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:

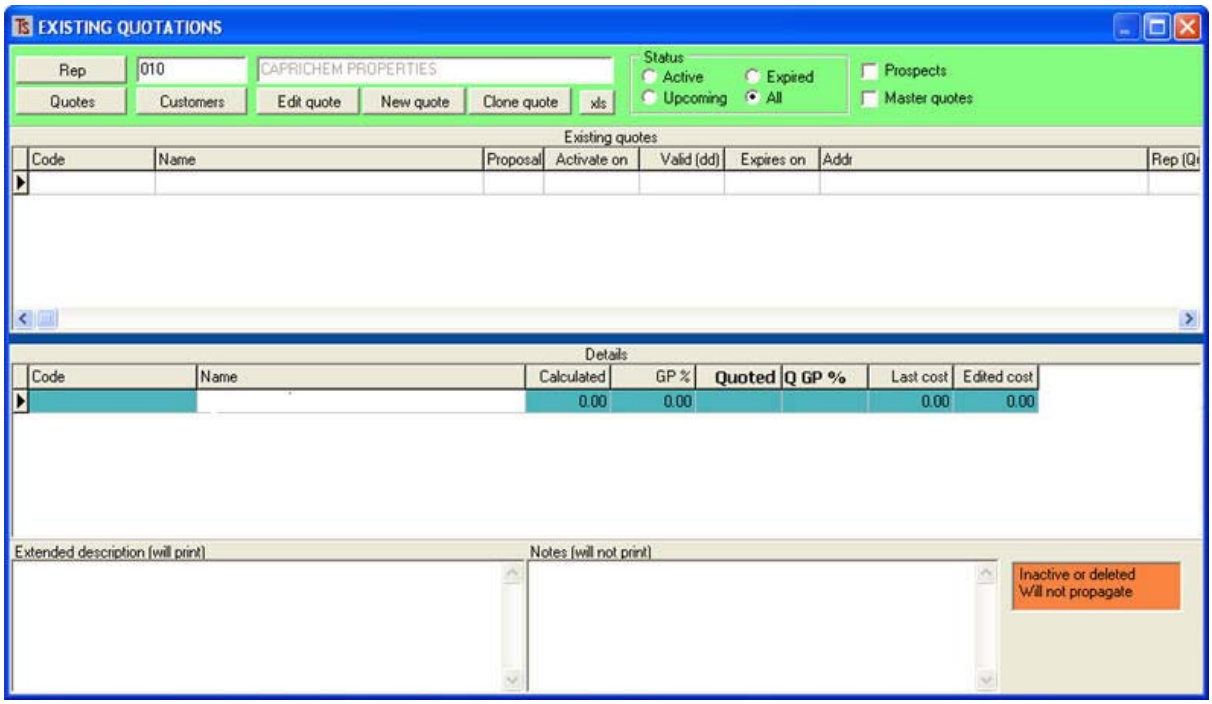


Figure 1

Click on the **[New Quote]** button.

You will see:

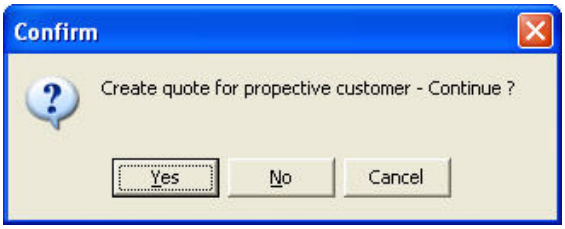


Figure 2

Select **[Yes]**

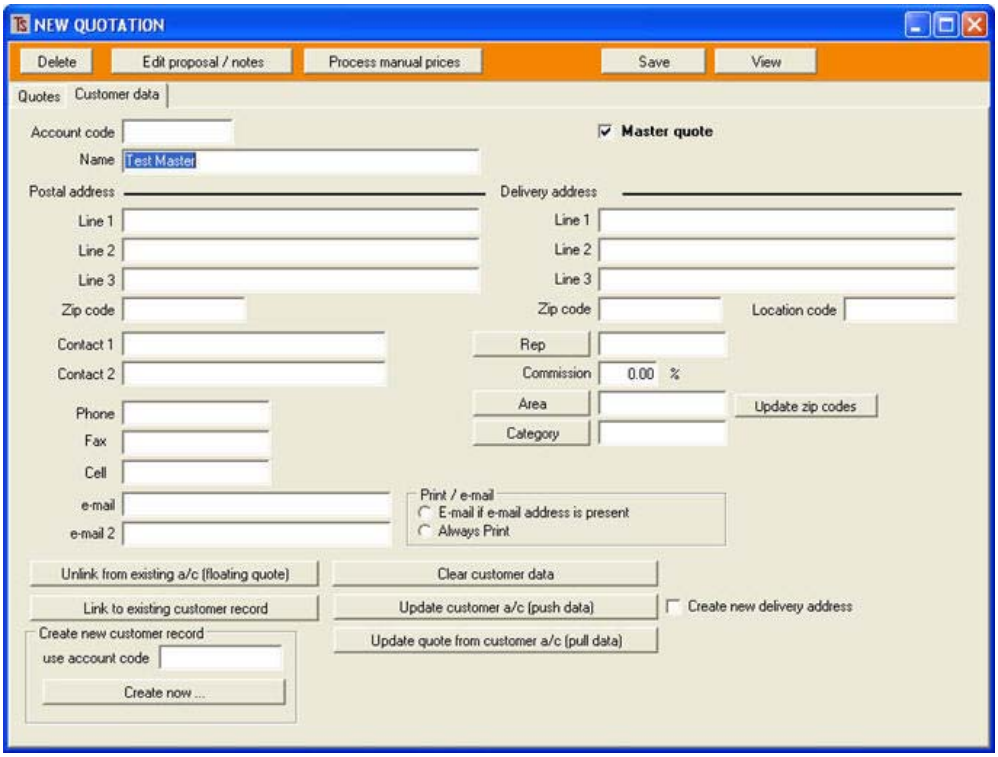


Figure 3

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:

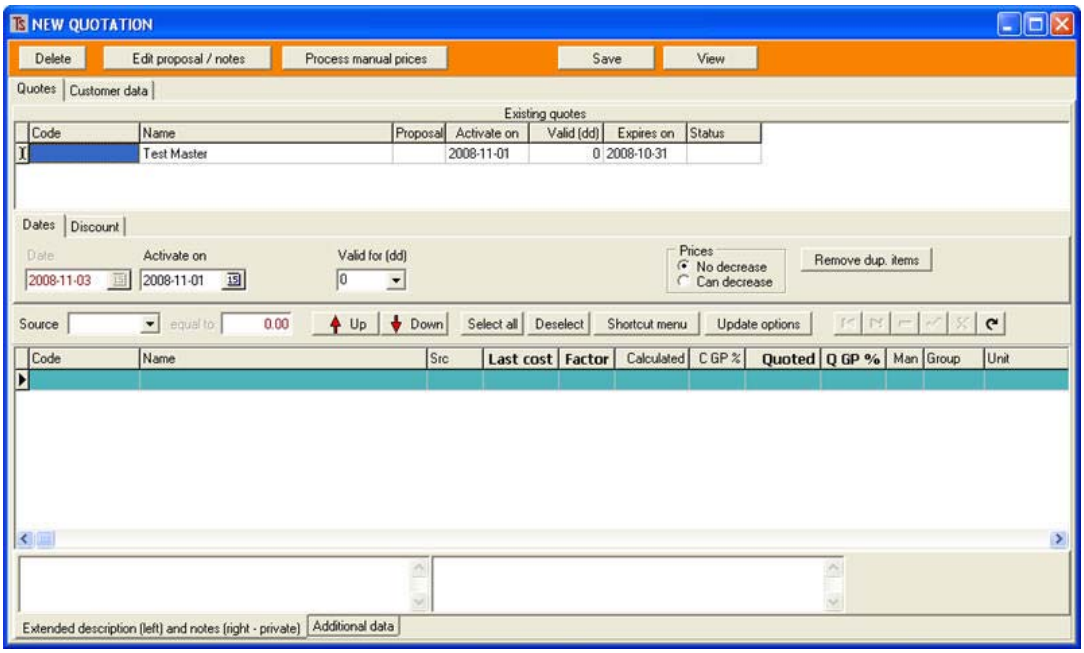


Figure 4

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.

**

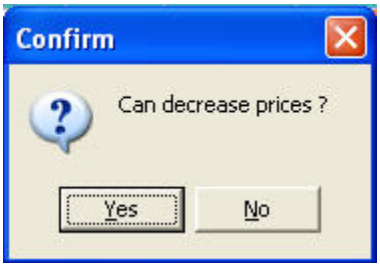
Within the Source selection you will see the / /=x options.

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.

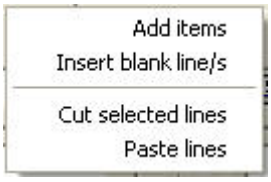
Should the source value result in a recalculation of the calculated price that is lower than the existing calculated price a warning will appear as follows:



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.

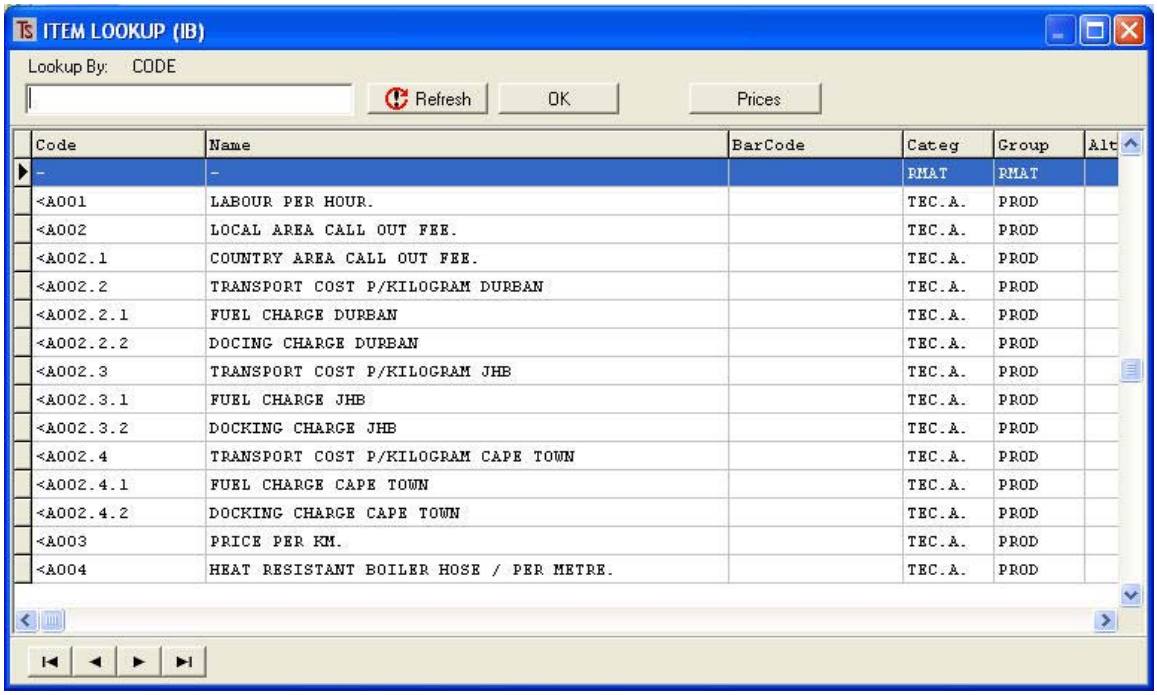


Figure 5

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.

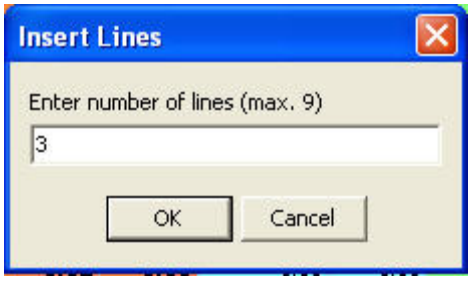


Figure 6

Blank lines are always inserted above a selected line, so you may have to use the Up or Down 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]**

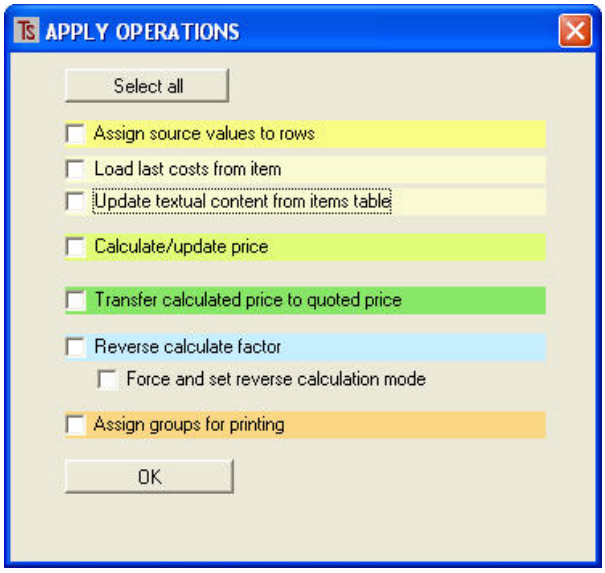


Figure 7

This has various tick boxes offering the following:

Select all 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:

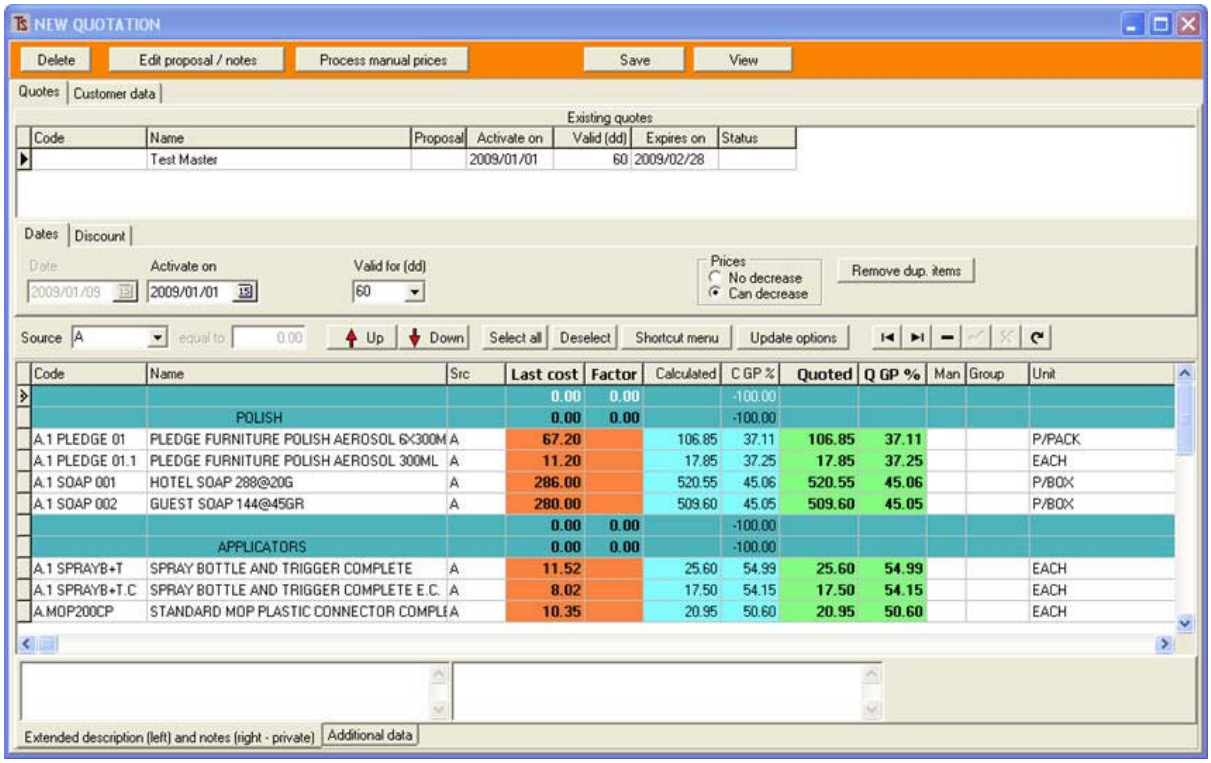


Figure 8

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:

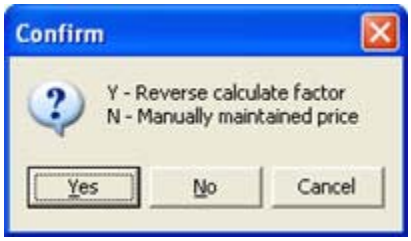


Figure 9

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**

Figure 10

Notice that the upper part of the screen (pink) allows you to select the quote to work on, whilst the lower half shows the products that are within the quote and the layout of the quote.
Double clicking the quote in the top screen will select it and take you to the screen where the quote may be altered or modified using the same facilities that are available when you initially enter a new quote.

ALLOCATING QUOTES TO CUSTOMERS

Once you have made a few **Master Quotes** you may now start to allocate quotes to customers.
(Actually, you don't have to establish any Master Quotes first, but it just makes things easier.)

If you go to **[Quotes]** and on the **<Day to day operations> tag,** click **[Maintain quotes]**

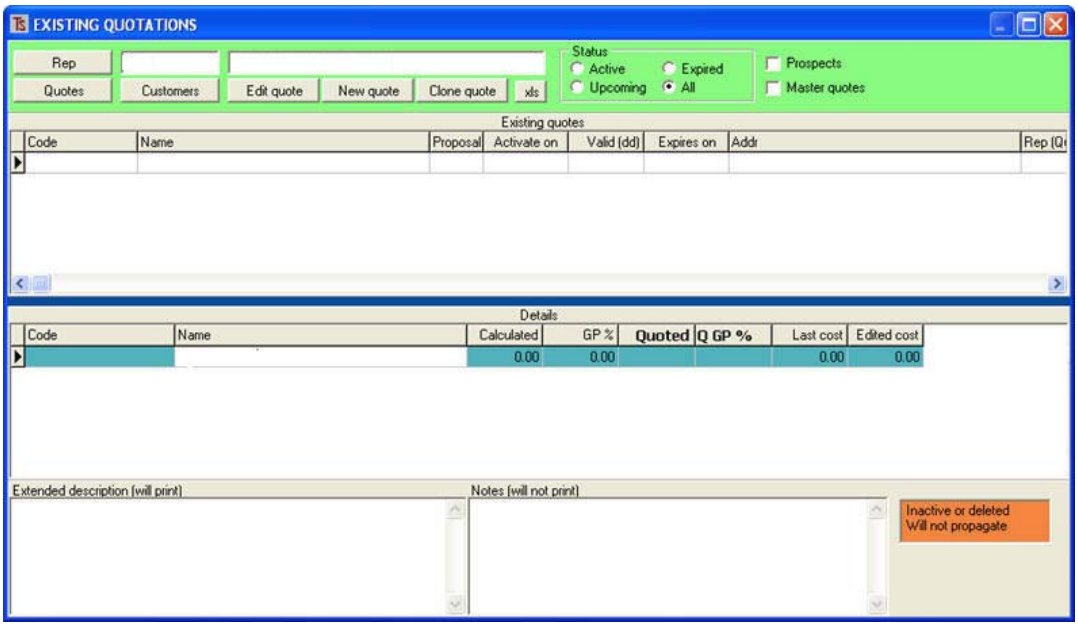


Figure 11

Note:
It is important to note that quotes may exist in a number of statuses – a quote that has been allocated to a customer or prospective customer may be current (Active) or Upcoming (to be applied at a specified future

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:

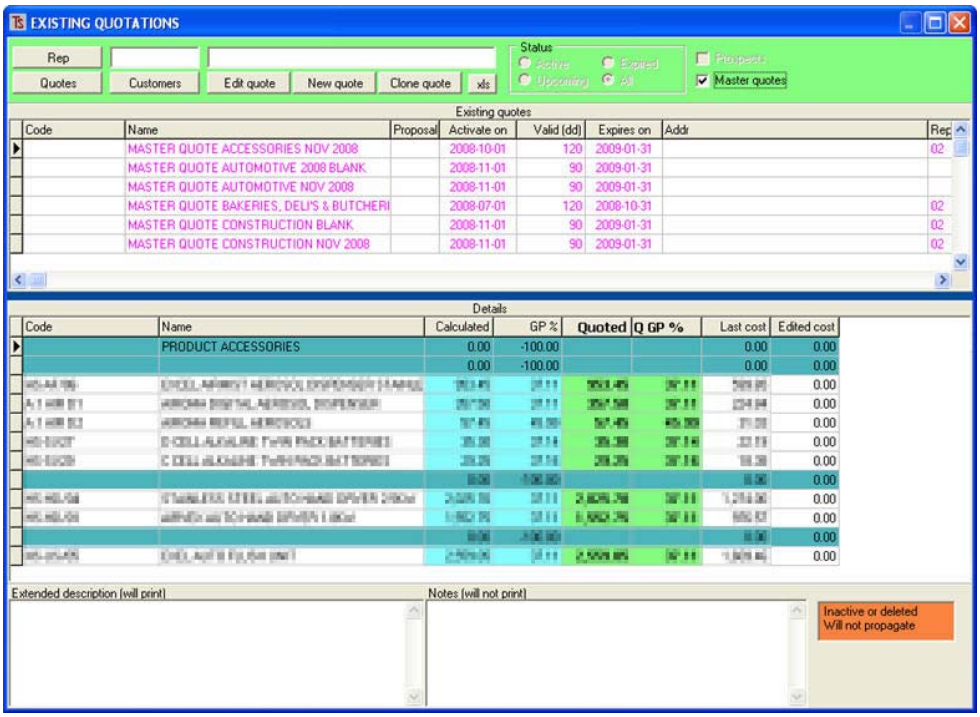


Figure 12

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:

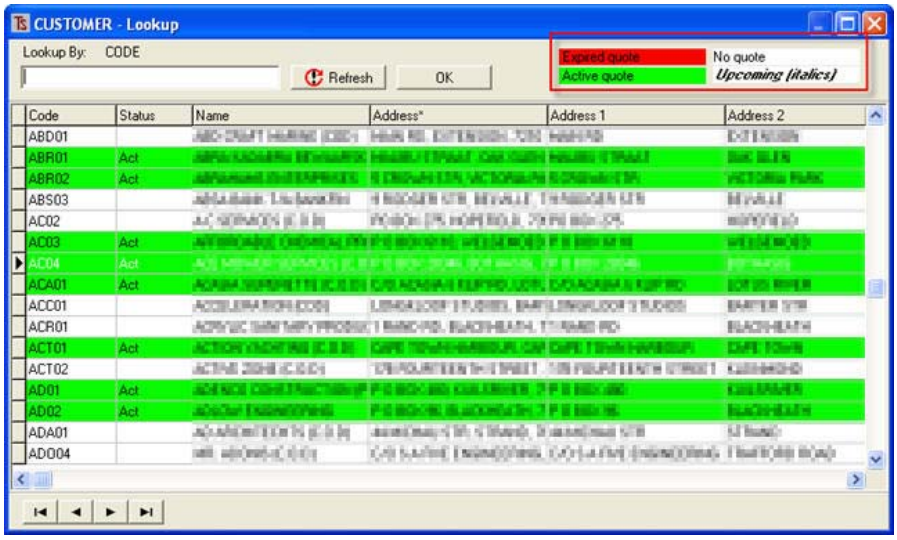


Figure 13

Note that this screen is <u>only</u> 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:

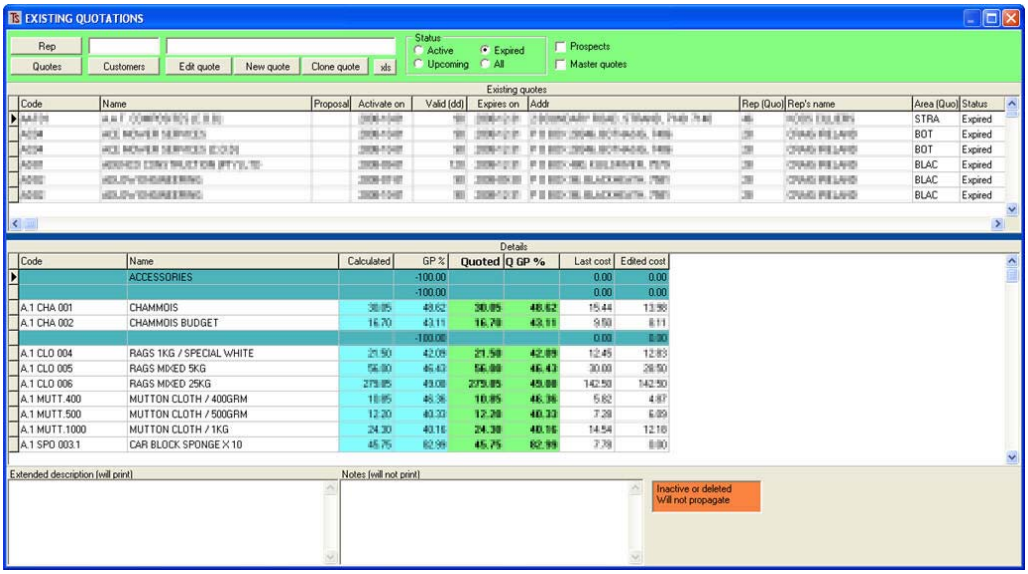


Figure 14

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:

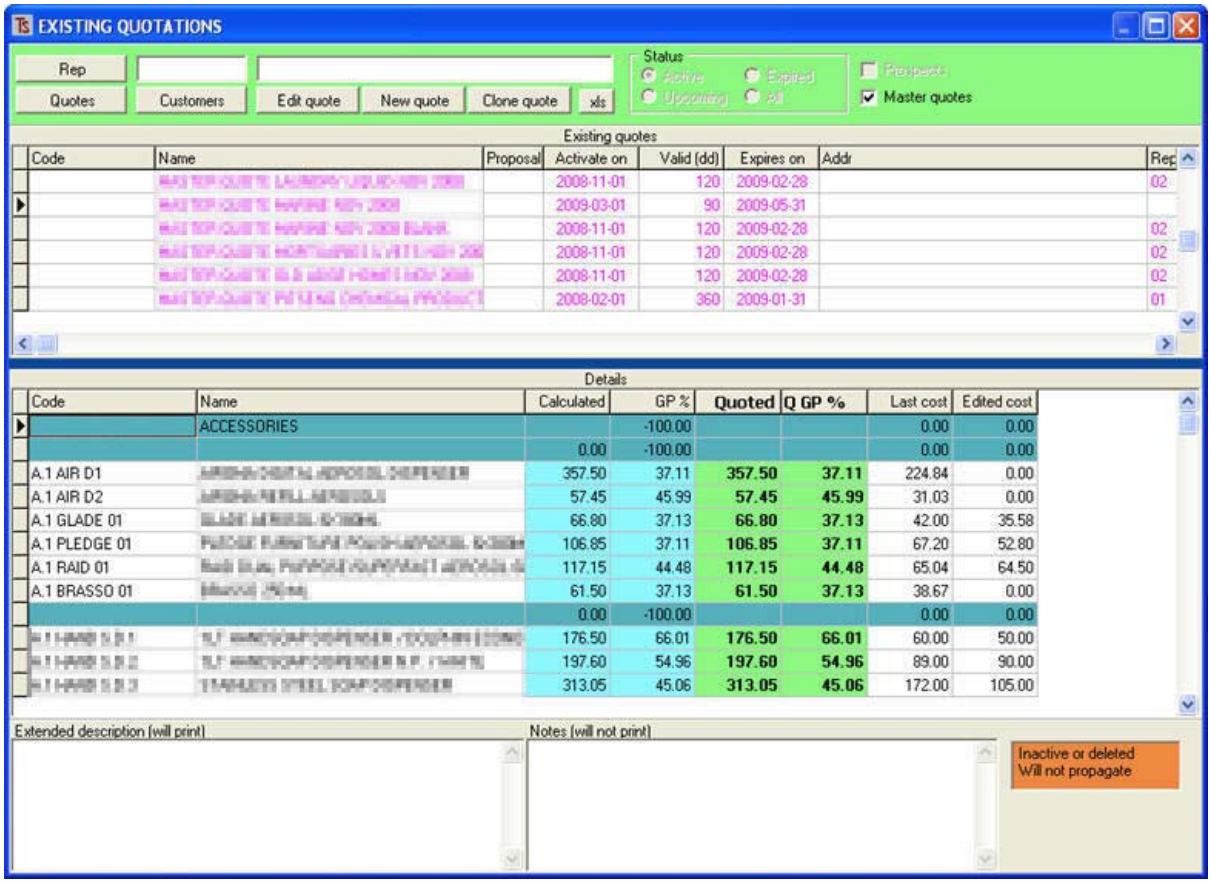


Figure 15

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:

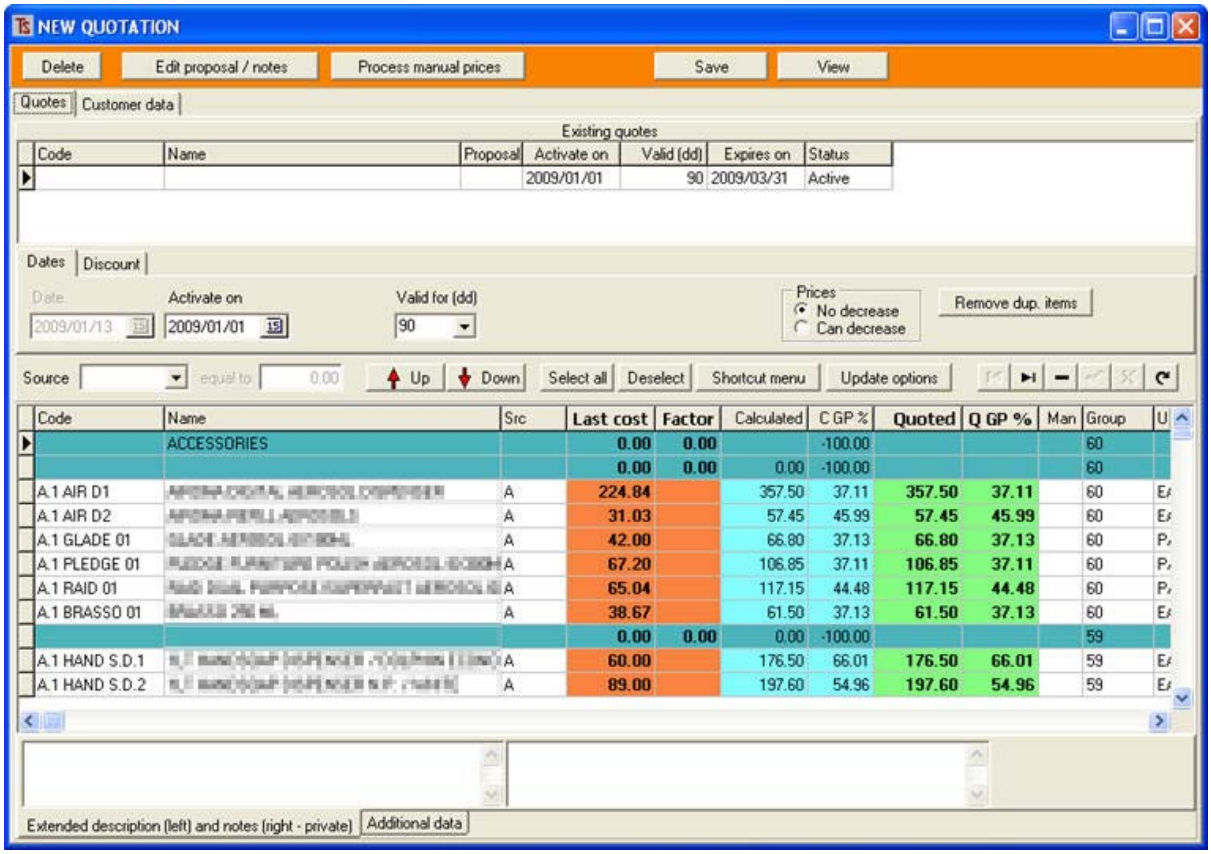


Figure 16

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

You will see:

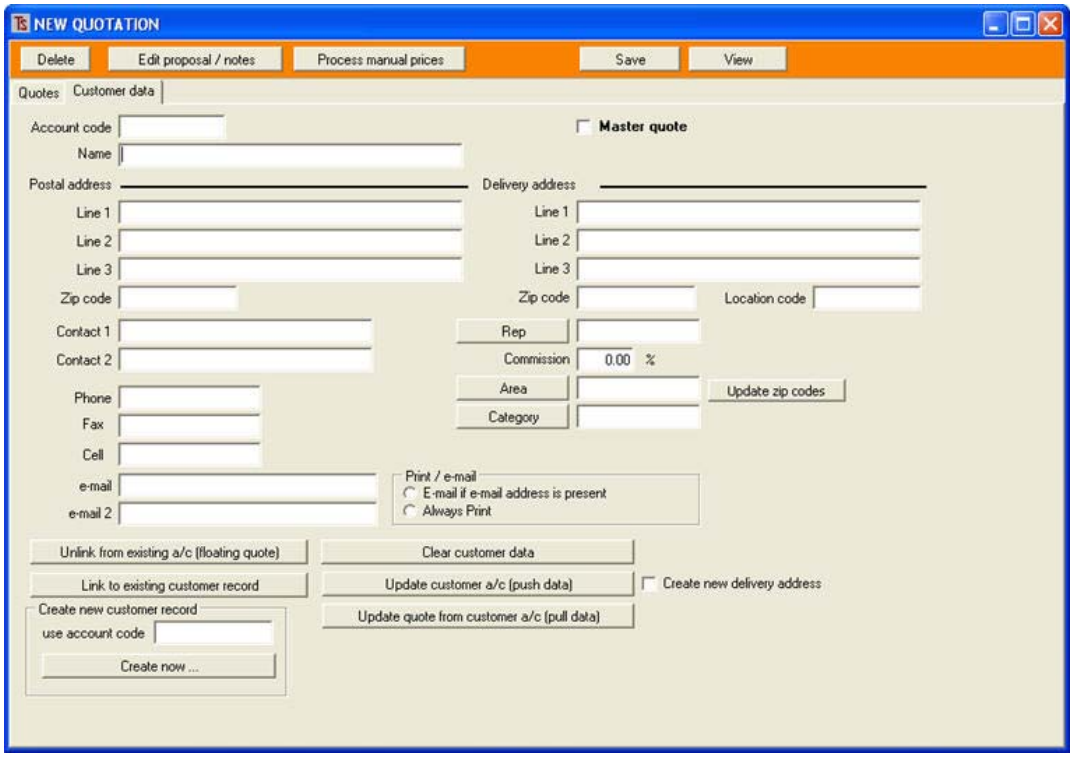


Figure 17

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:

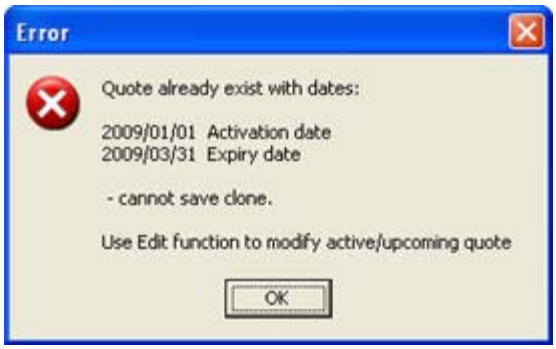


Figure 18

When you select the customer you will see:

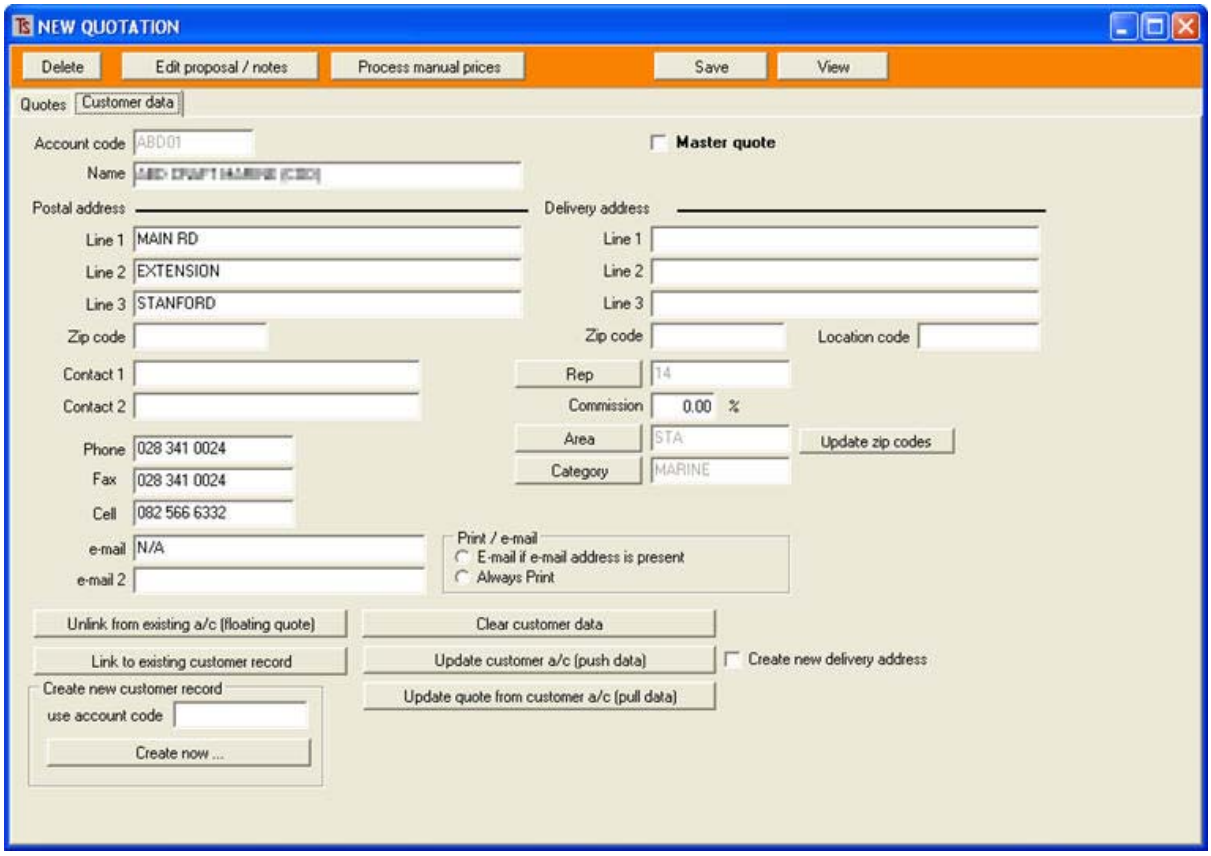


Figure 19

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 M**aster 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]

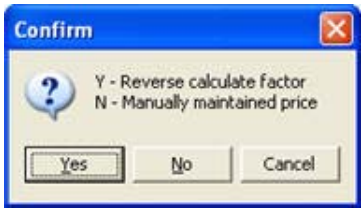
Go to **[Quotes][Day to day Operations][Maintain Quotes]**

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.

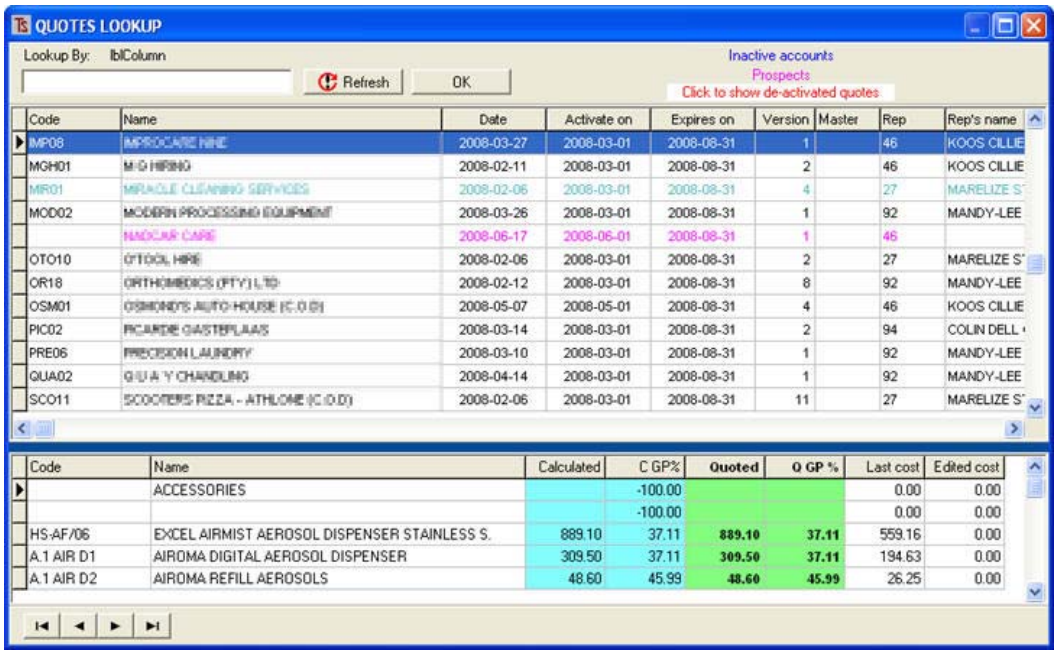
Method 2]

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

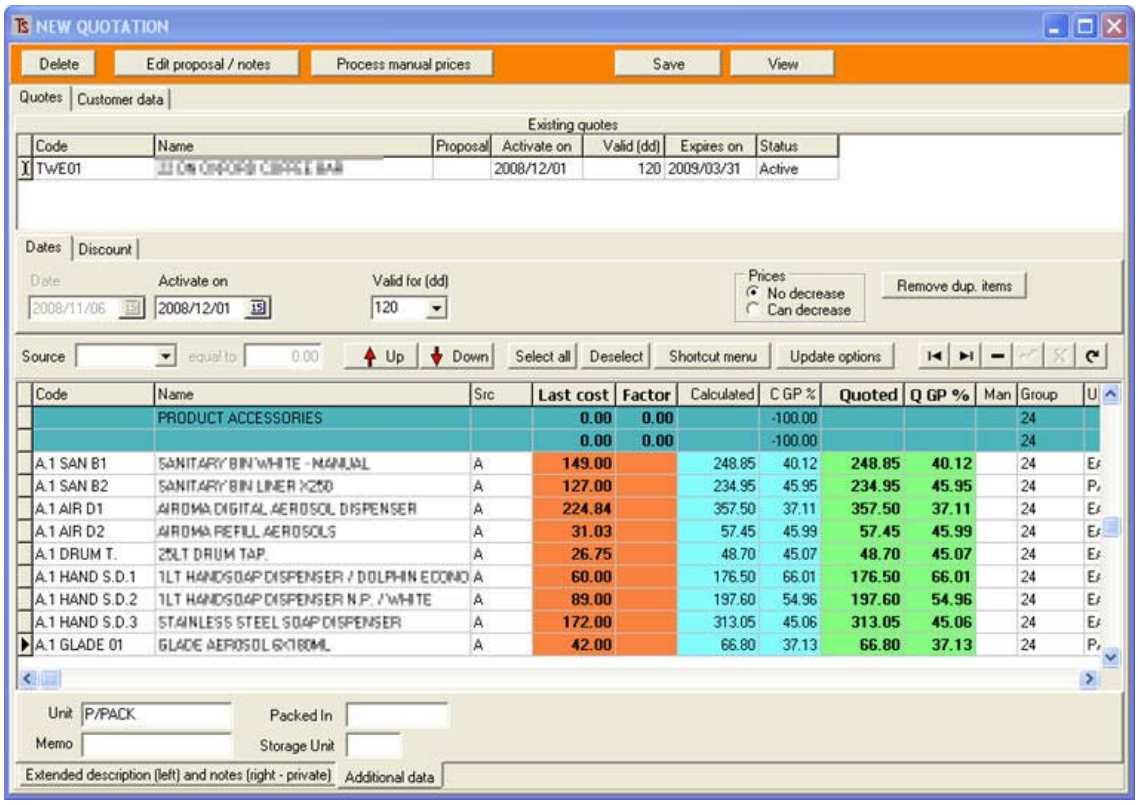
You will see a special lookup like this:



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.

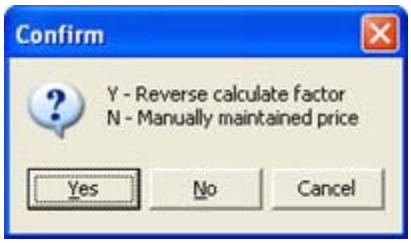
Once you have found the quote you are looking for, when you select it, you will see a screen such as:



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.

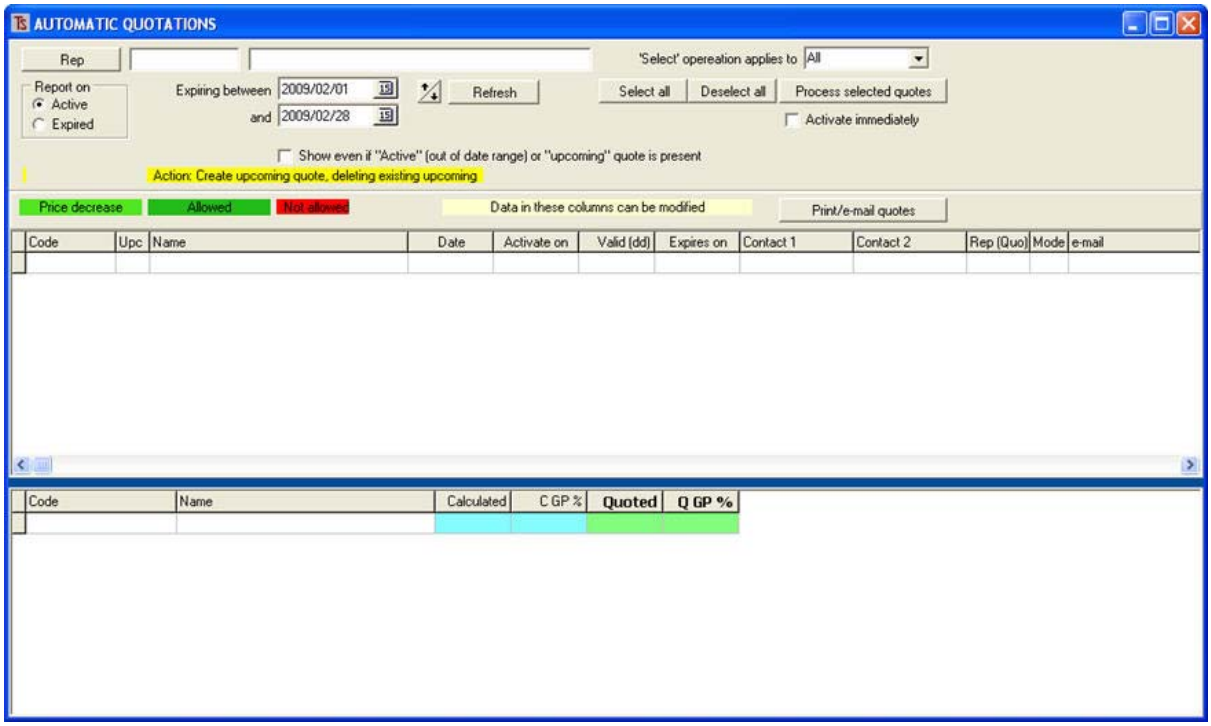
Again, when you alter a price, you will see a pop-up like this:



See above.

AUTOMATIC MAINTENANCE

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



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

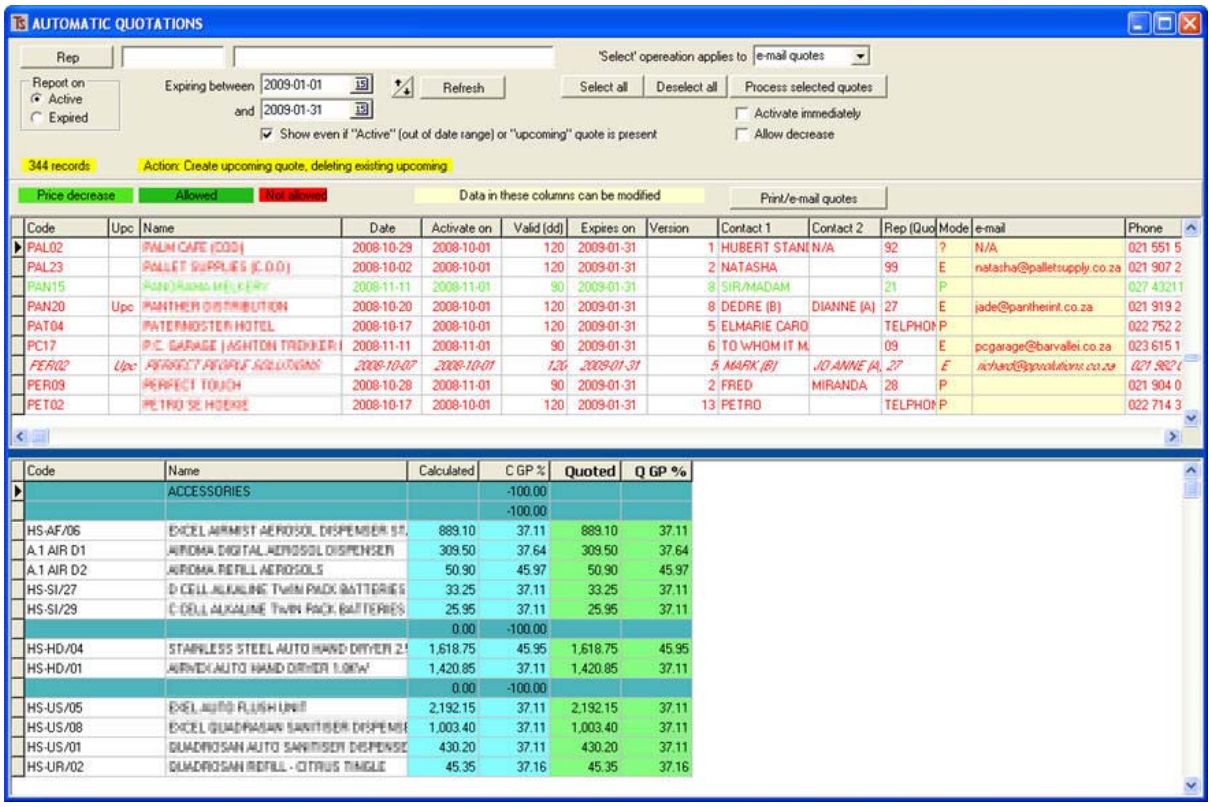
All
e-mail quotes
Print quotes

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

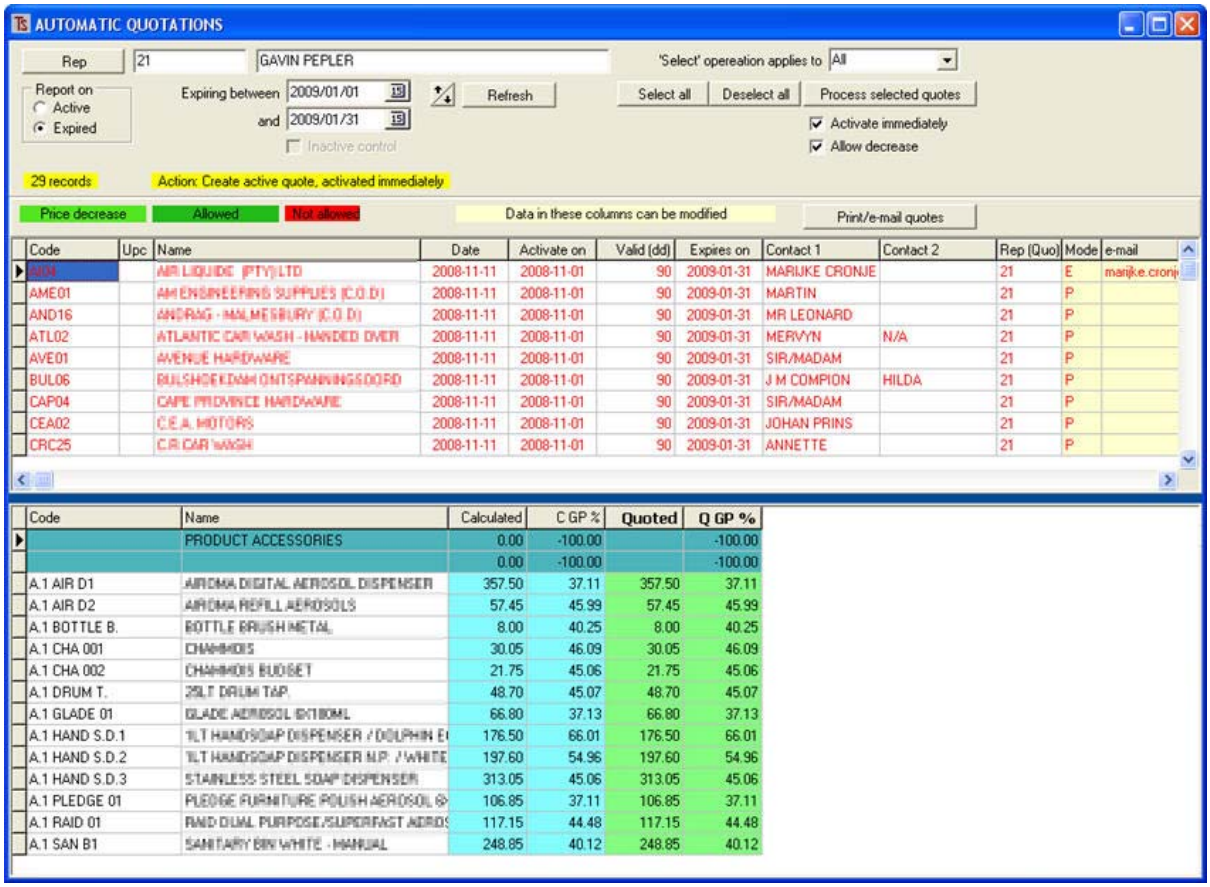
2] Select a date range that will include some expired or active quotes that are due to expire within the range selected.

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:



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]**.



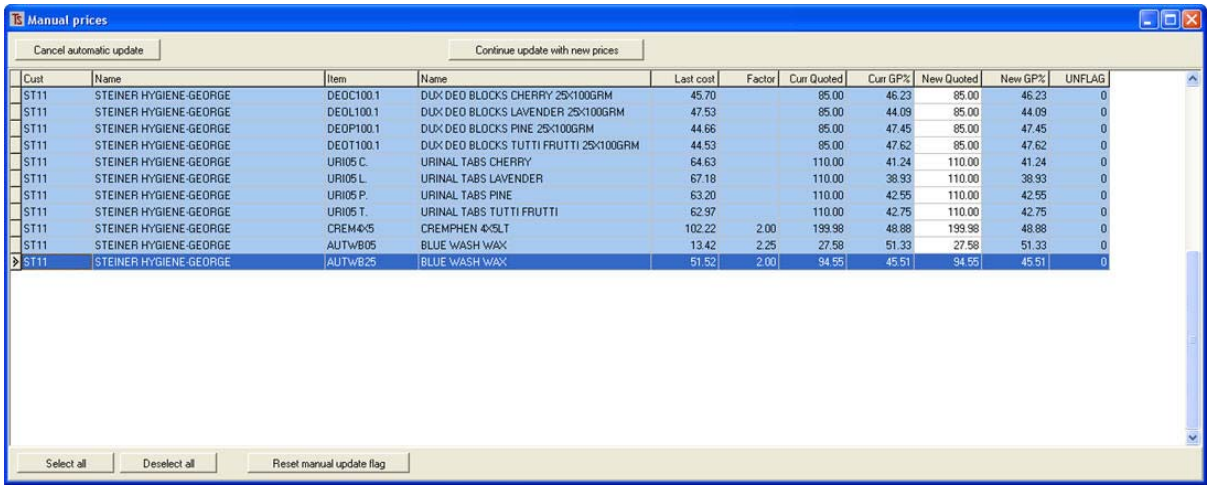
You will see that some of the options in the upper grey portion of the screen have disappeared and also that the quotes, selectable in the upper portion of the window, are colour coded so that you can see whether a price decrease is allowed or not (red for not allowed, green for allowed). You will also 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.

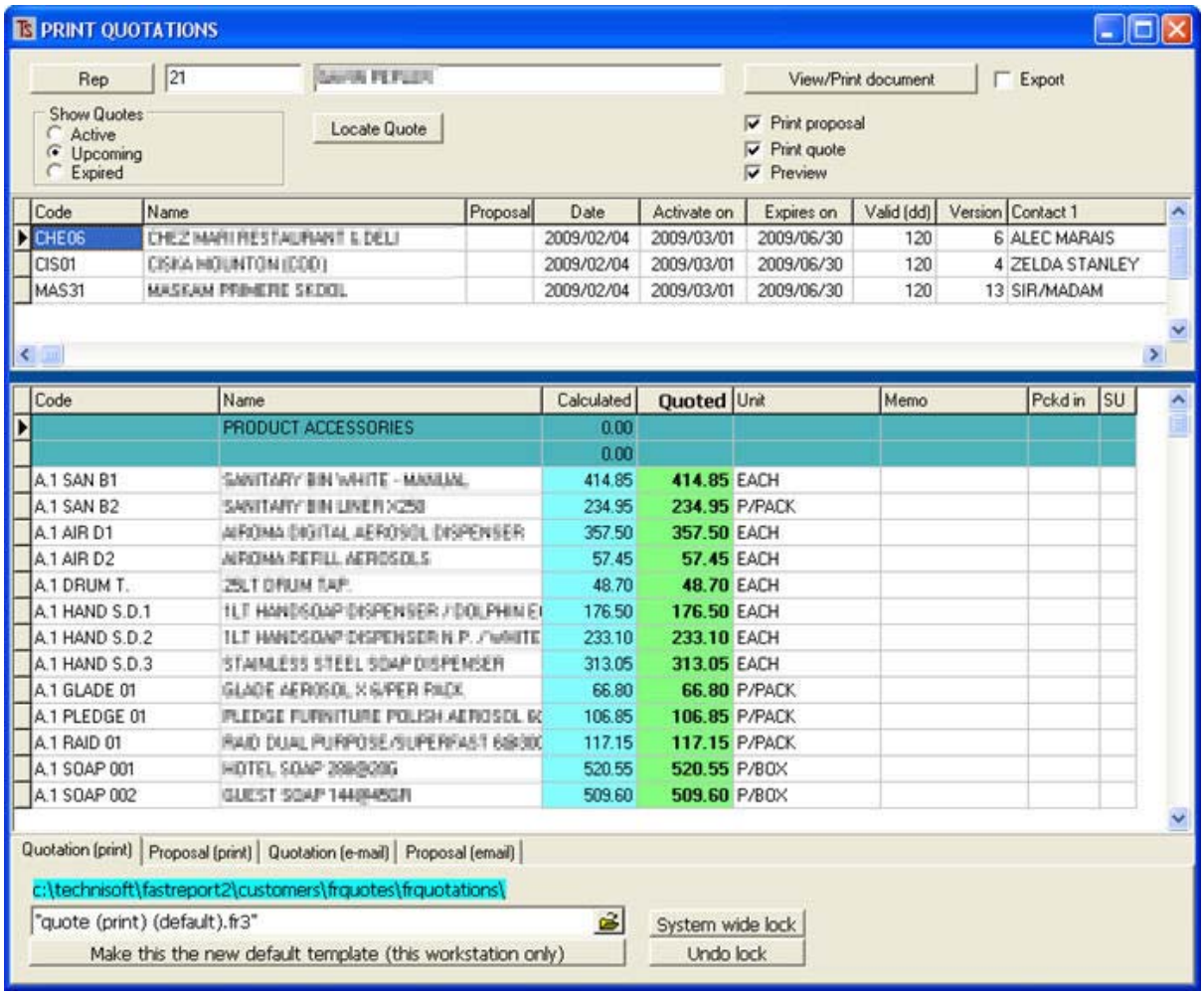


Cust	Name	Item	Name	Last cost	Factor	Curr Quoted	Curr GP%	New Quoted	New GP%	UNFLAG
ST11	STEINER HYGIENE-GEORGE	DEOC100.1	DUX DEO BLOCKS CHERRY 25X100GRM	45.70		85.00	46.23	85.00	46.23	0
ST11	STEINER HYGIENE-GEORGE	DEOL100.1	DUX DEO BLOCKS LAVENDER 25X100GRM	47.53		85.00	44.09	85.00	44.09	0
ST11	STEINER 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	94.55	45.51	94.55	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 be 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]**



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: 086 (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 *General Purpose Curry Detergent With Built In Stainers.*	5 K	5 K	90.80
CLP25	CURRY FLAVOUR LAUNDRY POWDER *General Purpose Curry Detergent With Built In Stainers.*	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.

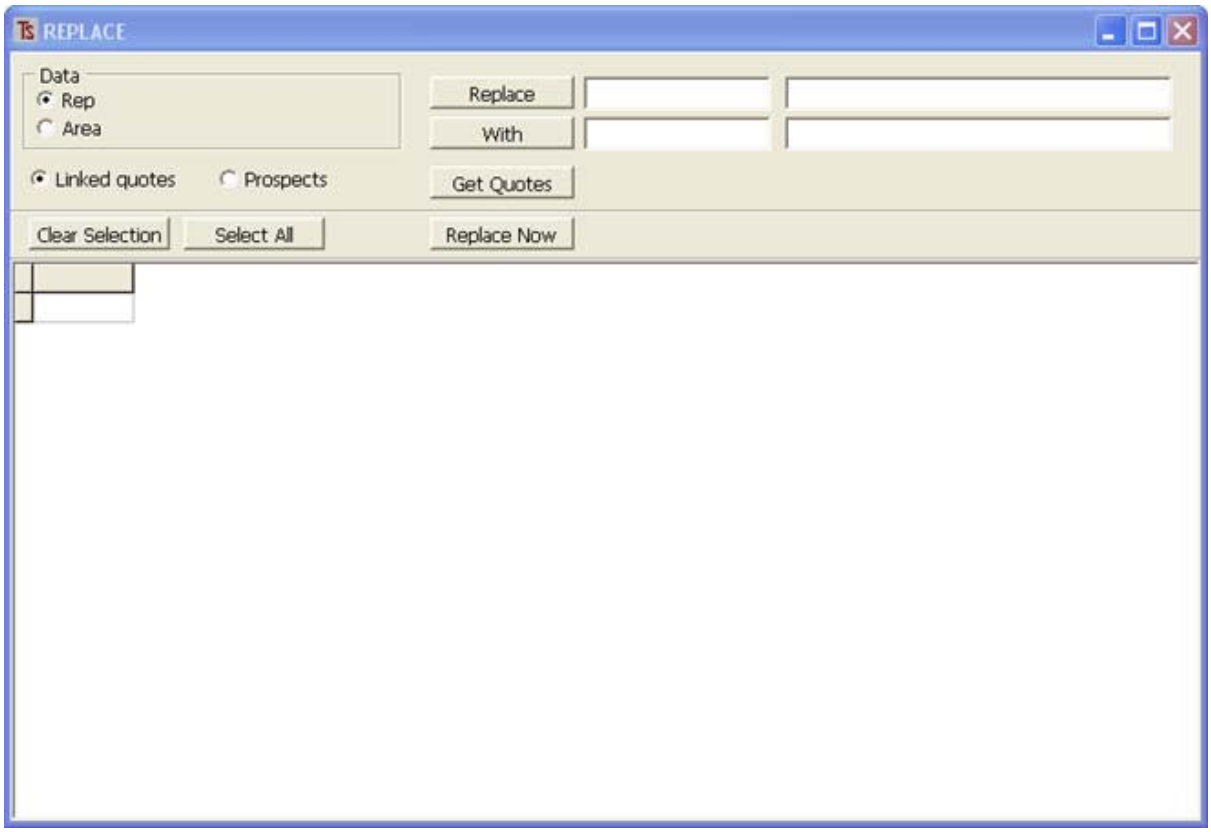
Regards
BAHR FLYE
072898989
SALES MANAGER

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

THE REPLACE FUNCTION

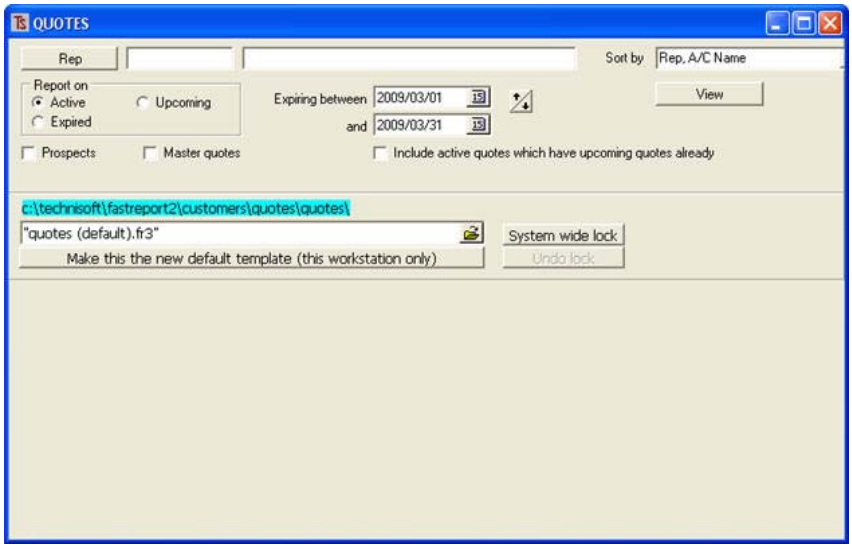
This is used to replace the quotes of one representative with those of another and is useful if there are staff or area changes.

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.

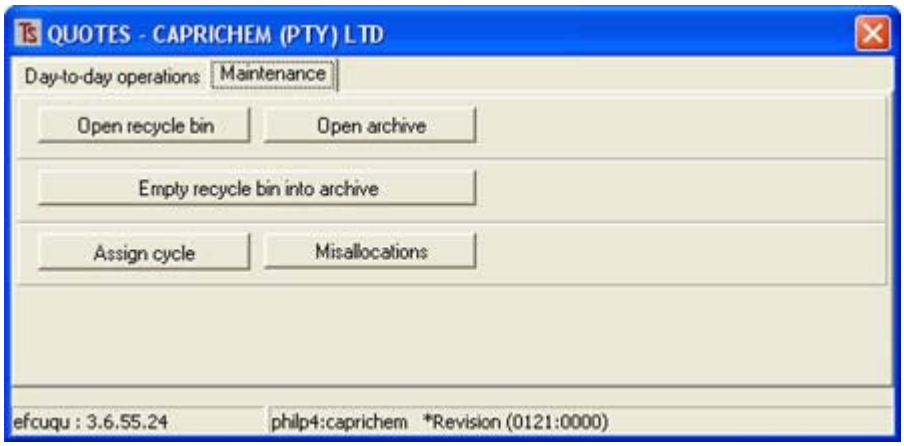
REPORTS



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

MAINTENANCE

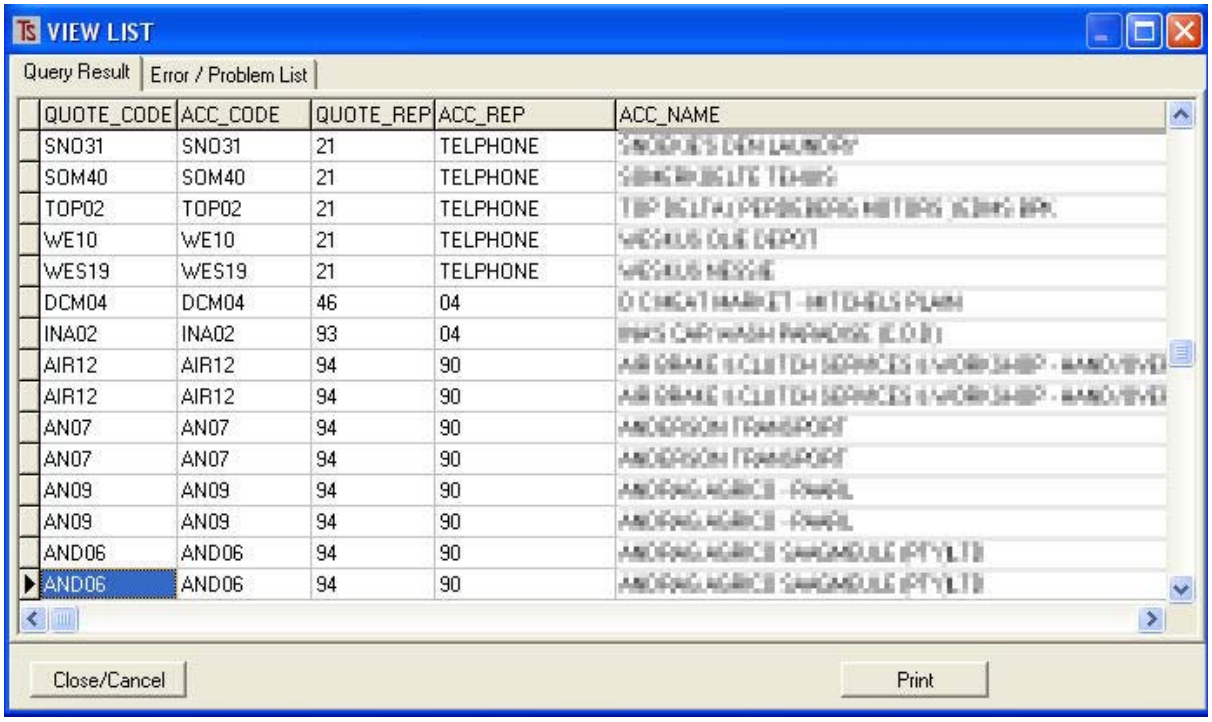
From the main Quotes menu select the **[Maintenance]** tag.



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:



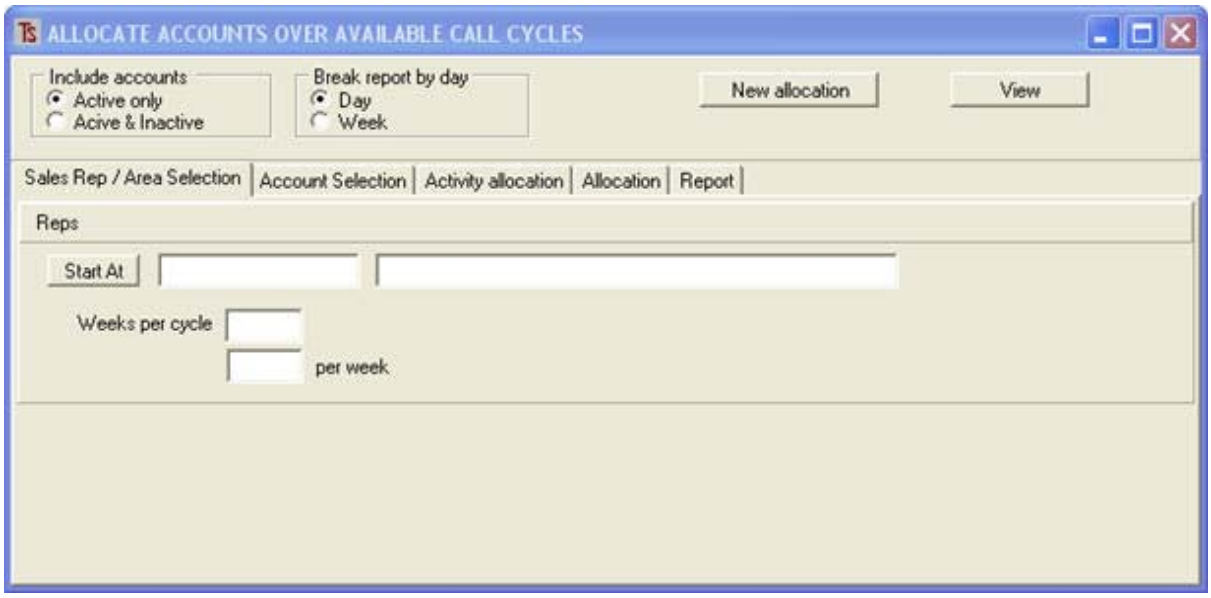
QUOTE_CODE	ACC_CODE	QUOTE_REP	ACC_REP	ACC_NAME
SNO31	SNO31	21	TELPHONE	[illegible]
SOM40	SOM40	21	TELPHONE	[illegible]
TOP02	TOP02	21	TELPHONE	[illegible]
WE10	WE10	21	TELPHONE	[illegible]
WES19	WES19	21	TELPHONE	[illegible]
DCM04	DCM04	46	04	[illegible]
INA02	INA02	93	04	[illegible]
AIR12	AIR12	94	90	[illegible]
AIR12	AIR12	94	90	[illegible]
AN07	AN07	94	90	[illegible]
AN07	AN07	94	90	[illegible]
AN09	AN09	94	90	[illegible]
AN09	AN09	94	90	[illegible]
AND06	AND06	94	90	[illegible]
AND06	AND06	94	90	[illegible]

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.

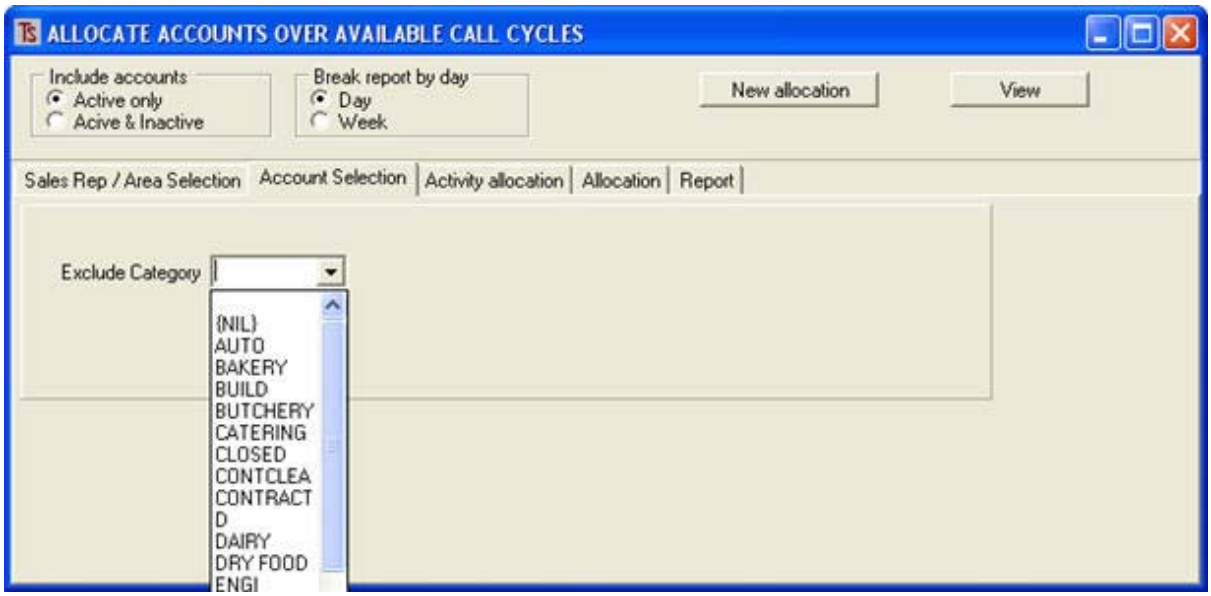
To implement this system go to **[Quotes][Maintenance] tag** and click on the **[Assign cycle]** button.



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.

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)

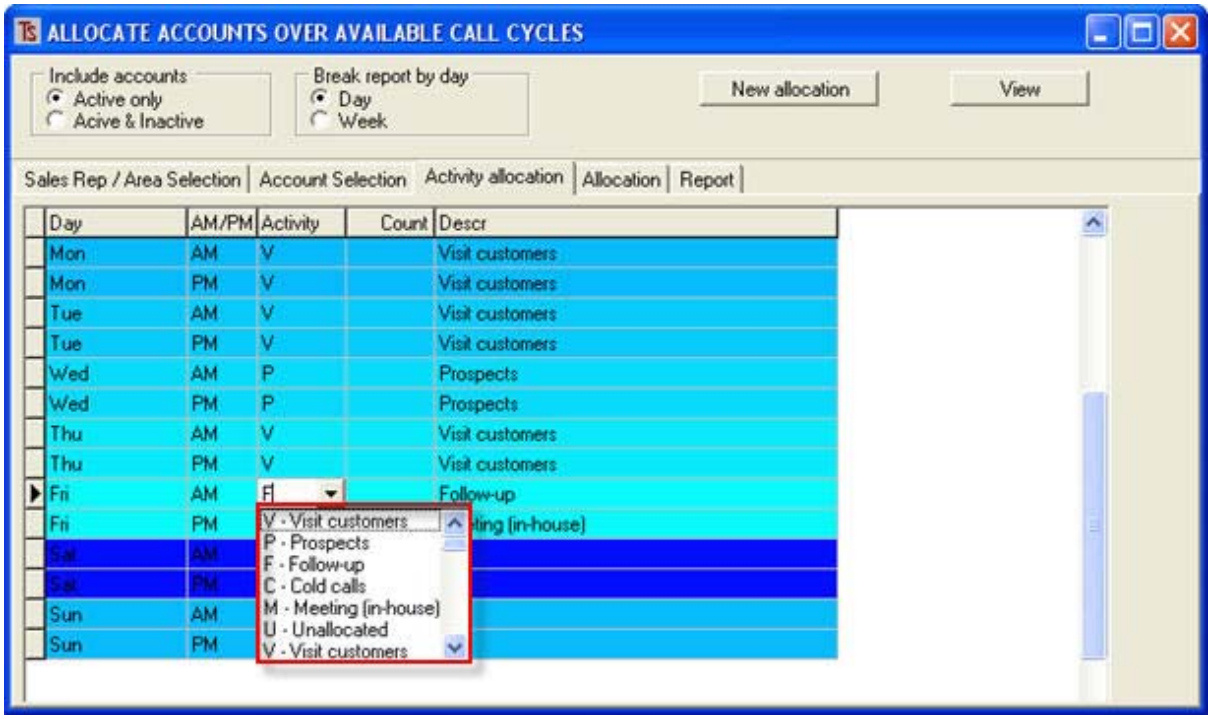


This screen allows you to exclude a certain category of customer by selecting from a drop-down list, as shown above.

Activity Allocation (tag)

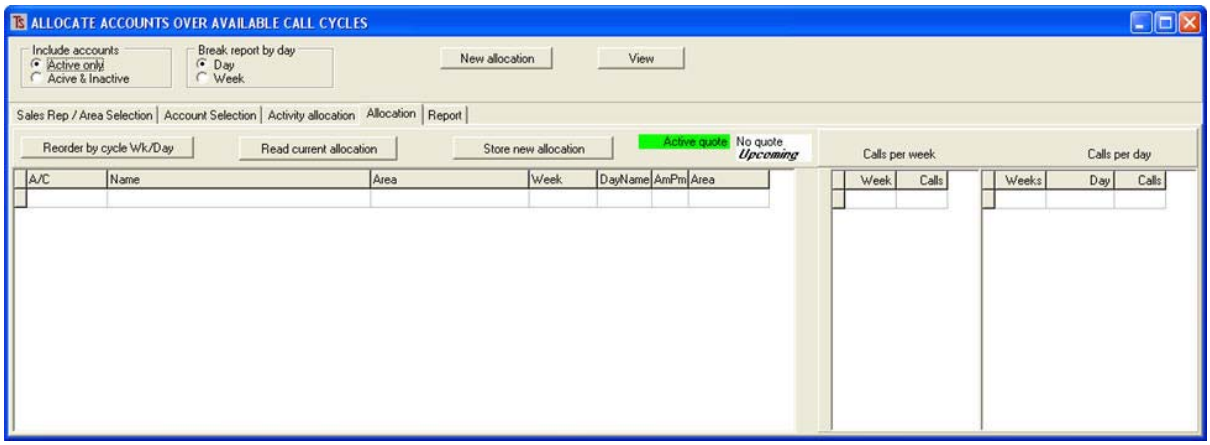
This screen is where you decide what activities you wish the rep to perform on the mornings **(AM)** and afternoons **(PM)** of each day.

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

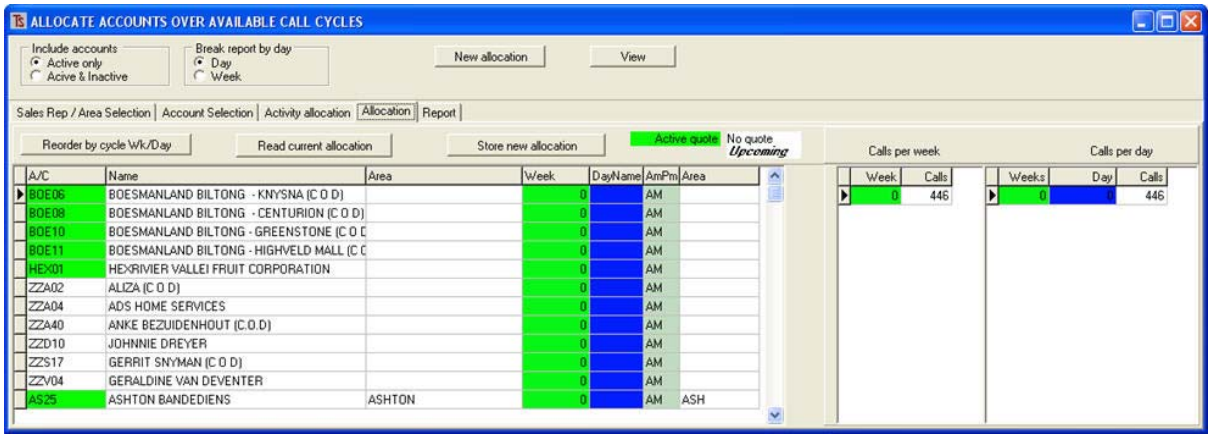


Once the reps activities have been allocated, proceed to the next tag:

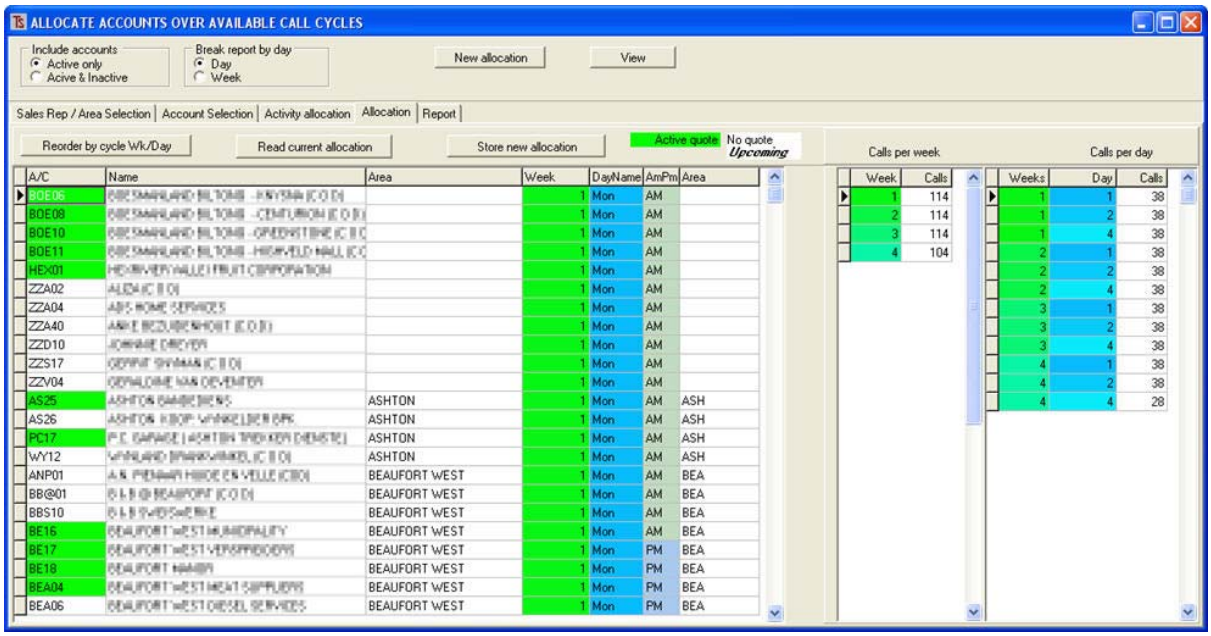
Allocation (tag)



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:

CAPRICHEM (PTY) LTD CYCLE ALLOCATIONS 2009/02/10 09:26:03 AM 1

Rep: 09 Account

DAY: 1 WEEK: 1

Area	A/C code	Name	Week	Day/Time	Not Act
	BOE06	[illegible]	1	Mon AM	
	BOE08	[illegible]	1	Mon AM	
	BOE10	[illegible]	1	Mon AM	
	BOE11	[illegible]	1	Mon AM	
	HEX01	[illegible]	1	Mon AM	
	ZZA02	[illegible]	1	Mon AM	
	ZZA04	[illegible]	1	Mon AM	
	ZZA40	[illegible]	1	Mon AM	
	ZZD10	[illegible]	1	Mon AM	
	ZZS17	[illegible]	1	Mon AM	
	ZZV04	[illegible]	1	Mon AM	
ASHTON	AS25	[illegible]	1	Mon AM	
ASHTON	AS26	[illegible]	1	Mon AM	
ASHTON	PC17	[illegible]	1	Mon AM	
ASHTON	WY12	[illegible]	1	Mon AM	

CYCLEALLOC

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.