



Quotations

Objective

To provide the flexibility of producing quotes with multiple offers for stocked and/or customized (estimated) items for existing or prospective customers.

The Value of Quotations

- Quote on existing and/or custom items
- Retain Bill of Materials for custom manufactured items
- Retain supplier contracts for non-stocked purchased items
- Provide access to the Product Configurator at line level
- Identify time and materials for manufacturing an item
- Estimate expected labor, material and overhead costs
- Safeguard profits with built-in profit margins
- Retain analysis on lost quotes
- Selectively include quotations in MRP for planning

Matching Quotations to your business

- Recall non-stocked item information for use in multiple quotations
- Determine price and lead-time with on-line cost roll-up
- Define multiple formats for printing quotes
- Control quoted costs with expiration dates
- Five offers per quotation with default quantity breaks
- Re-value based on current inventory or BOM costs
- Copy and modify previous quotation
- Import from CAD-generated files (or other ASCII files)
- Recall configurations previously defined using the Product Configurator
- Automatically create work orders, purchase orders, sales orders, retentions, deposits and billing schedules on acceptance of quote
- Job chaining for multi-level custom Bill of Materials
- Automatically issue lower jobs to their parent, on completion
- Add and print notes, comments and instructions on reports and quotation formats
- Create inventory items and generate Bill of Material from estimate
- Optionally consider progressive scrap on calculation of material and capacity requirements

Integration/Module dependency

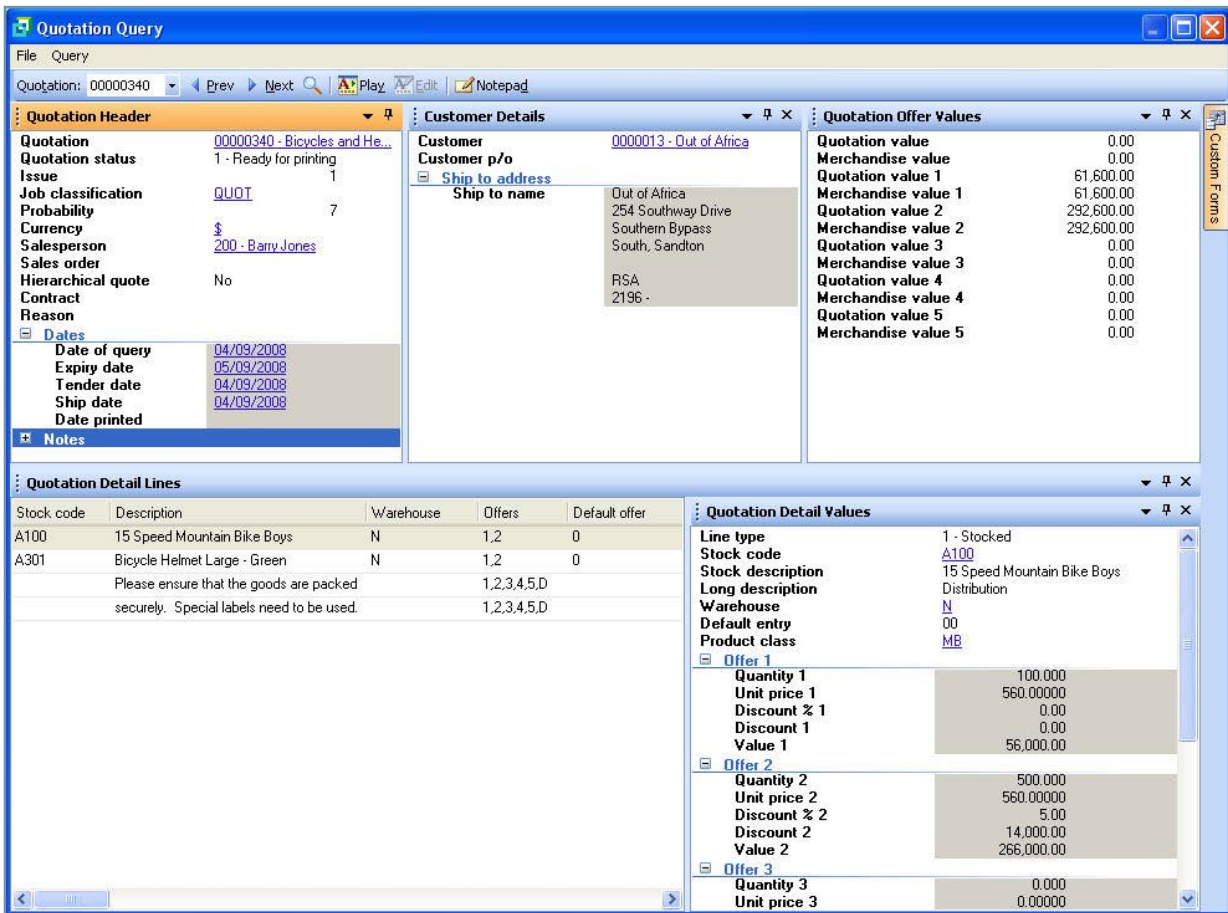
- Integrates with the following modules:
 - Accounts Receivable
 - Accounts Payable
 - Inventory
 - Sales Orders
 - Purchase Orders
 - Bill of Materials
 - Requirement Planning
 - Work in Progress



Quotations cont...

Audit trails and reporting

- Retains quotes for as long as required
- Detailed and summarized reports available
- Estimate details may be included in quotation reports
- On-screen queries show all quote and estimate details
- Analysis reporting available



The screenshot displays the 'Quotation Query' window with the following sections:

- Quotation Header:**
 - Quotation: 00000340
 - Quotation status: 1 - Ready for printing
 - Issue: 1
 - Job classification: QUOT
 - Probability: 7
 - Currency: \$
 - Salesperson: 200 - Barry Jones
 - Sales order:
 - Hierarchical quote: No
 - Contract:
 - Reason:
 - Dates:**
 - Date of query: 04/09/2008
 - Expiry date: 05/09/2008
 - Tender date: 04/09/2008
 - Ship date: 04/09/2008
 - Date printed:
 - Notes:
- Customer Details:**
 - Customer: 0000013 - Out of Africa
 - Customer p/o:
 - Ship to address:
 - Ship to name: Out of Africa
 - 254 Southway Drive
 - Southern Bypass
 - South, Sandton
 - RSA
 - 2196 -
- Quotation Offer Values:**

Quotation value	0.00
Merchandise value	0.00
Quotation value 1	61,600.00
Merchandise value 1	61,600.00
Quotation value 2	292,600.00
Merchandise value 2	292,600.00
Quotation value 3	0.00
Merchandise value 3	0.00
Quotation value 4	0.00
Merchandise value 4	0.00
Quotation value 5	0.00
Merchandise value 5	0.00
- Quotation Detail Lines:**

Stock code	Description	Warehouse	Offers	Default offer
A100	15 Speed Mountain Bike Boys	N	1,2	0
A301	Bicycle Helmet Large - Green	N	1,2	0
	Please ensure that the goods are packed securely. Special labels need to be used.		1,2,3,4,5,D	
- Quotation Detail Values:**
 - Line type: 1 - Stocked
 - Stock code: A100
 - Stock description: 15 Speed Mountain Bike Boys
 - Long description: Distribution
 - Warehouse: N
 - Default entry: 00
 - Product class: MB
 - Offer 1:**
 - Quantity 1: 100.000
 - Unit price 1: 560.00000
 - Discount % 1: 0.00
 - Discount 1: 0.00
 - Value 1: 56,000.00
 - Offer 2:**
 - Quantity 2: 500.000
 - Unit price 2: 560.00000
 - Discount % 2: 5.00
 - Discount 2: 14,000.00
 - Value 2: 266,000.00
 - Offer 3:**
 - Quantity 3: 0.000
 - Unit price 3: 0.00000