# Efficiency

## *Quotation Management Manual*

*Version 4.6*

REVISED: OCTOBER 2002

# *Table Of Contents*






Level 2, 11-15 Falcon Street, Crows Nest NSW Australia 2065
Tel: +61 2 9906 3505 • Fax: +61 2 9906 4424 • Eml: sales@avasystems.com.au
www.avasystems.com.au

# *Quotation Module – Set up*

## *First Steps*

Before using the Quotation Management Module, please check that the following areas of Efficiency are already set up.

**Supervisor**

- Operating Divisions
- Branches
- Warehouses
- Executives
- Security
- Users
- Functional Security
- User and Shared Options

**Modules**

- Companies and Contacts
- Vendors
- Products
- Campaigns
- Activities

## *Quotation Module Codes and Flags*

Now you can set up the Quotation Management Specific codes and Flags. These areas are explained in full detail within this manual. For any other set-ups required, please refer to the relevant manual.

The following code and flag tables should be set up during the initial set up. Each table requires at least one record. The system will provide a default record of

**Code:** 00000
**Description:** Default record of

It is recommended to keep at least one default record in each table. These tables (listed with their descriptive names, the database names are given on the detailed section for each item) are grouped in three categories. Some of the data in the tables relate to the whole corporation and some may be maintained at the operating division levels.

- Mandatory/Strongly Recommended
- Optional
- Site Specific

**Mandatory or Strongly Recommended**

| | |
|---|---|
| Quotation Status | Corporate Level |
| Quotation Type | Corporate Level |
| Quotation Result | Corporate Level |
| Quotation Line Status | Corporate Level |
| Shared Options | Corporate Level |
| User Options | User Level |

**Optional i.e. Default value may be used**

| | |
|---|---|
| Quotation Profile Group | Corporate Level |
| Quotation Profile Item | Corporate Level |
| Quotation Defaults | Operating Division |
| Quotation Transaction Category | Corporate Level |
| Quotation Transaction Type | Corporate Level |
| Quotation Transaction Status | Corporate Level |

# *Codes and Flags*

## *Quotation Status*

The Quotation Status is used to mark the various phases of a Quotation from the **Enquiry** stage to the **Order** (or Loss of an Order) stage by its status, i.e. Enquiry, Follow up, Requoted, Order Received etc.

### Quotation Status Tables and Fields

The Quotation Status data is maintained in the Quotation Status (quotstat) table.

The data in this table should be designed to address the needs of the entire corporation.

**Quotation Status fields in table QUOTSTAT**

| Field Name | Field Description |
|---|---|
| Status Id | A unique identification code. |
| Description | The description of the quotation status |

### Quotation Status Hints and Tips

- The Status IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended
- The codes of 'FQ=Follow Up Quotation' and 'OR=Order Received' must exist in the table at all times.

### Quotation Status Data Example

**Quotation Status Codes**

| Status Id | Description |
|---|---|
| *00000* | *Default Call Status* |
| **FQ** | **Quotation Follow up** |
| **OR** | **Order Received** |
| **LO** | **Order Lost** |
| **LR** | **Order Lost by Reseller** |
| **SH** | **Project Shelved** |
| **RQ** | **Requoted** |
| **EN** | **Enquiry** |

**Key**

*Abc:* This highlights the typical recommended records.
**Abc:** This highlights the mandatory or system dependant records**.**

The basic data values for the Quotation Status is provided with the software

## *Quotation Line Status*

The Quotation Line Status is used to mark the Quotation Lines with various status codes, i.e. Enquiry, Quote, Order, Back Order, Loss Sales etc.

### Quotation Line Status Tables and Fields

The Quotation Line Status data is maintained in the Quotation Line Status (quolnst) table.

The data in this table should be designed to address the needs of the entire corporation.

**Quotation Line Status fields in table QUOTLNST**

| Field Name | Field Description |
|---|---|
| Status Id | A unique identification code. |
| Description | The description of the quotation line status |

### Quotation Line Status Hints and Tips

- The Status IDs should be created manually.
- The Table must contain at least one record.

- Default records with the IDs of ‘00000’ is recommended
- The codes of ‘Q=Quotation’, ‘O=Order’ and ‘B=BackOrder’ must exist in the table at all times.

**Quotation Line Status Data Example**

**Quotation Line Status Codes**

| **Status Id** | **Description** |
|---|---|
| *00000* | *Default Call Status* |
| **Q** | **Quotation** |
| **O** | **Order** |
| **B** | **Back Order** |
| *L* | *Loss Sales* |
| *E* | *Enquiry* |

**Key**

*Abc:* This highlights the typical recommended records.
**Abc**: This highlights the mandatory or system dependant records.

# *Quotation Type*

The Quotation Type codes are intended to group the Quotations into Type and Type Category classification.

**Quotation Type Tables and Fields**

The Quotation Type codes are maintained in the Quotation Type Code Table (quotype), i.e. Firm, Budget, Tender.

These codes are grouped in the Quotation Type Category Table (quottypc), i.e. Quote, Enquiry, Template etc.

The data in these tables should be designed to address the needs of the **entire corporation**.

**Quotation Type Category fields in table QUOTTYPC**

| **Field Name** | **Field Description** |
|---|---|
| Type Category Id | A unique identification code. |
| Description | The description of the type category |

**Quotation Type Code fields in table QUOTTYPE**

| **Field Name** | **Field Description** |
|---|---|
| Type Id | A unique identification code for the type |
| Description | The description of the type |
| Type Category | A unique identification code for the type category |

The data in the Quotation Type Category table must exist before entering data in the Quotation Type Code table.

**Quotation Type Hints and Tips**

- The Type IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of ‘00000’ is recommended

**Quotation Type Data Example**

**Quotation Type Category Codes**

| **Type Cat Id** | **Description** |
|---|---|
| *00000* | *Default Quotation Type Category* |
| QUOTE | Quotations |
| ENQ | Enquiries |
| TEMPL | Templates |

**Quotation Type Codes**

| | | |
|---|---|---|
| ENQ | ENQ_B | Enquiry Budget |
| ENQ | ENQ_P | Enquiry Project |
| TEMPL | TEMP_GOV | Template Government Prices |
| TEMPL | TEMP_SCH | Template School Prices |

**Key**

*Abc:* This highlights the typical recommended records.
**Abc**: This highlights the mandatory or system dependant records.

## *Quotation Result*

The Quotation Result is used to mark the "Likelihood of an Order" after the most recent follow up. It is usually represented a percentage value as the "Chance of an Order", 10, 50, 99 percent etc.

**Quotation Result Tables and Fields**

The Quotation Result code is maintained in the Quotation Result Code Table (quotrslt).

The data in this table should be designed to address the needs of the **entire corporation.**

**Quotation Result fields in table QUOTRSLT**

| Field Name | Field Description |
|---|---|
| Result Id | A unique identification code. |
| Description | The description of the quotation result |

**Quotation Result Hints and Tips**

- The Result IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended

**Quotation Result Data Example**

**Quotation Result Codes**

| Result Code | Description |
|---|---|
| *00000* | *Default Result* |
| 10 | 10 Percent Chance |
| 50 | 50 Percent Chance |
| 90 | 90 Percent Chance |
| 100 | 100 Percent Chance |

**Key**

*Abc:* This highlights the typical recommended records.
**Abc**: This highlights the mandatory or system dependant records.

## *Quotation Transaction Category*

The Quotation Transactions Category code is used to group the Quotation Transactions records within the Category Groups

If the transactions are used for varying data as a data warehouse and presented in different data window objects (forms) then the Transaction Type and/or the Transaction Category are the main grouping methods. The Transactions Pick List and the Transaction Forms can be developed either during the implementation process or later by using the Development Kit.

**Quotation Transaction Category Tables and Fields**

The Quotation Transaction Category data is maintained in the Quotation Transaction Category (quottrnc) table. The data in this table should be designed to address the needs of the entire corporation.

**Quotation Transaction Category fields in table QUOTTRNC**

| Field Name | Field Description |
|---|---|
| Category Id | A unique identification code. |
| Description | The description of the Transaction Category |

**Quotation Transaction Category Hints and Tips**

- The Category IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended

**Quotation Transaction Category Data Example**

**Quotation Transaction Category Codes**

| Type Id | Description |
|---|---|
| *00000* | *Default Type* |
| C1 | Category One |
| C2 | Category Two |

**Key**

*Abc:* This highlights the typical recommended records.
**Abc:** This highlights the mandatory or system dependant records.

## *Quotation Transaction Status*

The Quotation Transactions Status code is used to group the Quotation Transactions records within the Status Groups

**Quotation Transaction Status Tables and Fields**

The Quotation Transaction Status data is maintained in the Quotation Transaction Status (quottrns) table.

The data in this table should be designed to address the needs of the entire corporation.

**Quotation Transaction Status fields in table QUOTTRNS**

| Field Name | Field Description |
|---|---|
| Status Id | A unique identification code. |
| Description | The description of the Transaction status |

**Quotation Transaction Status Hints and Tips**

- The Status IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended

**Quotation Transaction Status Data Example**

**Quotation Transaction Status Codes**

| Status Id | Description |
|---|---|
| *00000* | *Default Call Status* |
| **C** | **Closed** |
| **A** | **Active** |

**Key**

*Abc:* This highlights the typical recommended records.
**Abc**: This highlights the mandatory or system dependant records.

## *Quotation Transaction Type*

The Quotation Transactions Type code is used to group the Quotation Transactions records within the Type Groups

If the transactions are used for varying data as a data warehouse and presented in different data window objects (forms) then the Transaction Type and/or the Transaction Category are the main grouping methods. The Transactions Pick List and the Transaction Forms can be developed either during the implementation process or later by using the Development Kit.

**Quotation Transaction Type Tables and Fields**

The Quotation Transaction Type data is maintained in the Quotation Transaction Type (quottrnt) table. The data in this table should be designed to address the needs of the entire corporation.

**Quotation Transaction Type fields in table QUOTTRNT**

| Field Name | Field Description |
|---|---|
| Type Id | A unique identification code. |
| Description | The description of the Transaction Type |

**Quotation Transaction Type Hints and Tips**

- The Type IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended

**Quotation Transaction Type Data Example**

**Quotation Transaction Type Codes**

| Type Id | Description |
|---|---|
| *00000* | *Default Type* |
| T1 | Type One |
| T2 | Type Two |

**Key**

*Abc:* This highlights the typical recommended records.
Abc: This highlights the mandatory or system dependant records.

# Quotations Module – Maintenance

## Quotation Master

The Quotation Master Tab is used to create a new record or to locate the existing quotation record in order to change the data or to perform various functions on the tab folder.

The quotation maser details are maintained in the Quotation Master (quote) table.

The Quotation Maintenance Tab folder has the following features.

**Campaign Management**

Each Quotation is attached to a **campaign split** ad therefore a **campaign header** record. The actual Quotation values automatically update the campaign split and the campaign header records as well as the sales executive's **evaluation, commission points and values** for a wide range of time intervals.

**Company and Contact**

A new company structure including the contacts (employees) may be created or the existing records may be edited.

**Defaults and User Preferences**

Each User can have a pre-selected **default template**, which automatically fills the header and the line entry fields during the creation of a new Quotation. If there is more than one default record in the system, a pick list is displayed.

Each User can determine the personal User Preferences for Quotation Module for the defaults and the selection parameters.

**Activity - Follow up**

The Quotation module creates **the activity history and follow up** records dynamically within the Call Transaction module which ensures 'The Quotations and Proposals' are very much an integral part of your Sales, Marketing and Customer Service tools.

Each new Quotation automatically creates a **new activity transaction** and any subsequent Quotation follow up creates an **activity follow up transaction** in the system. This function ensures that all the activities related to any Quotation are also accessible from the other parts of Efficiency instantaneously.

**Security**

Multi level security and authorisation for the accessing, modifying and printing of the Quotation as well as controlling the cost, price and minimum price access privileges, at user levels, is available.

## How to Find A Quotation Record

There are three ways of finding an existing record:

1. On Screen Search
2. Search by Standard Search Engine
3. Search by Enhanced Search Engine

**On Screen Search**

You can find the existing quotation record using any combination of the following fields:

- Operating Division
- Quotation Status
- Quotation Result
- Quotation Type
- Quotation Executive
- Branch
- Company

You should always type in at least 2 or 3 letters of the search name. Click on the drop down arrow or press the <F4> key.

The pre – keyed in letters will act as an instant filter and the system will display you a drop down pick list of the quotations starting with the entered letters. The more you had typed in the field before attempting the search will make the list presented so much more precise.

Highlight the required name and either click on it or press the <Tab> key. If you had used the tab key, the empty spaces on the window will be filled with the quotation's data On the other hand if you had clicked on the pick list then the selected data will de displayed on the field. Now either click on any other field at the top section of the window or simply press the tab. The quotations data will be displayed as a previous selection.

Note: Your access to some quotations may be limited by your current access privileges.

**Filter Quotation IDs**

If you wish to filter the content of the Quotation Id Drop Down List Box, first enter the filter values in one or more of the following fields:

- Operating Division
- Quotation Status
- Quotation Category

**Filter Quotation Descriptions**

If you wish to filter the content of the Quotation Description Drop Down List Box, first enter the filter values in one or more of the following fields:

- Operating Division
- Quotation Status
- Quotation Category

**Search by Standard Search Engine**

When the Search button was clicked the search engine window is displayed:

There are two sections on this window. You can enter any selection criteria in the top Query section. When the Find button is clicked the matching results set will be displayed in the second window.

Highlight the required record and click on the OK button to return to the Quotation window with the selected quotation record.

If a quotation description fully or partially was entered in the quotation screen before clicking on the search button the search engine will be seeded with this value and the corresponding result set will be displayed automatically.

**Search by Enhanced Search Engine**

If the 'Quotation Search Engine Stays Open' entry was set to Yes in the Quotation section of the user options system will change the standard behaviour of the search engine to a continuous pick list.

The Search Engine window is now resizable and movable on the screen to a suitable location.

Make your query and selection as usual and click on the Find button. Double click on the selected line or click on the OK button will display the details of the selected record on the Quotation Entry Tab Sheet.

This allows the user to search the database and freely move up and down on the selected list.

**How to Edit an Existing Quotation Record**

You can alter any information on the window that is also regulated by the edit privileges which had been granted to you.

Once the editing is finished simply click on the <SAVE> button.

**How to Create a New Quotation Record**

When you are ready to create a new record click on the <NEW> button.

If the system was set to an "AUTOMATIC" id creation mode a system generated sequential number will be displayed in the ID field. Otherwise enter a unique identification code for this quotation.

The AUTOMATIC Id assignment is recommended.

Your cursor will be moved to the Description field so that you can start entering the new data.

**Quotation Master Data Field Attributes**

The data fields may carry various attributes:

**Key Fields**

The labels for these fields are presented in dark blue.

**Mandatory Fields**

You must enter a value in such fields and they are presented with a very distinctive colour (usually in light blue).

**Functional Fields**

The point will change from "Arrow' to a "Cross' when the cursor is on such a field. Double clicking on these fields will usually pop up a related utility, such as the calendar, clock or link to another module by using values obtained from the clicked field (or even the whole row).

**Audited Fields**

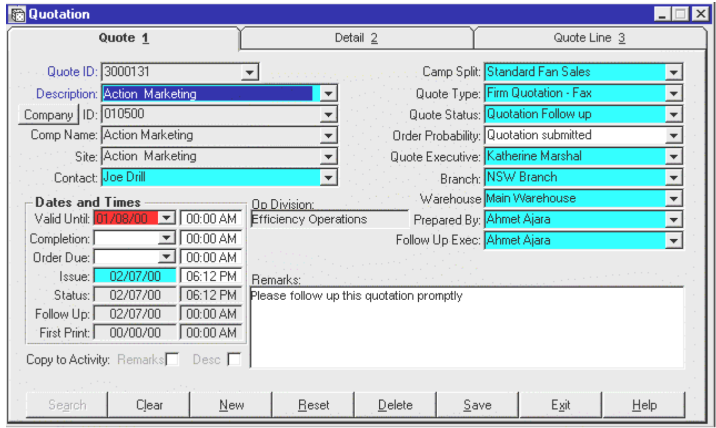
There is no visual attribute to tell you that the field is being audited. However, if you have such a field, simply double click on it. You will see a detailed table showing the complete change audit for the values that had been altered in this field.

**No Enter fields**

Displayed in grey colour. The grey colour indicates that the data entry on the field is disabled. In some cases this is a temporary situation; in other cases it is permanent.

**Quotation Tab Folder**

The Quotation Tab Folder is designed to maintain the Quotation Module.




**Data Fields**

The user can maintain or read the following fields:

**Quote Id:** A unique identification code for the Quotation.

**Description:** The description o the quote.

**Company and Contact**

Each contract belongs to a Company Site and assigned to a contact (employee) of this site.

You can click on the Company button to activate the company search engine or use the dropdown look up list to locate the company.

**Company Id:** The company id for the contract.

**Co Name:** Company name for the contract.

**Site:** Company site for the contract.

**Contact:** The contact (employee) who signed the contract.

**Campaign Split:** The campaign split which relates to this quotation.

**Quote Type:** The quotation type.

**Quote Status:** The current quotation status.

**Order Probability:** The current order probability code for the quote.

**Quote Executive:** The id of the executive who is responsible for this quotation.

**Branch:** The branch that is responsible for the quotation.

**Warehouse:** The current quotation warehouse.

**Prepared By:** The id of the executive who has signed this quotation.

**Follow Up Executive:** The id of the executive who has signed this quotation.

**Remarks:** The quotation remarks. OPTIONS: Zoom Remarks.

**Dates & Times**

**Valid Until:** The date until which this quotation is valid. OPTIONS: Calendar.

**Completion:** The date of completion or delivery of the content. OPTIONS: Calendar.

**Order Due:** The date on which the order is expected. OPTIONS: Calendar.

**Issue:** The date of the issue of the quotation.

**Status:** The date of status change.

**Follow Up**: The date of last follow up

**First Print:** The date of the first print.

**Copy to Call**

**QT Remarks:** Copy quotation remarks to activity transaction.

**QT Description**: Copy Quotation Description to activity remarks

**Command Buttons**

**Search**
Activates the search engine for quotation module.

**Clear**
Clears the entire window so that a new search can be initiated. If this button was pressed during a new record creation or editing, the "save, yes-no?" dialogue box will require a confirmation of the action.

**New**
Creates a unique system number for the quotation and sets the cursor on the Description field so that the new data can be entered.

**Reset**
This is a 'Bail Out' button. If you are not happy with what you have been entering on the window, this button will reset the data back to the original state. You must respond to the confirmation dialogue box for save or reset.

**Save**
Press here to save the values on the screen (temporary) to the database (permanent).

**Delete**
If you click on this button one of many things may happen depending on the configuration of your system and your current privileges.

1. 1. Nothing happens, you do not have enough privileges to delete the record.
2. 2. Systems response to request with a confirmation dialogue box, when confirmed one of many things may happen:

   2.a If the "Soft Delete" option was put on by the supervisor, a dialogue will capture your reason for requesting the deletion of the record and sets the colour red on the text so that all the other users will know that this record is going to be deleted by the supervisor.

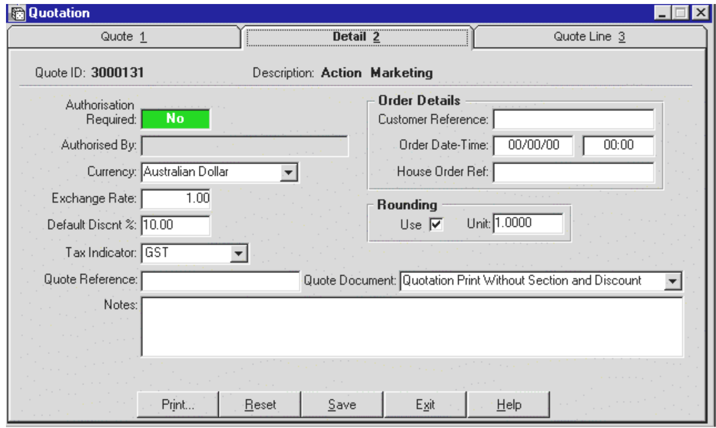
   2.b. If the standard delete function was enabled, based on your privilege, system will attempt to delete the record and also all of its children records.

**Exit**
Closes the complete tab folder.

**Help**
Activates the help screen related to this section.

**Quotation Details**

The quotation detail screen holds quotation details, such as currency, tax and authorisation




**Data Fields**

**Authorisation Required:** Yes or No depending on the Executive Security Restrictions. If the Executive creates a Quotation which is either above their Quotation Limit or below the minimum price. If they have no access then the Quotation will require Authorisation before it can be printed or Host Linked

**Authorised By:** The name of the Executive who authorised this Quotation.

**Currency:** The default currency Id which is applicable to this quotation.

**Exchange Rate:** The default exchange rate applicable to this quotation.

**Default Dscnt%: Default discount** percent to be used for the quote lines.

**Tax Indicator: Check box** if the quote is tax exempt.

**Quote Reference:** An additional reference for the quote.

**Quote Document:** The current document (template) id applicable to the quote.

**Notes:** Quotation comments.

**Order Details**

**Customer Reference:** The customer order reference (PO number).

**Order Date – Time:** The date & time of the customer order.

**House Order Ref:** The internal order (House Order) reference.

**Rounding**

**Use:** Check box if the line prices to be rounded.

**Unit:** Unit to be used for the rounding of the line prices, 0.50, 1.0 etc.

**Command Buttons**

**Print**
Prints the quotation.

**Reset**
Resets the screen to the original status.

**Save**
Saves the changes.

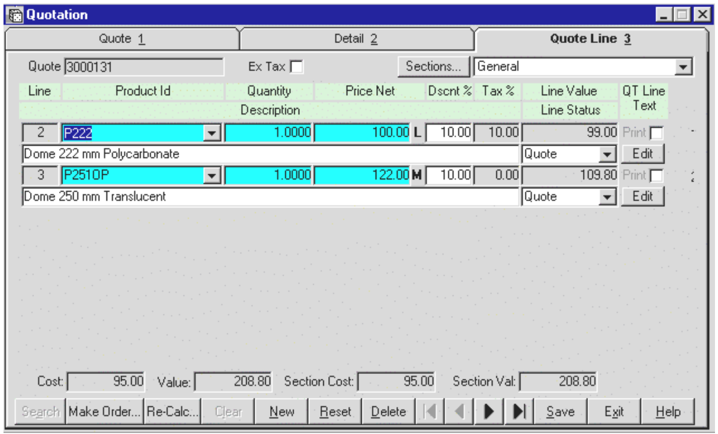
**Exit**
Exits out of quotation module.

**Help**
Activate the help screens related to this section.

**Quotation Lines**

Each quotation may hold an unlimited number of line items, either created from the Products Module or entered as free formatted text. The special text lines from the product module may be printed at each quotation line.

The quotation line items can be grouped into Sections each having its own totals, costs, and profit values. Sections then can be printed in a summary (one line of description and the section total value) or detail format (listing all the section line items), or simply nominated as 'Optional' so that the value of the section will not be included in the quotation total.




**Functions and Options**

The following functions and options are available on this folder either by double clicking on the related field or selecting from the Pop Up menu.

**Product**

The product tab folder with the selected product information can be accessed directly.

**History and Buying Patterns**

The historical Product information for the Client can be accessed:

The **customer buying patterns** can be used to enter the Quotation line items. The **Quote**, **order** and **sales** radio buttons will display the relevant information. A selected line item can be dragged and dropped on to the new Quotation as a new line item using the historical price or the up to date price.

**Special Prices**

The product selling prices may be automatically calculated and displayed from the **product special prices** by using various user defined **price combinations** for the **campaign**, **customer type** or the individual **customer** record. If the user has the authority and sufficient rights, the line prices can be overwritten, but not less than the pre-determined **minimum selling price** value. Similarly, the 'Product Cost' fields have limited access based on the Executive's access rights. Each Quotation Line can have further discount, and tax (sales or VAT) all automatically calculated into the line total, section total and the Quotation total values as entered.

**Foreign Currency**

A Quotation can be prepared on a selected **foreign currency** for which the exchange rate can be altered at any time.

**On Line Performance Analysis**

The **commission points** and the **percentage values** for the Order Executive can be displayed. As the Order line items are being maintained, the values on this window are dynamically updated.

**Line Price and Profit Analysis**

Double clicking on the 'Price' column accesses the Price and Profit Analysis window and it is used to manage the line price and profit values.

The **mark up, gross margin** or the **sales price** can be modified and the corresponding results observed. The modified values can be applied to the existing line values. The corresponding section and Quotation values are updated in real time.

**Line Quantities**

The various quantities of each line item are displayed when double clicking on the 'Qty' column.

If the Host Inventory System is integrated the quantities are displayed from the Host System Warehouse locations.

**Reference**

The Vendor and the Competitor Product sales and technical details can be displayed.

**BOM Kit**

If the BOM was initiated from the Kit option of the pop up menu at the Quotation line entry window, this window maintains the Kit for the line item.

If there was no Kit for the line item system will prompt you to copy the template from the existing product BOM. You do not have to copy the template from the BOM. The Kit lines can be maintained and new items can be added or existing ones can be deleted.

**A button with the 'KIT' label will be displayed at the Lines with the kits.**

The Line price can be updated from the Kit window.

**Data Fields**

**Product Id:** The product id.

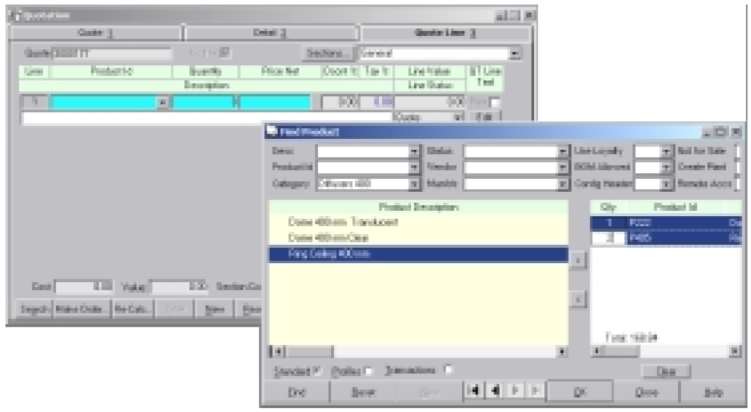
**Quantity:** The line quantity.

**Description:** The main line description. This could be product text or free format text.

The product can be searched with the standard drop down find features in the product Id field. In some cases a more advanced search is required. This is achieved by clicking on the search command button, where the Product Search engine.

The top section is the query window, where selection criteria can be entered to make the search for products matching the criteria.

Pressing <Find> will display a list of products matching the selection criteria. Highlighting a product and pressing <OK> will load the selected product into the quotation line.



You can make multiple selections using the query and the list displayed on the left side of the window. After the selection is made click on the > button to move the selected the product item to the right side of the window where you can enter the quantity against each item. Once the selection was completed click on the OK button. The selected items and quantities will be transferred to the line entry window.

For a new selection criteria click on the Reset button. To clear the selected product items on the list click on the Clear button.

**Price:** The Line item's selling price.

**Discount %:** The line item's discount percent if applicable. If the default discount was applied in Tab 2 then this will automatically be copied to the line item where it can be overwritten if required.

**Tax %:** The line item's tax percentage. If no tax is applicable, (i.e. an Ex Tax Quotation) the tax percentage will appear in blue, signifying this product has a tax percentage as specified in the Product Module but does not apply to this Quotation

**Line Value:** The line net value. Typically the quantity * sell price less discount amount * tax percentage.

**Line Status:** Line status i.e. 'Q' = Quote, 'O' = Ordered, 'L' = Loss.

**Command Button**

**Search**
Activates product search engine.

**Make Order**
Makes and order for this quotation.

**Re-Calc**
Recalculates the product prices if changed.

**Clear**
Clears the screen.

**New**

Adds a new order line.

**Reset**
Resets the screen to the original status.

**Delete**
Deletes the line order.

**Left and Right Arrows**
Switches from one order line to another in line order list.

**Save**
Saves the line order.

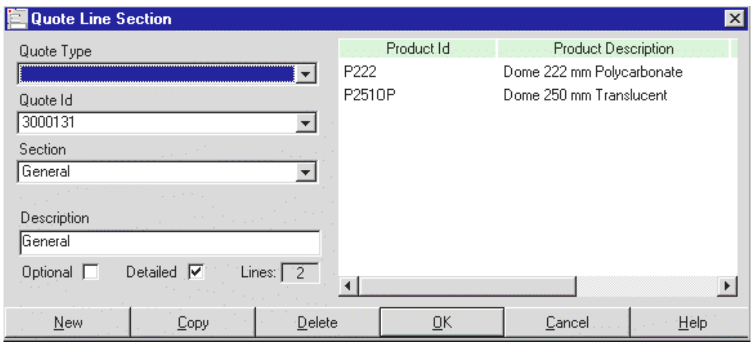
**Exit**
Exits out of the quotation module.

**Help**
Activates the help screen relevant to this section.

**Sections:**
To create a new Quote Line Section click on this button.

**Line Sections**

The quotation line sections are maintained on the following window.




**Data Fields**

**Quote Type:** Quote Type

**Quote Id:** Quotation Id Number will automatically be displayed

**Section:** By Selecting a Section from the drop down for this Quotation the list of Products used in this section will be displayed.

**Description:** Enter a Free Format Section Description.

**Optional/Details:** Click on the radio button

**Optional** will print the details on your quotation but will not include the sub-total in the grand total.

**Detailed** will print the details on your quotation as well as include the amounts in the sub-total and grand total

**How to Print a Quotation**

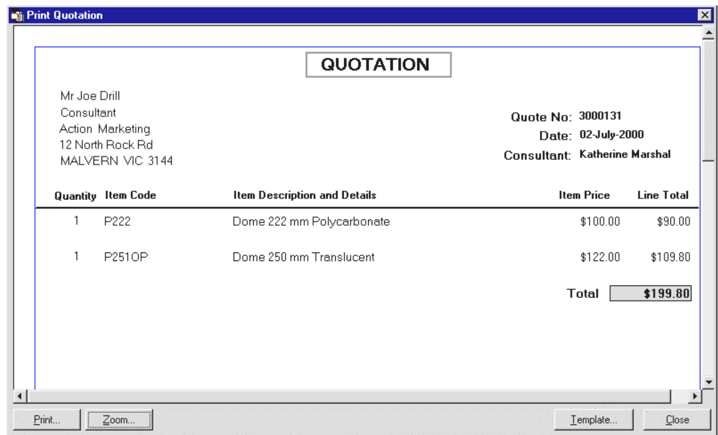
An authorisation level may be assigned to each Executive to mark the upper value of a single quotation that can be produced without seeking for an approval. Such quotations may not be printed without an authorisation.

Any number and styles of quotation formats may be prepared and provided in the system. The user can select any quotation format and to print the quotation or fax from the network's fax manager.

The new quotation formats (templates) may be developed in the InfoMaker Report Writer. If your Efficiency Licence includes the Development Kit Tools, then these formats are compiled into one of the pre – allocated Efficiency libraries.

Alternatively, the quotation can be printed on a windows word processor document such as WinWord, AMI pro and WordPerfect. The template document should be prepared in the word processor system and the site specific print and merge Macros should be prepared in the word processor.

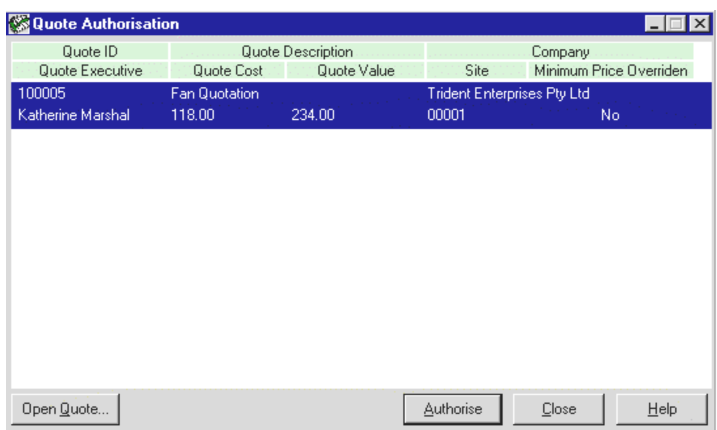
The <Print> button on tab 2 of the quotation module will allow the user to preview the quotation print using the document templates as specified in the Quotation document field.




## Quote Authorisation

From the Menu, select the Prepare – Preparation – Transactions Authorise Quotations option. The following screen will be displayed.

If there are no Quotations available for authorisation by the logged on Executive, a message box stating this will appear.

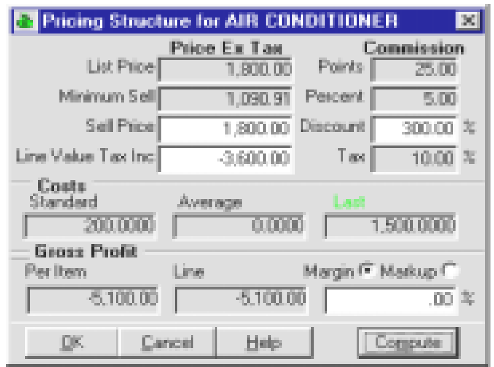



To authorise a quotation, highlight the quotation with the mouse or arrow keys and press the Authorise button. This will mark the quotation as authorised and record the Executive making the authorisation. The quotation will then be removed from the list of quotations to be authorised.

If required, pressing the Open Quote button whilst the order is highlighted will launch the Quotation module with the appropriate Quote active for enquiry.

## Quote Line Prices

Double clicking the Price field will launch the product price enquiry window.




The window provides details on prices for this line item. The highlighted Cost value indicates which cost price the system is using for calculation.

**Sell Price:** Displays the current sell price and the percentage margin or mark-up this represents based on the current cost price. The user can change the sell value and press <compute> to display the new margin or mark-up percentage.

**Discount:** The discount percentage can be changed and pressing the <compute> button will display the margin or mark-up percentage

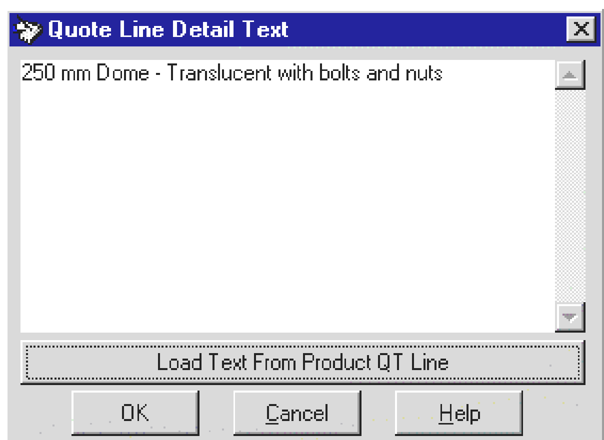
**Margin Mark-up:** Editing the margin or Mark-up percentage and pressing the <compute> button will display the margin or mark-up percentage

**<OK>** Pressing OK will accept the values

Some fields and values and functionality will not be available for users who have not had the appropriate security levels set.

## *Quote Line Detail Text*

Pressing the Edit button on the Quote line will launch the following window




This can be used for free text entry or Pre formatted text from the Product Quote line text can be loaded in here by Pressing the <Load Text from Product QT Line>. This text can then be edited if required.

The Edit box text will appear in green signifying this quote line contains order line text.

## *BOM Kit*

If the BOM was initiated from the Kit option of the pop up menu at the Quotation line entry window, this window maintains the Kit for the line item.

If there was no Kit for the line item system will prompt you to copy the template from the existing product BOM. You do not have to copy the template from the BOM. The Kit lines can be maintained and new items can be added or existing ones can be deleted.

A button with the 'KIT' label will be displayed at the Lines with the kits.

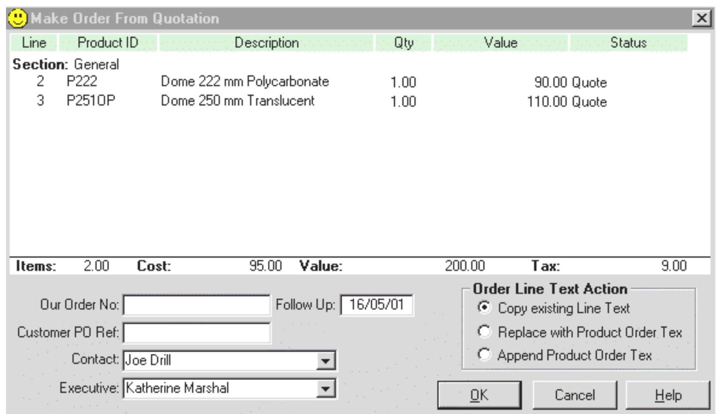
The Line price can be updated from the Kit window.

## *Make Order From Quotation*

The **sales order** may be created automatically from the quotation. Or alternatively, each quotation line can be flagged with a relevant line status, and then create the order selectively. The sales order and the inventory data can be transferred to the organisation's Financial Systems either 'On Line' or 'Batch' mode.

If Efficiency is integrated to a 'Host' financial and inventory system, all the related information for each product line, such as Quantity-on-Hand and Special Prices may also be on line.

In Quote line screen click on Make Order command button, you will be presented with the following screen.




**Data Fields**

**Our Order No:** The new order Id (Optional if order is auto number).

**Customer PO Ref:** Customer purchase order number.

**Contact:** Order contact name.

**Executive:** Order executive.

**Follow up:** Order follow up date.

**Radio Buttons for Order Line Text Action**

**Copy existing line text:** Copies the existing line text to the order, if there are any.

**Replace with product order text:** Replace existing line text with the product order text.

**Append order product text:** Appends Product Order text to the existing text lines.

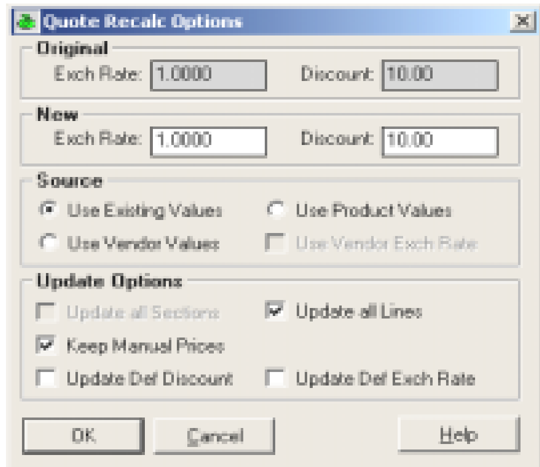
## *Duplicate Quotation*

First locate and retrieve the Quotation you wish to duplicate. Select <Option - Duplicate> option from right click menu.  The system will ask if you wish to copy the Quotation lines as well.  Answer Yes or No as applicable.

You can now make changes to the Quotation as required such as Company, Site Contact etc.  Pressing the save will then allocate a new quotation number

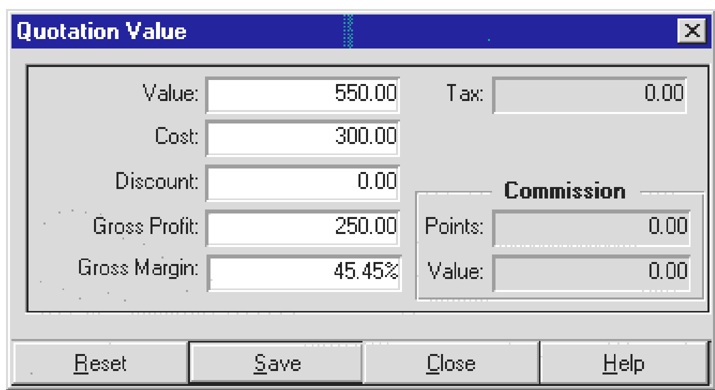
## *Quote Recalc Options*

The **re-calculate** function allows the system to re-calculate any global changes to the vendor's list price, vendor's sales discount, exchange rate, global discount, profit margin or the product selling prices including the special prices.




## *Quotation Values*

Pop up menu from the quotations main and details tab displays the value entry window that allows the user to change the quote values. This is useful for the proposals where there are no line items. As soon a line item is entered the values are updated with the line totals




## *Create Quotations from External Sources*

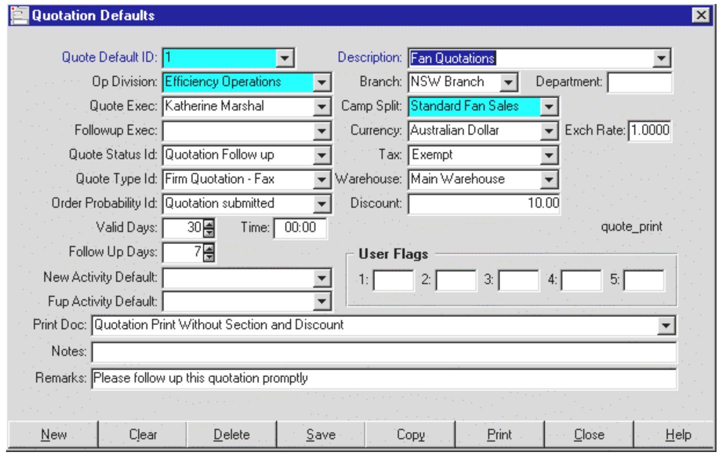
Quotations produced via the Internet or external sources can be piped into the database and converted directly into quotations in Efficiency for further processing without the need for re keying of data. During this stage if the customer does not exist, they too can be created from the information gathered before the quotation is processed.

## *Quotation Defaults*

This option can be accessed from Prepare – Preparation – Defaults in Quotation Module.

If there was a quotation default assigned to the user, the quotation default values will populate some of the fields when a new order is created.

If there is more than one default record, selecting <Select Defaults> can activate a pick list from right click menu to select another set of default values.




**Data Fields**

**Quote default Id:** Quote default template id.

**Op Division:** Operating Division.

**Quote Executive:** Default executive who produces the quotes.

**Follow up Exec:** Executive who follows up the quotation.

**Quotation Status Id:** Defaults quotation status id.

**Quotation Type Id:** Default quotation type.

**Order Probability Id:** General order expectancy rate from quote.

**Valid Days:** Default number of valid days.

**Time:** Default valid time.

**Follow Up Days:** Number of days for follow up.

**New Activity Default:** Activity default, which is used when a new quotation record was created.

**Follow up Activity Default:** Activity default to be used during the quotation follow up.

**Print Doc:** Default document id.

**Notes:** Defaults quotation Notes.

**Remarks:** Default quotation remarks.

**Description:** Description of the default record.

**Branch:** Default branch Id.

**Department:** Default department id.

**Campaign Split:** Default campaign split.

**Currency:** Default currency id.

**Exch Rate:** Default exchange rate.

**Tax:** Tax type.

**Warehouse:** Warehouse from where the line items may be supplied.

**Discount:** Default discount percentage.

**User Flags 1 – 5:** Default user flags.

**Command Buttons**

**New**
Creates a new default record id.

**Clear**
Clears the fields.

**Delete**
Deletes the default records.

**Save**
Saves the default records.

**Copy**
Makes a copy of existing default records.

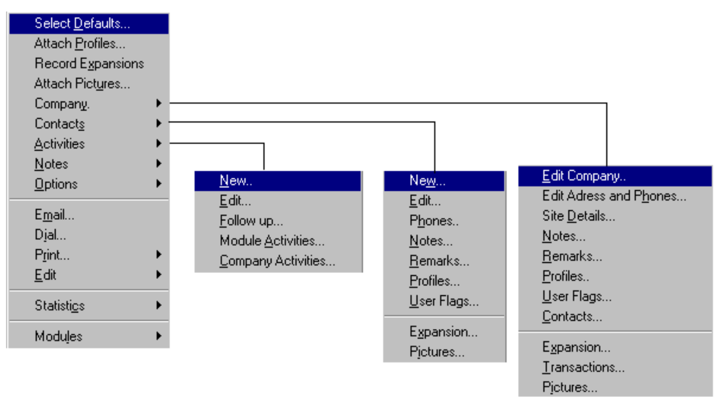
**Print**
Prints the default records.

**Close**
Closes the default screen.

**Help**
Activates the help screen relevant to this section.

**Quotation Pop Up Menu Options**

From the Quotation Module the user may right mouse click in any gray area on any Tab to obtain a list of additional functions or enquiries available.




**Select Defaults**

Information as set up in the selected default will be updated into the current quotation record automatically during a new quotation record creation as detailed under the Module Defaults topic.

**Attach Profiles**

Each quotation record can have many profile items attached to it .

**Record Expansions**

Additional information can be created for each Quotation Record and accessed instantaneously as described under the Module Expansions topic.

**Attach Pictures**

Each quotation record can have pictures, documents, audio and video objects as described under the Pictures topic.

**Company Sub Menu**

Edit the company and its various features and attributes, which have the order.

**Edit Company**

Edit Contract's company module.

**Company – Address and Phones**

Edit the company address and phones.

**Company – Site Details**

Edit company site details.

**Company – Notes**

Edit the company notes

**Company – Remarks**

Edit the company remarks

**Company – Profiles**

Edit the company profiles

**Company – User Flags**

Edit company user flags

**Company – Contacts**

List and edit company contacts

**Company – Expansion**

Access and edit company expansion records if they have been set-up

**Company – Transactions**

Access and edit company transactions

**Company – Pictures**

List and Edit the company pictures

**Contacts Sub Menu**

Edit the employee (contact) and its features and attributes assigned to this order.

**Contacts – New**

Create a new contact

**Contacts – Edit**

Edit the current contact.

**Contacts – Phones**

Edit company contacts phone numbers.

**Contacts – Notes**

Edit the company contacts notes.

**Contacts – Remarks**

Edit the company contacts remarks

**Contacts – Profiles**

List and edit the company contacts profiles

**Contacts – User Flags**

Edits the company contacts user flags

**Contacts – Expansion**

List and edit the company contacts expansion records

**Contacts – Transactions**

List and edit the company contacts transactions records

**Contacts – Pictures**

List and edit the company contacts pictures

**Activities Sub Menu**

**Activities – New**

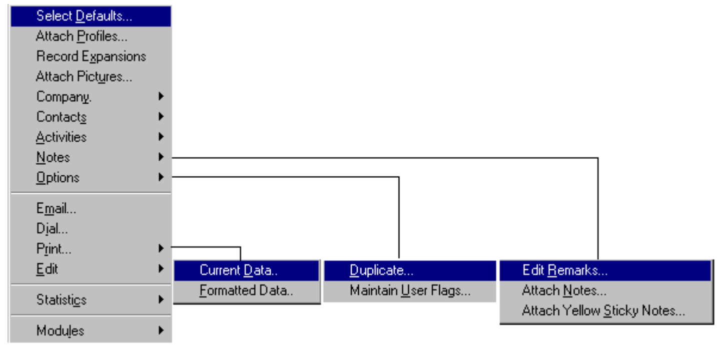
Create a new activity for the company

**Activities – Company Activities**

company activities.

**Activities – To Do List**

Edit to do list for the company




**Notes Sub Menu**

**Edit Remarks**

Remarks attached to each Quotation Record can be edited, added or deleted as described under the Module Remarks topic.

**Attach Notes**

Unlimited number of secured, date time stamped and sorted notes can be attached to each Quotation Record as described under the Module Notes topic.

**Attach Yellow Sticky Notes**

Yellow Sticky Notes that can be automatically displayed when finding the record can be attached to each quotation record as described under the Yellow Sticky Notes topic.

**Options Sub Menu**

**Duplicate**

A Quotation Record can be duplicated and another Quotation record created with the same or similar attributes as described generally under the Record Duplication topic.

**Maintain User Flags**

Up to 5 User Flags can be added to each Quotation record as generally described under the topic of User Flags Maintenance.

**Email**

This will activate the Email facilities. Refer to the Email topic for general information.

**Print Sub Menu**

The screen print or to print a pre-designated report can be processed here.

**Print Current Data**

Click on this to print the active data window. The Print Function details how to print and the available options.

**Print Formatted Data**

Click on this to print a pre-determined format (which should have been set up by the supervisor) using the current order record. The Print Function details how to print and the available options.

**Edit Sub Menu**

Selecting the appropriate option can perform the Undo, Copy, Cut, Clear and Paste functions at the field level.

**Statistics Sub Menu**

Statistics – Row Status and Row Count

Click on one of the above menu entires display the status of the record.

**Product References**

Product cross-references from the Vendor Products is accessed .

# Reports and Enquiries

Efficiency basic system is provided with various Quotation management reports.

User can design any number of quotation reports using the InfoMaker report writer. A blank report library named 'QUOTRPTS.PBL' is provided under the 'Reports' subdirectory of each client.

How to set up reports in InfoMaker is found under the InfoMaker Reports Set Up topic.

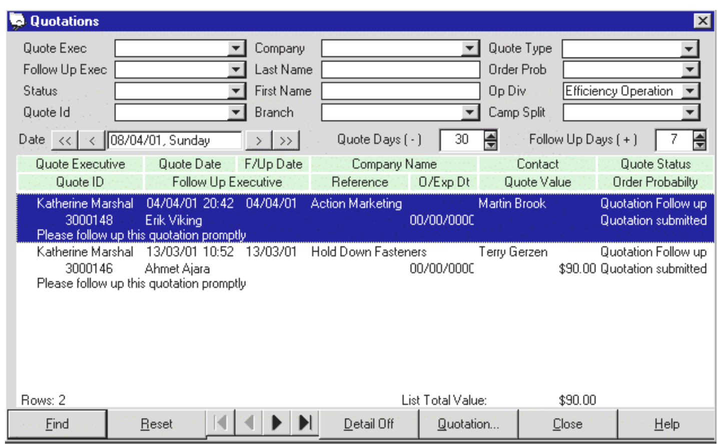
## Quotation Reports

| Report Group | Report Item |
|---|---|
| **Quotation List** | By Product |
| | Details |
| | By Executive |
| | Data Page |
| | By Status |
| | By Register |
| | By Follow Up Executive |
| | By Company |
| **Activity** | Quotation Activities |

## Quotation Enquiries

Quotations History Window allows the user to access the selected Quotations for one or for all companies. Once the Quotations were listed, the pop up menu will lead the user to access to all the related information and functions of Efficiency.

This window contains two data windows one is used for Query and the other is used for Listing of the results.




When the window is started the query data window is populated with the default values that were set in the User's preferences.

Once the selections were entered click on the Find button to display the new result set or click on the Reset button to initialise a new search

**Detail On**

Click on this button to display the details of each quotation.

**Quotation**

Click on this button to start the Quotation module for the selected line item.

**Pop Up Menu**

Right mouse click on a selected line item or pressing Alt+F1 will pop up the Pop Up Menu. Depending on the content of the site licence user can access all the functions and options of Efficiency. The following are typical.

**Module**

Access to the options and functions of the entire Quotation Module.

**Contact**

Access the details, functions and options of Employee (Company Contacts) of the selected quotation.

**Company**

Access the details, functions and options of Company and Site of the selected quotation.

**Activity**

Access the details and attachments of the selected activity as well as drilling down the specific activities of the Company, Contact or the module record. The TO Do lists for the Quotation is also accessed from this option.

**Email**

Start Email session the email the email address of the contact of the quotation.

**Filter, Sort**

Start Filter or Sort functions.

**Print**

Print current window, formatted data or save as functions can be selected.

**Dial**

The auto dial window is displayed by listing all the available phone numbers for the contact of the quotation

**Enquiry**

Depending on the content of the activity record Contact or Company sub menus are displayed from which all the standard enquiries are accessible.