

Quotations System

Quote Header Screen

Enter/Maintain a Quote QUCTHD

Quote #: 00294	ACTIVE	Salesperson: RC	ROBERT CONLEY
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
BOSTON	MA	P.O. Number:	
01201-3436		Job Name: WEATHER DATA	
		Beginning Date: 12 Jun 2021	
Ship to: ABC ELECTRIC		Ending Date: 12 Jul 2022	
574 LEXINGTON ST		Salesprsn Notification (Days): 5	
BOSTON	MA	# of Times Quote Can Be Used: 10	
024523436		# of Times Quote Has Been Used: 1	
Contact: BILL STANTON			
Placed by:			
Special Instructions:			
<input type="radio"/> Display Log			
<input type="radio"/> 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 – Detail Line Item Screen

Add / Delete/ or Maintain Line Items

WALTHAM SUPPLY QUCLIN

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

Part: 78364300000    Mfgr 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				

Comments:

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

Item History                       Freight or Misc Charges  
 Inventory Status                       Tag Entry  
 Open Quotes                               Cost Help 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 in the lower left, display a screen with information or allows further action, such as 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 – Gross Margin Calculator

Gross Margin Calculator
QUCTS2

Quote #: 
 Customer:

	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

Frt+Misc:

Parts Total:

Parts at Cost:

Margin:

Sales Tax:

Total w/tax:

Total Price:

Flat Gross Profit:

Proportionate Gross Profit:

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.