Quotes

Overview

You can now generate **Quotes** for items to give to customers. **Quotes** can display discounted pricing and each quote requires an expiration date that this pricing is valid through.

Setup

Permissions

The following associate permissions have been added:

Give Customer Quotes Allows associate to create customer quotes.

System Options

Clientele Menu

The following system options have been added:

Quote Disclaimer The disclaimer printed at the bottom of every quote.

Quote Reserve When printing a quote, the amount of space, in inches, to reserve at the top of the form. This is used to accommodate preprinted forms.

Quotes

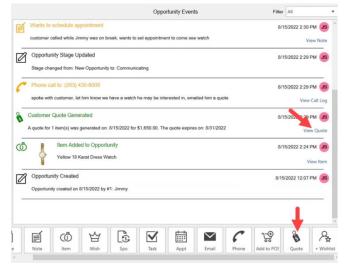
Quotes can be accessed from the following places:

	Op o (i
	Quotes (3)
ip	
5	

Customer Record

Inactive	Primary	Spouse/Partner				T
ID # 001-	00002		Method	Type	Who	Contac
Gender	~	~	0		-	
Title				Cell	Dominick	(203) 430-6000
First Don	inick			Home	Dominick	dominick@ajsllc.com
Middle				WebSale	Dominick	dominick@ajsllc.com
Last Mas	ท่					70 Colony St
Suffix				Home	Dominick	Seymour, CT 06483
License #			â	Home_1	Dominick	1 Main St Shelton, CT 06484
Company]	-		Shelton, C1 00404
Birthday 1/1/	1980]			
Couple		~	1			
Anniv		Company Account				
Dt Entered 10/2	10/2020		+ Addr	ress +	Phone -	- Email
Last Merch	andise Associate Jimmy S	Sales				
Last Tran	saction Associate Jimmy S	Sales	Opportunitie	is (7)	Quotes (3)	Client Profile

> Opportunity



Creating a New Quote

- 1. Click Clientele > Quotes > Add Quote. The Customer Quote window will appear.
- 2. Each quote requires a customer, expiration date, and one or more items.

ustomer Quote		
reate price quote of iter	ns to give to the customer.	
Customer*	Mastri, Dominick (001-00002)	8
Contact Methods	dominick@ajsllc.com 70 Colony St	tify the stomer
Quote Expiration Date*	8/31/2022	
001-310-1000001	Lody Set an Drop Earring Cultue expiration date	ps With 2= Retail: \$1,000.00 (X) Price: \$900.00
001-200-1000010	Lady's Titanium Free Form Fashion Ring 1.70Ct Retangular Cushion Green Emera Set	
Add Items Notes	Price valid until expiration date	Add notes to print at the bottom of the quote.
Print		Save Cancel

- 3. After entering required data, click **Print** if you want to print or email it, otherwise click **Save**.
 - a. If you print, it will display a preview. From here you can select whether to print or email.

Price Quote For Customer:	nt the Email the uote quote	8/17/2022
70 Colony St Seymour, CT 06483 (203) 438-6000 dominick@ajsllc.com	Expires On: Wednesday, August 31, 2022	Quote Generated By: Jimmy Sales (# 1)
310-1000001	Lady's White Satin Platinum Drop Earrings With 2= Cultured Pearls	\$900.00
200-1000010	Lady's Titanium Free Form Fashion Ring With One 1.76Ct Retangular Cushion Green Emerald	\$1,000.00
Notes: Price valid until expiration date.	SubTota	al\$1,900.00

Finding Quotes

To search for a quote:

- 1. Click **Clientele > Quotes > Find Quotes**. The **Customer Quote Customers** screen will appear.
- 2. Enter criteria to select a specific customer, or leave blank for all, then click OK.
- 3. A list of matching **Quotes** will be displayed.

	Ŧ	Date Entered	т	Number of Items T	Total	T	Expiration Date
Mastri, Dominick		8/11/2022		1	\$1,500.00		8/31/2022
Madison, Jamie		8/11/2022		1	\$2,500.00		8/31/2022
Madison, Jamie		8/11/2022		2	\$4,000.00		8/31/2022
Mastri, Dominick		8/15/2022		1	\$1,650.00		8/31/2022
Mastri, Dominick		8/17/2022		2	\$1,900.00		8/31/2022

4. Use the buttons at the bottom to Delete, Edit, Add, Print, or Add to Sale.

Adding a Quote to a Sale

To add a quote to a sale:

- 1. Click Clientele > Quotes > Find Quotes. Enter criteria to find your quote and click OK.
- 2. Select the quote in the list and click Add to Sale.
- 3. Alternatively, you can click **Add to Sale** from within the **Quote** screen itself making it accessible anywhere you can **Edit** a quote, e.g., customer record, POS, opportunity.



When selling items at POS, the software automatically checks the customer record for open quotes and will offer to honor the quoted price if it is not expired.