

EXACT QUOTES MAINTENANCE and SALESPERSON CALL ALLOCATION SYSTEM

The EXACT Quotes Maintenance System is a fully integrated system for the easy creation of proposals to **prospective** customers and the automatic maintenance of existing quotes to **existing** customers.

EXACT Quotes also allows the allocation of call cycles to sales representatives based on existing proposals or the need to follow up on quotes that have been given to customers. The cycles can also include cold calls and calls on customers for whom no proposals exist, as well as other activities such as sales meetings, etc.

Call sheets may be produced for the representatives. These may be automatically sorted by the customers' geographical areas and can detail precisely what the representative should be doing at all stages of his day, week or month.

It will be immediately obvious if a sales person has a territory that is becoming unmanageable where he/she has too many customers to service properly.

Thus EXACT Quotes is a complete sales management tool.

With this system a series of "Master Quotes" that pertain to certain products that are sold in specific markets or industries may be created.

For example a company may sell a range of chemical items, some of which are generally used in the automotive industry, others that are used in agriculture, others that are used in the hotel trade, etc. Different "Master Quotes" could be set up for those industries: i.e. one for automotive, one for agriculture, one for hotels, etc..

The operator (who could be a member of the sales team) may select a "Master Quote", clone it and allocate it to either a prospective or existing customer and then manipulate the quote in various ways to suit the specific needs of that customer or prospect.

Quote manipulation includes selecting or de-selecting products to be included in the quote, entering arbitrary prices, from which a "markup factor" (the factor by which a cost price will be multiplied to arrive at a selling price) may be "reverse calculated", selecting different standard prices upon which to base the quoted price or altering markup factors. Using this facility, the operator may enter a proposed selling price for an item and can see what the gross profit will be.

Quotes are valid for a certain number of days and then may be automatically updated by using the latest costs and the markup factor or the latest selling price from the base price list, thus allowing the quoted prices to reflect manufacturing cost updates.

A proposal may also be created for a **potential customer** or prospect that is not yet "on the books". If the prospect decides to start buying, because his information is already in the system, it is a simple matter to convert him to a customer and invoice him according to his specific quote because all of his details are already on the system.

When a quote is active, if the customer places an order, he/she is automatically charged the prices that are on his/her quote.

NOTE: If you are not into ploughing through manuals, you may proceed to page 13 where you will find a summary of the operational steps.

Operation:

GENERATING QUOTES

The operation of quotes begins by establishing one or more “Master Quotes”

To do this go to [Quotes][Day to day Operations][Maintain Quotes]

You will see a screen similar to the following:

Code	Name	Proposal	Activate on	Valid (dd)	Expires on	Addr	Rep (Q)

Code	Name	Calculated	GP %	Quoted	Q GP %	Last cost	Edited cost
		0.00	0.00			0.00	0.00

Figure 1

Click on the [New Quote] button.

You will see:

Confirm

Create quote for prospective customer - Continue ?

Yes No Cancel

Figure 2

Select [Yes]

Figure 3

Tick the **[Master quote]** box and give the Quote a name to identify it, as shown above where the quote is called Test Master. **Note this procedure is different from normal data input in EXACT or ALCHEMIST where you would normally need to first enter a code. Because Master Quotes can “float” and be cloned for specific customers – only upon cloning and issuing to a customer will the quote acquire a code.**

The screen above is where you would normally put the customer’s details, however, a “Master Quote” has no customer, so click on the **<Quotes>** tag to go to the screen where products may be entered:

Figure 4

The next thing to do is to decide upon what source you want for the quote.

If you select the down arrow next to **[Source]** you will see a drop-down something like this displaying

all of the available standard inventory price lists that are in the system:

/

/=x

A

B

C

D

E

F

KEYA

STAF


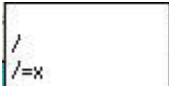
TEND

UPN


Notice there are two special cases, namely / and /=x. We will deal with those shortly (See **, below), but let us assume, for the moment that you wish to base this quote on the **B** Price list. Select the **B**.

Now the list will be able to calculate a proposed price because it knows what the mark-up factors are that appear for each stock item in the **B** price list.

**

Within the Source  selection you will see the  options.

If you select /, the source will reflect a markup factor that you will need to enter manually.

If you select /=x, the selection box to the right of the Source  box will open up in yellow, and you will be able to insert a markup factor into this box that will be applied to all of the selected items.

After any of the selections above have been made, you must select the **[Update Options]**

button and select ☐ Assign source values to rows in order to update the information.

Should the source value result in a recalculation of the calculated price that is lower than the existing calculated price a warning will appear as follows:



If "No" is selected, then the source will change, but the calculated price will not if it is lower than the existing price.

Next select the **number of days** that you wish the quote to be valid for and select the option that determines whether quoted prices will be allowed to **decrease or not**.

Now click the **[Shortcut Menu]** – the following appears:



As you can see you may select “Add items”, “Insert blank lines”, and “Cut selected lines” or “Paste lines”.

Select Add Items

You will see what looks like a conventional stock lookup screen, however, with this screen you will be able to select several lines at a time by holding the **[Ctrl]** button and clicking the items required. When you click **OK**, the items will be placed into the quote.

The screenshot shows a window titled "ITEM LOOKUP (IB)". At the top, there is a "Lookup By: CODE" label and a text input field. To the right of the input field are three buttons: "Refresh" (with a circular arrow icon), "OK", and "Prices". Below this is a table with the following columns: "Code", "Name", "BarCode", "Categ", "Group", and "Alt". The table contains several rows of data, including items like "LABOUR PER HOUR.", "LOCAL AREA CALL OUT FEE.", "COUNTRY AREA CALL OUT FEE.", "TRANSPORT COST P/KILOGRAM DURBAN", "FUEL CHARGE DURBAN", "DOCKING CHARGE DURBAN", "TRANSPORT COST P/KILOGRAM JHB", "FUEL CHARGE JHB", "DOCKING CHARGE JHB", "TRANSPORT COST P/KILOGRAM CAPE TOWN", "FUEL CHARGE CAPE TOWN", "DOCKING CHARGE CAPE TOWN", "PRICE PER KM.", and "HEAT RESISTANT BOILER HOSE / PER METRE.". At the bottom of the window, there are navigation buttons: "<|>|>|>".

Code	Name	BarCode	Categ	Group	Alt
-	-		RMAT	RMAT	
<A001	LABOUR PER HOUR.		TEC.A.	PROD	
<A002	LOCAL AREA CALL OUT FEE.		TEC.A.	PROD	
<A002.1	COUNTRY AREA CALL OUT FEE.		TEC.A.	PROD	
<A002.2	TRANSPORT COST P/KILOGRAM DURBAN		TEC.A.	PROD	
<A002.2.1	FUEL CHARGE DURBAN		TEC.A.	PROD	
<A002.2.2	DOCKING CHARGE DURBAN		TEC.A.	PROD	
<A002.3	TRANSPORT COST P/KILOGRAM JHB		TEC.A.	PROD	
<A002.3.1	FUEL CHARGE JHB		TEC.A.	PROD	
<A002.3.2	DOCKING CHARGE JHB		TEC.A.	PROD	
<A002.4	TRANSPORT COST P/KILOGRAM CAPE TOWN		TEC.A.	PROD	
<A002.4.1	FUEL CHARGE CAPE TOWN		TEC.A.	PROD	
<A002.4.2	DOCKING CHARGE CAPE TOWN		TEC.A.	PROD	
<A003	PRICE PER KM.		TEC.A.	PROD	
<A004	HEAT RESISTANT BOILER HOSE / PER METRE.		TEC.A.	PROD	



Figure 5

From the Shortcut menu you will also be able to select “Insert blank line/s”

This will bring up a screen as shown where you may select the number of lines to insert.

The screenshot shows a dialog box titled "Insert Lines". It has a text input field with the label "Enter number of lines (max. 9)". The number "3" is entered in the field. Below the input field are two buttons: "OK" and "Cancel".

Figure 6

Blank lines are always inserted above a selected line, so you may have to use the  or  buttons to move the lines to where you want them.

You may type information into blank lines. Use this facility to make headings, for example, for various groups of products. The blank lines are also used by the programme to determine the order in which the items will be printed. (See the **<Group>** column in the diagram below.)

[Update Options]

Once you have selected the products you wish to include in the quote, click on **[Update Options]**

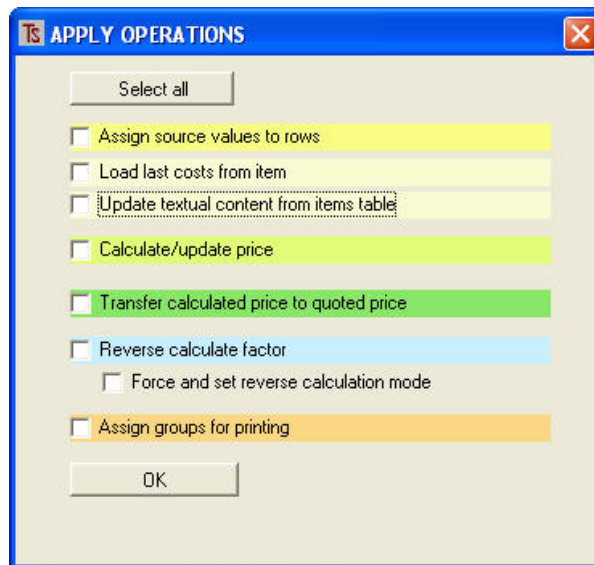


Figure 7

This has various tick boxes offering the following:

- This button will select all of the quotes on the previous screen for updating automatically without you needing to select them individually.
- ☐ Assign source values to rows This selection will assign the source values to the selected items, for example, you may wish to change the source value of some items from Price A to Price C
- ☐ Load last costs from item This will load the last cost from the stock record to the selected items.
- ☐ Calculate/update price This will calculate and update the recommended selling price of the selected items. This price is calculated from the last cost of the item multiplied by whatever markup factor is in the source list, or whatever markup has been selected for this item.
- ☐ Transfer calculated price to quoted price This will do what it says.
- ☐ Reverse calculate factor If a quoted price has been inserted manually, this will calculate the markup factor for future automatic maintenance by dividing the quoted price by the last cost.
- ☐ Force and set reverse calculation mode This option will assign the selected source value to the selected products and force a reverse calculation of the markup factor.
- ☐ Assign groups for printing This will run through the whole quote, determine where the blank lines are and, working backwards, assign groups to the items in order to determine the printing order.

If you select all of the update parameters, as suggested above, you will eventually end up with something like this:

NEW QUOTATION

Buttons: Delete, Edit proposal / notes, Process manual prices, Save, View

Quotes | Customer data

Existing quotes

Code	Name	Proposal	Activate on	Valid (dd)	Expires on	Status
▶	Test Master		2009/01/01	60	2009/02/28	

Dates | Discount

Date: 2009/01/09 | Activate on: 2009/01/01 | Valid for (dd): 60

Prices: ☐ No decrease ☒ Can decrease | Remove dup. items

Source: A | equal to: 0.00 | Up | Down | Select all | Deselect | Shortcut menu | Update options

Code	Name	Src	Last cost	Factor	Calculated	C.G.P. %	Quoted	Q.G.P. %	Man	Group	Unit
▶			0.00	0.00		-100.00					
	POLISH		0.00	0.00		-100.00					
A.1 PLEDGE 01	PLEDGE FURNITURE POLISH AEROSOL 6X300M A	A	67.20		106.85	37.11	106.85	37.11			P/PACK
A.1 PLEDGE 01.1	PLEDGE FURNITURE POLISH AEROSOL 300ML A	A	11.20		17.85	37.25	17.85	37.25			EACH
A.1 SOAP 001	HOTEL SOAP 288@20G	A	286.00		520.55	45.06	520.55	45.06			P/BOX
A.1 SOAP 002	GUEST SOAP 144@45GR	A	280.00		509.60	45.05	509.60	45.05			P/BOX
	APPLICATORS		0.00	0.00		-100.00					
			0.00	0.00		-100.00					
A.1 SPRAYB+T	SPRAY BOTTLE AND TRIGGER COMPLETE	A	11.52		25.60	54.99	25.60	54.99			EACH
A.1 SPRAYB+T.C	SPRAY BOTTLE AND TRIGGER COMPLETE E.C. A	A	8.02		17.50	54.15	17.50	54.15			EACH
A.MOP200CP	STANDARD MOP PLASTIC CONNECTOR COMPLEA	A	10.35		20.95	50.60	20.95	50.60			EACH

Extended description (left) and notes (right - private) | Additional data

Figure 8

Now you will be able to enter the fields under the **[Quoted]** column and alter the quoted prices, should you wish to do so.

Should you do this, you will see, upon tabbing out of the altered price field, the following message:

Confirm

Y - Reverse calculate factor
N - Manually maintained price

Yes No Cancel

Figure 9

If you select **[Yes]**, the markup factor will be reverse calculated by dividing the altered selling price by the cost.

If you select **[No]** the item will be flagged as a manually maintained price. This means that, when doing automatic updates, you will first be offered the opportunity to adjust these prices manually before the automatic update, which applies markup factors, will operate.

SAVE THE QUOTE

Once you are happy that the quote accurately reflects what you need in it, press the **[Save]** button.

You may also **[View]** the printout to see how it will look.

EDITING QUOTES

Once one or more Master Quotes have been established, you will see that these quotes may be edited by going to **[Quotes][Day to day Operations][Maintain Quotes]**

If you select ☒ Master quotes you will see a screen similar to that shown below in Figure 10

date), or it may be Expired (reached the cut-off date without being renewed).

A particular customer or prospect can have three types of quotes associated with it. There may be an expired quote, a current quote and an upcoming quote.

If a customer has all three types of quote, when the current quote expires, the expired quote automatically moves to the recycle bin, the current quote becomes the expired quote and upcoming quote becomes the new current quote.

When you have been running the system for some time you should have quotes of all three statuses in your system, so, in the Status area, you may select the type of quotes with which you would like to work - Active, Upcoming, Expired or All radio buttons.

ISSUING A QUOTE TO A CUSTOMER

At the set-up stage, you may only have Master Quotes in your system, and if you tick ☒ Master quotes you will see a screen similar to this:

Code	Name	Proposal	Activate on	Valid (dd)	Expires on	Addr	Rep
	MASTER QUOTE ACCESSORIES NOV 2008		2008-10-01	120	2009-01-31		02
	MASTER QUOTE AUTOMOTIVE 2008 BLANK		2008-11-01	90	2009-01-31		
	MASTER QUOTE AUTOMOTIVE NOV 2008		2008-11-01	90	2009-01-31		
	MASTER QUOTE BAKERIES, DELI'S & BUTCHERY		2008-07-01	120	2008-10-31		02
	MASTER QUOTE CONSTRUCTION BLANK		2008-11-01	90	2009-01-31		02
	MASTER QUOTE CONSTRUCTION NOV 2008		2008-11-01	90	2009-01-31		02

Code	Name	Calculated	GP %	Quoted	Q GP %	Last cost	Edited cost
	PRODUCT ACCESSORIES	0.00	-100.00			0.00	0.00
		0.00	-100.00			0.00	0.00
MS-44-100	1/2" COLL. ALUMINUM TUBES (10' x 1/2" x 1/2")	100.00	100.00	100.00	100.00	100.00	0.00
A-1-100-101	1/2" COLL. ALUMINUM TUBES (10' x 1/2" x 1/2")	100.00	100.00	100.00	100.00	100.00	0.00
A-1-100-102	1/2" COLL. ALUMINUM TUBES (10' x 1/2" x 1/2")	100.00	100.00	100.00	100.00	100.00	0.00
MS-44-101	1/2" COLL. ALUMINUM TUBES (10' x 1/2" x 1/2")	100.00	100.00	100.00	100.00	100.00	0.00
MS-44-102	1/2" COLL. ALUMINUM TUBES (10' x 1/2" x 1/2")	100.00	100.00	100.00	100.00	100.00	0.00
MS-44-103	1/2" COLL. ALUMINUM TUBES (10' x 1/2" x 1/2")	100.00	100.00	100.00	100.00	100.00	0.00
MS-44-104	1/2" COLL. ALUMINUM TUBES (10' x 1/2" x 1/2")	100.00	100.00	100.00	100.00	100.00	0.00
MS-44-105	1/2" COLL. ALUMINUM TUBES (10' x 1/2" x 1/2")	100.00	100.00	100.00	100.00	100.00	0.00
MS-44-106	1/2" COLL. ALUMINUM TUBES (10' x 1/2" x 1/2")	100.00	100.00	100.00	100.00	100.00	0.00
MS-44-107	1/2" COLL. ALUMINUM TUBES (10' x 1/2" x 1/2")	100.00	100.00	100.00	100.00	100.00	0.00
MS-44-108	1/2" COLL. ALUMINUM TUBES (10' x 1/2" x 1/2")	100.00	100.00	100.00	100.00	100.00	0.00
MS-44-109	1/2" COLL. ALUMINUM TUBES (10' x 1/2" x 1/2")	100.00	100.00	100.00	100.00	100.00	0.00
MS-44-110	1/2" COLL. ALUMINUM TUBES (10' x 1/2" x 1/2")	100.00	100.00	100.00	100.00	100.00	0.00

Figure 12

Firstly you will need to determine the code for a customer to whom you want to allocate a quote, because customers who already have quotes may not be issued with another one.

Customer Lookup to see which customers have quotes and at what status existing quotes are.

If you click on the **[Customers]** button at the top of the screen shown above, you will get a special customer lookup screen that looks similar to this:

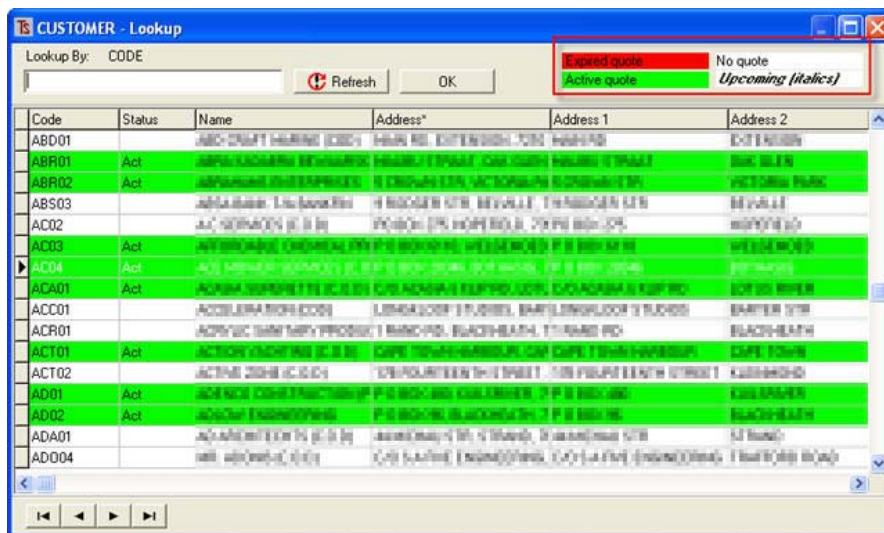


Figure 13

Note that this screen is only a look-up screen that is used to see which customers have quotes and at what status such quotes are, you cannot select from here.

Notice that at the top right (outlined in red) there is a key telling you the different statuses of the customer. A red band means the customer has an expired quote, a green band means there is an active quote for the customer, an uncoloured band means there is no quote, and an uncoloured band with a font in italics means there is an Upcoming quote for that customer.

If you click on the [Quotes] button as shown in Figure 14, you will see a lookup screen for the quotes. These will display according to the selection you have made under **Status (Active, Upcoming, Expired or All)**, or **Prospects** or **Master quotes**.

For example, if you select expired quotes by clicking the **(Expired)** radio button, you will see a screen similar to:

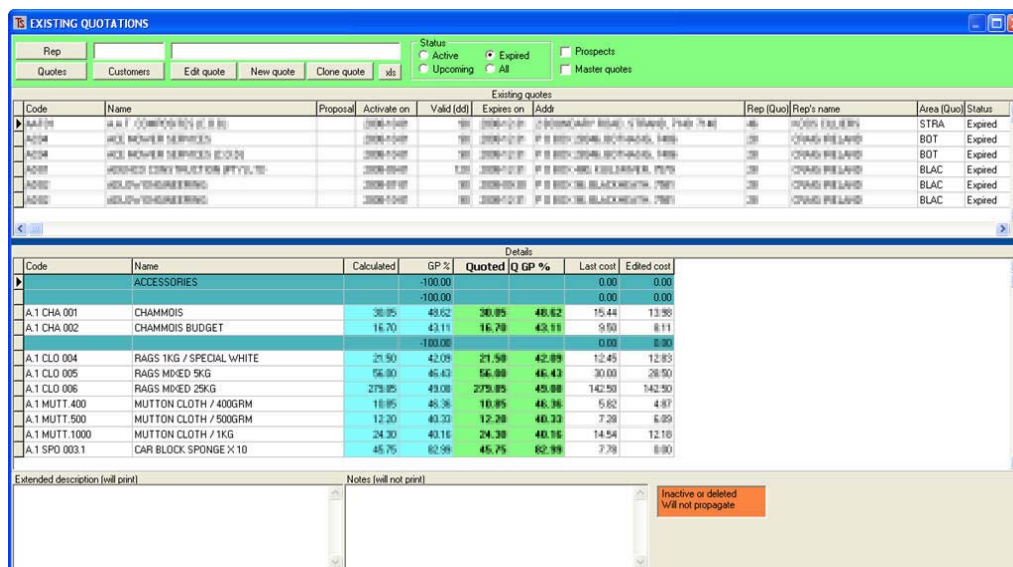


Figure 14

You may base a quote on any pre-existing quote. This is why it is easier to carefully build a series of Master Quotes and then base quotes that you issue to customers or prospects on one of those quotes.

Let us assume that you have made a series of Master Quotes. Click on the box next to [Master Quotes] and you will see a screen similar to this:

EXISTING QUOTATIONS

Rep: Status: ☒ Active ☐ Expired ☐ Upcoming ☐ All ☐ Prospect ☒ Master quotes

Quotes Customers Edit quote New quote Clone quote xls

Code	Name	Proposal	Activate on	Valid (dd)	Expires on	Addr	Reg
	WAS TOP QUOTE TO LAURENCE/ALICE-NEW 2009		2008-11-01	120	2009-02-28		02
	WAS TOP QUOTE TO HANNA- NEW 2009		2009-03-01	90	2009-05-31		
	WAS TOP QUOTE TO HANNA- NEW 2009 BLANK		2008-11-01	120	2009-02-28		02
	WAS TOP QUOTE TO HORTENSE & JET L-NEW 200		2008-11-01	120	2009-02-28		02
	WAS TOP QUOTE TO IS & JACOB HANNA- NEW 2009		2008-11-01	120	2009-02-28		02
	WAS TOP QUOTE TO JOE & JACOB HANNA- NEW 2009		2008-02-01	360	2009-01-31		01

Details

Code	Name	Calculated	GP %	Quoted	Q GP %	Last cost	Edited cost
	ACCESSORIES	0.00	-100.00			0.00	0.00
						0.00	0.00
A.1 AIR D1	ARMCHAIR/CRASH ARMCHAIR/CRASH	357.50	37.11	357.50	37.11	224.84	0.00
A.1 AIR D2	ARMCHAIR/CRASH ARMCHAIR/CRASH	57.45	45.99	57.45	45.99	31.03	0.00
A.1 GLADE 01	GLADE ARMCHAIR/CRASH	66.80	37.13	66.80	37.13	42.00	35.58
A.1 PLEDGE 01	PLEDGE FURNITURE/POUCH/ARMCHAIR/CRASH	106.85	37.11	106.85	37.11	67.20	52.80
A.1 RAID 01	RAID BAG/ PURPOSE PURPOSE/ARMCHAIR/CRASH	117.15	44.48	117.15	44.48	65.04	64.50
A.1 BRASSO 01	BRASSO BAG/	61.50	37.13	61.50	37.13	38.67	0.00
		0.00	-100.00			0.00	0.00
A.1 HAND S.D.1	A.1 HAND/COMPONENT/ARMCHAIR/CRASH	176.50	66.01	176.50	66.01	60.00	50.00
A.1 HAND S.D.2	A.1 HAND/COMPONENT/ARMCHAIR/CRASH	197.60	54.96	197.60	54.96	89.00	90.00
A.1 HAND S.D.3	A.1 HAND/COMPONENT/ARMCHAIR/CRASH	313.05	45.06	313.05	45.06	172.00	105.00

Extended description (will print) Notes (will not print)

Inactive or deleted Will not propagate

Figure 15

Select the quote you wish to use as the base quote to allocate to a customer or prospect and then click **[Clone quote]**

You will see the computer working and then a screen like this:

NEW QUOTATION

Delete Edit proposal / notes Process manual prices Save View

Quotes Customer data

Code	Name	Proposal	Activate on	Valid (dd)	Expires on	Status
			2009/01/01	90	2009/03/31	Active

Dates Discount

Date: 2009/01/13 Activate on: 2009/01/01 Valid for (dd): 90

Prices: ☒ No decrease ☐ Can decrease Remove dup. items

Source: equal to 0.00 Up Down Select all Deselect Shortcut menu Update options

Code	Name	Src	Last cost	Factor	Calculated	C GP %	Quoted	Q GP %	Man	Group	U
	ACCESSORIES		0.00	0.00	0.00	-100.00			60		
			0.00	0.00	0.00	-100.00			60		
A.1 AIR D1	ARMCHAIR/CRASH ARMCHAIR/CRASH	A	224.84		357.50	37.11	357.50	37.11	60		E
A.1 AIR D2	ARMCHAIR/CRASH ARMCHAIR/CRASH	A	31.03		57.45	45.99	57.45	45.99	60		E
A.1 GLADE 01	GLADE ARMCHAIR/CRASH	A	42.00		66.80	37.13	66.80	37.13	60		P
A.1 PLEDGE 01	PLEDGE FURNITURE/POUCH/ARMCHAIR/CRASH	A	67.20		106.85	37.11	106.85	37.11	60		P
A.1 RAID 01	RAID BAG/ PURPOSE PURPOSE/ARMCHAIR/CRASH	A	65.04		117.15	44.48	117.15	44.48	60		P
A.1 BRASSO 01	BRASSO BAG/	A	38.67		61.50	37.13	61.50	37.13	60		E
			0.00	0.00	0.00	-100.00			59		
A.1 HAND S.D.1	A.1 HAND/COMPONENT/ARMCHAIR/CRASH	A	60.00		176.50	66.01	176.50	66.01	59		E
A.1 HAND S.D.2	A.1 HAND/COMPONENT/ARMCHAIR/CRASH	A	89.00		197.60	54.96	197.60	54.96	59		E

Extended description (left) and notes (right - private) Additional data

Figure 16

Click on the **[Customer data]** tag at the top left.

You will see:

The screenshot shows a software window titled "NEW QUOTATION" with a blue header bar. Below the header is a menu bar with buttons: "Delete", "Edit proposal / notes", "Process manual prices", "Save", and "View". The main area is divided into two tabs: "Quotes" and "Customer data", with "Customer data" currently selected. The "Customer data" tab contains various input fields for customer information, including "Account code", "Name", "Postal address" (with three lines), "Delivery address" (with three lines), "Zip code", "Location code", "Contact 1", "Contact 2", "Phone", "Fax", "Cell", "e-mail", and "e-mail 2". There are also fields for "Rep", "Commission" (set to 0.00 %), "Area", and "Category". A "Master quote" checkbox is located near the top right. At the bottom, there are several buttons: "Unlink from existing a/c (floating quote)", "Link to existing customer record", "Create new customer record" (with a sub-field "use account code" and a "Create now ..." button), "Clear customer data", "Update customer a/c (push data)", "Update quote from customer a/c (pull data)", and "Create new delivery address". A "Print / e-mail" section with radio buttons for "E-mail if e-mail address is present" and "Always Print" is also visible.

Figure 17

If you wish to allocate the quote to a prospect who does not exist as a customer in your records, then give the quote a name (probably the name of the prospect) and save it.

If you wish to allocate the quote to an existing customer, remember that the quote cannot be allocated to a customer who already has an active quote.

Click on the **[Link to existing customer record]** button at the bottom.

You will see a lookup screen from which you may select an existing customer.

Note that you cannot select a customer who already has an existing active quote, if you do, you will see the following warning when you attempt to save the quote:



Figure 18

When you select the customer you will see:

NEW QUOTATION

Delete Edit proposal / notes Process manual prices Save View

Quotes: Customer data

Account code ABD01 Master quote

Name JED DRAFT MARINE (CIC)

Postal address Line 1 MAIN RD Line 2 EXTENSION Line 3 STANFORD

Delivery address Line 1 Line 2 Line 3

Zip code Zip code Location code

Contact 1 Rep 14

Contact 2 Commission 0.00 %

Phone 028 341 0024 Area STA Update zip codes

Fax 028 341 0024 Category MARINE

Cell 082 566 6332

e-mail N/A Print / e-mail

e-mail 2 E-mail if e-mail address is present Always Print

Unlink from existing a/c (floating quote) Clear customer data

Link to existing customer record Update customer a/c (push data) Create new delivery address

Create new customer record use account code Update quote from customer a/c (pull data)

Create now ...

Figure 19

You should now go back to the **[Quotes]** tag and carefully examine the whole quote to ensure that it contains all of the correct products and that the prices are correct and that the gross profits are in line.

Once you are happy with the quote, you may either **[View]** or **[Save]** the quote.

If the quote is viewed, you may select the option to e-mail the quote immediately to the customer or prospect.

SUMMARY

In summary, the above procedure has followed these steps:

1. **[Maintain Quotes]**
2. **[New]** and confirm
3. Tick **Master Quotes** box
4. Insert Name (NOT code)
5. Click **[Quotes]** tag
6. Select **Source**
7. Enter **Activate on** date
8. Enter **Valid for** number of days
9. Allow **Prices** to decrease or not
10. Select **[Shortcut Menu]** and, using **Ctrl** button on your keyboard select multiple products to add to the quote.

11. Select **[Update options]** and invoke all of the options
12. Alter any prices that you may want to change and **[Save]** the quote
13. Now you may allocate the **Master Quote** created above by going to **[Quotes][Day to day Operations][Maintain Quotes]** and ticking the **Master quotes** box.
14. Select the quote that you wish to allocate to a customer or prospect and click **[Clone quote]**
15. Alter the clone to suit the customer or prospect to whom you wish to allocate the quote.
16. Click the **[Customer data]** tag and:
 - a) If a prospect, add the name of the prospect in the **Name** field
 - or
 - b) If an existing customer without a quote, click on the **[Link to existing customer record]** button, select the relevant customer from the dropdown list.
17. Save the quote.

MAINTAINING QUOTES

Quotes may be maintained manually, but the main strength in this system relies upon being able to automatically maintain a large number of quotes simultaneously.

MANUAL MAINTENANCE

Method 1]

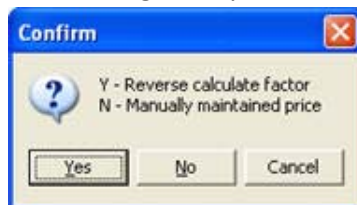
Go to [Quotes][Day to day Operations][Maintain Quotes]

Select the Rep whose quotes you want to maintain and other parameters, such as status to filter out the quotes you do not want to look at.

Select the customer or quote in the upper panel.

Click [Edit quote]

Make changes. As you exit a field, you will see:



If you select **Y**, the system will calculate the markup factor by dividing the quoted price by the last cost of the item. ***This is a useful facility for the automatic maintenance of quotes because as costs change, the system can take the latest cost and multiply it by the factor to arrive at a new quoted price. This way you can maintain the same gross profit as your initial quote and increase or decrease selling prices according to fluctuations of costs.***

If you select N you will need to maintain the price manually.

Remember to click on the [Save] button to save any changes.

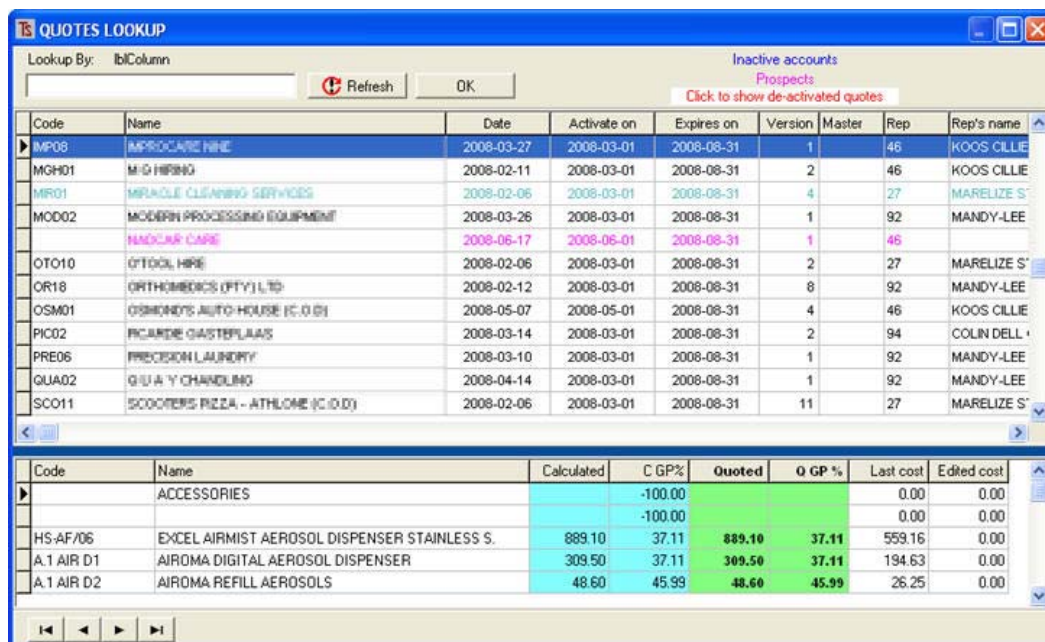
Method 2]

Go to [Quotes][Day to day Operations][Maintain Quotes]

Select the Rep whose quotes you want to maintain and other parameters, such as status to filter out the quotes you do not want to look at.

Click on the [Quotes] button

You will see a special lookup like this:



The image shows a software window titled "QUOTES LOOKUP". It has a search bar with "tblColumn" and buttons for "Refresh" and "OK". Below the search bar is a table of quotes with columns: Code, Name, Date, Activate on, Expires on, Version, Master, Rep, and Rep's name. The table lists various quotes like "IMPOCARE NINE", "MID HIRING", "MIRACLE CLEANING SERVICES", etc. Below this table is another table showing a detailed view of a quote, with columns: Code, Name, Calculated, C GP%, Quoted, Q GP%, Last cost, and Edited cost. The detailed view shows data for "ACCESSORIES", "EXCEL AIRMIST AEROSOL DISPENSER STAINLESS S.", "AIROMA DIGITAL AEROSOL DISPENSER", and "AIROMA REFILL AEROSOLS".

Code	Name	Date	Activate on	Expires on	Version	Master	Rep	Rep's name
IMPO8	IMPOCARE NINE	2008-03-27	2008-03-01	2008-08-31	1		46	KOOS CILLIE
MGM01	MID HIRING	2008-02-11	2008-03-01	2008-08-31	2		46	KOOS CILLIE
MRO1	MIRACLE CLEANING SERVICES	2008-02-06	2008-03-01	2008-08-31	4		27	MARELIZE S
MOD02	MODERN PROCESSING EQUIPMENT	2008-03-26	2008-03-01	2008-08-31	1		92	MANDY-LEE
	NUCLEAR CARE	2008-06-17	2008-06-01	2008-08-31	1		46	
OTO10	OTOOL HIRE	2008-02-06	2008-03-01	2008-08-31	2		27	MARELIZE S
OR18	ORTHOMEDICS (PTY) LTD	2008-02-12	2008-03-01	2008-08-31	8		92	MANDY-LEE
OSM01	OSMOND'S AUTO-HOUSE (P.O.B)	2008-05-07	2008-05-01	2008-08-31	4		46	KOOS CILLIE
PIC02	PICARDIE CATERING	2008-03-14	2008-03-01	2008-08-31	2		94	COLIN DELL
PRE06	PRECISION LAUNDRY	2008-03-10	2008-03-01	2008-08-31	1		92	MANDY-LEE
QUA02	QUA Y CHANDLING	2008-04-14	2008-03-01	2008-08-31	1		92	MANDY-LEE
SCO11	SCOOTERS PIZZA - ATHLONE (P.O.B)	2008-02-06	2008-03-01	2008-08-31	11		27	MARELIZE S

Code	Name	Calculated	C GP%	Quoted	Q GP%	Last cost	Edited cost
	ACCESSORIES		-100.00			0.00	0.00
			-100.00			0.00	0.00
HS-AF/06	EXCEL AIRMIST AEROSOL DISPENSER STAINLESS S.	889.10	37.11	889.10	37.11	559.16	0.00
A.1 AIR D1	AIROMA DIGITAL AEROSOL DISPENSER	309.50	37.11	309.50	37.11	194.63	0.00
A.1 AIR D2	AIROMA REFILL AEROSOLS	48.60	45.99	48.60	45.99	26.25	0.00

Note that the colour key is at the top right (blue for inactive, pink for prospects) and that you may filter further by clicking [Click to show de-activated quotes](#)

Also note that the lookup screen shows the quotes in the top half and the actual contents of the highlighted quote in the bottom half. You can also browse through the bottom portion of the screen.

Once you have found the quote you are looking for, when you select it, you will see a screen such as:

The screenshot shows the 'NEW QUOTATION' window. At the top, there are buttons for 'Delete', 'Edit proposal / notes', 'Process manual prices', 'Save', and 'View'. Below these are tabs for 'Quotes' and 'Customer data'. The 'Existing quotes' section shows a table with columns: Code, Name, Proposal, Activate on, Valid (dd), Expires on, and Status. The first row is highlighted with a pink background.

Below the quotes section, there are fields for 'Date', 'Activate on', and 'Valid for (dd)'. There are also radio buttons for 'Prices' (No decrease, Can decrease) and a 'Remove dup. items' button.

The main section is a table with columns: Code, Name, Src, Last cost, Factor, Calculated, C GP %, Quoted, Q GP %, Man, Group, and U. The table contains several rows of product data, including 'PRODUCT ACCESSORIES', 'SANITARY BIN WHITE - MANUAL', 'SANITARY BIN LINER 250', 'AROMA DIGITAL AEROSOL DISPENSER', 'AROMA REFILL AEROSOLS', '25LT DRUM TAP', '1LT HANDSOAP DISPENSER / DOLPHIN ECONO', '1LT HANDSOAP DISPENSER N.P. / WHITE', 'STAINLESS STEEL SOAP DISPENSER', and 'GLADE AEROSOL 500ML'.

At the bottom, there are fields for 'Unit', 'Packed In', 'Memo', and 'Storage Unit'. There is also a section for 'Extended description (left) and notes (right - private)' and 'Additional data'.

In the upper part of the screen there are details of the customer to whom the quote is attached, the Activation date, the number of days the quote is valid, the expiry date and the status.

In the lower portion are the products or services that are within the quote and the quoted prices. These prices may be changed.

Again, when you alter a price, you will see a pop-up like this:

The screenshot shows a 'Confirm' dialog box with a question mark icon. The text inside says: 'Y - Reverse calculate factor' and 'N - Manually maintained price'. There are three buttons at the bottom: 'Yes', 'No', and 'Cancel'.

See above.

AUTOMATIC MAINTENANCE

Go to [Quotes][Day to day Operations][Automatic re-quoting]

Rep: [] 'Select' operation applies to: All

Report on: ☒ Active ☐ Expired

Expiring between: 2009/02/01 and 2009/02/28

Buttons: Refresh, Select all, Deselect all, Process selected quotes, Activate immediately

Checkbox: ☐ Show even if "Active" (out of date range) or "upcoming" quote is present

Action: Create upcoming quote, deleting existing upcoming

Buttons: Price decrease, Allowed, Not allowed

Data in these columns can be modified

Print/e-mail quotes

Code	Upc	Name	Date	Activate on	Valid (dd)	Expires on	Contact 1	Contact 2	Rep (Quo)	Mode	e-mail
------	-----	------	------	-------------	------------	------------	-----------	-----------	-----------	------	--------

Code	Name	Calculated	C GP %	Quoted	Q GP %
------	------	------------	--------	--------	--------

1] Filter the range of quotes by [Rep], [Select operation applies to] (where a drop-down list will offer you:

All
e-mail quotes
Print quotes

[Report on], and [Show even if "Active"]

2] Select a date range that will include some expired or active quotes that are due to expire within the range selected.

3] If the quotes that you will be updating are for customers where you have an agreement that a previously-issued quote, even though valid for a certain period, may, in the event of drastic input price changes, be changed within the valid period, before the old quote has reached its expiry date, then click [Activate immediately], otherwise leave this check-box blank so that the new quotes will be activated upon expiry of the old quotes.

4] Click the [Refresh] button.

A screen similar to the following will be displayed:

13 AUTOMATIC QUOTATIONS

Rep: [] 'Select' operation applies to: e-mail quotes

Report on: ☒ Active ☐ Expired

Expiring between: 2009-01-01 and 2009-01-31 Refresh

Select all Deselect all Process selected quotes

☒ Show even if "Active" (out of date range) or "upcoming" quote is present

☐ Activate immediately ☐ Allow decrease

344 records Action: Create upcoming quote, deleting existing upcoming

Price decrease: Allowed Not allowed Data in these columns can be modified Print/e-mail quotes

Code	Upc	Name	Date	Activate on	Valid (dd)	Expires on	Version	Contact 1	Contact 2	Rep (Quo)	Mode	e-mail	Phone
PAL02		PALM CAFE (C.O.D.)	2008-10-29	2008-10-01	120	2009-01-31		1 HUBERT STANIN/A		92	P	N/A	021 551 5
PAL23		PALLET SUPPLIES (C.O.D.)	2008-10-02	2008-10-01	120	2009-01-31		2 NATASHA		99	E	natasha@palletsupply.co.za	021 907 2
PAN15		PAN (K)AUMA ME. KEN	2008-11-11	2008-11-01	90	2009-01-31		8 SIR/MADAM		21	P		027 43211
PAN20	Upc	PANTHER DISTRIBUTION	2008-10-20	2008-10-01	120	2009-01-31		8 DEDRE (B)	DIANNE (A)	27	E	jade@pantherint.co.za	021 919 2
PAT04		PATERMSTER HOTEL	2008-10-17	2008-10-01	120	2009-01-31		5 ELMARIE CARO	TELPHON P				022 752 2
PC17		P.C. GARAGE (ASHTON TROKIER)	2008-11-11	2008-11-01	90	2009-01-31		6 TO WHOM IT M		09	E	pcgarage@barvallei.co.za	023 615 1
PER02	Upc	PERFECT PERFECT SOLUTIONS	2008-10-07	2008-10-01	120	2009-01-31		5 ANNA (B)	JO ANNE (A)	27	E	richard@gsolutions.co.za	021 982 6
PER03		PERFECT TOUCH	2008-10-28	2008-11-01	90	2009-01-31		2 FRED	MIRANDA	28	P		021 904 0
PET02		PETRO SE HODKE	2008-10-17	2008-10-01	120	2009-01-31		13 PETRO	TELPHON P				022 714 3

Code	Name	Calculated	C GP %	Quoted	Q GP %
	ACCESSORIES		-100.00		
			-100.00		
HS-AF/06	EXCEL AIRMIST AEROSOL DISPENSER ST.	889.10	37.11	889.10	37.11
A.1 AIR D1	AIROMA DIGITAL AEROSOL DISPENSER	309.50	37.64	309.50	37.64
A.1 AIR D2	AIROMA REFILL AEROSOLS	50.90	45.97	50.90	45.97
HS-SI/27	D CELL ALKALINE TWIN PACK BATTERIES	33.25	37.11	33.25	37.11
HS-SI/29	C-CELL ALKALINE TWIN PACK BATTERIES	25.95	37.11	25.95	37.11
		0.00	-100.00		
HS-HD/04	STAINLESS STEEL AUTO HAND DRYER 2.1	1,618.75	45.95	1,618.75	45.95
HS-HD/01	AIRVED/AUTO HAND DRYER 1.0GW	1,420.85	37.11	1,420.85	37.11
		0.00	-100.00		
HS-US/05	EXCEL AUTO FLUSH UNIT	2,192.15	37.11	2,192.15	37.11
HS-US/08	EXCEL GUARDASAN SANITISER DISPENSE	1,003.40	37.11	1,003.40	37.11
HS-US/01	GUARDOSAN AUTO SANITISER DISPENSE	430.20	37.11	430.20	37.11
HS-UR/02	GUARDOSAN REFILL - CITRUS SINGLE	45.35	37.16	45.35	37.16

Normally you would **not** be working with **Active** quotes for an automatic maintenance, so tick the (**Expired quotes**) radio button under **Report on**, select a range of dates to work with (**Expiring between**) and [**Refresh**].

13 AUTOMATIC QUOTATIONS

Rep: 21 GAVIN PEPLER 'Select' operation applies to: All

Report on: ☐ Active ☒ Expired

Expiring between: 2009/01/01 and 2009/01/31 Refresh

Select all Deselect all Process selected quotes

☒ Activate immediately ☒ Allow decrease

29 records Action: Create active quote, activated immediately

Price decrease: Allowed Not allowed Data in these columns can be modified Print/e-mail quotes

Code	Upc	Name	Date	Activate on	Valid (dd)	Expires on	Contact 1	Contact 2	Rep (Quo)	Mode	e-mail
AME01		AMERLIQUE (PTY) LTD	2008-11-11	2008-11-01	90	2009-01-31	MARLUKE CRONJE		21	E	marluke.cronje
AME01		AMERLIQUE (PTY) LTD	2008-11-11	2008-11-01	90	2009-01-31	MARTIN		21	P	
AND16		ANDRAG - MALMEBURY (C.O.D.)	2008-11-11	2008-11-01	90	2009-01-31	MR LEONARD		21	P	
ATL02		ATLANTIC CAR WASH - HANDED OVER	2008-11-11	2008-11-01	90	2009-01-31	MERVYN	N/A	21	P	
AVE01		AVENUE HARDWARE	2008-11-11	2008-11-01	90	2009-01-31	SIR/MADAM		21	P	
BUL06		BULSHOEKHAM ONTSPANNINGSOORD	2008-11-11	2008-11-01	90	2009-01-31	J M COMPION	HILDA	21	P	
CAP04		CAPE PROVINCE HARDWARE	2008-11-11	2008-11-01	90	2009-01-31	SIR/MADAM		21	P	
CEA02		C.E.A. MOTORS	2008-11-11	2008-11-01	90	2009-01-31	JOHAN PRINS		21	P	
CRC25		C.R. CAR WASH	2008-11-11	2008-11-01	90	2009-01-31	ANNETTE		21	P	

Code	Name	Calculated	C GP %	Quoted	Q GP %
	PRODUCT ACCESSORIES	0.00	-100.00		-100.00
		0.00	-100.00		-100.00
A.1 AIR D1	AIROMA DIGITAL AEROSOL DISPENSER	357.50	37.11	357.50	37.11
A.1 AIR D2	AIROMA REFILL AEROSOLS	57.45	45.99	57.45	45.99
A.1 BOTTLE B.	BOTTLE BRUSH METAL	8.00	40.25	8.00	40.25
A.1 CHA 001	CHAMMOS	30.05	46.09	30.05	46.09
A.1 CHA 002	CHAMMOS BUDGET	21.75	45.06	21.75	45.06
A.1 DRUM T.	25LT DRUM TAP	48.70	45.07	48.70	45.07
A.1 GLADE 01	GLADE AEROSOL (TUBOML)	66.80	37.13	66.80	37.13
A.1 HAND S.D.1	1LT HANDSOAP DISPENSER / DOUPHIN E	176.50	66.01	176.50	66.01
A.1 HAND S.D.2	1LT HANDSOAP DISPENSER M.P. / WHITE	197.60	54.96	197.60	54.96
A.1 HAND S.D.3	STAINLESS STEEL SOAP DISPENSER	313.05	45.06	313.05	45.06
A.1 PLEDGE 01	PLEDGE FURNITURE POLISH AEROSOL S	106.85	37.11	106.85	37.11
A.1 RAID 01	RAIDUAL PURPOSE/SUPERFAST AEROS	117.15	44.48	117.15	44.48
A.1 SAN B1	SANITARY BIK WHITE - MANUAL	248.85	40.12	248.85	40.12


You will see that some of the options in the upper grey portion of the screen have disappeared and also that the quotes, selectable in the upper portion of the window, are colour coded so that you can see whether a price decrease is allowed or not (red for not allowed, green for allowed). You will also see that, if you select [**Show even if "Active....."**], these quotes will appear in *italics*.

5] Decide whether or not to allow a decrease in the prices, even though the prices themselves have prices that are marked as being non-reducible.

6] Click **[Select All]** or individually select quotes by clicking them with the **Ctrl** button on your keyboard held down. (Note that if the 'Select' operation has been selected as, for example **e-mail quotes**, then, upon pressing **[select all]**, all of the quotes with e-mail addresses will be selected (highlighted in blue).

7] Click on **[Process Selected Quotes]**

If there are any products within the quotes that have been altered manually and where no reverse-calculation of the mark-up factor has taken place, these products will still need to be quoted manually, so the system will present these to the operator in a screen similar to that shown below. All of the relevant information is on the screen, and the operator can decide on a new price to charge the customer.



Cust	Name	Item	Name	Last cost	Factor	Curr Quoted	Curr GP%	New Quoted	New GP%	UNFLAG
ST11	STEINER HYGIENE-GEORGE	DEOC100.1	DUX DEO BLOCKS CHERRY 25X100GRM	45.70		85.00	46.23	85.00	46.23	0
ST11	STEINER HYGIENE-GEORGE	DEOL100.1	DUX DEO BLOCKS LAVENDER 25X100GRM	47.53		85.00	44.09	85.00	44.09	0
ST11	STEINER HYGIENE-GEORGE	DEOP100.1	DUX DEO BLOCKS PINE 25X100GRM	44.66		85.00	47.45	85.00	47.45	0
ST11	STEINER HYGIENE-GEORGE	DEOT100.1	DUX DEO BLOCKS TUTTI FRUTTI 25X100GRM	44.53		85.00	47.62	85.00	47.62	0
ST11	STEINER HYGIENE-GEORGE	URI05 C.	URINAL TABS CHERRY	64.63		110.00	41.24	110.00	41.24	0
ST11	STEINER HYGIENE-GEORGE	URI05 L.	URINAL TABS LAVENDER	67.18		110.00	38.93	110.00	38.93	0
ST11	STEINER HYGIENE-GEORGE	URI05 P.	URINAL TABS PINE	63.20		110.00	42.55	110.00	42.55	0
ST11	STEINER HYGIENE-GEORGE	URI05 T.	URINAL TABS TUTTI FRUTTI	62.97		110.00	42.75	110.00	42.75	0
ST11	STEINER HYGIENE-GEORGE	CREM4X5	CREMPHEN 4X5LT	102.22	2.00	199.98	48.88	199.98	48.88	0
ST11	STEINER HYGIENE-GEORGE	AUTWB05	BLUE WASH WAX	13.42	2.25	27.58	51.33	27.58	51.33	0
ST11	STEINER HYGIENE-GEORGE	AUTWB25	BLUE WASH WAX	51.52	2.00	94.95	45.51	94.95	45.51	0

The quoted prices are inserted in the white column, under **New Quoted**.

These quotes may be checked for errors and then printed or e-mailed by pressing the **[Print/e-mail quotes]** : they will then become the new **Upcoming quotes** that will replace the existing **Active** quote when it expires.

When that happens the old **active quote** will be put into the **recycle bin**.

Periodically the **recycle bin** should be emptied into the **archive**.

The emptying facility is offered to you when you first enter the quotes module and upon exiting, however please note that if you have a lot of unarchived quotes on your system, the operation can take a long time – sometimes in excess of two hours, depending on the speed of your computers.

PRINTING QUOTES

From the main Quotes Menu click **[Print quotes]**

PRINT QUOTATIONS

Rep: 21 View/Print document ☐ Export

Show Quotes:
☐ Active
☒ Upcoming
☐ Expired ☒ Print proposal
☒ Print quote
☒ Preview

Code	Name	Proposal	Date	Activate on	Expires on	Valid (dd)	Version	Contact 1
CHE06	CHEZ MARI RES TAURANT & DELI		2009/02/04	2009/03/01	2009/06/30	120	6	ALEC MARAIS
CIS01	CISKA MOUNTAIN (CDD)		2009/02/04	2009/03/01	2009/06/30	120	4	ZELDA STANLEY
MAS31	MASKAM PRIMEIRE SKOL		2009/02/04	2009/03/01	2009/06/30	120	13	SIR/MADAM

Code	Name	Calculated	Quoted	Unit	Memo	Pckd in	SU
	PRODUCT ACCESSORIES	0.00					
		0.00					
A.1 SAN B1	SANITARY BIN WHITE - MANUAL	414.85	414.85	EACH			
A.1 SAN B2	SANITARY BIN LINER X250	234.95	234.95	P/PACK			
A.1 AIR D1	AIROMA DIGITAL AEROSOL DISPENSER	357.50	357.50	EACH			
A.1 AIR D2	AIROMA REFILL AEROSOLS	57.45	57.45	EACH			
A.1 DRUM T.	25LT DRUM TAP	48.70	48.70	EACH			
A.1 HAND S.D.1	1LT HANDSOAP DISPENSER /DOLPHIN E	176.50	176.50	EACH			
A.1 HAND S.D.2	1LT HANDSOAP DISPENSER H.P. /WHITE	233.10	233.10	EACH			
A.1 HAND S.D.3	STAINLESS STEEL SOAP DISPENSER	313.05	313.05	EACH			
A.1 GLADE 01	GLADE AEROSOL X SUPER PACK	66.80	66.80	P/PACK			
A.1 PLEDGE 01	PLEDGE FURNITURE POLISH AEROSOL B	106.85	106.85	P/PACK			
A.1 RAID 01	RAID DUAL PURPOSE/SUPERFAST 68000	117.15	117.15	P/PACK			
A.1 SOAP 001	HOTEL SOAP 200030G	520.55	520.55	P/BOX			
A.1 SOAP 002	GUEST SOAP 1440450G	509.60	509.60	P/BOX			

Quotation (print) | Proposal (print) | Quotation (e-mail) | Proposal (email)

<c:\technisoft\fastreport2\customers\frquotes\frquotations\>

Note that you will need to select the correct templates for the documents by clicking on the various tags at the bottom of the page and choosing the right template. These templates are editable in the usual way with the FastReports editor.

Select a quote to print in the upper half of the screen: the products and prices will be visible in the lower section.

Select (top right) whether you are printing a **proposal** or a **quote** and whether you wish to **preview** it or not, and click **[View/Print document]**.

(You may also export to a database, text, spreadsheet or an Excel file if you wish)

Upon clicking the button you will generate a document, depending upon your template set-up, something like the following:



QUOTATION
2009/02/04

66, BARRY STREET
ROBERTSON 6705
SOUTH AFRICA

Ph: (023) 626 6622 Fax: 085 (023) 6266622

HONEST JOE'S CAR WASH
22 FIRST AVE
PAROW
7500

Valid from 2009/03/01
Valid for 120 days
Expires on 2009/06/30
Review on 2009/05/31

Dear JOE,

Thank you for giving us the opportunity to submit this quotation for the supply of chemicals.
The quote is as follows:

Item code	Description	Unit	Pack size	Unit price
	CHEMICAL PRODUCTS			
	LAUNDRY PRODUCTS			
CLP05	CURRY FLAVOUR LAUNDRY POWDER <i>General Purpose Curry Detergent With Built In Stainers.</i>	5 K	5 K	90.80
CLP25	CURRY FLAVOUR LAUNDRY POWDER <i>General Purpose Curry Detergent With Built In Stainers.</i>	25 K	25 K	273.65

Item code	Description	Unit	Pack size	Unit price
	FABRIC SOFTNERS			
ULTE05	ULTRAFLOPPY WET DOG	5 L	5 L	48.35
ULTE25	ULTRAFLOPPY WET DOG	25 L	25 L	219.60
ULTEA05	ULTRAFLOPPY VROT TOMATO	5 L	5 L	48.45
ULTEA25	ULTRASOFT VROT TOMATO	25 L	25 L	220.10

If you have any questions do not hesitate to contact us.

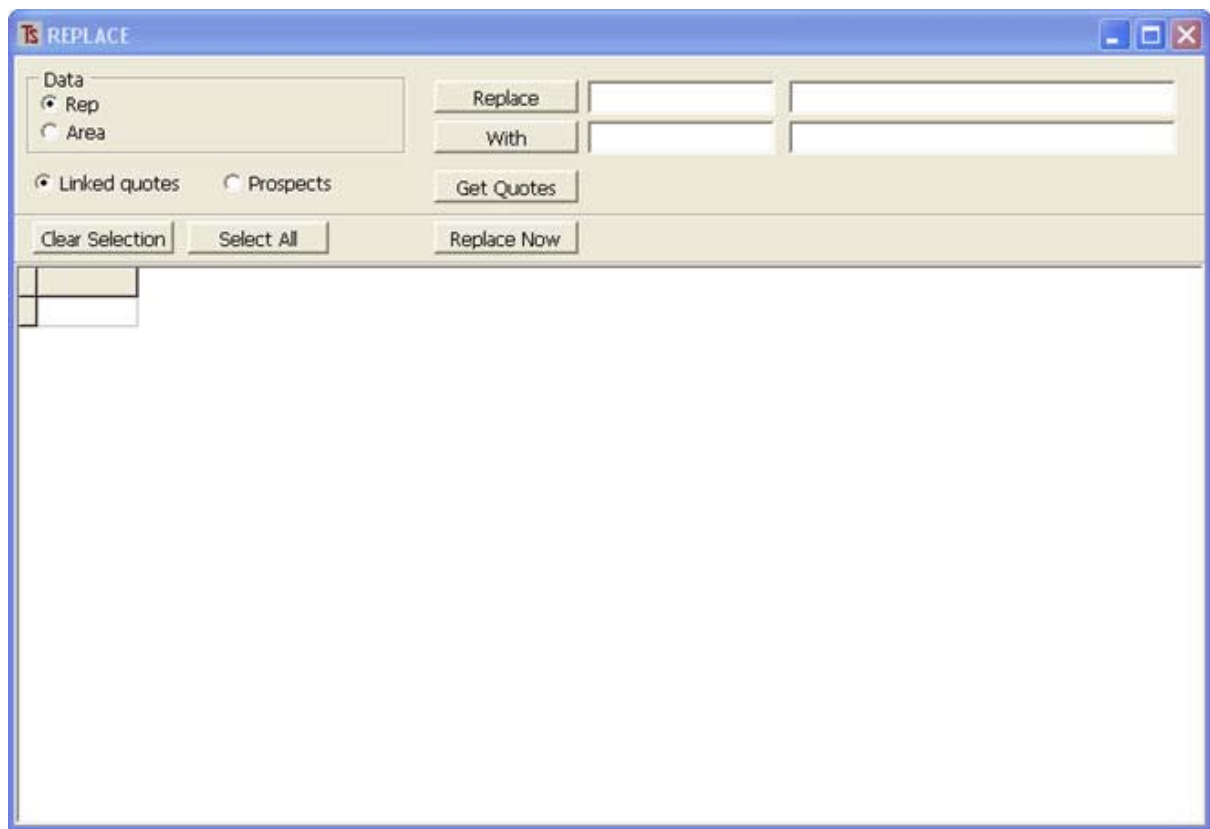
Regards
BAHR FLYE
072898989
SALES MANAGER

This may then be e-mailed directly to the customer or prospect.

THE REPLACE FUNCTION

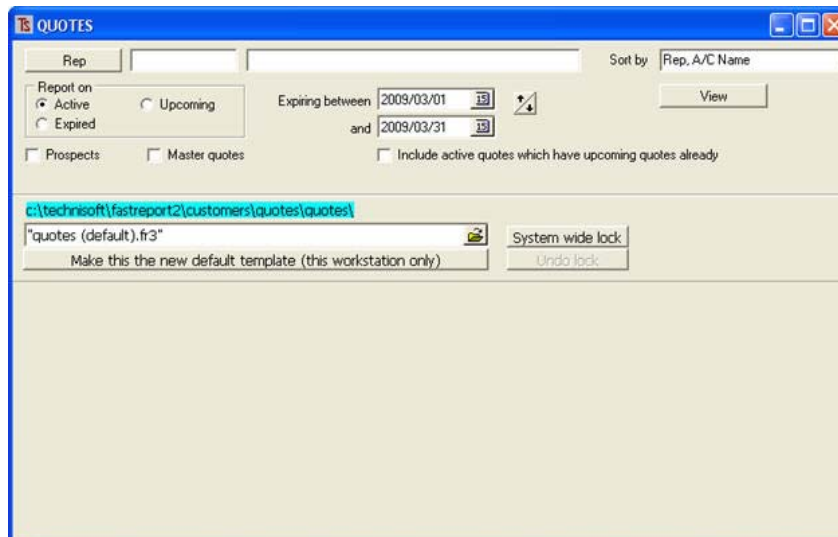
This is used to replace the quotes of one representative with those of another and is useful if there are staff or area changes.

Clicking **[Replace]** shows:



You will see you may replace a rep or an area by selecting the radio button in the **Data** panel. Select the Rep or area to be replaced. Select the **[With]** rep or area and chose whether you want to replace **Linked quotes** or **Prospects**. Press **[Get Quotes]** and then select the quotes you wish to transfer from the first rep to the second. (You may click the **[Select All]**) When you click **[Replace Now]** the selected quotes will be moved.

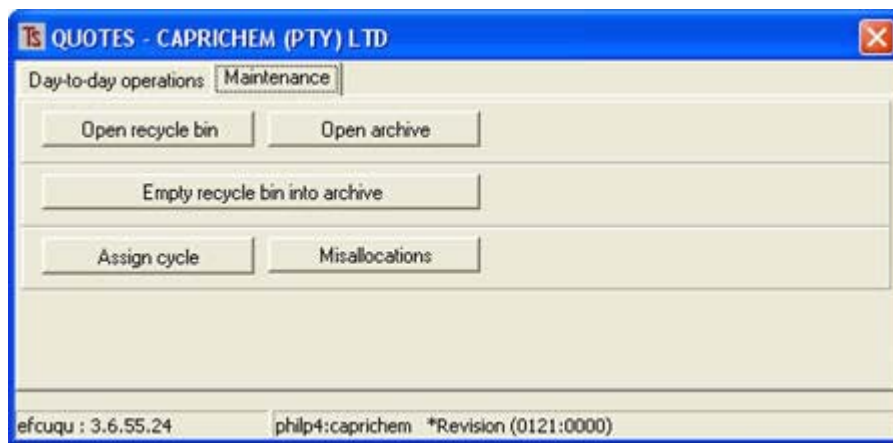
REPORTS



If the above screen is not self-explanatory, then you have not been paying attention – start from the beginning and wake up!

MAINTENANCE

From the main Quotes menu select the **[Maintenance]** tag.



Here you may:

[Open the recycle bin] in case you need to resuscitate a previously archived quote.

[Open the archive] in case you need to resuscitate an archived quote and get it back into the recycle bin.

[Empty the recycle bin into the archive]

MISALLOCATIONS

The customers each have a specific salesperson allocated to them, however, under certain circumstances, a salesperson other than the customer's default allocated salesperson may issue a quote to that customer.

This may result in commission being paid to a salesperson who has no right to the commission.

When territories or areas are changed, this may also lead to a misallocation of salespersons.

The **[Misallocation]** button produces a screen like this:

QUOTE_CODE	ACC_CODE	QUOTE_REP	ACC_REP	ACC_NAME
SND31	SND31	21	TELEPHONE	SHOOPERS DEN LAUNDRY
SOM40	SOM40	21	TELEPHONE	SHIRAZHULTE THERM
TOP02	TOP02	21	TELEPHONE	TIP BELTA PERSONAL METERS (JONGE BPR)
WE10	WE10	21	TELEPHONE	WESKUS OUE DEPOT
WES19	WES19	21	TELEPHONE	WESKUS NESTLE
DCM04	DCM04	46	04	D CHICAT MARKET - MITCHELS PLAIN
INA02	INA02	93	04	INNS CAR WASH REMOVED (LOBI)
AIR12	AIR12	94	90	AIR GRABE & CLUTCH SERVICES & WORKSHOP - BANOBYE
AIR12	AIR12	94	90	AIR GRABE & CLUTCH SERVICES & WORKSHOP - BANOBYE
AN07	AN07	94	90	ANDERSON TRANSPORT
AN07	AN07	94	90	ANDERSON TRANSPORT
AN09	AN09	94	90	ANDERSON TRANSPORT
AN09	AN09	94	90	ANDERSON TRANSPORT
AND06	AND06	94	90	ANDERSON TRANSPORT (PTY) LTD
AND06	AND06	94	90	ANDERSON TRANSPORT (PTY) LTD

It can be seen that the **Quote_Rep** (the rep who produce the quote or under whose code the quote was issued) is different from the **Acc_Rep** (the rep that is the default rep in the customer's record)

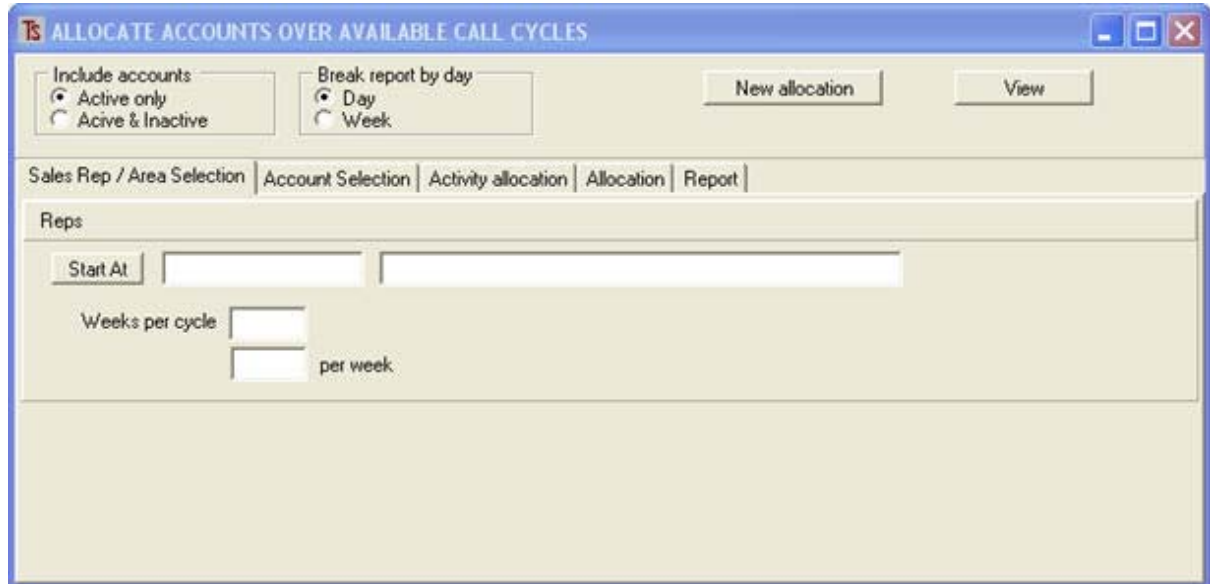
It must be decided which salesperson is due to commission on sales to the particular customer. This is dictated by the **Customer's** default rep (**Acc_rep**), which should be changed if necessary.

SALES REPRESENTATIVES WORK SCHEDULES

The Exact Quote Maintenance Facility has a powerful sales management tool whereby the sales representatives can be issued with work-sheets detailing what they should be doing during their working day, week or month.

The correct application of this system results in an extremely powerful sales management tool that can allow for the rational deployment of the sales force, highlight areas of competency (or incompetency!), expose reps who have too much or too little territory and allow the manager full control over the sales force.

To implement this system go to **[Quotes][Maintenance]** tag and click on the **[Assign cycle]** button.



The screenshot shows a software window titled "ALLOCATE ACCOUNTS OVER AVAILABLE CALL CYCLES". It features a top toolbar with "Include accounts" (radio buttons for "Active only" and "Active & Inactive"), "Break report by day" (radio buttons for "Day" and "Week"), and buttons for "New allocation" and "View". Below the toolbar is a tabbed interface with tabs for "Sales Rep / Area Selection", "Account Selection", "Activity allocation", "Allocation", and "Report". The "Sales Rep / Area Selection" tab is active, showing a "Reps" section with a "Start At" button, two empty text input fields, a "Weeks per cycle" input field containing the number 4, and another input field containing the number 60 followed by the text "per week".

Select whether to include **Active only** or both **Active & Inactive** and whether to break the report by **Day** or **Week** and then select a **Rep** to work on.



This is a close-up of the "Reps" section from the previous screenshot. It shows the "Start At" button, two empty text input fields, the "Weeks per cycle" input field with the value 4, and the input field with the value 60 and the text "per week".

You will see that the number of **Weeks per Cycle** and the maximum number of calls **per week** are pulled in from the Rep's record (See **[Customer][Maintenance][Reps]**)

Account Selection (tag)

ALLOCATE ACCOUNTS OVER AVAILABLE CALL CYCLES

Include accounts: ☒ Active only ☐ Active & Inactive

Break report by day: ☒ Day ☐ Week

New allocation View

Sales Rep / Area Selection Account Selection Activity allocation Allocation Report

Exclude Category: (NIL), AUTO, BAKERY, BUILD, BUTCHERY, CATERING, CLOSED, CONTCLEA, CONTRACT, D, DAIRY, DRY FOOD, ENGI

This screen allows you to exclude a certain category of customer by selecting from a drop-down list, as shown above.

Activity Allocation (tag)

This screen is where you decide what activities you wish the rep to perform on the mornings (**AM**) and afternoons (**PM**) of each day.

The activities are selected from a drop-down list, shown below outlined in red.

ALLOCATE ACCOUNTS OVER AVAILABLE CALL CYCLES

Include accounts: ☒ Active only ☐ Active & Inactive

Break report by day: ☒ Day ☐ Week

New allocation View

Sales Rep / Area Selection Account Selection Activity allocation Allocation Report

Day	AM/PM	Activity	Count	Descr
Mon	AM	V		Visit customers
Mon	PM	V		Visit customers
Tue	AM	V		Visit customers
Tue	PM	V		Visit customers
Wed	AM	P		Prospects
Wed	PM	P		Prospects
Thu	AM	V		Visit customers
Thu	PM	V		Visit customers
Fri	AM	F		Follow-up
Fri	PM	V - Visit customers		Meeting (in-house)
Sat	AM	P - Prospects		
Sat	PM	F - Follow-up		
Sun	AM	C - Cold calls		
Sun	PM	M - Meeting (in-house)		
Sun	PM	U - Unallocated		
Sun	PM	V - Visit customers		

Activity dropdown: V - Visit customers, P - Prospects, F - Follow-up, C - Cold calls, M - Meeting (in-house), U - Unallocated, V - Visit customers

Once the reps activities have been allocated, proceed to the next tag:

Allocation (tag)

If you then click on the **[Read Current Allocation]** button you will see the current allocation for the selected salesperson.

In the example below, you will see that the calls have not been allocated for the rep according to the number of weeks per cycle and the number of calls. There is only a week 0 and 446 calls allocated to this week.

If you now click on the **[New allocation]** button, this happens:

You will see that the available time slots have been filled with calls to be made. These have been divided into the four week cycle with about 38 calls per day.

The calls are also arranged by the **geographical location** of the customers so that the rep does not waste time travelling from one area to another.

The report may then be printed by clicking on the **[View]** button:

[illegible]

And so on for each day of the four week cycle.

All that needs to be done now is to **[Store new allocation]** and print the report to give to the rep.

NOTES

When using the **Exact / Alchemist Quotes** it is important to establish a basic policy within your company to control how you cost your products and how you price them to your customers. By this we mean that you should decide, before implementing a computerised system, the basis of costings (what sources to use for costing), as well as the basis for pricing your products to the end user.

For example, will you have a standard range of price lists that have a standard mark-up factor that is used to generate future selling prices from the latest input costs, will you be having ad-hoc prices that are specific to a customer, and then allow the computer to “reverse calculate” the markup factor and use this in the future to maintain gross profit, or will you have fewer price lists but allow special discounts to special customers?

Exact can cater for almost any scenario, but there are certain limitations, and, because the **Quotes** module is designed to automatically maintain the selling prices to customers, the fewer aberrations and exceptions to the basic policy, the better.

Also, before starting up with **quotes** make sure that the customer and salesperson data is valid and complete so that the system will work properly.

For example, because quotes may be produced in batches comprising a) Printed Quotes or b) e-mailed quotes, it is important to insert valid information in the customer's e-mail address field. If the system detects an input in this field that is not a valid e-mail address, it will not "know" how to deal with sorting.