Sales Quotes Screen - User How To's

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Overview of the Sales Quotes Screen

'Quotes screen' is a comprehensive screen that stores and displays every significant information about a Quote transaction all on one screen. It is divided into four (4) main sections to organize data and functions:

- **Main Fields (section)**
  - **Bill To -** The entity who will pay for the order.
  - **Ship To -** The entity who will receive the order.
  - **Quotation # -** Record numbering type can be set at**Settings>System>Record Numbering** as manual, sequential or date format.
  - **Sales Order # -** The Sales Order related to the Quote.
  - **Expiration Date -** Determines when the Quote expires.
  - **Type of Quote**
  - **Warehouse -** Where items will come from before delivery to customers.
  - **Quote Date -** The date the Quote was created.
  - **Customer PO # -** The Purchase Order # on the Customer's purchase document. (Optional) For document tracking purposes.
  - **Entered By -** Creator of the Quote.
  - **Payment Terms -** Payment terms and conditions you set as the seller. Pre-define your Payment Terms settings according to your company set conditions. **Go to Settings>Sales>General Sales Settings>Payment terms (section).**
  - **Sales Rep -** The Sales Representative who communicated the sale.
  - **Order Source -** Where an order originated from.
  - **Shipped Via -** The shipping method.
  - **Contact**
  - **Email**
  - **Job ID -** The Job record related to the Quote.

- **Add/Edit Line Item (section)**
  - **Audit Log**
    
    icon - Lets you view all updates (and details) made on this section.
  - **Gear**
    
    icon - Click to view all Column Filters on this section. You may check/uncheck to show/hide these fields.
  - **Double Arrow Down**

    icon - Click to show Line 2 fields.
  - **Double Arrow Up**

    icon - Click to hide Line 2 fields.
  - **Commit Line Item**
    

    button - Click to validate and save any data input or changes on the Add/Edit Line Item table. This

button turns red when you need to do so.

- **Tabs (section)** - *see below*.
    - **Comments -** Put any notes related to this quote.
    - **Payment Info**
    - **Pictures**
    - **Custom Fields** - Set your customized fields at **Settings** (gear icon, top right corner) **> Custom Fields**.
    - **Related Back Orders**
    - **Other**
- **Footer (section)**
    - **New** (button) - To create a new Sales Quote record.
    - **Delete** (button) - To delete that Quote screen.
    - **Refresh** (button)
    - **Create Sales Order** (button) - To auto create Sales Order related to this quote.
    - **Send Email** (button) - To easily send email about this quote to your clients.
    - **Print** (button) - To print this quote. Can set needed print copies and various settings according to your requirements.
    - **Follow Up** (button)
    - **Function** (button)
    - **Save** (button) - To save the actions/changes made on that screen.
    - **Help** (button) - Leads you to self-help articles about the **Sales Order** screen.
    - **Close** (button) - To close that screen.

Sales Quotes Screen - Common Task

How to add a new customer on the Sales Quotes Screen

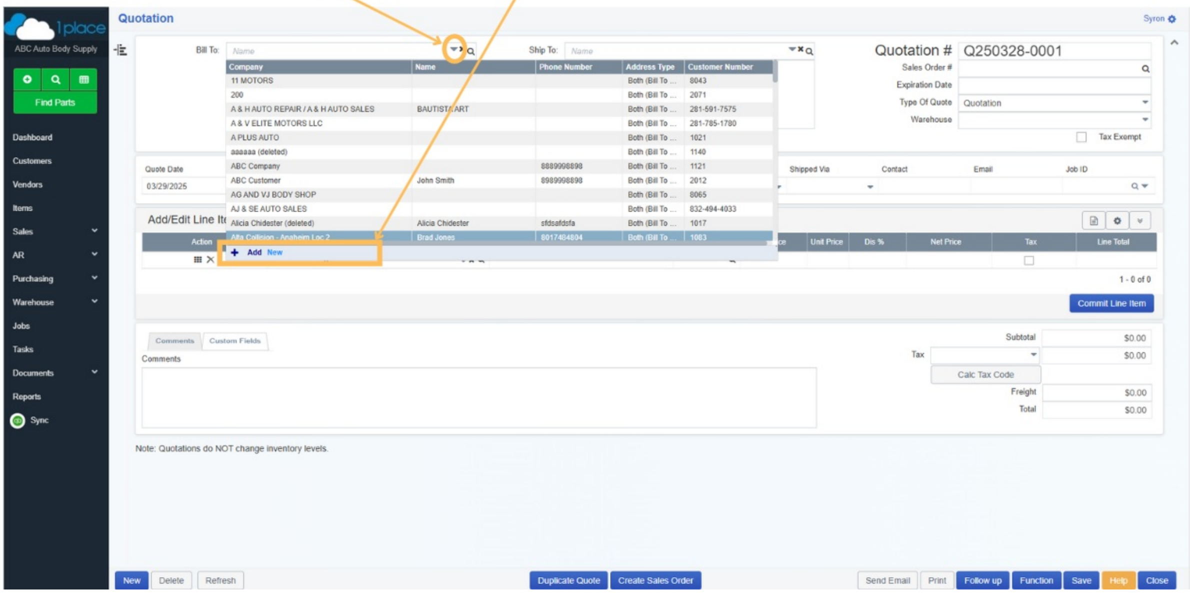
1. Beside the Bill to Company Name Field, click on the arrow down button and then it will show the list of existing customers.

2. At the bottom of that customer list, there is an option to add a new customer. Click on the +Add New button to add a new customer.

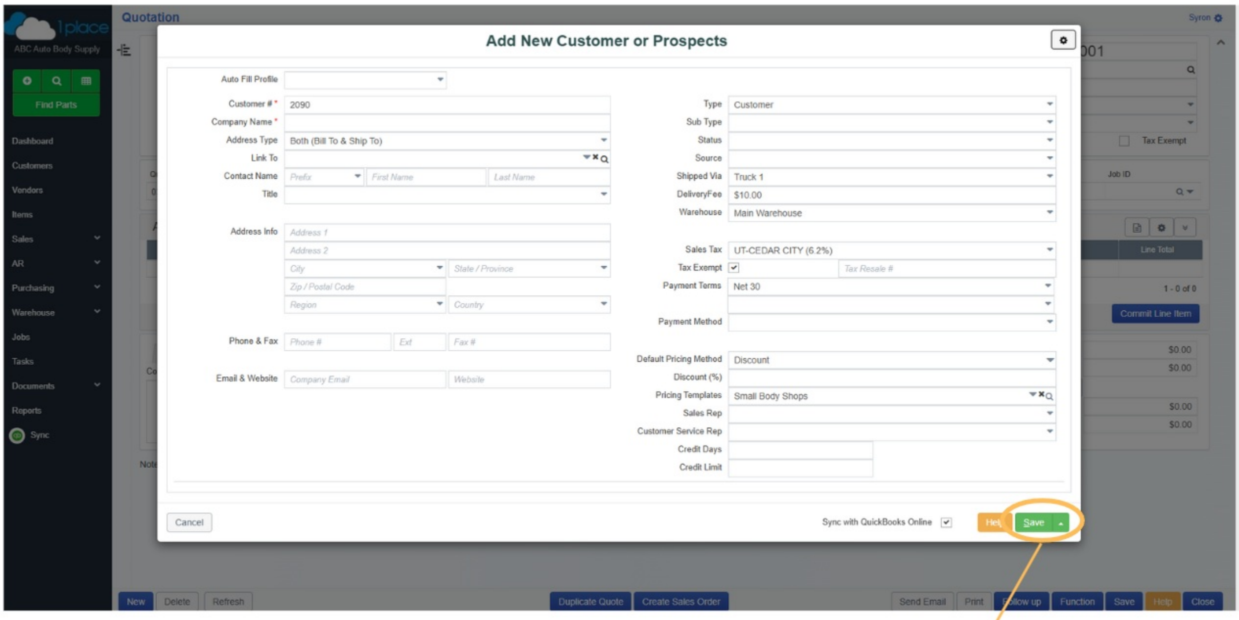
3. A pop up screen will appear and user would need to fill out the necessary information for the new customer.

1. On the Sales Quotes Screen, click on the arrow down button located beside the Ship to Company Name Field.

2. Click on the + Add New button to create a new customer.



Fill out all the necessary details for the new customer.

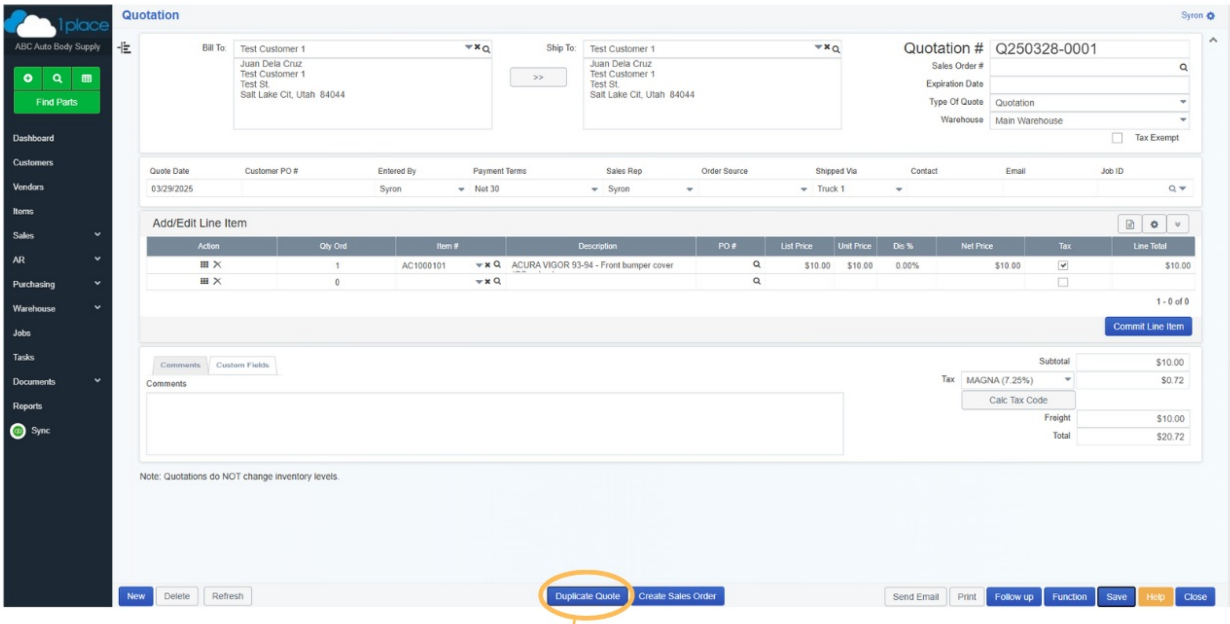


Click the Save button to Save the new customer record.

How to duplicate an existing quote

1. Open the quote you would like to duplicate.

2. On the Sales Quote Screen, click on the Duplicate Quote Button to create a duplicate of the quote. A new tab will open with the duplicate copy of the quote with its own Quotation #.

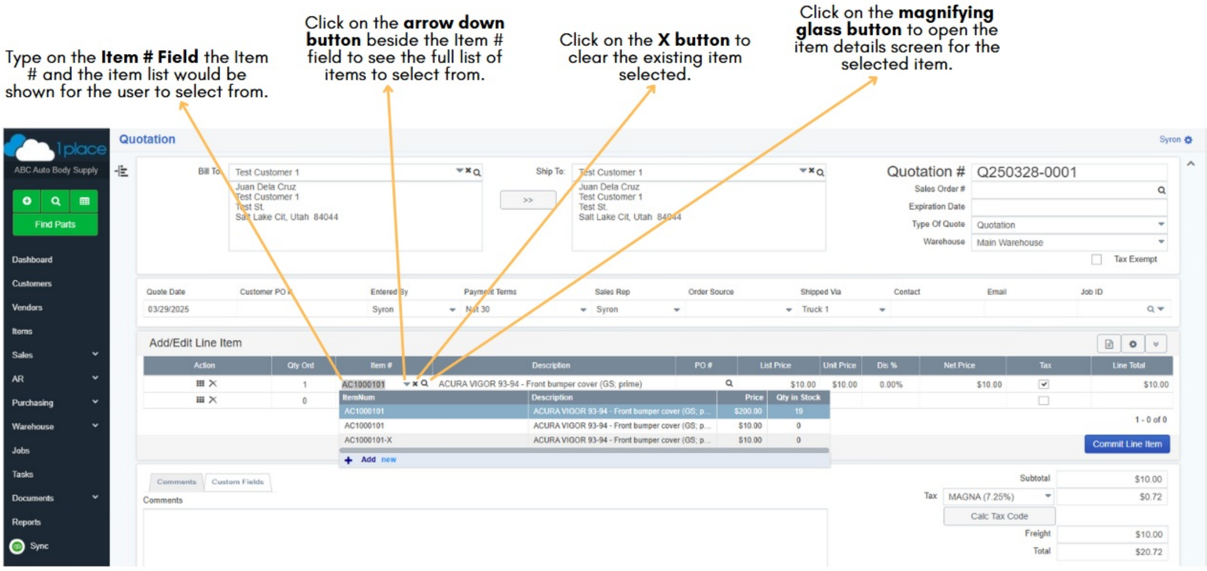


Click the Duplicate Quote button to duplicate an existing quote.

How to Edit 'Item Number' on the Quote screen.

- **Item # Field:** Type on this field the item # and an item list would be shown for the user to select from. If the user enters anything that won't match an existing item #, a prompt would appear asking the user if the system should search in other fields such as the description.
- **Arrow Down Button:** Click on this button to see the full list of items to select from. If it is a new item that is not on the list, a **+ add new button** can be clicked to create a new item.
- **X Button:** Click on this button to clear the existing item selected.
- **Magnifying Glass Button:** Click on this button to open the item details screen for the selected item.

NOTE: The permission to edit or make changes on a specific field is determined based on the role (security type) assigned to the user and set by the admin user of the account.



How to Edit 'Item Description' on the Quote screen.

The description column can be edited by clicking on the item description allowing the user to add or remove any description.

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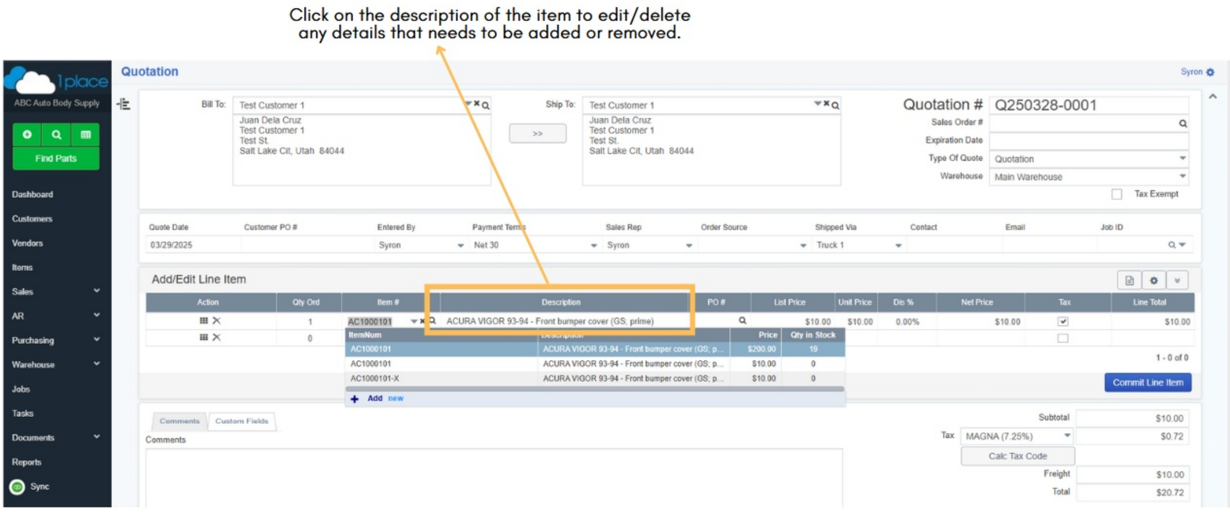
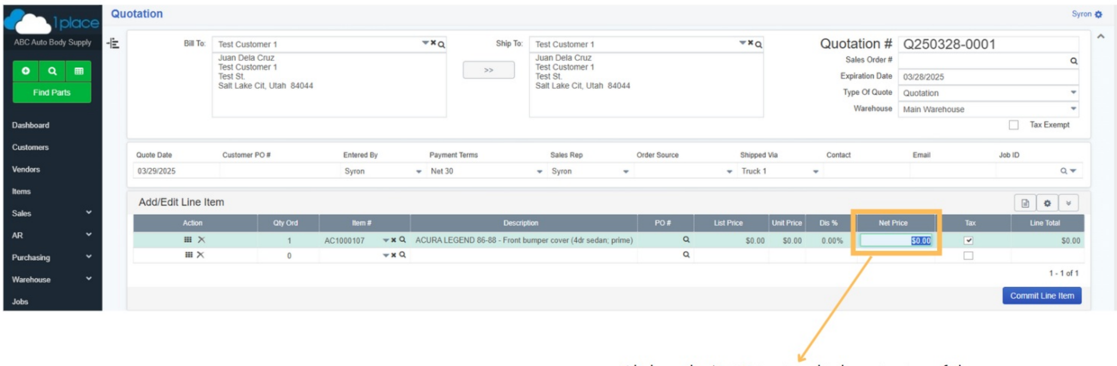


How to Edit the Net Price of an Item on the Quote Screen

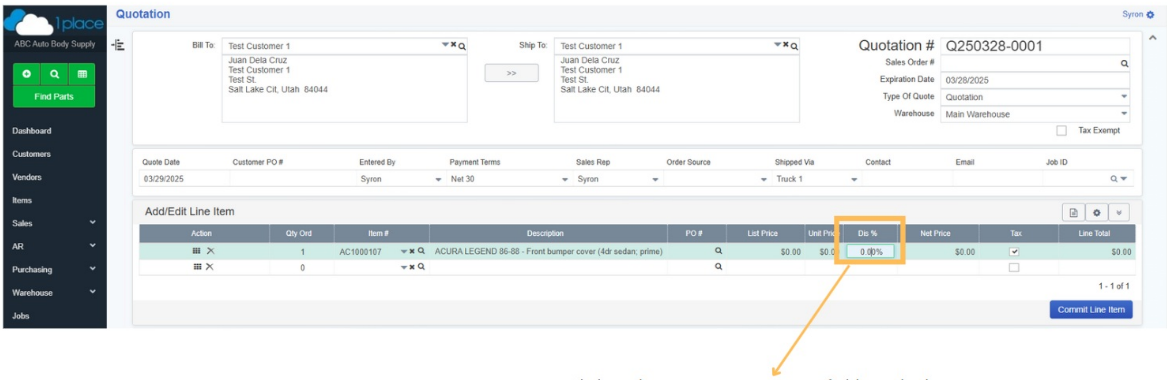
The Net Price can be edited by clicking on the net price of a specific line item you are working on.



Click on the Net Price to edit the net price of the line item.

How to Edit the Discount % of an Item on the Quote Screen

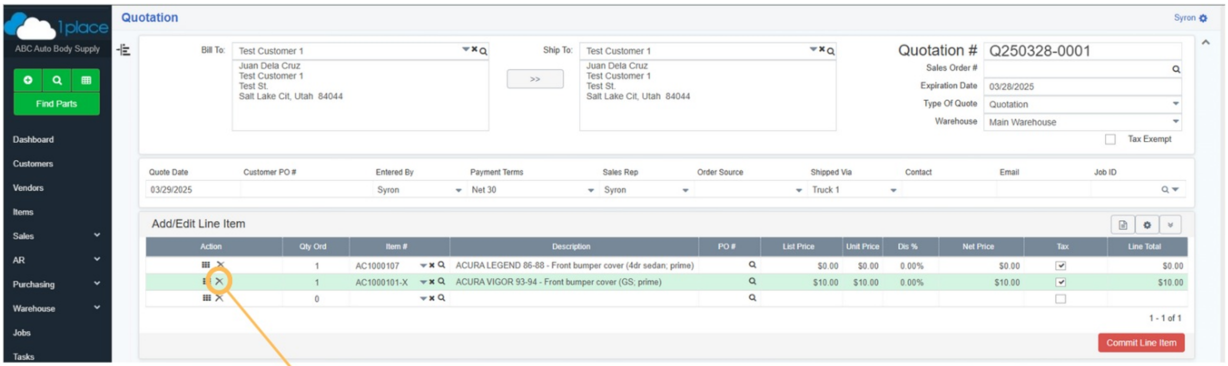
The Net Price can be edited by clicking on the Dis % (Discount %) of a specific line item you are working on.



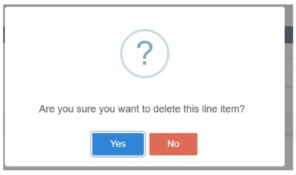
Click on the Discount Percentage field to edit the discount of the line item.

How to Delete a Line Item on the Quote Screen

A line item can be deleted by clicking on the X button below the action column. The user will then be asked to confirm the action through a pop up message that will appear. 'Yes' to proceed with deleting the item from the quote and 'No' to cancel the action.

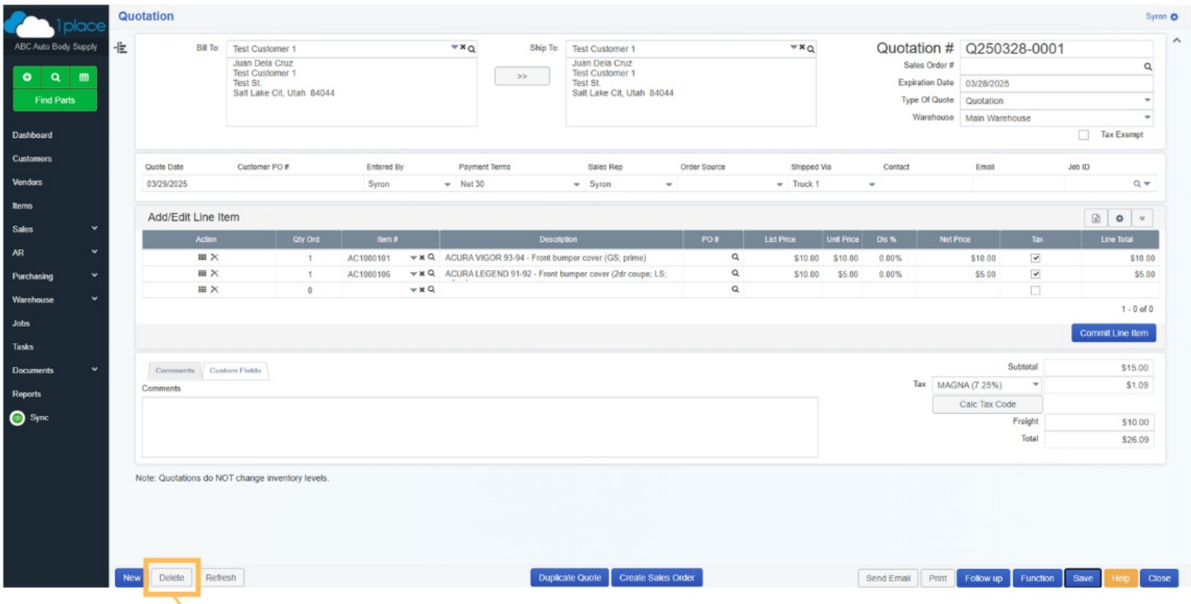


To delete a line item, click on the X button below the action column of the line item you would like to delete. User would have to confirm the action with the pop up message that will appear as shown beside this text.



How to Delete a Quote on the Quote Screen

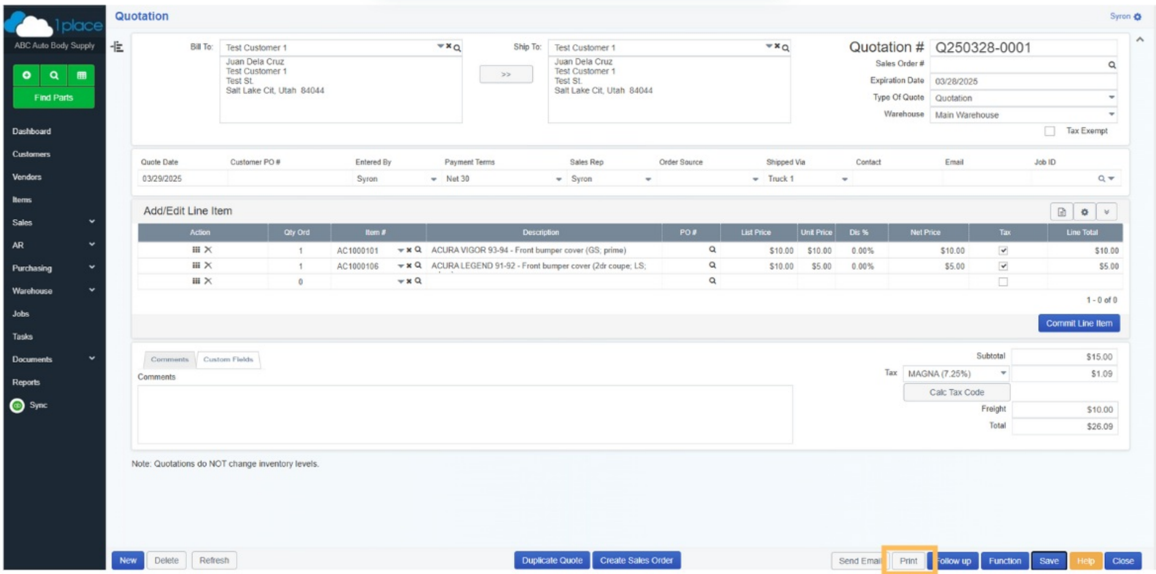
A quote can be deleted by clicking on the Delete button located at the lower left corner beside the New button.



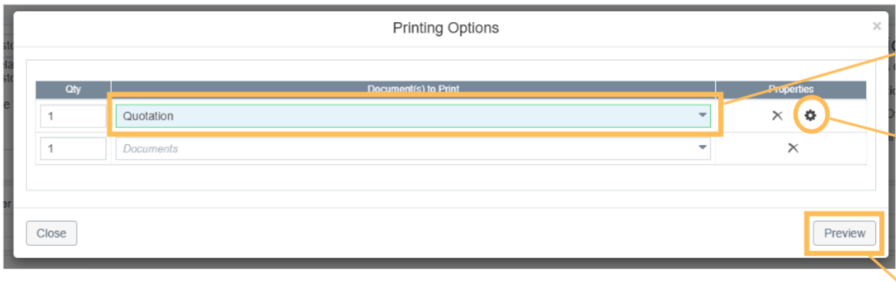
To delete the quote, click on the DELETE button found at the lower left corner of the sales quote screen.

How to Print a Quote on the Quote Screen

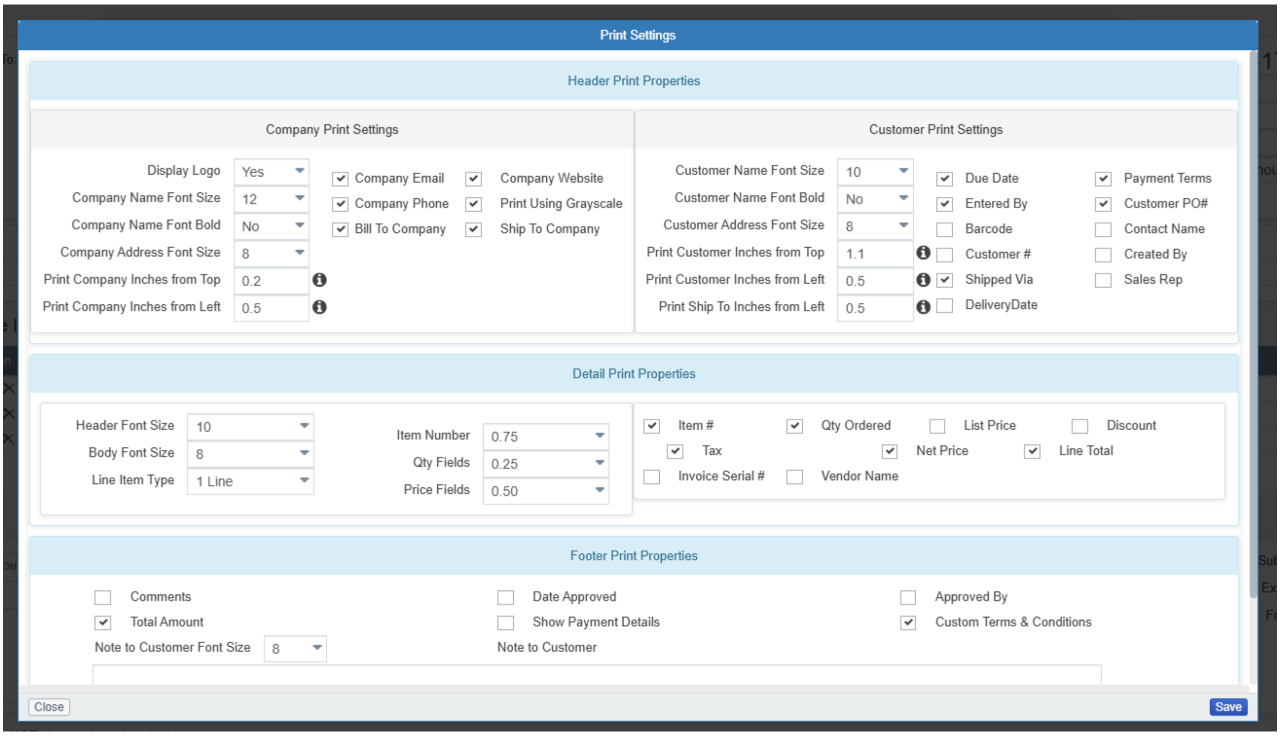
1. To Print a Quote, click on the Print button on the lower right side of the quote screen.



2. The printing option will appear and will allow the user to select a quotation document template from the dropdown under the Document(s) to Print column. Each template has a pre-set print settings. To setup print settings, click on the gear icon. To proceed with the print preview of the document, click on the Preview button and follow the next prompts.



The Print Settings will allow you customize the Logo, font formatting and which company and customer information are printed on the document. It has 3 sections: 1) the Header Print Properties which will customize the header of the document which contains the company and customer information. 2) the Detail Print Properties which will customize the details of the document (on this example the quote line items). The user can select will columns will be included on the printed document. 3) the Footer Print Properties which will customize any additional information such as the comments, total amount, date approved, payment details, approved by, and custom terms and conditions..


Print Settings
Header Print Properties
Company Print Settings
Customer Print Settings
Display Logo
Yes
Company Name Font Size
12
Company Name Font Bold
No
Company Address Font Size
8
Print Company Inches from Top
0.2
Print Company Inches from Left
0.5
Company Email
Company Phone
Bill To Company
Company Website
Print Using Grayscale
Ship To Company
Customer Name Font Size
10
Customer Name Font Bold
No
Customer Address Font Size
8
Print Customer Inches from Top
1.1
Print Customer Inches from Left
0.5
Print Ship To Inches from Left
0.5
Due Date
Entered By
Barcode
Customer #
Shipped Via
DeliveryDate
Payment Terms
Customer PO#
Contact Name
Created By
Sales Rep
Detail Print Properties
Header Font Size
10
Body Font Size
8
Line Item Type
1 Line
Item Number
0.75
Qty Fields
0.25
Price Fields
0.50
Item #
Qty Ordered
List Price
Discount
Tax
Net Price
Line Total
Invoice Serial #
Vendor Name
Footer Print Properties
Comments
Total Amount
Note to Customer Font Size
8
Date Approved
Show Payment Details
Note to Customer
Approved By
Custom Terms & Conditions
Close
Save