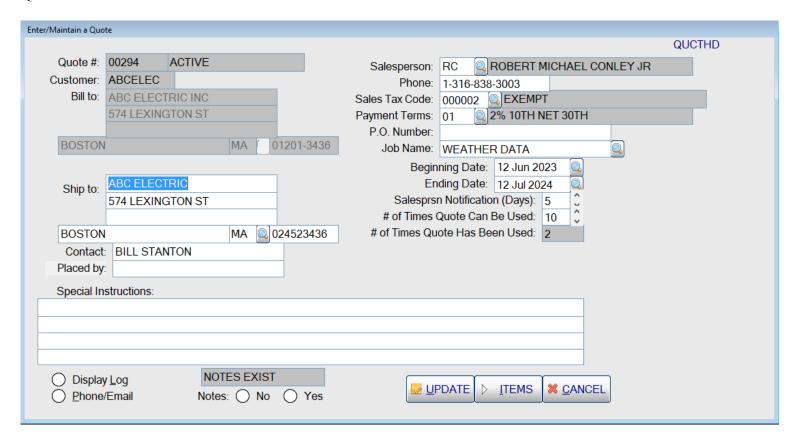
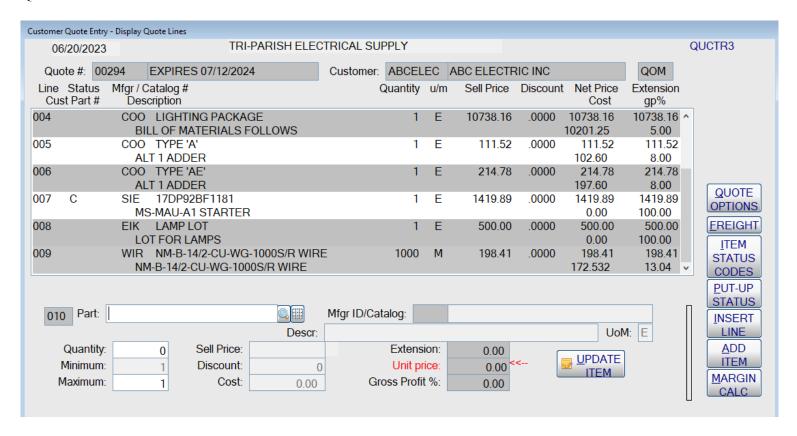
## **Quotations System**

### Quote Header Screen



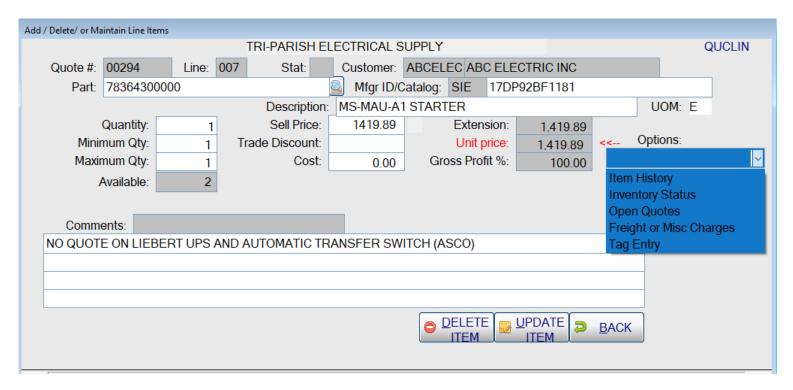
The Quote Header Screen allows entry of such information as the customer p.o. #, job name, and special instructions for the quote. The search buttons (magnifying glasses) indicate that there is a lookup available for the shipping address, ship-to state, salesperson, terms, and job name. The beginning and ending dates can also be changed by clicking on the search buttons. To proceed to the line items on the quote, click on the ITEMS button with your mouse or hold down the <Alt> key and hit an <I>.

## Quote Line Items Screen



The line item screen allows the quick adding of new items at the bottom of the screen. After an item has been added, it can be changed by clicking on the line item itself and the next screen will be displayed that allows changes or the entry of comments. Six items are displayed on the screen, but if there are more items on the quote, a scroll bar will appear and the operator can scroll up and down through the items. When the operator has finished entering the items, they hit the <QUOTE OPTIONS> button and are given the options to complete the quote.

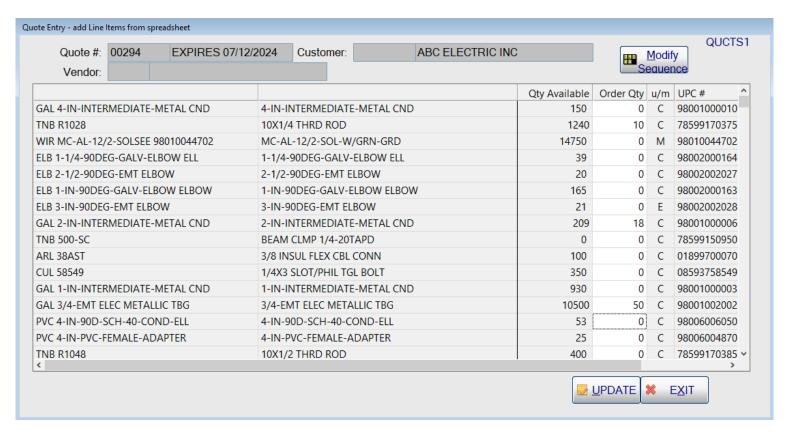
## Quote - Detail Line Item Screen



This screen allows the operator to make changes for line items on quotes, to view more information concerning the item, or to cancel the item. Each of the buttons from the pull-down box on the right, display a screen with information or allows further action, such as viewing item hisotry or entering house tag information (used by lighting showrooms). When the operator clicks on UPDATE, the changes are updated and they are returned to the Line Items screen above. If they click on the button to display the Inventory Status, the Stock Item Inquiry screen is displayed.

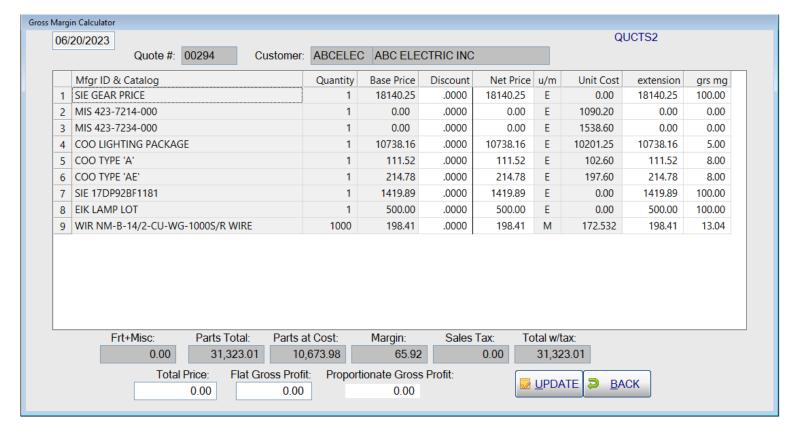
# Quotes – adding items from a grid

When the operator selects the Grid button on the Line Item Screen, they can quickly add many items from a grid. The items displayed in the grid can be for specified manufacturer's, by house part #'s, by customer part #, based on previous sales for this customer or based on most frequent sales for this customer.



The user enters an order quantity for each of the items, and then hits the <UPDATE> button to add all of the selected items to the quote.

Quotes – Gross Margin Calculator



The Gross Margin Calculator is available for orders and quotes. It allows the operator to enter a Total Price, or Flat Gross Profit, or Proportionate Gross Profit and then re-calculates the pricing for the items and shows the new parts total, margin and total with tax and freight. The operator can also change the discount, net price, extension, or gross margin for the individual line items.