

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

The following system options have been added:

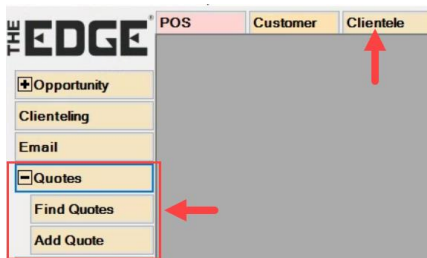
Quote Disclaimer The disclaimer printed at the bottom of every quote.

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.

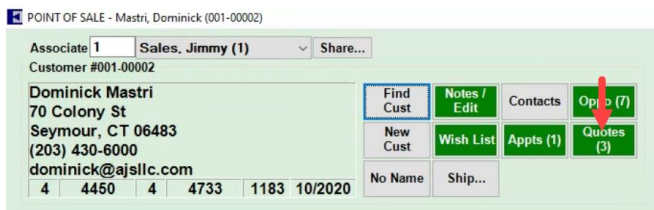
Quotes

Quotes can be accessed from the following places:

➤ Clientele Menu



➤ Point of Sale



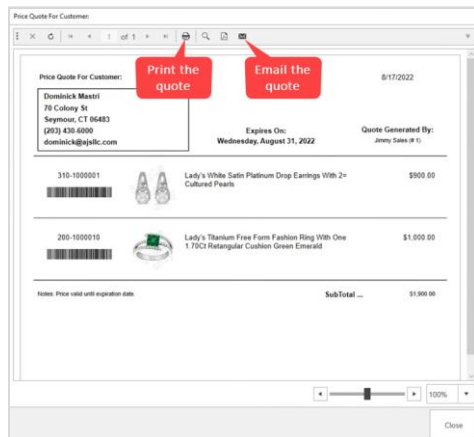
➤ Customer Record

➤ 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.

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.



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.

Customer	Date Entered	Number of Items	Total	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.



NOTE

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.