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How Do You Enter a Quote Within the Software?

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Quotes Overview

The Quotes Module in the ProfitMaker software includes the ability to combine a request for quotation (RFQ) from vendors and the quote to the customer into one operation. The quotes program provides the flexibility to generate quotes for single or multiple vendors, single or multiple quantity breaks, calculate a selling price based on a vendor cost, or determine a cost based on a price and IPC code.

Each quote may have up to 99 line items, with RFQ's having up to 99 vendors for each line item. A quote may be faxed directly to the vendor or customer. The accepted quote may be imported directly into Order Entry, eliminating the need to reenter the line items and color and imprint information.

There are a number of steps to follow to enter and produce a Vendor RFQ and Customer Proposal. The actual steps you perform depend on what output you wish to print (RFQ only/Proposal only/Both) and if you want to bring the accepted quote into Order Entry. Be sure you have gone through the "Getting Started" section of this guide to complete all setup requirements before entering a quote.

The steps described below are based on performing ALL functions and can be adjusted based on your needs. Follow these steps in the order presented.

Step 1

Enter Quote:You are entering "base" information only about the product at this time. No prices or costs are entered at this time (unless you are NOT producing a Vendor RFQ, and only doing a Customer Proposal), as cost information is being requested from the vendors in the Vendor RFQ.

Note: If you know the price and cost and are not doing a RFQ, enter all information and produce a Customer Proposal only. If you are quoting from a catalog, enter the IPC code/price, and the system will calculate the cost.

Step 2

Print Or Fax Vendor RFQ Quote: You are requesting line item costs, by supplier, from which the prices and markups will be calculated for the Customer Proposal. If you wish to print a master copy for reference, check the 'Print master copy' box on the customer screen and indicate to print both on the print vendor quote screen.

Step 4

Print Or Fax Customer Quote: Send the completed quote to the customer. Their decision to accept or reject the quote will determine if you proceed to the next step with the transfer to Order Entry.

Step 5

Accept Quote: If the customer wishes to order the merchandise, the quote needs to be accepted. You may leave some lines open for future ordering while accepting others. Only the accepted line items will be pulled into Order Entry. If the customer has decided not to purchase at this time, but you wish to keep the quote as reference, select the Reject button on the customer window and no further changes to the quote will be allowed.

Step 6

Order Entry:Once the quote is accepted, go into Order Entry to turn the quote into an order. When adding an order, enter the quote number you wish to turn into an order. You will be given the opportunity to add any accepted lines on the quote to the order.

Quotes Sequence

Quote Type A
Customer quote, one item with two charges. You know price and cost and all items are coming from a single vendor. Only quoting primary item to customer.

Enter the first line item. This will be the primary line which will show on the customer's quote. Do not check the Multiple vendors/qtys button since there will be no quantity breaks or multiple vendors. Enter in all quantity, cost, and price information. Click Ok when complete.

Enter the two additional cost lines. The CLT and VLT will be 1 for all line items as we are showing only the primary line item to the customer, and we are purchasing all merchandise and services from that same vendor.

Note:If the CLT and VLT are left at their defaults of 1, 2, and 3, all of these line items would print on the quote to the customer.

Proceed to the Color/Imprint window. Enter in any color/imprint and factory instructions you wish the vendor to see.

Complete the Shipping window by filling in any information you wish to carry forward into Order Entry. You don't need to go into the vendor cost or markup windows. All information for the quote is complete at this point. Save and print the customer quote.

Once the customer accepts the quote, go back into Quotes Entry and edit the quote. Select the Line Item window, right click on the primary line item, and select Accept Line Item. When the Accept Line Item window comes up, you can edit information as needed. Since lines 2 and 3 share the same

CLT# with line 1, they are automatically accepted when you accept line 1.

Note:*If the lines to not share a CLT#, accept each line as needed.*

Go back to the Customer window and click the Accept button. Click Yes to accept the entire quote. Click save.

In the Order Entry module add an order for this customer.

Once you enter Customer #, PO # and the Quote #, the Line Item window will appear. If you select all items, the system will pull them into the Line Item screen.

The quantity, price, and cost will be there on the primary line item, but only the cost on each of the secondary line items. Also the color/imprint, factory instructions, and shipping information will come in from the quote.

Quote Type B
Customer quote, one item with one secondary charge. We are getting costs from two different vendors. Quoting both lines on customer's quote.

Enter the first line item. Check the box for Multiple vendors/qtys since we are requesting a quote from more than one vendor on this line. You will not have access to quantity, cost, price, or vendor on this line.

Click the Qty/Vend button at the bottom of the screen. Since this line does not have quantity breaks, enter the first quantity break as the quantity you are quoting. Leave the rest of the breaks at 0. Click OK.

This will bring up the vendor screen. Click Add, and enter in the first vendor you wish to receive a quotation from. Click OK, and the vendor will appear on the list above. Click Add again to add a second vendor. Click Ok. When all vendors are on the list, click Cancel to stop entering vendors.

Click Ok to save this line and begin entering your second line. The CLT# on this line will remain at 2 because we want the customer to see this item on their quote. The VLT# will be 1, since we are required to purchase both

items from the same vendor. Again, the quantity, price, cost, and vendor information fields will be unavailable. After entering in the item description, click the Qty/Vend button at the bottom of the screen. Answer 'Yes' to the question asking if you wish to repeat quantity breaks from the primary line. Click Ok. The vendor screen will not be available since you are sharing a VLT# of 1. The same vendors must be repeated from the primary line on all items sharing VLT# 1. Click Ok on the main item screen to save the line.

Proceed to Color/Imprint window and enter in any information for the vendor(s). Complete the shipping window, and save the quote. Then go to Print Vendor Quotes and print the Vendor RFQs. Once you receive the quotations back from the vendor, edit the quote. On the Vendor Cost tab, highlight the first line item, and highlight the vendor whose costs you are entering. Click the Cost button at the bottom of the screen and enter in the vendor's cost for this item. Repeat this process for both line items and vendors.

With the primary line item highlighted, click the Combine button at the bottom of the screen. Since both lines share the same VLT#, this will combine the costs of both items together to show you which vendor has the lowest cost overall. The vendor with the lowest combined cost will show with an * next to their cost. Click Approve to select the lowest-cost vendor for your items. Double click next to the desired cost in the lower grid to select a different vendor with higher costs. A $ will appear next to your selected vendor's cost.

On the Markup tab, highlight the first item and click on Edit Prices. Enter in the selling price for this item. Click OK, then click the Proc to Cust button. The Item Status in the middle-right of the screen should change to M – Proc to Customer. Repeat for the second line.

Save the quote, and print it for the customer through the Print Customer Quotes menu option.

Once the customer accepts the quote, go back in to edit the quote. Select the Line Item window, right click on the first line item, and select Accept Line Item. Accept the second line item following the above procedure. Then go to the Customer Window and click the Accept button. Click Yes to accept.

In Order Entry add an order for this customer. Enter the quote number in the Add window. The lines from the quote will come up in the Line Items to be Repeated window, select them all. The quantity, price, and cost will be there on each line item. The color/imprint instructions will also transfer in.

Quote Type C
Customer quote, item with secondary charge, different vendor, and quantity breaks. Quoting only primary item.

Enter the primary line. The CLT and VLT will be 1 on this line. Check the box for Multiple Vendors/Qtys since we will have quantity breaks on this line. Enter other information such as product code and description, and click the Qty/Vend button. Enter in your quantity breaks and your first vendor. Click OK.

Enter the secondary line for the charge you don't want the customer to see. The CLT should be changed to 1 so this line links to the primary line and won't print on the customer's copy of the quote. Leave the VLT as 2 since we aren't forced to order this item from the same vendor as the first line. Check the 'Multiple Vendors/Qtys' box. Enter in any other information you wish, then click the Qty/Vend button. Enter the quantity breaks and a vendor for the second line. Click OK to save the line. Complete the Color/Imprint window and Shipping window for each item and vendor.

In the Vendor Cost window, highlight the first line, and select the Cost button. Enter the cost for the primary item in each quantity break. Select the second line and enter in costs for each break. Click the Approve button for each line, and a $ will appear next to each cost, showing that the costs have been approved for this item.

In the Markup window, click the Combine button. This will show the total combined cost for both lines. Enter the price you wish to charge the customer for both combined lines on the primary line. You can leave the price on the secondary line at 0 since it will not print on the customer's quote. Click the Proc to Cust button and save the quote. Print the quote through the 'Print Customer Quotes' menu option.

Once the customer accepts the quote, edit the quote and select the Line Item window. Right click on the primary line item, and select Accept Line Item. When the Accept Line Item window appears, you can edit the quantity the customer has selected and the correct price and cost for that quantity break will transfer in. Go back to the Customer window and click the Accept button. Click Yes to accept.

In Order Entry, add an order for this customer. Once you enter Customer #, PO # and the Quote #, the line item window will appear. If you select all items, the system will pull them into the line item window. The quantity, price, and cost will be there on the primary line item, but only the cost will show for the secondary item.