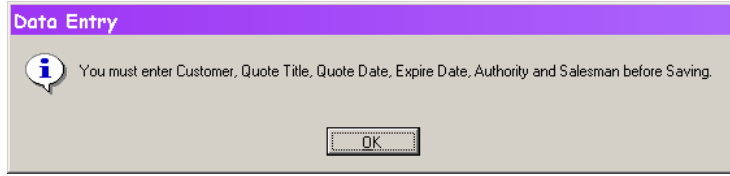

Print Remote Quotes

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.)
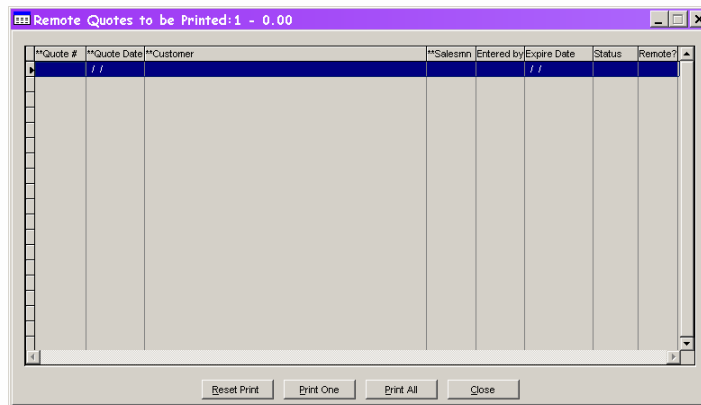
Quote Reports

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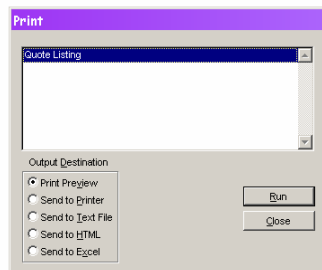
The Quote List report can be run by Principal (for a single mill or all mills), by Customer (for a single customer or all customers), or by Salesman (for a single salesman or all

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.