

Chapter 3.26: Quotations

Introduction

The *Quotations* option is used to create product or equipment quotes from customers by a salesperson. These orders can be monitored and converted to *Delivery Orders* once the customer agrees to purchase the items. This chapter will guide you through the entire *Quotations* process and the many options available.

NOTE: The Quotations feature is part of an Optional Module. Please contact Sales for more information on purchasing the Quotations Module.

Menu of items

There are a series of programs used with the quotations in this module. Several are found on *Modules > Quotations* area. There are the following:

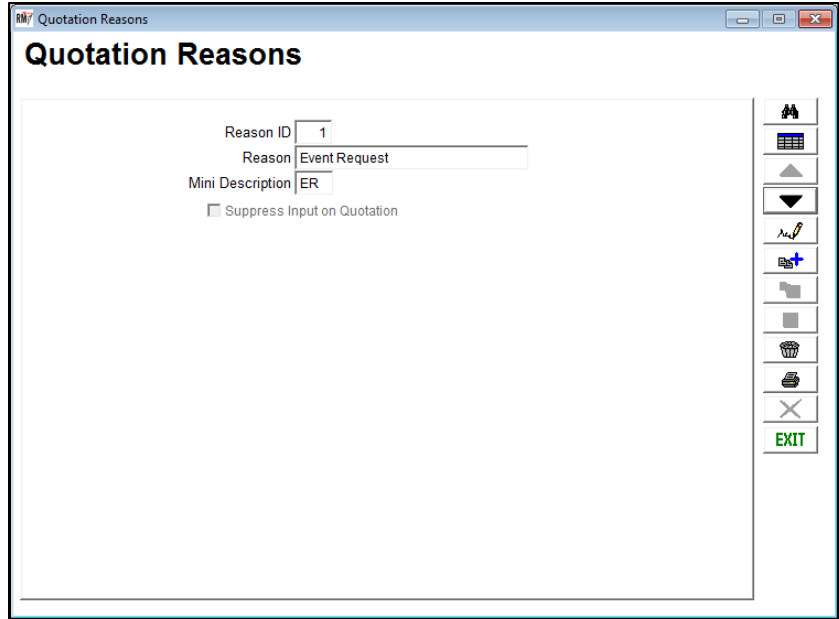
Quotation
Quotation Reasons
Quotation Defaults
Quotation Report

In addition, there are other 'hooks' to the program in Delivery Orders, for example.

Quotation Reasons

Prior to creating quotes for your customers, you will need to establish a series of 'Quotation Reasons' that will be used to identify each request.

Navigate to *Modules > Quotation > Quotation Reasons*, and add up to 24 reasons that quotes will be created (e.g., Event Request).



Fields:

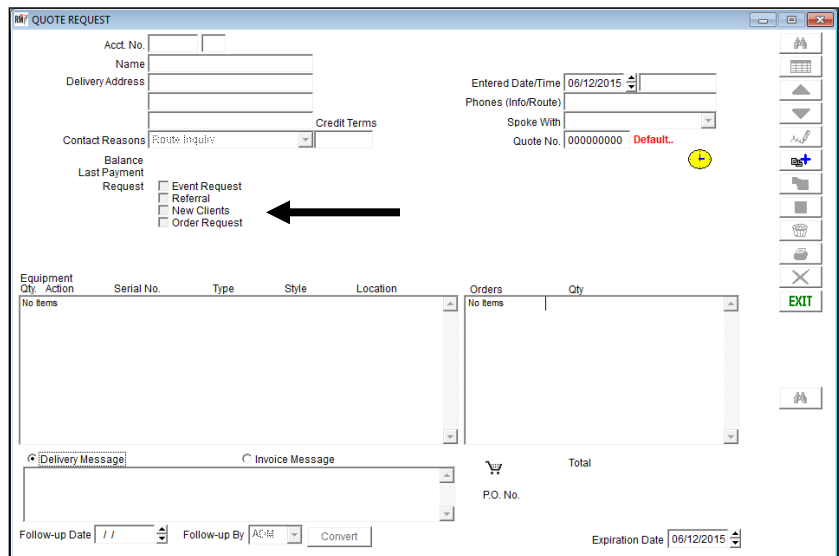
Reason ID: Enter an ID for each reason.

Reason: Enter a description for each reason.

Mini Description: Enter a 2 character Mini Description code for each reason.

Suppress Input on Quotation: Select this option to not allow the user to select this Reason on the Quote screen. This is good for when using a Reason as a separator in groups of quotation reasons.

Here is an example of the *Quote Request* screen after a series of *Quotation Reasons* have been defined:

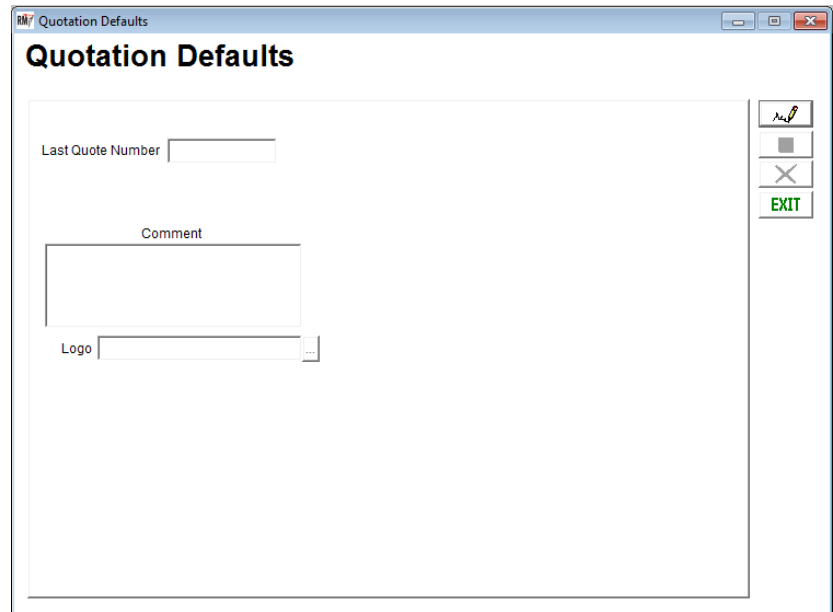


Quotation Defaults

In addition to request reasons, you can establish a series of default settings that will be printed on each *Quote Request*.

Navigate to *Modules > Quotation > Quotation Defaults*, and click the *Modify* key.

A definition of each option is provided below.



The screenshot shows a software window titled "RM Quotation Defaults". The window contains the following fields and controls:

- Last Quote Number:** A text input field.
- Comment:** A large text area for entering a comment.
- Logo:** A text input field with a browse button (three dots) to the right.
- Buttons:** On the right side, there are four buttons: a "Save" button (with a floppy disk icon), a "Cancel" button (with an 'X' icon), an "EXIT" button (in green), and a "New" button (with a document icon).


Fields:

Last Quote Number: Displays the last quote number assigned to a *Quote Request*. Enter a starting number in this field if desired.

Comment: Enter an optional comment that will be printed on each *Quote Request*.

Logo: Enter or browse for an optional image file that will be attached to each printed *Quote Request*.


Here is an example of a printed *Quote Request* using the examples displayed on the previous page:

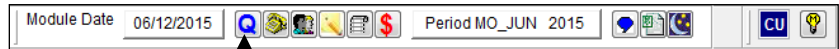
		Account No.: 100000 Created On: 02/08/2011 @ 09:50																																				
		Quote #1 Expiration Date: 02/08/2011 Follow-up Date: 02/08/2011 P.O.																																				
Quote Prepared For Robert Jordan 2100 Standford Ave Modesto, CA 95350 Spoke with: Phones: 866-549-8837 / 209-534-1050		Quote Prepared By Advantage Water Company 147 South Broadway Modesto CA 95350 ADMINISTRATOR Phone: - - E-Mail: aboland@advantagers.com																																				
Items Requested																																						
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Prod</th> <th style="text-align: left;">Description</th> <th style="text-align: left;">Qty.</th> <th style="text-align: left;">Price</th> <th style="text-align: left;">Ext. Price</th> <th style="text-align: left;">Notes</th> </tr> </thead> <tbody> <tr> <td>510</td> <td>5 Gallon Distilled</td> <td>5.00</td> <td>6.250</td> <td>31.25</td> <td></td> </tr> <tr> <td colspan="4"></td> <td style="text-align: right;">Order</td> <td style="text-align: right;">31.25</td> </tr> <tr> <td colspan="4"></td> <td style="text-align: right;">Deposits</td> <td style="text-align: right;">0.00</td> </tr> <tr> <td colspan="4"></td> <td style="text-align: right;">Tax (15.00%)</td> <td style="text-align: right;">4.69</td> </tr> <tr> <td colspan="4"></td> <td style="text-align: right;">Quote Total</td> <td style="text-align: right;">35.94</td> </tr> </tbody> </table>	Prod	Description	Qty.	Price	Ext. Price	Notes	510	5 Gallon Distilled	5.00	6.250	31.25						Order	31.25					Deposits	0.00					Tax (15.00%)	4.69					Quote Total	35.94		
Prod	Description	Qty.	Price	Ext. Price	Notes																																	
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				Quote Total	35.94																																	
Special Instructions																																						
<div style="border: 1px solid black; padding: 5px; display: inline-block;"> Comment </div>																																						
Comment: Questions? Contact us at 888-294-7688																																						
Authorized by: _____																																						

Creating a Quote Request

This section will guide you through creating a *Quote Request* for a customer.

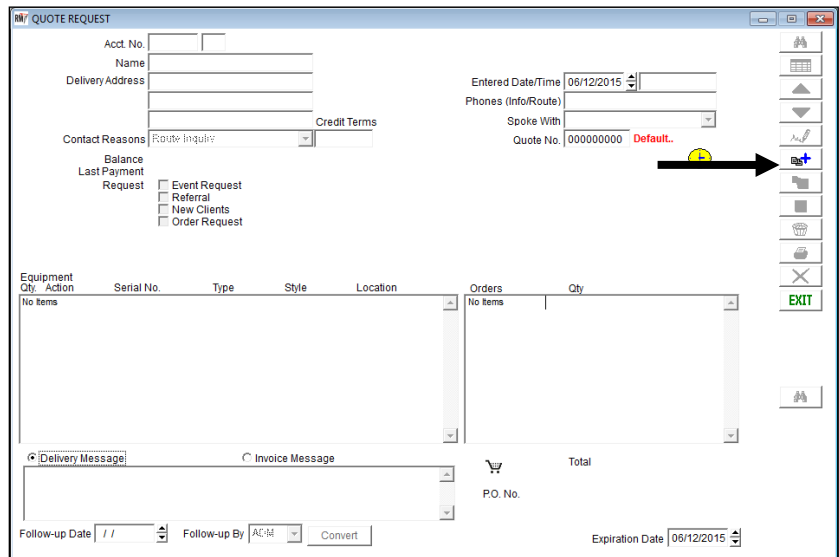
Module Bar

Click on the  *Quotations* button available on the 'Module Toolbar' on the Route Manager screen:



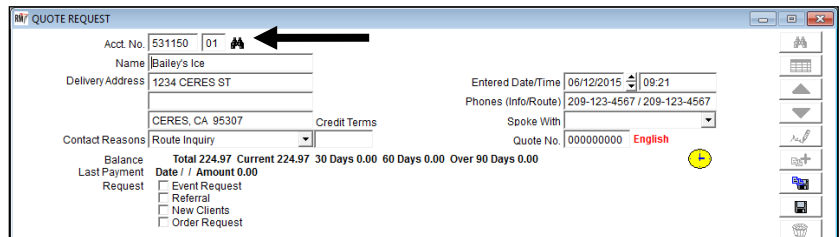
NOTE: Alternatively, you can add a new *Quote Request* to the system under *Tools > Quotation > Quotation*.

The *Quote Request* screen will be displayed. Click the *Add* key to create a new request:



The screenshot shows the 'MR/QUOTE REQUEST' window. The 'Add' button, represented by a yellow plus sign in a circle, is highlighted with a black arrow pointing to it from the right. The form contains various fields for account information, contact details, and request options.

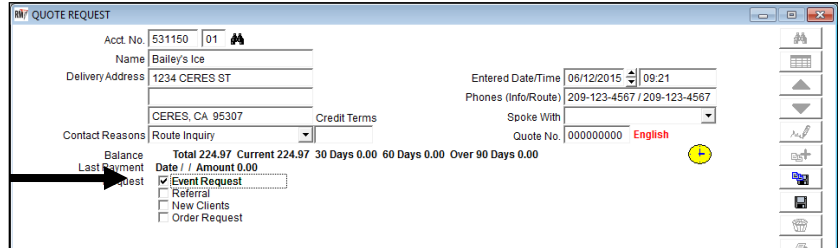
Enter an account number, or click on the *Fast Find* key, to search for the desired account:



The screenshot shows the 'MR/QUOTE REQUEST' window with the account number '531150' entered in the 'Acct. No.' field. The 'Fast Find' key, represented by a magnifying glass icon, is highlighted with a black arrow pointing to it from the left. The form is populated with account details for 'Bailey's Ice'.

Choose a Quote Request Reason

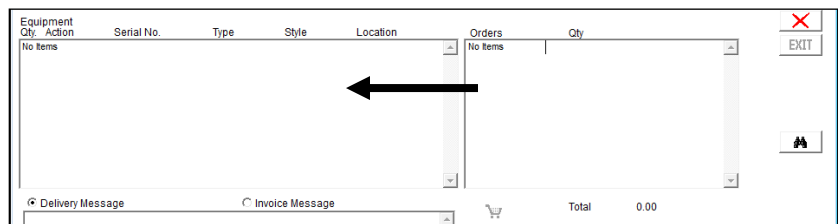
At least one *Quote Request Reason* should be selected per order; this information helps identify the *Quote Request* on reports.



Acct. No. 531150 01
 Name Bailey's Ice
 Delivery Address 1234 CERES ST
 CERES, CA 95307
 Entered Date/Time 06/12/2015 09:21
 Phones (Info/Route) 209-123-4567 / 209-123-4567
 Spoke With
 Quote No. 000000000 English
 Balance Total 224.97 Current 224.97 30 Days 0.00 60 Days 0.00 Over 90 Days 0.00
 Last Payment Date // Amount 0.00
 Quote Request Reason:
 Event Request
 Referral
 New Clients
 Order Request

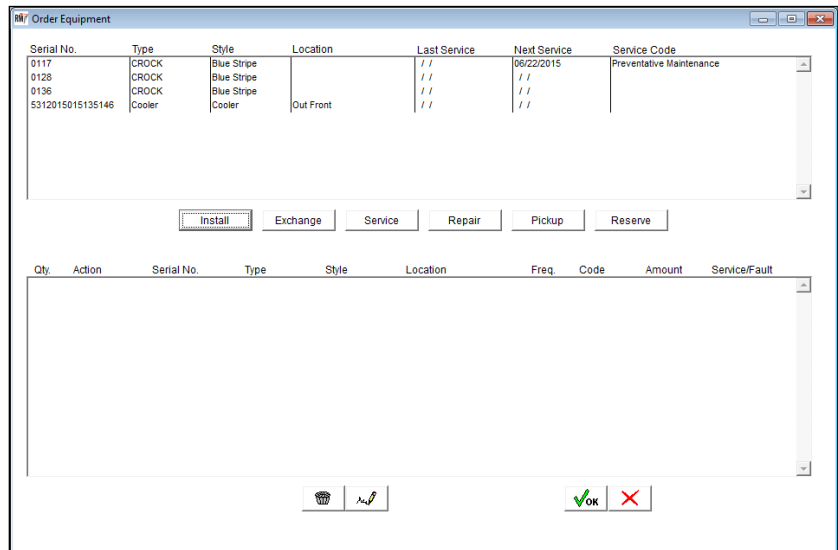
Working with Equipment

If the nature of the request is related to equipment, simply click in the *Equipment* box to access the 'Order Equipment' screen.



Equipment Qty.	Action	Serial No.	Type	Style	Location	Orders	Qty
No Items						No Items	

All installed equipment on the account will be displayed, and you will have multiple activities that can be added to the request (defined on the next page):



Serial No.	Type	Style	Location	Last Service	Next Service	Service Code
0117	CROCK	Blue Stripe		//	06/22/2015	Preventative Maintenance
0126	CROCK	Blue Stripe		//		
0136	CROCK	Blue Stripe		//		
5312015015135146	Cooler	Cooler	Out Front	//		

Buttons: Install, Exchange, Service, Repair, Pickup, Reserve

Qty.	Action	Serial No.	Type	Style	Location	Freq.	Code	Amount	Service/Fault

Select one of the following keys displayed on the screen:

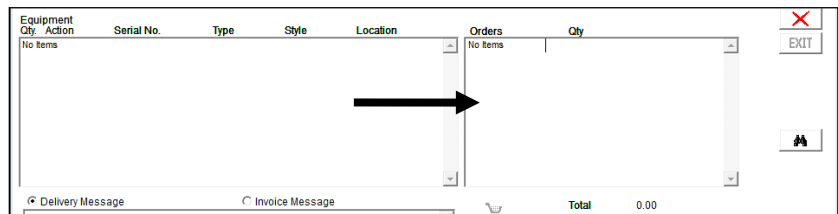
- ▶ **Install:** Select this option to request that a driver install the *Equipment Type* and *Style* specified on the order.

- ▶ **Exchange:** Select this option to replace the selected *Serial Number* for the *Equipment Type* and *Style* specified on the order.
- ▶ **Service:** Select this option to schedule an equipment service for the selected *Serial Number*.
- ▶ **Repair:** Select this option to schedule an equipment service “fault” (something is broken) for the selected *Serial Number*.
- ▶ **Pickup:** Select this option to schedule an equipment pickup for the selected *Serial Number*.
- ▶ **Reserve:** Select this option to reserve the equipment for a certain date range in the future.

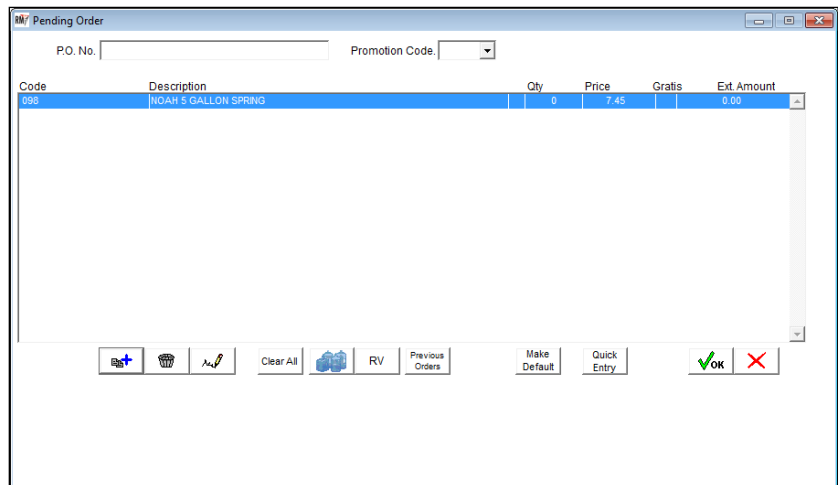
Click *OK* on the bottom of the ‘Order Equipment’ screen to save the selected equipment option(s).

Adding Products

If the quote includes products, simply click in the *Orders* box to access the ‘Pending Order’ screen.



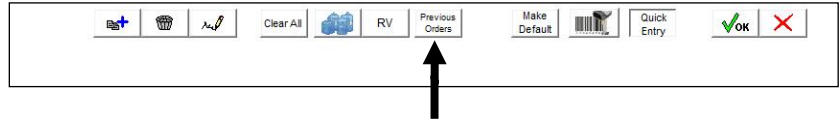
The customer’s assigned *Default Products* will automatically be displayed for quick entry. Double-click on any item displayed to update the price or quantity, and add alternate items to the order by selecting the *Add* key.



NOTE: Any items left on the screen at ‘0’ quantity will automatically be removed from the request on *Save*.

Additional Feature - Previous Orders:

Additionally, you can select the 'Previous Orders' key to view historical orders and invoices posted on the account. This will help save time creating requests on accounts that typically order the same items.



The *Previous Orders* screen allows you to view previous *Delivery Orders* or invoices based on the oldest transaction date entered.

Date	Invoice/Order#	Chg. Code	Qty	Price	Extended	None/Add/Repl.
06/11/2015	096995	401 Monthly Jul	2	24.99	49.98	<input type="radio"/> N <input type="radio"/> C <input type="radio"/> A <input type="radio"/> R
06/11/2015	096997	401 CROCK	1	24.99	24.99	<input type="radio"/> N <input type="radio"/> C <input type="radio"/> A <input type="radio"/> R
06/11/2015	096999	668 Equipment Purchas	1	150.00	150.00	<input type="radio"/> N <input type="radio"/> C <input type="radio"/> A <input type="radio"/> R

If you would like to *Add (A)* or *Replace (R)* any of the items listed on the current order, select the applicable radio button displayed next to each item in the list:

Date	Invoice/Order#	Chg. Code	Qty	Price	Extended	None/Add/Repl.
06/11/2015	096995	401 Monthly Jul	2	24.99	49.98	<input type="radio"/> N <input checked="" type="radio"/> C <input type="radio"/> A <input type="radio"/> R
06/11/2015	096997	401 CROCK	1	24.99	24.99	<input type="radio"/> N <input type="radio"/> C <input type="radio"/> A <input checked="" type="radio"/> R
06/11/2015	096999	668 Equipment Purchas	1	150.00	150.00	<input type="radio"/> N <input type="radio"/> C <input type="radio"/> A <input checked="" type="radio"/> R

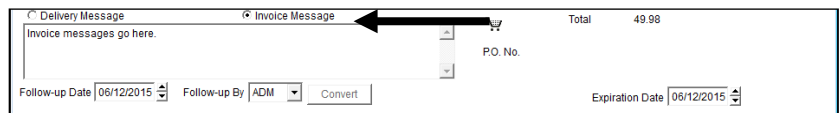
Click *OK* to complete the *Pending Order* process and add the items to the *Quote Request*.

Entering Messages

Enter a message into the *Delivery Message* box that will be displayed for the driver once the quote is converted into a *Delivery Order*:



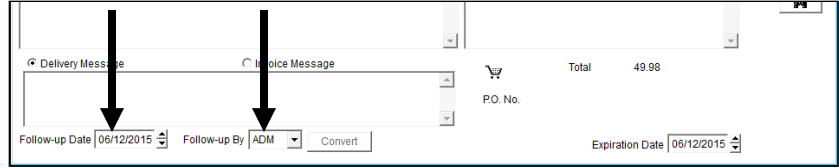
Select the *Invoice Message* radio button to enter a message that will be printed on the customer's invoice once the quote is converted into a *Delivery Order*.



Quote Request Follow-up

Each *Quote Request* will need to be converted into a *Delivery Order* once the customer would like the request processed.

A *Follow-up Date* and employee (*Follow-up By*) should be assigned to each request to ensure that it is processed in a timely manner:



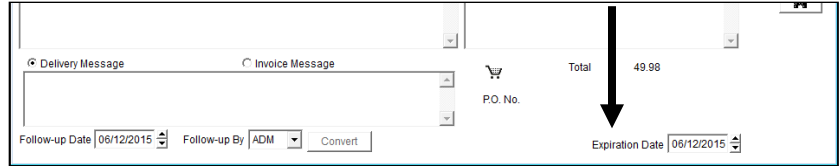
Delivery Message Invoice Message

Follow-up Date: 06/12/2015 Follow-up By: ADM Convert

Total: 49.98

P.O. No. Expiration Date: 06/12/2015

Additionally, enter an expiration date for the request:



Delivery Message Invoice Message

Follow-up Date: 06/12/2015 Follow-up By: ADM Convert

Total: 49.98

P.O. No. Expiration Date: 06/12/2015

NOTE: These dates will be used within the *Quotations Report* discussed within the *Managing Quote Requests* section of this document.

Additional Options

This section introduces you to some of the additional items available within the *Quote Request* screen.

Shopping Cart

The *Shopping Cart* key allows you to provide the customer with an invoice total based on the 'Pending Order' entered.



Delivery Message Invoice Message

Follow-up Date: 06/12/2015 Follow-up By: ADM Convert

Total: 49.98

P.O. No. Expiration Date: 06/12/2015

Click on the *Shopping Cart* to view the invoice total:

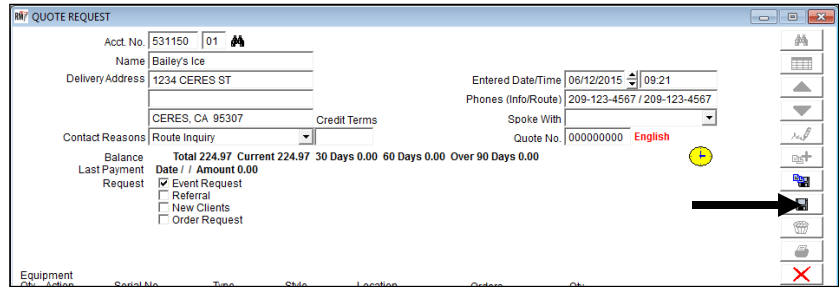
Code	Description	Qty	Price	Gratis	Extended Amount
401	CROCK	1.00	24.990		24.990C
401	CROCK	1.00	24.990		24.990C

Order	49.98
Rent	0
Deposits	0.00
Tax	0.00
Total Today	49.98
Previous Balance	224.97
Total due	274.95

OK

Saving the Quote Request

After you have created and scheduled the order, click the **Save** key to complete the process.



RR/QUOTE REQUEST

Acct. No. 531150 01

Name Bailey's Ice

Delivery Address 1234 CERES ST
CERES, CA 95307

Entered Date/Time 06/12/2015 09:21

Phones (Info/Route) 209-123-4567 / 209-123-4567

Contact Reasons Route Inquiry

Spoke With English

Quote No. 000000000

Balance Total 224.97 Current 224.97 30 Days 0.00 60 Days 0.00 Over 90 Days 0.00

Last Payment Date / Amount 0.00

Request Event Request
 Referral
 New Clients
 Order Request

Equipment

Save

Continue to the next section to learn how to manage *Quote Requests* after they have been created.

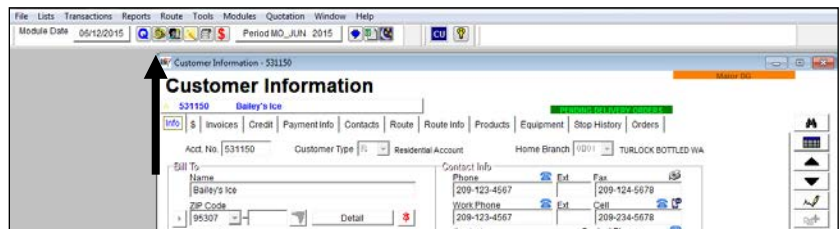
Managing Quote Requests

Each *Quote Request* is identified and tracked in Route Manager to assist you with managing your requests daily.

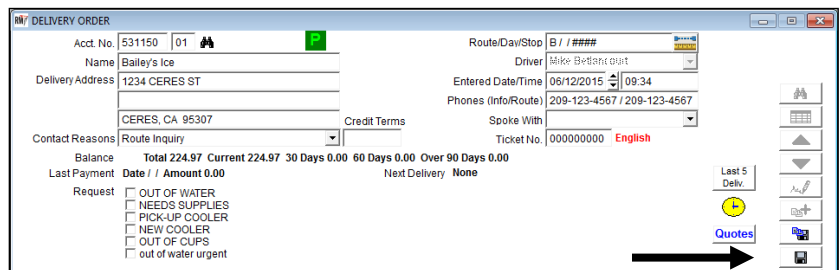
Converting Quote Requests

Each *Quote Request* will be converted into a *Delivery Order* prior to delivery.

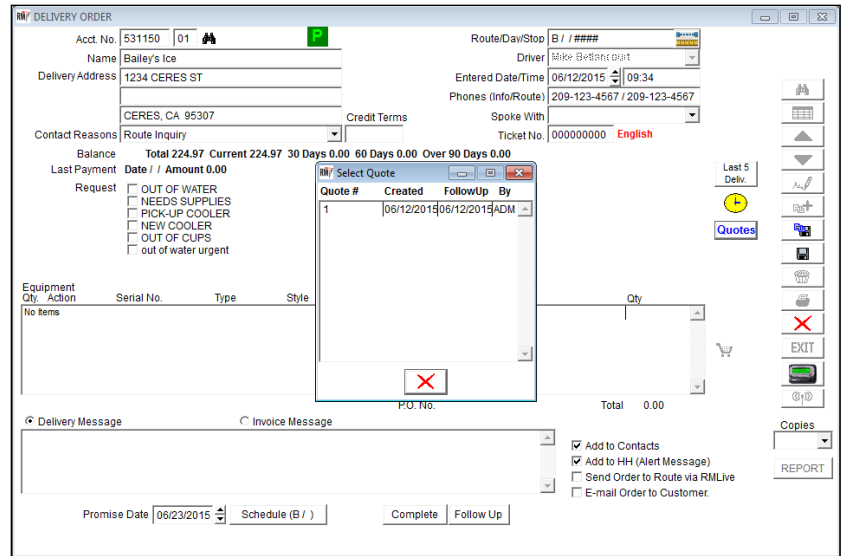
Navigate to a customer's account that currently has an assigned *Quote Request* and select the *Delivery Order* button:



If the customer has any active *Quote Requests*, the 'Quotes' icon will be available (activated) on the screen:



Click the *Quotes* icon to display all active requests:

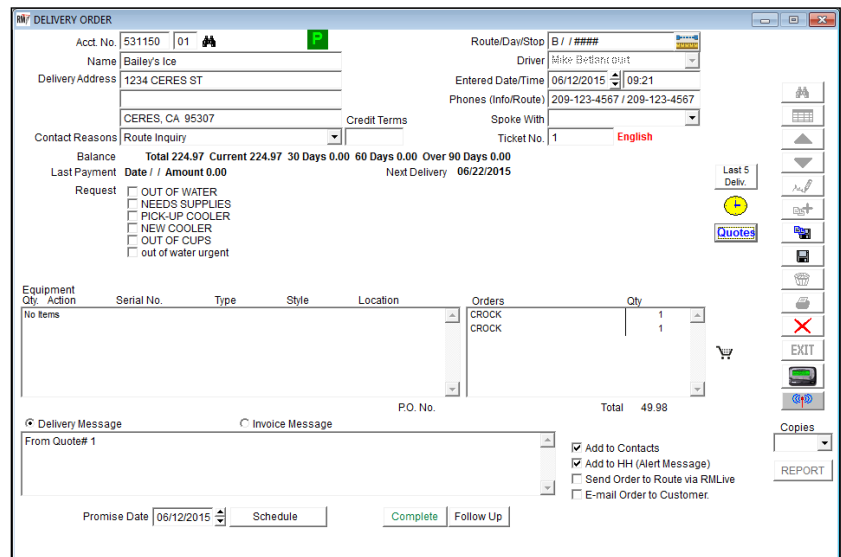


The screenshot shows the 'DELIVERY ORDER' form for account 531150. A 'Select Quote' dialog box is open, displaying a table with one quote:

Quote #	Created	FollowUp	By
1	06/12/2015	06/12/2015	ADM

The main form shows a balance of 224.97 and a 'Request' section with several unchecked options. A 'Quotes' icon is visible on the right-hand toolbar.

Double-click on any *Quote Request* to populate the *Delivery Order* screen with the order:



The screenshot shows the 'DELIVERY ORDER' form after quote #1 has been selected. The 'Next Delivery' date is now 06/22/2015. The 'Orders' table is populated with two rows:

Equipment	Qty	Action	Serial No.	Type	Style	Location	Orders	Qty
No Items							CROCK	1
							CROCK	1

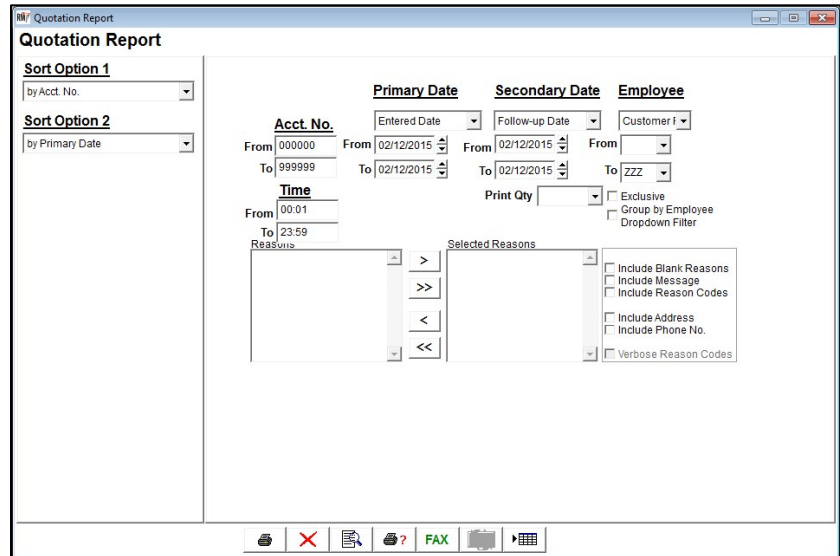
The total amount is now 49.98. The 'Delivery Message' field is populated with 'From Quote# 1'. The 'Quotes' icon on the toolbar is now highlighted.

The *Delivery Order* is now ready to be configured and processed as normal.

Quotation Report

The *Quotation Report* provides you with detailed information on all active *Quote Requests* in the system.

Navigate to *Modules > Quotation > Quotation Report*. Adjust the *Entered Date* and *Follow-up Date*, and select the desired *Quotation Reasons* to include on the report.



Fields:

Sort Options 1 & 2:

- ▶ **Account Number**
- ▶ **Primary Date**
- ▶ **Secondary Date**
- ▶ **Employee**
- ▶ **Route**

Acct Number: Enter an account number range to include on the Report.

Primary Date: Choose from one of the Date options in the drop down menu, then enter a date range to include on the report.

Secondary Date: Choose from one of the Date options in the drop down menu, then enter a date range to include on the report.

Employee: Select the way the customer is contacted and by which employee they were provided the quotation from the drop down menus provided.

Time: Enter a time range to include on the report.

Print Quantity: Select the product charge code that you wish to display the quantity for on the report.

Exclusive: Select this option to only show quotes on the report that have the Charge Code selected in the Print Quantity dropdown field.

Group by Employee Drop Down Filter: Select this option to group each quotation by employee and also start each new employee on its own page.

Reasons/Selected Reasons: Move the reasons you would like to include on the report to the Selected Reasons section by using the arrow buttons provided, select the double arrows to select the entire list for movement.

Include Blank Reasons: Select this option to include quotes that did not have a reason selected.

Include Message: Select this option to include the message entered on the quotations on the report.

Include Reason Codes: Select this option to include the 2 character reason codes on the report.

Include Address: Select this option to include the address on the report

Include Phone Number: Select this option to include the customer's phone number on the report.

Verbose Reason Codes: Select this option to print the Reason Description rather than the 2 digit Reason Code. Requires Include Reason Code to be selected first.

NOTE: The *Promised Date* option only applies to *Delivery Orders*.

Example Report:

Quotation Report						
Criteria Acct # Range: 000000 To 999999						
All Quotations						
Entered Date Range: 08/28/2012 To 08/28/2015						
Follow-up Date Range: 08/28/2012 To 08/28/2015						
Acct. No.	Acct. Name/Message/Comp. Date & Message	Entered Date	Follow-up Date	Customer Route	Time	
531150	Bailey's Ice	06/12/2015	06/12/2015	B	09:21	
	Quotation #: 1					
	Rsn Codes: Event Request					
		Total Quotations	1		Qty:	
		Total Quotations	1		Qty:	
		Total Quotations	1		Qty:	

Summary

The *Quotations* system in Route Manager is a helpful feature that can assist your sales representatives as they secure future orders from your customers. If you

have any questions regarding this option, or require assistance, please contact Advantage Route Systems.

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