

# Quotations System

## Quote Header Screen

Enter/Maintain a Quote QUCTHD

Quote #: 00294	ACTIVE	Salesperson: RC	ROBERT MICHAEL CONLEY JR
Customer: ABCELEC		Phone: 1-316-838-3003	
Bill to: ABC ELECTRIC INC		Sales Tax Code: 000002	EXEMPT
574 LEXINGTON ST		Payment Terms: 01	2% 10TH NET 30TH
		P.O. Number:	
BOSTON	MA	01201-3436	Job Name: WEATHER DATA
			Beginning Date: 12 Jun 2023
Ship to: ABC ELECTRIC			Ending Date: 12 Jul 2024
574 LEXINGTON ST			Salesprsn Notification (Days): 5
			# of Times Quote Can Be Used: 10
BOSTON	MA	024523436	# of Times Quote Has Been Used: 2
Contact: BILL STANTON			
Placed by:			
Special Instructions:			
<input type="checkbox"/> Display Log			
<input type="checkbox"/> Phone/Email			
NOTES EXIST			
Notes: <input type="radio"/> No <input type="radio"/> Yes			
<input type="button" value="UPDATE"/>		<input type="button" value="ITEMS"/>	<input type="button" value="CANCEL"/>

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

Customer Quote Entry - Display Quote Lines

06/20/2023 TRI-PARISH ELECTRICAL SUPPLY QUCTR3

Quote #: 00294 EXPIRES 07/12/2024 Customer: ABCELEC ABC ELECTRIC INC QOM

Line	Status	Mfgr / Catalog #	Quantity	u/m	Sell Price	Discount	Net Price	Extension
Cust Part #		Description					Cost	gp%
004		COO LIGHTING PACKAGE BILL OF MATERIALS FOLLOWS	1	E	10738.16	.0000	10738.16	10738.16
							10201.25	5.00
005		COO TYPE 'A' ALT 1 ADDER	1	E	111.52	.0000	111.52	111.52
							102.60	8.00
006		COO TYPE 'AE' ALT 1 ADDER	1	E	214.78	.0000	214.78	214.78
							197.60	8.00
007	C	SIE 17DP92BF1181 MS-MAU-A1 STARTER	1	E	1419.89	.0000	1419.89	1419.89
							0.00	100.00
008		EIK LAMP LOT LOT FOR LAMPS	1	E	500.00	.0000	500.00	500.00
							0.00	100.00
009		WIR NM-B-14/2-CU-WG-1000S/R WIRE NM-B-14/2-CU-WG-1000S/R WIRE	1000	M	198.41	.0000	198.41	198.41
							172.532	13.04

QUOTE OPTIONS

FREIGHT

ITEM STATUS CODES

PUT-UP STATUS

INSERT LINE

ADD ITEM

MARGIN CALC

010 Part:  Mfgr ID/Catalog:

Descr:  UoM: E

Quantity: <input type="text" value="0"/>	Sell Price: <input type="text"/>	Extension: <input type="text" value="0.00"/>
Minimum: <input type="text" value="1"/>	Discount: <input type="text" value="0"/>	Unit price: <input type="text" value="0.00"/>
Maximum: <input type="text" value="1"/>	Cost: <input type="text" value="0.00"/>	Gross Profit %: <input type="text" value="0.00"/>

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

Add / Delete/ or Maintain Line Items

TRI-PARISH ELECTRICAL SUPPLY QUCLIN

Quote #: 00294    Line: 007    Stat:    Customer: ABCELEC ABC ELECTRIC INC

Part: 78364300000    Mfr ID/Catalog: SIE 17DP92BF1181

Description: MS-MAU-A1 STARTER    UOM: E

Quantity:	1	Sell Price:	1419.89	Extension:	1,419.89
Minimum Qty:	1	Trade Discount:		Unit price:	1,419.89
Maximum Qty:	1	Cost:	0.00	Gross Profit %:	100.00
Available:	2				

Options: <<--

- Item History
- Inventory Status
- Open Quotes
- Freight or Misc Charges
- Tag Entry

Comments:   
 NO QUOTE ON LIEBERT UPS AND AUTOMATIC TRANSFER SWITCH (ASCO)

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 history 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.

Quote Entry - add Line Items from spreadsheet

Quote #: 00294    EXPIRES 07/12/2024    Customer: ABC ELECTRIC INC    QUCTS1

Vendor:          Modify Sequence

		Qty Available	Order Qty	u/m	UPC #
GAL 4-IN-INTERMEDIATE-METAL CND	4-IN-INTERMEDIATE-METAL CND	150	0	C	98001000010
TNB R1028	10X1/4 THRD ROD	1240	10	C	78599170375
WIR MC-AL-12/2-SOLSEE 98010044702	MC-AL-12/2-SOL-W/GRN-GRD	14750	0	M	98010044702
ELB 1-1/4-90DEG-GALV-ELBOW ELL	1-1/4-90DEG-GALV-ELBOW ELL	39	0	C	98002000164
ELB 2-1/2-90DEG-EMT ELBOW	2-1/2-90DEG-EMT ELBOW	20	0	C	98002002027
ELB 1-IN-90DEG-GALV-ELBOW ELBOW	1-IN-90DEG-GALV-ELBOW ELBOW	165	0	C	98002000163
ELB 3-IN-90DEG-EMT ELBOW	3-IN-90DEG-EMT ELBOW	21	0	E	98002002028
GAL 2-IN-INTERMEDIATE-METAL CND	2-IN-INTERMEDIATE-METAL CND	209	18	C	98001000006
TNB 500-SC	BEAM CLMP 1/4-20TAPD	0	0	C	78599150950
ARL 38AST	3/8 INSUL FLEX CBL CONN	100	0	C	01899700070
CUL 58549	1/4X3 SLOT/PHIL TGL BOLT	350	0	C	08593758549
GAL 1-IN-INTERMEDIATE-METAL CND	1-IN-INTERMEDIATE-METAL CND	930	0	C	98001000003
GAL 3/4-EMT ELEC METALLIC TBG	3/4-EMT ELEC METALLIC TBG	10500	50	C	98001002002
PVC 4-IN-90D-SCH-40-COND-ELL	4-IN-90D-SCH-40-COND-ELL	53	<input type="text" value="0"/>	C	98006006050
PVC 4-IN-PVC-FEMALE-ADAPTER	4-IN-PVC-FEMALE-ADAPTER	25	0	C	98006004870
TNB R1048	10X1/2 THRD ROD	400	0	C	78599170385

UPDATE    EXIT

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

Gross Margin Calculator
QUCTS2

06/20/2023
Quote #: 00294
Customer: ABCELEC ABC ELECTRIC INC

	Mfgr ID & Catalog	Quantity	Base Price	Discount	Net Price	u/m	Unit Cost	extension	grs mg
1	SIE GEAR PRICE	1	18140.25	.0000	18140.25	E	0.00	18140.25	100.00
2	MIS 423-7214-000	1	0.00	.0000	0.00	E	1090.20	0.00	0.00
3	MIS 423-7234-000	1	0.00	.0000	0.00	E	1538.60	0.00	0.00
4	COO LIGHTING PACKAGE	1	10738.16	.0000	10738.16	E	10201.25	10738.16	5.00
5	COO TYPE 'A'	1	111.52	.0000	111.52	E	102.60	111.52	8.00
6	COO TYPE 'AE'	1	214.78	.0000	214.78	E	197.60	214.78	8.00
7	SIE 17DP92BF1181	1	1419.89	.0000	1419.89	E	0.00	1419.89	100.00
8	EIK LAMP LOT	1	500.00	.0000	500.00	E	0.00	500.00	100.00
9	WIR NM-B-14/2-CU-WG-1000S/R WIRE	1000	198.41	.0000	198.41	M	172.532	198.41	13.04

Frft+Misc: 0.00

Parts Total: 31,323.01

Parts at Cost: 10,673.98

Margin: 65.92

Sales Tax: 0.00

Total w/tax: 31,323.01

Total Price: 0.00

Flat Gross Profit: 0.00

Proportionate Gross Profit: 0.00

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.