

FLEXX[®]
Quotation Manager
Reference Manual
Version 7.0L0

Databyte



Copyright 1990 - 2011 Databyte

All Rights Reserved.

Reproduction or publication of the software or manual, in any format, is prohibited.

Databyte is a division of E.K. Databyte Consulting Corp.

FLEXX is a registered trademark of E.K. Databyte Consulting Corp.

Databyte makes no representations or warranties with respect to the contents of this document and specifically disclaims any implied warranties of merchantability or fitness for a particular purpose. Further, Databyte reserves the right to revise this document and to make changes from time to time in its content without being obligated to notify any person of such revisions or changes. Portions of this Guide are derived from the VISION reference manual and are protected by various Unify Corporation Copyrights.

Table of Contents

1.0 Introduction.....	1
1.1 About Quotation Manager	1
1.2 About This Manual	2
1.3 Quotation Manager Sequence of Operations	4
2.0 Starting Quotation Manager	5
3.0 Working With Quotations	8
3.1 Quotation Master	11
3.2 Sections Maintenance	17
3.3 Quotation Detail.....	20
3.4 Sales Order Generation	24
3.5 Quotation Text	28
3.6 Quotation Copy Function.....	30
3.7 Purge Quotations Process	32
3.8 Rapid Quote Entry	34
3.9 Email Quote Confirmation.....	39
4.0 Extracting Quotation Information	42
4.1 Quote Overview	42
4.2 SKU Price Lookup Function.....	44
4.2 Printing Standard Quotation Reports	46

1.0 Introduction

1.1 *About Quotation Manager*

The Quotation Manager module streamlines the operation of creating quotes and then converting those quotes into sales orders. The Quotation Manager is also used to enter Standing Orders which can then be used to generate sales orders whenever required.

Using Quotation Manager you can:

- Δ Set up, maintain and share with FLEXX Accounts Receivable an unlimited number of customers
- Δ When interfaced with FLEXX e-Commerce, receive all web orders into quotation for regular and standing order quotes.
- Δ Enter an unlimited number of quotes and standing orders
- Δ Use price-based or cost-based pricing
- Δ Enforce a specific gross margin percentage to be met by the overall quote
- Δ Seamlessly create sales orders in FLEXX Order Processing.

Quotation Manager can be further customized through the use of the Application Control Table (See *FLEXX Implementation Guide, Sec.3*). For further information see *Sec. 3.0*.

Quotation and FLEXX

The Quotation module is fully integrated with these FLEXX modules;

- Δ Accounts Receivable (AR) - Quotation uses the same Customer listings as AR to prevent double entry
- Δ Inventory Control (IC) - Quotation uses all of the SKU items defined in IC as well as the corresponding price matrix and costing tables.
- Δ Order Processing - (OP) - Once a quote has been accepted by a customer, it can be used to create a sales order in OP.

1.2 About This Manual

Content

This manual describes the forms and functions in Quotation Manager. It contains the following sections;

- Δ Starting Quotation: describes how to get into the Quotation Manager module
- Δ Working with Quotations: describes the forms you use to add, find and modify quotes, as well as how to create orders in FLEXX Order Processing
- Δ Extracting Quotation Information: describes how to perform on-form analysis and how to print Quotation reports.

Manual Conventions

- Δ We use an asterisk (*) to indicate wildcards. However, different database systems use different symbols for wildcards. See the table below. Ask your System Administrator which symbol to use.

Database	To Match All	To Match One
MS SQL Server	%	_(underscore)
Oracle	%	_(underscore)
Sybase	%	_(underscore)

- Δ Information that you enter and information that appears on the form appears in bold type. Example: Enter **Y** in the **Begin Process?** field.
- Δ References to other sections are italicized. Example: (*See 2.0 Starting Quotation Manager*).

***Other FLEXX
Tables Needed***

The following tables may also be needed to fully use all of the capabilities of Quotation Manager.

Δ Company Table *

Δ Division Table *

Δ Warehouse Table *

Δ Salesperson Table *

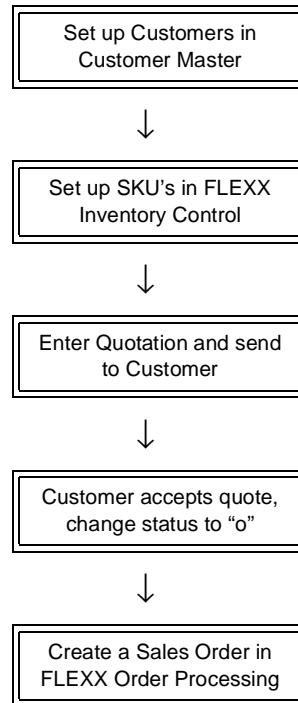
Δ SKU Master Table - See FLEXX Inventory Control Manual

Δ Tax Table *

Δ Customer Master Table *

* See FLEXX Getting Started Manual

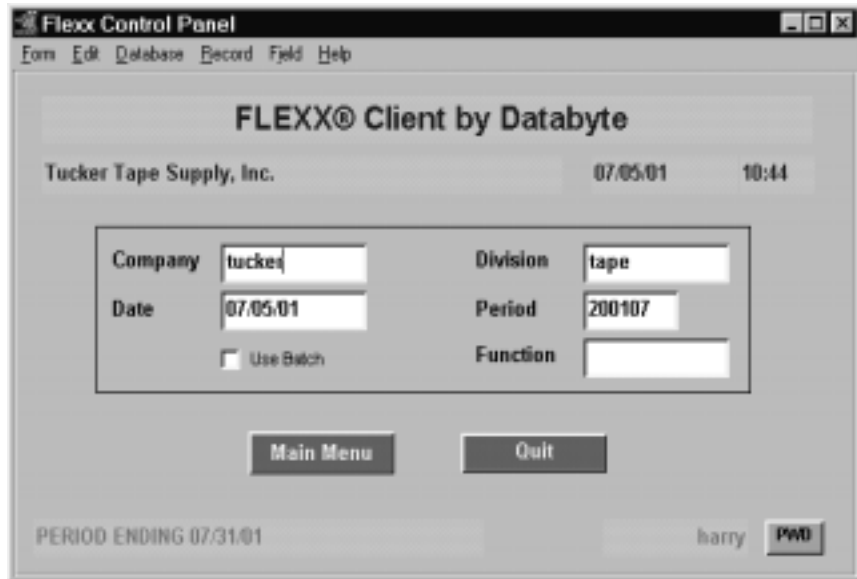
1.3 *Quotation Manager Sequence of Operations*




2.0 Starting Quotation Manager

To Start Quotation Manager

Log on to FLEXX. The Session defaults form appears.



The screenshot shows the 'Flex Control Panel' window. The title bar reads 'Flex Control Panel' and the menu bar includes 'Form', 'Edit', 'Database', 'Record', 'Field', and 'Help'. The main content area displays 'FLEXX® Client by Databyte' and 'Tucker Tape Supply, Inc.' with a date of '07/05/01' and time of '10:44'. Below this is a form with the following fields: 'Company' (tucker), 'Division' (tape), 'Date' (07/05/01), 'Period' (200107), and 'Function' (blank). There is a 'Use Batch' checkbox which is unchecked. At the bottom of the form are 'Main Menu' and 'Quit' buttons. The status bar at the bottom shows 'PERIOD ENDING 07/31/01' and a user name 'harry' with a 'PWD' button.



The screenshot shows the 'Flex Information' window. The title bar reads 'Flex Information'. The main content area has a tabbed interface with 'Online Data' selected and 'Data Warehouse' visible. Below the tabs is a table with the following data:

Click on the Button to Display Main Flex Menu	update	not stored	record 1	of 1
---	--------	------------	----------	------

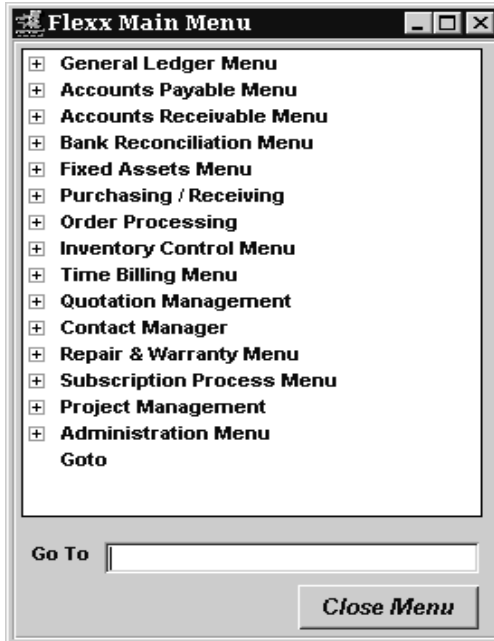
This form lets you set up the defaults for the session. For example, if you plan to work with accounts in one company/division during a session, enter the company and division codes here. During the session, these codes appear automatically in the **Company** and **Division** fields whenever you have a blank form or new record. You can overwrite the session defaults any time they appear on a form.

Fields

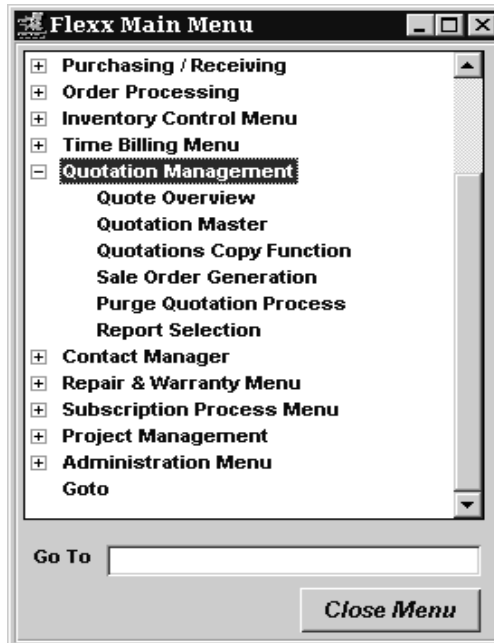
Enter the following information.

Field	Entry	Default	Reqd
Company	The default company code. Use Zoom to select from a list of companies.	Set by System Administrator	Y
Division	The default division code. Use Zoom to select from a list of divisions.	Set by System Administrator	Y
Date	The default date.	System Date	Y
Period	The default period number.	GL Period Table	Y
Use Batch	Select this option by clicking the box. Batch control lets you group similar Contact Manager transactions together and enter, edit and post them as a whole using a unique batch number. Each Contact Manager transaction in the batch still has a transaction number. If you selected B/C, the Batch Control screen appears when you first go to add a transaction.		Y
Function	To quickly access a specific FLEXX module, enter the code for the module, then <<press Main Menu>>. Example: To go straight to Quotation Manager and bypass the Main Menu, type mainquot in this field and <<press Enter>> Twice. See the Session Defaults section of your <i>Getting Started</i> manual for more information.		N
Buttons			
Main Menu	Access the FLEXX main menu		
Quit	Terminate the FLEXX session.		
PWD	Press this button to change both the user's Logon password and the FLEXX Authorization password (See <i>Administration Manual, User Master description</i>).		

Press **Main Menu**. The FLEXX Main Menu appears.



Select **Quotation Management**. The Quote Main Menu appears.



3.0 Working with Quotations

This section describes;

- Δ How to enter a quote
- Δ How to enter a standing order
- Δ How to enter quote sections and details
- Δ How to create a sales order from a quote
- Δ How to create a sales order from a standing order
- Δ How to create new quotes from existing ones.

COD

A situation may arise where a quote customer is designated “COD” on the FLEXX Customer Master form (*See Getting Started Manual*). This COD is completely ignored during the Quote creation and entry process. However, when the quote becomes an order in FLEXX Order Processing, the newly created order detail will have a detail line containing the COD charge. For this functionality to work, a “COD” SKU must be set up. *For further information on this, see the FLEXX Inventory Control Manual - topic Special SKU's.*

Freight

Should it be required to include freight charges as part of a quote, it will be necessary to first set up a “freight” SKU. Once this SKU has been set up, it can be entered just like any other SKU. *For further information on this see the FLEXX Inventory Control Manual - Special SKU's.*

E-Mail Confirmation

FLEXX quotation confirmation by Email can be used in Quotation Manager. To use this functionality, the Customer must be defined for the functions that are to send the Email (*See Getting Started, Customer Master description*). Further, the Company Table Email Template also needs to be defined (*See Getting Started, Company Master, Email Template description*).

If the Customer Master has been defined to use E-Mail Quotation confirmation, whenever a change is made to the quote details, FLEXX will display a prompt message “Do you want to send E-Mail for this Order now?” Pressing Yes will result in an E-Mail message being sent to the E-Mail address defined on the Customer Ship To form, or if not defined, to the address defined on the Customer Main form.

Please see Sec. 3.9 Email Quote Confirmation for a detailed description of this function.

Standing Orders

For a detailed description on handling Standing Orders, please refer to the FLEXX Procedures Guide, Specialty Modules, "Standing Orders" description.

Notes:

Pricing:

The Quotation module can be set up to do pricing in one of two ways;

1. Price Based - based on the SKU Price Matrix in FLEXX Inventory Control; or
2. Cost Based - Cost plus pricing where the pricing is based on the SKU cost plus a predetermined mark up percentage. This percentage is defined per customer on the Customer Master table (*see Getting Started manual*).

To let FLEXX know which pricing method to use, the FLEXX Application Control Table for each company must be defined as shown below.

Price Matrix Pricing

OR....

Cost Plus Pricing

Application	Type	Description	*Value	Company
quotes	unit_price	Unit price or Cost	P	default
quotes	unit_price	Unit price or Cost	C	default

Time Period:

It is also possible, through the use of Application Control, to define the standard time period (in days) that a quote is valid. The FLEXX default is 30 days. If it is necessary to use some other time period (e.g. 90 days), set up Application Control as follows;

Application	Type	Description	Value	Company
quotes	quote_term	Expiry date of Quote	90	default

Gross Margin:

The total gross margin percentage of each quote can be checked against a predetermined percentage. This percentage is set in Application Control and if a quote doesn't meet or exceed this gross margin, it can only be converted to an order after it has been authorized by a user defined with the appropriate authority (see *Administration Guide, User Authorization definitions*). To make use of this minimum gross margin percentage, FLEXX Application Control must be set up as follows.

Application	Type	Description	Value	Company	Parameter
quotes	markup	Minimum quotes gross margin	(user defined)	default	minpercent

Sales Commission:

An overall default sales commission percentage can also be set using FLEXX Application Control. Any sales commission percentage already set up on the Salesperson Table (See *FLEXX Getting Started Manual*) will be ignored. FLEXX will by default automatically set it to 10 percent. To have the sales commission percentage default to something other than 10 percent, use the following settings in FLEXX Application Control:

Application	Type	Description	Value	Company	Parameter
op	slscmsn	Default Sales Commission	(user defined)	setup	dfltpct

Should the need arise to override this default sales commission percentage, an end user with the appropriate authority (assigned as part of User Master set up - see *FLEXX Administration Guide*) can do so.

Web Orders:

FLEXX eCommerce orders entered on an internet browser session become "Web" or "Pre-Paid Web" quotes. These quotes need to be processed according to normal FLEXX Quote processing procedures.

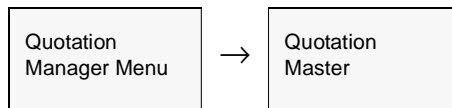
The "Pre-Paid Web" quote is the result of an eCommerce order that is paid by Credit Card as opposed to being invoiced and billed to the customer.

3.1 Quotation Master

Description

The Quotation Master form is used to enter general information about the quote and standing order. This includes such data as the customer, the dates the quote is effective and its status. The specifics of what items the customer is requesting a quote for are described in Sec. 3.3.

Select



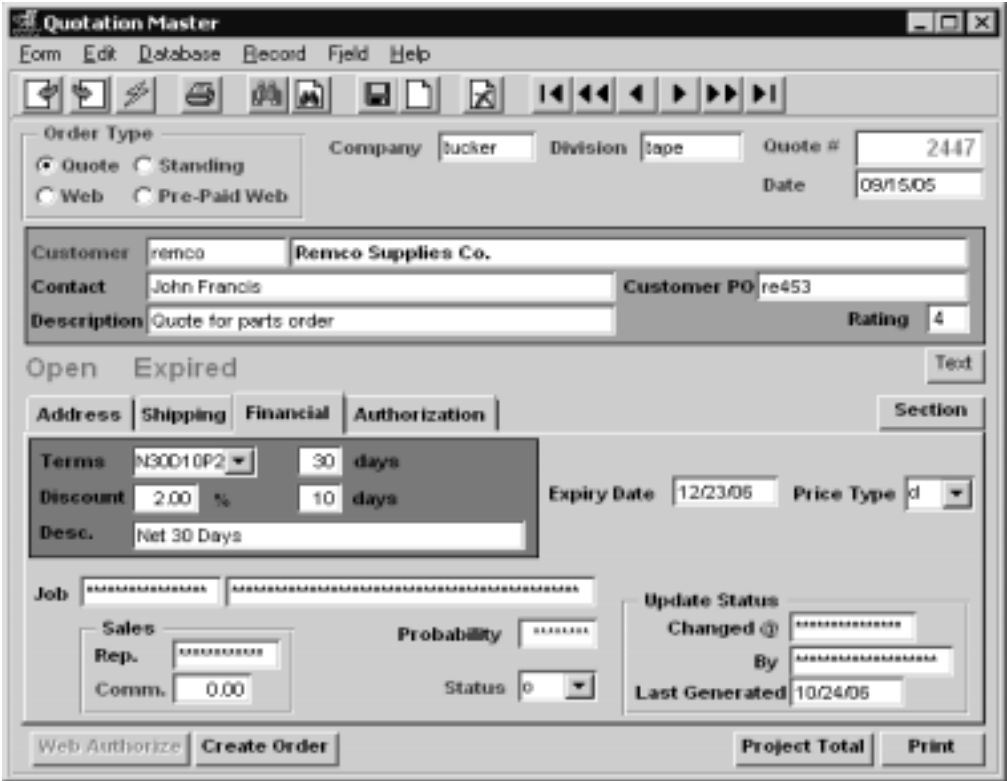
The Quotation Master form appears in Find mode. To create a new quote press <<Clear to Add>>.

Fields

The following fields appear on the form.

Field	Entry	Default	Reqd
Order Type	Radio button used to specify type of quote; can be: <ul style="list-style-type: none"> • Quote - standard quote. Generally used for a one time quote; then is closed after the order is created. • Standing - standing order. This order remains active indefinitely and can be used to generate multiple sales orders based on selection criteria. • Web - Quote entered as a FLEXX eCommerce order. All web orders are stored as Web Quotes in the Quotation Module. They are then reviewed and approved prior to being processed as a standard sales order. • Pre-paid Web - Quote entered as a FLEXX eCommerce Credit Card order. 	Quote	Y
Company	The Company code for the company supplying the quote.	Session Default	Y
Division	The Division code for the division supplying the quote.	Session Default	Y
Quote #	The number of the quote order, either autogenerate using the next available number or manually entered as desired.	Autogen	Y
Date	The date the quotation was created.	Session Default	Y
Customer	The customer code and name of the customer requesting the quote.		Y
Contact	The name of the contact person at the customer site. The contact information that defaults here is set up as part of the Customer Contact information defined when the customer was set up (<i>See FLEXX Getting Started Manual</i>).	Customer Contact	N
Customer PO	Purchase Order number as required by the customer. This field will be required if the customer has been defined with PO Required on the Customer Master. FLEXX will report an error message at Order Creation if PO number is missing.		N
Description	Any user-defined comment. If this is a web Quote, this will say "Web Order", and if the confirmation e-mail could not be sent, will add "Email not sent!"		N
Rating	Customer Rating value as set on Customer Master.		N
Text button	Will be lit if there is underlying text. Press the button to enter or view text.		
Address Tab			
Bill To Address	Customer bill to address, phone and fax numbers as defined on the Customer Master table.	Customer Master	Y
Phone/Fax	Customer's phone and fax telephone numbers at the Bill To location.	Customer Master	N
Contact	The customer contact name at the Bill To location.	Customer Master	N
Ship To Address	Customer ship to address, phone and fax numbers as defined on the Customer Master.	Customer Master	Y
Phone/Fax	Customer's phone and fax telephone numbers at the Ship To location.	Customer Master	N
Contact	The customer contact name at the Ship To location	Customer Master	N

Field	Entry	Default	Reqd
Shipping Tab:			
Carrier	The preferred carrier used to ship the eventual order. Any predefined carrier can be used.	Customer Ship To	N
Freight	The code used to identify how the freight charges are to be paid. Any predefined code can be used. FLEXX recognizes codes 'best', 'ppd/chg', 'collect', and 'prepaid'.	Customer Ship To	N
FOB	Free on Board location.		N
Comment	End-user comment field for any additional comments on this shipping data.		N
Warehouse	The warehouse to be used to fulfill the order.	Company/Division Table	Y

Field	Entry	Default	Reqd								
<p>Financial Tab:</p> 											
Terms	The payment terms code specified on the Customer Master for this customer, and defined on the Terms Maintenance Table . The number of days are as defined for this code on the table.	Customer Master Table	Y								
Discount	Percentage discount and number of days for early payment as defined for the Terms code.	Customer Master Table	N								
Description	The Terms description. This will either be the description defined on the Terms Table, or if an Override is defined on the Customer Master, it will be used.	Terms Table or Customer Master	Y								
Expiry Date	<p>The Expiry Date is set to default to 30 days after the entry date. This default can be changed to some other period through the use of FLEXX Application Control (See Sec. 3.0). This date is only used for display purposes when the quote is printed. A quote that has passed the expiry date can still be used to create an order in FLEXX Order Processing. To set the expiry date in the Application Control Table the following settings should be defined by company:</p> <table border="1"> <thead> <tr> <th>Application</th> <th>Type</th> <th>Description</th> <th>Value</th> </tr> </thead> <tbody> <tr> <td>quotes</td> <td>quote_term</td> <td>Expiry Date</td> <td>number of days quote is valid</td> </tr> </tbody> </table> <p>On web quotes, this value will be the quote entry date and will not be used by FLEXX to "expire" the quote. The quote will remain in effect until it has been processed successfully.</p>	Application	Type	Description	Value	quotes	quote_term	Expiry Date	number of days quote is valid	System Generated	
Application	Type	Description	Value								
quotes	quote_term	Expiry Date	number of days quote is valid								

Field	Entry	Default	Reqd
Price Type	The customer's Price Type setting. This will determine the list price of the items entered on the Quote Detail form. Note: This field is active only when Application Control quotes <i>unit_price</i> is set to "P" (See Sec. 3.0). If set to "C", this field is inactive and the quote list prices will be based on the item costs.	Customer Master	Y
Job	Job Code and description. This field is only active if Job Costing is installed and the Application Control variable <i>install</i> for application <i>jc</i> is set to Y. It is linked to a Job defined in the Job Contract Entry form in Project Management.		N
Sales Rep.	The Salesperson responsible for the potential sale.	Customer Master	N
Comm.	The commission percentage the salesperson will earn. This default percentage is set using FLEXX Application Control (See Sec. 3.0). This percentage can be overridden by an end user with the appropriate authorization rights. See the FLEXX Administration Guide for more information.		
Probability	A user defined setting to indicate the percentage probability of this quote becoming a sales order. Can be any value from 0 to 100. This is for user reference only (no FLEXX processing), and can also be used for reporting purposes.		
Status	The status of the quote. Status can be; <ul style="list-style-type: none"> • o - Open. All quotes initially start with this status. While a quote has this status, new sections can be added in Section Maintenance (See Sec. 3.2) and additional Quotation detail line items can also be added (Sec. 3.3). Standing Orders will remain open indefinitely, until they are manually closed. • c - Closed. After the Sales Order Generation routine (See Sec. 3.4) has been run for a Quote only, FLEXX will automatically change the status of the quote from "o" - open to "c" - closed. Once a quote has a status of closed, it can no longer be changed. On a Standing Order, the quote will remain open until it is manually closed (status changed to "c"). • h - Held. This status is mainly used for Standing Orders. To temporarily 'suspend' a standing order, change the status to "h", and then when it is again activated, restore it back to "o", or close it if no longer required. A quote in Held status can not be used to generate a sales order. • i - Incomplete. A setting to indicate the quote is still in the process of being created and should not yet be converted to a sales order. NOTE: Web order quotes are in this status if they have not been properly completed during the eCommerce entry process. • x - Cancelled. An end user status to be used where quotes have been cancelled by the customer. If a quote has a cancelled status, the Sections Maintenance and Detail Quotation forms can not be changed. A cancelled quote can be re-opened (reset to status "o") if needed. 	o	Y
Update Status Changed @ By	This field is automatically updated by FLEXX only after the quote has been printed (See Sec. 4.2) and then is changed. This field is updated with the user code of the person who changed the quote as well as the date. If the quote is reprinted, this field is returned to its original status of null values.	System Generated	

Field	Entry	Default	Reqd
Last Generated	Shows the last time a sales order has been generated from the quote.	System Generated	

Authorization Tab:

Through the use of FLEXX Application Control (“markup” parameter - See Sec. 3.0) it is possible to enforce a minimum Gross Margin percentage that each quote must meet or exceed. This minimum percentage applies to the overall quote, not each individual quote detail. When a quote is first created, the authorization status is displayed as “n/a”. If the overall quote margin is below the minimum margin set in application control, the authorization status will go to “required” and the quote will be in status “h”. A quote with a status of “required” will need to be authorized before a sales order can be created. (See Sections Maintenance - Sec. 3.2). Once the authorization routine has been completed successfully, the status of the quote will become “approved”. It is now possible to create a sales order (See Sec. 3.4).

Buttons

Web Authorize	Used in the FLEXX e-Business module to authorize customer web quote requests. <i>Please refer to the FLEXX e-Business manual for complete details on this function.</i>
Create Order	Press this button to create a sales order in FLEXX Order Processing. This button is only functional for standard or web quotes, and is not active for Standing Orders. The Sales Order Generation routine (See Sec. 3.4) is required for Standing Orders.
Project Total	Press this button to display the Quotation Amount form which shows a summary of the projects expected billings including all taxes. This total represents the sum of the section price for each section of the quote.
Print	Press this button to print the quote.

3.2 Sections Maintenance

Description

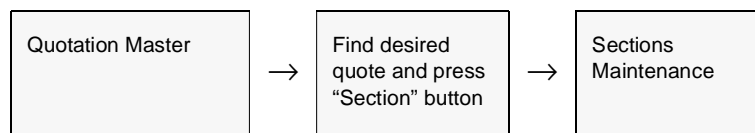
Within each quote, different “sections” (or phases) can be defined. For each section defined, an order will be created in FLEXX Order Processing. This has the advantage of being able to break up a quote into sections, satisfy the needs of the first section (reflected now in a sales order) and invoice it in FLEXX Accounts Receivable when complete. Then you can proceed with the next section, etc. At least one Section is required, even if sectioning the quote is not required.

However, if multiple sections have been created, it is also possible to create a single sales order from these sections. This is described in Sec. 3.4 Sales Order Generation.

To add new sections, the status of the Quote must still be “o” - Open; it cannot be “c” - Closed. After a quote has been created and Sections Maintenance selected, the cursor will be located on the Section Title field. Enter the section title and then pressing <<Enter>> will save the Section and present the Detail Quotation form.

There is also functionality on this form to authorize quotes that do not meet the minimum margin percentage as defined in FLEXX Application Control (*See Sec. 3.0*). If the quote does not meet the minimum percentage, the quote must be authorized by an end user with the appropriate rights. *See FLEXX Administration Guide, User Authorization for more information.*

Select



The Sections Maintenance form appears in Update mode.

Fields

The following fields appear on the form.

Field	Entry	Default	Reqd
Order No.	The sales order number created in FLEXX Order Processing as a result of using the Sales Order Generation routine (See Sec. 3.4).	System Generated	
Quote No.	The number of the quote.	Quote Master	Y
No.	The entry line sequence number.	System Generated	Y
Section Title	End-user description of each section. Each section will by default create its own Sales Order in FLEXX Order Processing as a result of using the Sales Order Generation routine (See Sec. 3.4). So if there are two sections defined, there will be two orders created. Each order will have the comment "Generated from Quotation" (quote number) Section 1 or 2 etc. entered on the corresponding Shipping tab Comment field. It is however possible to create a single order from all quote sections if this is desired, by checking the corresponding box on the Sales Order Generation form.		N

Field	Entry	Default	Reqd
Markup Set	If the quote price is based on cost plus a percentage mark up, then a default markup percentage is defined on the Customer Master - Additional Information form (See <i>FLEXX Getting Started Manual</i>). If the default markup percentage is not acceptable it can be overridden. This markup percentage is used in conjunction with the cost of the SKU as per the SKU Inventory Table (See <i>FLEXX Inventory Manual</i>) to determine a quote price. If cost plus pricing is not being used and SKU Price Matrix pricing is used, a 0.00 value will appear here and the field will be stippled.	Customer Master	
Actual	The actual Markup percentage of the section entry.	System Generated	
Section Price	The total value of the sections billing based upon the SKU price of each SKU defined on the Detail Quotation form (See Sec. 3.3).		
Section Cost	The total cost of the section based upon the cost of each SKU defined on the Detail Quotation form (See Sec. 3.3).		
G.M. %	Gross Margin percentage of the section entry.	System Generated	
Text	Text flag, Y - if there is underlying text, N - if not (See Sec. 3.5 Quotation Text)	N	N
Job Code	The Job Costing job code if unique to this section. This can be used to link quotes to other sales orders and purchase orders for a common project.		N
Changed	This flag will be set if the selected entry has been previously modified.		N
Totals	The column totals of all sections.	System Generated	
Buttons			
Text	Press the Text button to display or enter the text screen. Button will be lit green if there is underlying text.		
Authorize	This button will only be lit when authorization is required. If a quote markup percentage falls below the minimum percentage set up in FLEXX Application Control (see <i>Implementation Guide, Sec. 3</i>), it must be authorized before the quote can become a sales order. To authorize a quote, press this button. If the end user performing the authorization has the appropriate rights, an authorization form will appear. The authorization form will display the current gross margin percentage of the quote. This current value percentage is compared to the value the end user can approve. As long as the current value exceeds the users' allowed value and a current password is entered, the quote will be approved. The authorization status on the quote header will now go from "required" to "approved".		
Detail	Press this button to go to the Quote Detail form (See Sec. 3.3).		

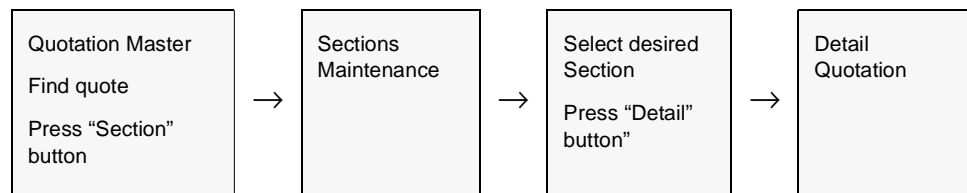
To enter each section's detail items press <<Next Form>> (or the Details button) and enter the line items.

3.3 Quotation Detail

Description

The Quotation Detail form contains information on what items the customer is requesting a quote for. The total price and costs of the items quoted are also displayed.

Select



The Quotation Detail form appears in Update mode.

The screenshot shows the 'Detail Quotation' window with the following data:

SKU Code	Description	Sell UOM	Quantity	Sell Unit Price	Stock Unit Cost	Tax	Sell Priced
cws-200	*Cedar Wood Spindle 200mm	** EA	2.0	90.0	29.156563	Y	<input checked="" type="checkbox"/>
cws-500	Cedar Wood Spindle Kit 500	** EA	2.0	300.0	15.898933	Y	<input checked="" type="checkbox"/>
cws-800	CWS 900mm BOM	** EA	1.0	199.99	15.894039	N	<input checked="" type="checkbox"/>
cws-250	Cedar Wood Spindle 250mm	** EA	1.0	0.0	0.0	N	<input type="checkbox"/>
cws-870	Cedar Wood 870mm	** EA	1.0	0.0	0.0	N	<input type="checkbox"/>
freight	Freight Charges	** EA	1.0	25.0	10.0	N	<input checked="" type="checkbox"/>

Summary fields: Job Code: [XXXXXXXXXXXX], Resource: [XXXXXXXXXXXX], Total Markup %: 766.407812, Totals: 1094.99, 115.99503

Line Control: Seq: 1, Invoiceable: Y, Inventory: Y, BOM: N, Sales Resp.: 0000, Price Type: id

Stock: Level: 1207.75, UOM: EA, Qty: 2.0

Status: [N], Last Gen Date: [XXXXXXXXXX]

Fields

The following fields appear on the form.

Field	Entry	Default	Reqd
Company	Default company supplying the quote		Y
Warehouse	The Warehouse Code representing the warehouse from which the quoted items will be obtained.	Quote Header	
SKU Code	The SKU code representing the parts to be quoted on. These SKU's are set up in FLEXX Inventory Control (See the FLEXX Inventory Control Manual - SKU Master).		Y
Description	Full description of the SKU part being ordered and will default to the definition on the SKU Master. This value can be changed if Application Control setting for op skudesc = Y. Otherwise it is unchangeable.	SKU Master	N
Untitled	This field is only updated after a quote has been printed. If the detail quotation information is changed after the quote has been printed, a "+" value will appear. If a quote is then reprinted, this field is again filled with null values.		
Sell UOM	The Selling UOM of this SKU.	SKU Attributes.	Y
Quantity	The quantity of the goods being quoted.	1.00	Y
Sell Unit Price	The SKU price per unit. If "Price based" pricing is being used, this will be the price as defined on the SKU Master Price table (See FLEXX Inventory Control Manual - SKU Pricing Table), including all discounts and currency conversion if applicable. The Quotation module determines whether to use the defined price matrix through the use of the Application Control Table as described in topic "Working with Quotes" (See Sec. 3.0). If "Cost based" pricing is being used the price determined here is based on the cost of the SKU (as per FLEXX Inventory Control) plus a mark up percentage (as defined on the Customer Master).	System Generated	Y
Stock Unit Cost	The cost of the SKU. If the SKU is carried as inventory, the cost is the Average cost value for that warehouse as per the Inventory Table in FLEXX Inventory Control. If the SKU is a non-inventory item, the cost is the value as per the Standard Cost field on the SKU Master. If the SKU is costed using either LIFO or FIFO, only one cost is selected. So, in other words, if a quote is for 10 units and there are 8 available at \$5 each and 200 available at \$7 each, all 10 will be FIFO costed for quote purposes only at a rate of \$5. If LIFO all 10 would be a \$7.00.	SKU Master	Y
Text	Y if there is underlying text; N if not. <<Zoom>> to enter new text.		
Sell Priced?	This flag is checked if the UOM entered has a price defined on the SKU price table. If the Sell UOM is not priced, FLEXX will use the Stock UOM price with the conversion factor defined in the Unit of Measure Table to determine the price.	SKU Master	Y
Total Markup %	The total percentage markup of price over cost.	System Generated	
Total Price	The total extended billing amount of the section. Basically represents the sum of each SKU's billing amount.	System Generated	

Field	Entry	Default	Reqd
Total Cost	The total extended cost of the section. Basically represents the sum of the costs of the SKU's used on the quote.	System Generated	
Buttons			
SKU Subst.	Press this button to see the SKU Substitute Items form to be able to select substitutes.		
Eqpmt Wrnty	The Equipment Warranty button is enabled when a Serialized RW Equipment SKU is entered on the detail line. Press this button to display the Customer Equipment Maintenance form where additional warranty information can be entered or viewed (<i>See the Repair & Warranty manual for more details</i>).		
Stock Tab			
Line Control			
Seq	The sequence number determining the order of the detail lines.	System Generated	Y
Grp	Used by the Bill of Materials function to group the BOMs.	System Generated	Y
Level	The Bill of Materials level. If the SKU part being ordered by the customer is a Bill of Material "parent" or if the SKU part is a SKU in its' own right it has a level of "0". If the SKU part is a subcomponent of a parent BOM, it will have a level of "1". If the SKU part is a subcomponent of a subcomponent of a parent BOM it will have a level of "2" etc. (<i>For further details see the FLEXX Inventory Control Manual - Bill of Materials</i>)	"0"	Y
Invoicable	The detail entry can be invoiced.	SKU Master	
Inventory	The SKU is an inventory item.	SKU Master	
BOM	If the part being quoted is a "parent" SKU representing a Bill of Materials a Y - Yes will appear here. If not a N - No. If the BOM flag is set to Y -Yes and you press <<next form>> the SKU BOM Entry/Maintenance form appears. This form displays the sub-SKU's that make up the parent SKU.	SKU Master	N
Sales Rep	The salesperson code assigned to this customer. This is a display only field that is stippled. It will default to the Quote Master setting.	Customer Master	Y
Price Type	The customer's Price Type setting. This will determine the list price of the items entered on the Quote Detail form. Note: This field is active only when Application Control quotes <i>unit_price</i> is set to "P" (<i>See Sec. 3.0</i>). If set to "C", this field is inactive and the quote list prices will be based on the item costs.	Customer Master	Y
Stock Level	The current Stock Level (On Hand less Committed) quantity of the SKU for the selected warehouse.	SKU Master	Y
UOM	The Stocking UOM.	SKU Master	
Qty	The number of units of the Sell UOM converted to Stocking UOM.	System Generated	Y
Status	The Status of the detail entry: •a - Active •c - Cancelled		

Field	Entry	Default	Reqd
Last Gen Date	Though stippled, this field will show the date of the latest order creation for this quote or standing order.	System Generated	
Edition Tab			
Use Latest Edition	This flag is only valid for Edition SKU's and will be checked if the entry is for the latest edition.		
Edition	For edition SKU's, the edition number of the SKU that is quoted.		N
Edition Level	The Edition Stocking Level.	SKU Master	Y
Recurring Interval	For Edition or Recurring SKU's, these fields indicate the recurring cycles of the SKU.	SKU Master	

BOM Costing

If the SKU entered is a BOM, and the BOM SKU is defined 'Invoiceable' on the SKU Attributes form, its costing will also be taken from its Cost definition, whether or not it is defined 'Inventory'. This is significant mainly when a Non-inventory BOM SKU is entered, and no cost has been set for it, the assumption being all costing will be determined by the 'child' SKU costs. If a cost has not been set for the parent BOM, the Sections Maintenance form will show a Section Cost and GM % of zero resulting in a likely requirement for Authorization before an order can be created.

3.4 Sales Order Generation

Description

The Sales Order Generation routine is used to seamlessly create an order in FLEXX Order Processing based upon the quote and its detail entries. Once a quote has been accepted, the quote status on the Quotation Master (*See Sec. 3.1*) needs to be changed from “q” - quote to “o” - open. A quote must have a status of “o” - open if a sales order is to be generated. Once the sales order has been generated in FLEXX Order Processing the status of the quote is changed automatically from “o” - open to “c” - closed. To start the sales order generation process and to automatically change the quote status from “q” to “o”, press the Create Order button on the Quotation Master (*See Sec. 3.1*). After the button has been pressed the Sales Order Generation form appears.

The Sales Order Generation process is required to generate a sales order for a Standing Order. It is not possible to accomplish this with the **Create Order** button on Standing Orders (the button is inactive for Standing Orders). For a Standing Order, after the sales order has been generated, the standing order will remain in open status. Additional sales orders can be generated as required until the quote (Standing Order) has been closed (changed to status “c”). *Please refer to the FLEXX Procedures Guide, Specialty modules for more details on Standing Order Processing.*

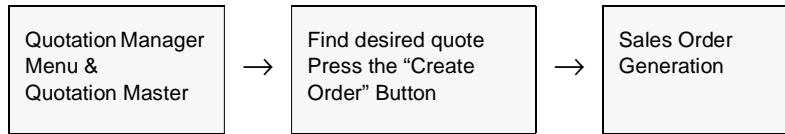
Currently, Sales Order Generation will only create regular sales orders (i.e. type “rg”) in FLEXX Order Processing. If Quotation is to be used to create Factory Direct orders (i.e. type “fd”) it will be necessary to change the sales order header type status of the resulting order from “rg” - regular sales order to “fd” - factory direct, press << Add/Update >> and then << Next Form >> to the sales order detail and change each detail line status from “o” - open to “fo” - Factory Order Open. Only quotes with an authorized status of “n/a” or “approved” can be used to create sales orders.

The Sales Order Generation form can also be used to automatically create new price records on the SKU Price form. The new price records are created based on the prices entered on the Quote detail form (*see Sec. 3.3*). To make use of this functionality select the Generating Price box on the Sales Order Generation form. If the quote is to be used only to generate a new price record and to be left open for further processing, deselect the **Close** box. The quote will then remain open, and can be modified and used to generate a sales order. However, whenever an order is generated, the quote will be automatically closed.

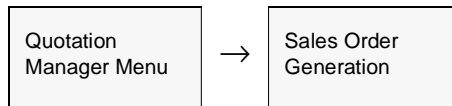
Note:

If the customer is defined with PO Required on the Customer Master and the Customer PO field on the quote header is empty, FLEXX will report error message 2471 “Missing Customer PO Number.” and also identify the quote number that is in error.

Select



OR



The Sales Order Generation routine appears in Update mode.

Sales Order Generation

Form Edit Field Help

Selection Criteria

Company: lucker Division: tape

Quotation: 2447 to 2447

Customer: remco

Quote Type: Quote Standing Order
 Web Pre-Paid Web

SKU Code: %

SKU Cycle: %

Cut Off Date: 10/24/06

Include On Hold Quote?

Generation Criteria

Warehouse: []

Next Bill Date: 10/24/06

Effective Date: []

Expiry Date: []

Documents to Create

Sales Order?

Price List? Close?

Reprice?

Combine All Sections into One Order? Yes No

Start [] Idle []

Fields

The following fields appear on the form.

Field	Entry	Default	Reqd
Selection Criteria			
Company	The Company code of the company supplying the quote.	Session Default	Y
Division	The Division code of the division supplying the quote.	Session Default	Y
Quotation	The number range of Quotes and Standing Orders to be selected to create sales orders in FLEXX Order Processing.	Session Default	Y
Customer	The customer code attached to the quotes to be selected to create sales orders.	%	Y
Quote Type	<ul style="list-style-type: none"> •Quote - standard quotation •Standing Order •Web - web order •Pre-Paid Web - Credit Card paid web order 	Quote	Y
The next 5 fields are active only for Standing Orders:			
SKU Code	Can select orders by particular SKU code or leave wildcards to select all SKU	%	
SKU Cycle	Can select certain cycle group as defined on SKU master user 5 field.	%	
Cut off Date	Cut off date of the SKU Edition specified on SKU master, edition form.	System Date	
Include On Hold Quote ?	This flag will generate sales order for Standing Orders marked held, but the resulting order will be given a Credit Hold Status and will need to have credit release before it can be processed. With the flag off no standing orders with Held status will be generated.		
Generation Criteria			
Warehouse	For Standing Orders, the Warehouse which the orders will come from. Generally the generated order will specify the shipping warehouse as the #1 vendor code (SKU Master Vendor form) which is also defined as a warehouse code. If there is insufficient quantity then the warehouse specified in the warehouse field is used.		
Next Bill Date	Enter the next billing date to appear on the generated sales order.	Session Default	Y
Effective Date	If the Price List flag is set, this field is used to set the date the price record will be effective.	Session Default	Y
Expiry Date	If the Price List flag is set, this field is used to set the date the price records will expire. The date that appears here is determined by FLEXX based on the expiry date of the quote.	System Generated	
Documents to Create			

Field	Entry	Default	Reqd
Sales Order ?	Select this field to have a sales order created in FLEXX Order Processing based upon the quote. (Not active for Standing Orders). If the quote is to be used to only generate a new SKU price record, uncheck this field and check the Generating Price box.		
Price List ?	Select this field to have price records created in FLEXX Inventory Control based upon the prices entered in the quotation detail. As a result of selecting this field, the two Generation Criteria fields will appear. (Not active for Standing Orders).		
Close ?	This field is only active when the Price List field is selected. With this box checked, the quote will be closed on completion of running the process.		
Reprice ?	Check this flag if the quote values are to be used to reprice the SKU's on the Sales Order, but not generate new SKU price records on the SKU Price table.		
Combine All Sections into One Order ?	<ul style="list-style-type: none"> • Yes - Combine all sections of quote into a single order. • No - Create separate order from each section. The default setting can be changed by setting the Default flag on the associated Master Types Table # 2319.	No	Y
Start	Press Start button to create sales order.		

Web Orders:

The order created from a “Web” quote will be a standard sales order in OP that will need to be processed according to normal FLEXX order processing procedures.

The order created from a “Pre-Paid Web” quote will generate a Pre-Paid sales order, and all invoice and payment processing will be automatically completed. An invoice will be generated and the order will be marked Invoiced (status “i”), a receipt will be generated and applied to the invoice, and the invoice will be marked “Paid”. The operator will still need to Release and Ship the order to complete the sales process. Additionally, the invoice can be printed which will be stamped “Paid” and can be used as a customer receipt.

3.5 Quotation Text

Description

For a quote selected using the Quotation Master and/or Detail form, use the Text to:

- Δ Add unlimited comments about the quote. For example, the text could be used to keep a historical record of changes made to the quote. Enter as many lines as you want, then press <<Add/Update>>.
- Δ View comments.
- Δ Update comments. Change as many lines as you want, then press <<Add/Update>>.
- Δ Delete comments.

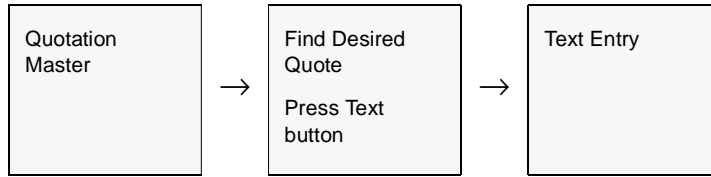
Quote Master header text with keywords 'top' and 'bot' will be printed at the top and bottom respectively of the quote report.

All Section text, regardless of keyword will appear at the top of each section.

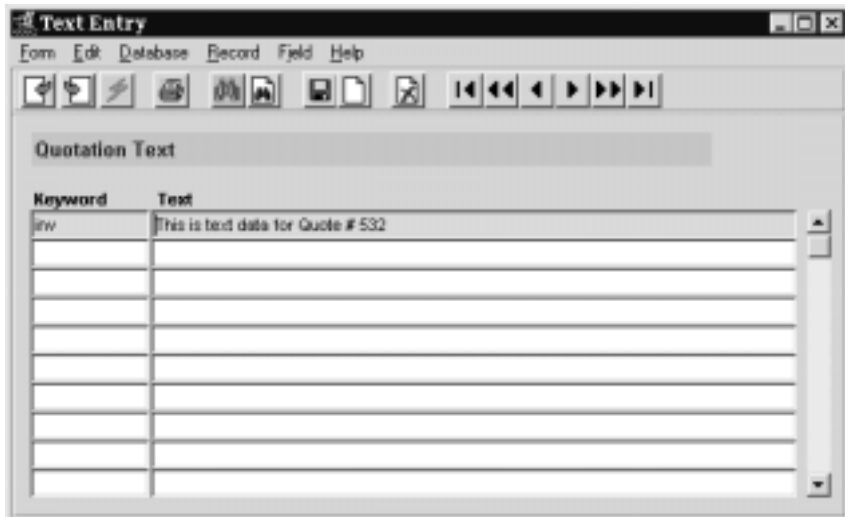
Any text entered on the Quote, regardless of keyword, will be carried over to the newly created Order. Text entered on the Quote Master and/or the Quote Sections Maintenance forms will be carried over to the Order Entry Header form. Text entered on the Quote Detail form will appear on the corresponding Order Detail form. To have Quotations text flow all the way through to the resulting invoice in FLEXX Accounts Receivable, use a keyword of "inv".

Access to Quote Text forms is disallowed until the Quote Master and/or Detail has been saved. Once a Quote has a status of "c" - closed, it is no longer possible to add/modify text.

Select



The Quotation Text form appears in Find Mode.



Fields

The following fields appear on the form.

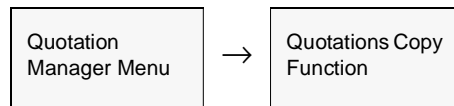
Field	Entry	Default	Reqd
Keyword	A word indicating the type of comment. Example: Notes or Info .		Y
Text	The comment.		N

3.6 Quotations Copy Function

Description

The Quotations Copy function is used to completely copy an existing quote, including the header, sections and details. This will create a new quote with a status of “q” which can then be modified as needed.

Select



The Quotation Copy Function appears in Update mode.



Fields

The following fields appear on the form.

Field	Entry	Default	Reqd
Copy From:			
Company	The Company Code appearing on the Quote Master to be copied.	Session Default	Y
Quotes #	The number of the quote that will serve as a template to be copied to create a new quote.		Y
Customer	The Customer code and name of the quote to be copied.	Quotation Master	Y
Job Name	The Job description appearing on the Quotation Master form of the quote to be copied.	Quotation Master	N
Date	The date appearing on the Quotation Master form of the quote to be copied.	Quotation Master	Y
Copy To:			
Company	The Company Code to appear on the newly created quote.		Y
Quotes #	The quote number of the newly created quote. This is an autogenerated value only and cannot be changed.	System Generated	Y
Customer	The customer code and name to appear on the newly created quote. This customer code does not have to be the same as the customer code of the originating quote.	Original quote customer	Y
Start	Press Start button to start the process.		

Notes

If the process fails with a conflict id, <<zoom>> on the Process ID field (box next to Start button), determine if the conflicting process ('r' status) should still be running, Force it to completion if not, and rerun the process (*see Administration Guide, sec 4.1 for details*).

3.7 Purge Quotation Process

Description

The Purge Quotation Process is used to purge open unused quotes from the system. This process can be used to simplify the process of deleting incomplete quotes, which could also be accomplished by manually deleting each individual quote. This process also allows purging quotes by date range of the dates entered on the Quote Master.

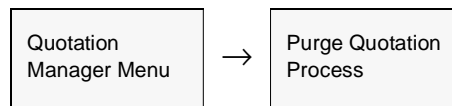
The following conditions will allow quotes to be purged:

- Δ Standard Quote - only status “o” (Open), “i” (Incomplete), or “x” (Cancelled).
- Δ Standing Order - only status “o” and “x” and if there are no orders already attached. Once an order has been generated from a Standing Order, it can no longer be purged, regardless of its status. To close the quote, manually change the header status to “c”.
- Δ Web - only status “o”, “i”, or “x”.

Note:

The Purge Process will only purge those quotes and standing orders that also have a Section defined. If it has not yet been completed, the only way to purge those quotes is to manually delete the Quotation header form by clicking on the X-Delete icon.

Select



The Purge Quotation Function appears in Update mode



Fields

The following fields appear on the form.

Field	Entry	Default	Reqd
Company	The Company code appearing on the Quote Master.	Session Default	Y
Division	The Division code on the quote.	Session Default	Y
Quote Type	The type of the quotation to be purged.	Quotes	Y
Quote Status	The status of the quotes to be purged; can be: <ul style="list-style-type: none"> • o - Open • i - Incomplete • x - Cancelled For standard or web quotes, status o, i, and c can be used. For Standing Orders, only those quotes that have no sales orders attached and are status o or x can be purged.	o	Y
Quote Date	The range of dates appearing on the Quotation Master form of the quote to be purged.	Session Default	Y
Start	Press Start button to start the process.		

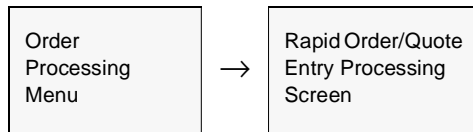
3.8 Rapid Quote Entry Processing

Description

The Rapid Order Entry process in Order Processing can also be used to create a quote directly from a SKU price lookup. Rather than using the SKU Price Lookup function (as described in the OP manual), the operator would select the Rapid Order Entry function from the OP menu, and perform the price lookup from that screen allowing him/her to then create a quote using the displayed values if so desired.

Be aware that the Rapid Order Entry menu item can be added to the Quote Manager menu so it is also selectable there.

Select



The Rapid Order/Quote Processing screen is displayed in Update mode.

UOM	Qty	Whse	Effective Date	Expiry Date	Price Type	List Price	Discount Price	Minimum Price	Customer Specific
BOX	1.0		01.01.04		d	500.0	500.0	0.0	<input checked="" type="checkbox"/>
EA	1.0		01.01.04		d	90.0	90.0	0.0	<input checked="" type="checkbox"/>
EA	1.0	centrl	04.01.04		d	125.0	125.0	175.0	<input checked="" type="checkbox"/>
EA	0.0		02.01.03		d	105.0	105.0	0.0	<input type="checkbox"/>
EA	5.0		01.01.03		d	85.0	85.0	300.0	<input type="checkbox"/>
EA	1.0		01.01.03		d	135.0	135.0	0.0	<input type="checkbox"/>

The initial search screen is the SKU Price/Inventory Details form which is used to enter the required search keywords Customer code and SKU code or description.

Fields

The following fields appear on the form.

Field	Entry	Default	Reqd
Company	The company code.	Session Default	Y
Customer	The customer code to use for the lookup.		Y
SKU	The SKU code or description to find the price and inventory values. Either the code or the description can be used in the search.		Y
Price Type	You can specify a specific price type for the search, or use the default % for all price types.	%	Y
SKU Size	The SKU size value as defined on the SKU Attributes form.	SKU Master	Y
View Price/ Inventory	Press this button to display the current effective prices for this customer and the inventory levels for the selected SKU. Note that this button changes to Clear Price/Inventory after the search has completed. Pressing the button clears the entries allowing a new search.		
UOM	The Unit of Measure for the displayed price.	SKU Master Pricing Table	Y
Qty	The quantity this price is effective for.		Y
Whse	The warehouse this price is effective for.		Y
Eff. Date	The effective data of the displayed price.		Y
Expiry Date	The expiry date of this price.		
Price Type	The price type for this price.		Y
List Price	The defined list price of the SKU (includes currency conversion if foreign).		Y
Discount Price	The customer's effective price for this SKU. This price is calculated for this customer, and includes any available "line" discounts (not the Whole Order (volume) discount) and currency conversion. This value can be changed here if desired, and will become the actual order price of the SKU when the order is generated.		Y
Minimum Price	The minimum price for this SKU as defined on the SKU Pricing table.		Y
Customer Specific	This field will be checked if the price displayed has been defined as the customer-specific price on the SKU Price table.		
Last Price Paid	This field will display the last price paid for the selected SKU by this customer.	Order History	
Qty On Hand	The current on hand quantity of the selected SKU.	SKU Master	Y
Qty On Order	The current on order quantity for the SKU.	SKU Master	Y
Customer Order History	Press the Order History button to display a complete price history of the selected SKU for the specified customer. FLEXX will display the Customer Order Review screen (See Sec. 10.2).		

Field	Entry	Default	Reqd
Customer Quote History	Press the Quote History button to display the Quote Overview screen listing all previously entered quotes for the selected customer.		
Show Image	Press this button to display the stored image for the selected SKU.		
Quote Section	If a Quote entry is to be created, enter the Section code to be used. All section codes to be used need to be predefined on the associated Master Types table (zoom on the field to display or update the table entries).	Master Types Table 2315	
Select for Quote	Press this button to select the highlighted entry for a Quote entry.		
Select for Order	Press this button to elect the highlighted entry for a Sales Order entry.		
The following fields are display only to be used as reference.			
Currency	The customer's defined currency code.	Customer Master	Y
Price Type	The customer's defined Price Type.	Customer Master	Y
Disc. Type	The customer's defined discount code.	Customer Master	Y
Order Disc.	The customer's defined Whole Order discount code.	Customer Master	N
Warehouse	The default warehouse code as defined on the Company/Division table.	Company/ Division Table	Y
Division	The default Division code as specified on the FLEXX Control Panel.	Control Panel	Y
User	The user code of the FLEXX user performing the process.	FLEXX login	Y

The fields required for the lookup are:

- Δ Customer – the customer code for the customer requesting the order; if not known, you can zoom this field to display the Customer Search screen allowing a search for the desired code.
- Δ SKU – the code or description of the SKU to be ordered.

Once these fields have been entered, pressing the View Price/Inventory button will display the price and inventory records for that SKU, effective for that customer. The prices shown will include the following:

- Δ All defined 'customer specific' prices effective for the current date, and
- Δ All non-specific other than the customer's Price Type, but with the customer's currency code, and
- Δ All warehouse specific prices effective for the current date.

Δ All prices will include the customer’s defined discount if the SKU is flagged discountable.

If the prices to be displayed are only those defined for the customer’s Price Type, enter that code into the Price Type field (e.g. “d” rather than the “%”), and only those prices will be listed.

After selecting the desired entry and pressing either the **Select for Quote** (or **Select for Order**) button, the operator will need to display the Rapid Order Details screen to complete the process.

Press the Rapid Order Details tab to display the following screen:

The Details screen will list all items selected for either Order or Quote generation. The Rapid Order Type field will show the type of selection the highlighted entry is for (Order or Quote). This can be changed if required by clicking the other field.

Further changes can be made on this screen to the Qty and Unit Price values as required.

For a quote selection a valid Quote Section code is required. All predefined codes will be displayed in a drop-down box list.

The Shipto Location value is required and is copied from the default value defined on the Customer Master, but can be changed to another valid value.

Once entries are completed, press the **Create Quote** button to transfer the selections to a new quote. If more than one detail entry is displayed, all entries will be transferred to the newly created quote. If any of the listed records are not to be ordered, the user should delete those before pressing the Create button; otherwise they will be transferred to the order.

Fields

The following fields appear on the form.

Field	Entry	Default	Reqd
Company	The company code.	Session Default	Y
Rapid Order Type	Will display the type of selection used to create the entry, either Order or Quote. This can be changed to the other if so desired.		Y
SKU Code	The SKU code of the selection used.		Y
SKU Description	The SKU description as defined on the SKU Master	SKU Master	Y
Whse	The warehouse this price is effective for.		Y
UOM	The Unit of Measure for the selection used.		Y
Qty	The quantity for the selection used. This can be changed to any desired quantity.		Y
Unit Price	The customer's specific price for this order. This can be changed to any desired value and will become the actual order price of the SKU when the order is generated.		Y
Extended Price	The order extended price.		Y
Order Total	The total value of the order, excluding taxes.		Y
Shipto Location	The Ship To location code to be used for the order or quote. This field is required for a quote entry and will default to customer's default Shipto code.	Customer Master	Y
Quote Section	Used only for quotes. This is required when creating Quote orders.		Y
Create Quote	Press this button to create the actual quote entry in the FLEXX Quotation Management module.		
Create Order	Press this button to create the actual order entry in FLEXX Order Processing.		
The remaining fields have been described in the previous screen description.			

Please refer to the FLEXX Procedures Guide, Distribution Modules, Topic Order Processing for a detailed description on the use of this function.

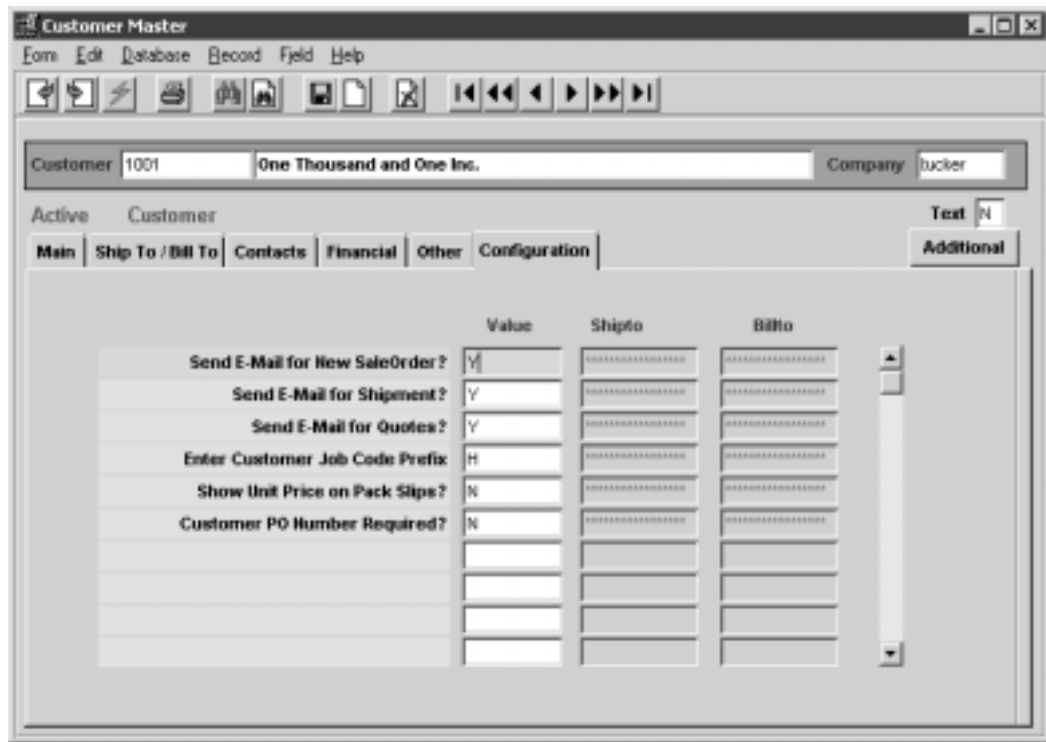
3.9 Email Quote Confirmation

Description

Quote Confirmation by Email enables the system to send an Email to the customer at quote entry completion. To use this functionality, the following tables need to be defined:

Customer Master, Configuration

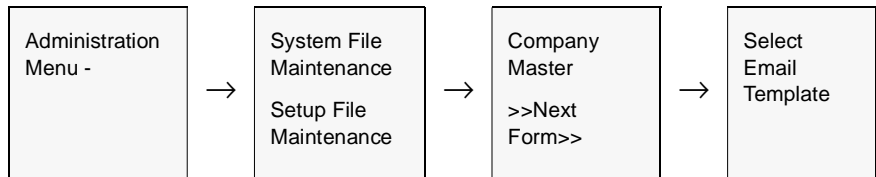
The customer must be defined for the functions that are to send the Email; Order entry, Shipment completion, and Quote entry (*See Getting Started, Customer Master Configuration description*).



Company Table, Email Template

Company Table **Email Template** also needs to be defined (See *Getting Started, Company Master, Email Template description*).

Select



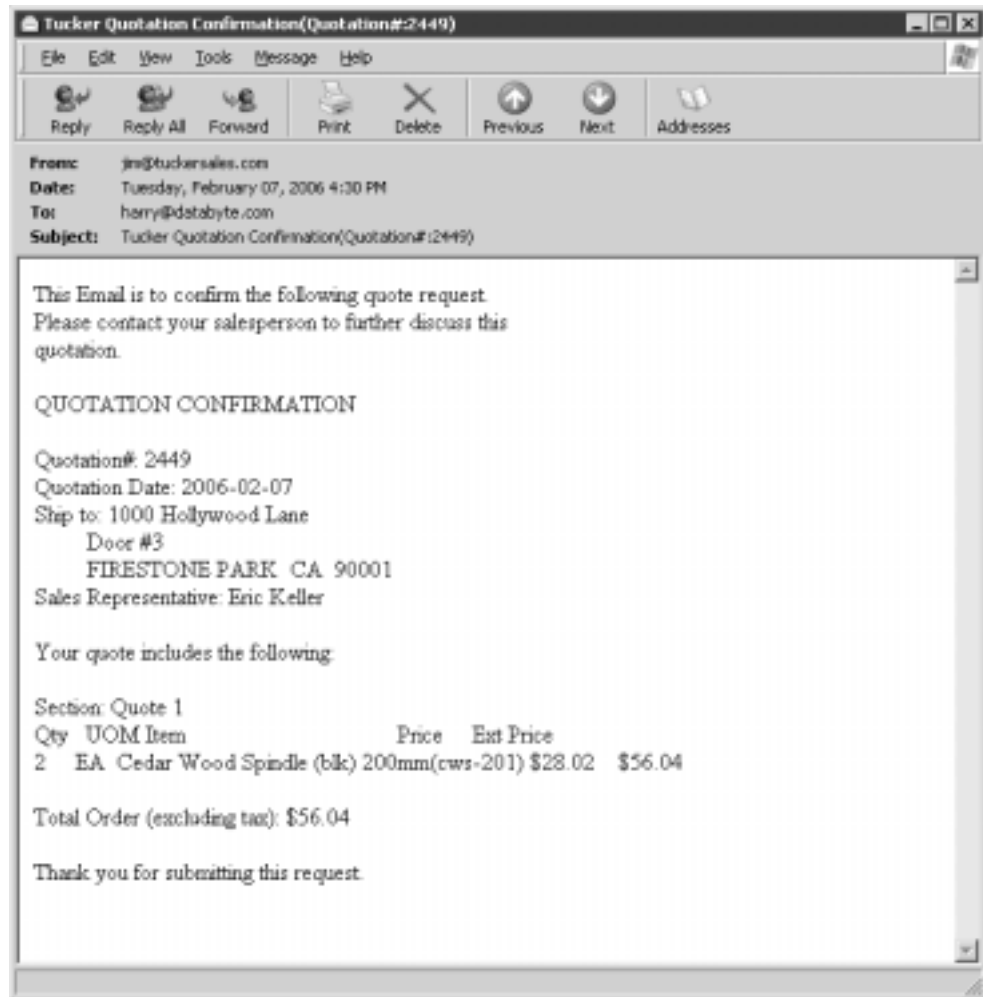
If the Customer Master has been defined to use Email Quotes confirmation, whenever a change is made to the quote details, FLEXX will display a prompt message “Do you want to send Email for this order now?” Pressing Yes will result in an Email message being sent to the Email address defined on the

Customer Ship To form, or if not defined, to the address defined on the Customer Main form.

The Order Email will consist of the following information:

- Δ Subject line - as defined on the Email Template form
- Δ Email Message - as defined on the Email Template form, plus the Quote order details
- Δ Email signature - as defined on the Email Template form

Example of Quote Confirmation Email



4.0 Extracting Quotation Information

Description

This section describes;

- Δ How to do on-screen inquiries with regards to the status of the quote
- Δ Printing standard reports.

Notes

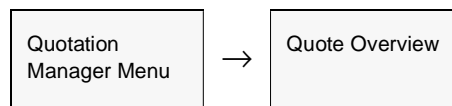
While in find mode, the Quotation Master form can be used, in conjunction with selection criteria, to search the database to respond to various different queries (i.e. all quotes by customer, all open quotes, etc.).

4.1 Quote Overview

Description

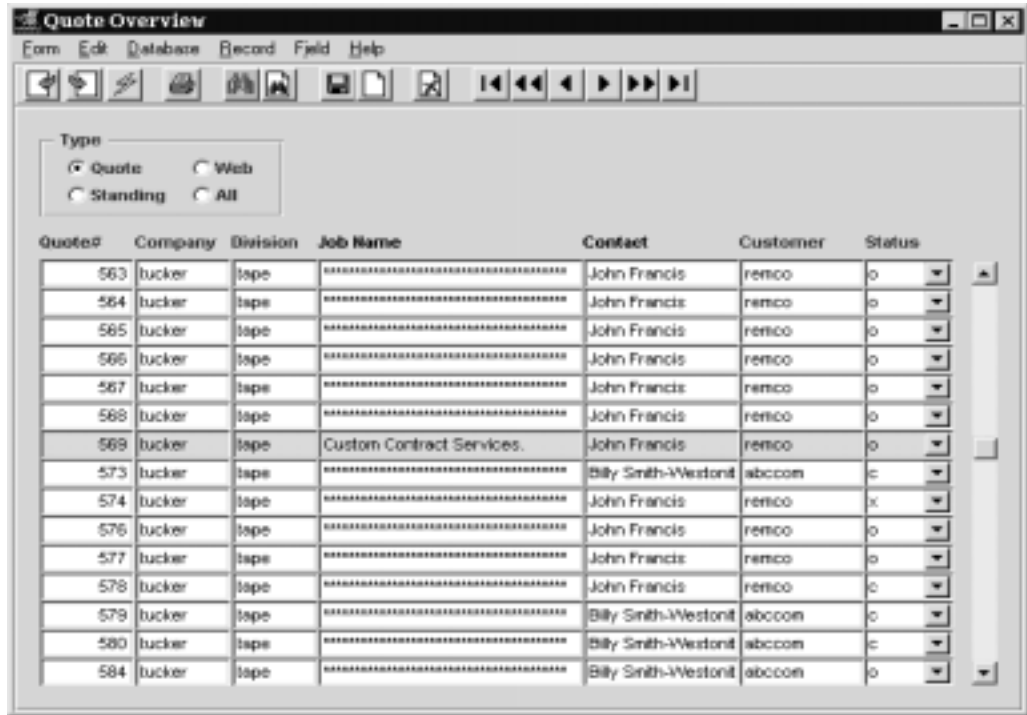
The Quote Overview form is a view only form and no changes can be made to the information displayed. This form will make it possible to view the status of each quote depending on the search criteria entered.

Select



FLEXX® - Quotation Manager 4.0 Extracting Quotation Information

The Quote Overview form appears in Find mode



Fields

The following fields appear on the form.

Field	Entry	Default	Reqd
Type	The type of quotation record to be displayed. This will default to All if not selected.	All	N
Quote	The quote number of the quote to be viewed or leave blank to see all quotes.		
Company	The Company code of the quotes to be viewed.	Session Default	N
Division	The Division code of the quotes to be viewed.	Session Default	N
Job Name	The job description appearing on the Quotation Master.		
Contact	The contact appearing on the Quotation Master or leave blank to see all quotes.		
Customer	The customer code of the quotes to be viewed or leave blank to see all quotes.		
Status	The Status can be: <ul style="list-style-type: none"> • o - Open • c - Closed/Completed • x - Cancelled • h - Held • i - Incomplete 		

4.2 SKU Price Lookup Function

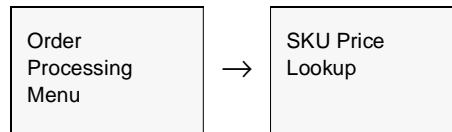
Description

The SKU Price Lookup function is used to perform a price lookup of selected SKU's for a particular customer. FLEXX will use the effective price for the specified customer Price Type, and display prices for all warehouses and quantity price breaks defined on the SKU Pricing table.

The SKU Price Lookup screen can be accessed in one of three ways:

- Δ Select the SKU Price Lookup entry on the Order Processing menu;
- Δ From the SKU Search screen by pressing the Price Lookup button;
- Δ From the Customer Search screen by pressing the Price Lookup button (see *Getting Started manual, Customer Search Screen description*).

Select



Or, <<zoom>> on customer field, Press Price Lookup button.

The SKU Price Lookup screen appears in Update mode.



FLEXX® - Quotation Manager 4.0 Extracting Quotation Information

Fields

The following fields appear on the form.

Field	Entry	Default	Reqd
Company	The company code.	Session Default	Y
Customer	The customer code to use for the price lookup.	%	Y
SKU Code	The SKU code to find the price for.	%	Y
Order Type	Specify the Order Type code; can be either "rg" (regular) or "sb" (subscription) as defined for the SKU on the Pricing table.	rg	Y
Price Type	Enter the Price Type to retrieve. This will default to the customer setting but can be changed to any valid value as well as % to show all defined price types.	Customer Master	Y
Retrieve Price	Press this button to display the currently effective prices for this customer.		
Show Image	Press this button to display the image for this item (<i>See Inventory Control manual, SKU Image description</i>).		
The following fields are display only and cannot be entered/changed.			
UOM	The Unit of Measure for this price.	SKU Master Pricing Table	
Qty	The quantity this price is effective for.		
Eff. Date	The effective data of the displayed price.		
Expiry Date	The expiry date of this price.		
Price	The List price of the SKU.		
Disc. Price	The customer's effective price for this SKU. This price is calculated for this customer, and includes any available "line" discounts, but not the Whole Order (volume) discount.		
Minimum Price	The minimum price for this SKU as defined on the Pricing table.		
History	Press the History button to display a complete price history of the selected SKU for the specified customer. FLEXX will display the Customer Order Review screen (<i>See Order Processing manual, Sec. 9.2</i>).		

4.3 Printing Standard Quotation Reports

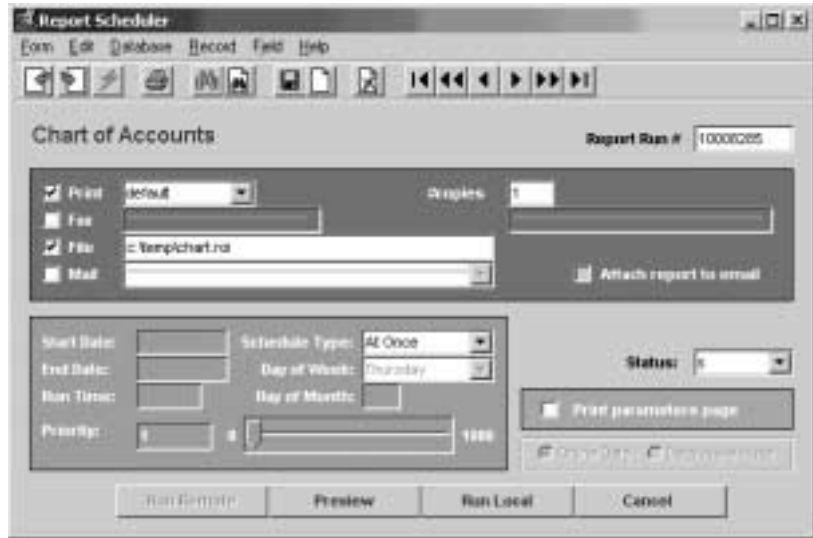
Description

Reporting within Quotation Manager is the same as in all FLEXX modules. The reports you can generate depends on which ones are set up in the system.

The following table lists the standard Quotation reports.

Report Code	Report Title	Description
quotplt	Price List Quotation	Prints out by quote, the details of each quote which can be sent to the prospective customer for approval.
quotprof	Quotation Status and Profit Report	Prints a report of selected quotes showing their status and profit margins.
quotprt	Print Quotations	Prints details of each quote, similar to <i>quotplt</i> but includes the quote totals as well as Authorization and Acceptance text.
quotstat	Quotation Win/Loss Report	Prints a report of selected quotes showing their win probability.

4. <<Press Run Report>> to display the following printing options.



Fields

Enter the following information to print the report.

Field	Entry	Default	Reqd
Print	Select the print box to send the report output to a printer.		Y
Print Device	The printer name. This will be the printer specified as the Default on the User Master for this user.	default	Y
# Copies	Enter the number of copies of the report desired.	1	Y
Fax	Select the fax box to fax the report. This functionality only works if fax software has been installed and configured to FLEXX specifications.		Y
Fax Number	Enter the fax telephone number.		Y
File	Select the file box to send the report output to a file, otherwise leave blank. This file can be used to reprint the report at any time.		Y
File Name	The user-defined name of the file to send the output to. Your System Administrator sets up this field.	System Generated	
Mail	Select the Mail box to have the report server send you an e-mail on print completion. This functionality only works when reports are being "scheduled".	User Master	N
Mail Address	The e-mail address to be used.	User Master	
Attach report to email	Select this box to have the report "rox" file sent to the designated e-mail address as an attachment. If Actuate is loaded the report can then be viewed or printed.		
The following fields are only active (lit) if the FLEXX Report Server is installed and active.			

FLEXX® - Quotation Manager 4.0 Extracting Quotation Information

Field	Entry	Default	Reqd
Start Date	The date to start the printing schedule for this report.	Session Default	Y
End Date	The date when the print schedule is to end.	Session Default	Y
Run Time	The time of day when the print schedule is to be started.	Internal Time Clock	Y
Priority	The scheduling priority. Once the report scheduler has determined which reports are eligible to be run for the specified date or time, they are then prioritized with 1000 being the highest and 0 the lowest priority.	1	
Schedule Type	The type of schedule to use; can be: <ul style="list-style-type: none"> • At Once – to be run immediately. This is the only option for Preview or Run Local. • Run Once – run only once (no repeats). • Daily – run schedule each day for the period entered. • Weekly – run the schedule once a week. • Monthly – run the schedule once a month 	At Once	
Day of Week	The day of the week the report is to be scheduled.	Session Default	
Day of Month	The month date the report is to be scheduled. Note that when defining the Day of Week or Day of Month settings, only one or the other can be set. FLEXX will enter the other corresponding value to match.	Session Default	
Status		s	
Print Parameters Page	Select this box to have a cover sheet printed with the report, displaying the selection criteria used to produce the report. This can be controlled with the Application Control variable <i>parampage</i> setting.	marked	
Buttons			
Run Remote	Press this button to send the report to the Report Scheduler to be printed.		
Preview	Press this button to preview the report only. It can be printed from the preview screen.		
Run Local	Press this button to print the report on the local printer (i.e. not schedule the printing)		
Cancel	Press Cancel to cancel the operation. This is the same as pressing <<Previous Form>>. It will not cancel printing if the report has already been sent to the printer or scheduler.		