Creating a Quote

---

1. Starting Screen.

```
(05)CEA - QLD                  Invoice Entry Menu              2520

                                1 Counter Sales               2525
   Version    : ERAnet V9       2 Customer Sales Inquiry      2526
   Date       : Oct 12,2018     3 Open Invoice/Ro/Quote Inquiry 2527
                Friday          4 Invoice Inquiry             2529
   Store      : STORE05         5 Invoice Reprint             Q2530
   User       : CHRISBU         6 Parts Activity Analysis     2551
   Port/Wkstn : 71 / 222        7 View Request for Parts      2518


   Log Off      [88]

   Menu Help  [HELP]

   Applications [77]




   Selection: 2525_
   Help: Select a menu option, or enter your desired action    [/=Options]
```

2. Type "2525" for Counter Sales and press enter.

```
12 OCT 2018 P71          CEA - QLD - Counter Sales       STORE05  2525

Invoice# Cust #  Name                 Phone       Pay    Ctrmn Ot Pl
|
Make JB  Cust Po#           Tax EX#            ID#
Ln# Part# / Description............ Qord Qshp List.... Sale.... Extended Tc Pl








AVAI      LIST           STK          ASSOC
BN1       TRADE          STS    SRC   COMPNT
BN2       COST           GRP          ALTER                    TOT
NEW#                     OLD#                                  TAX
REMARKS                                                        BAL
(A=Add)(D=Del)(E=Ent)(M=Mod)(Pn=Pg#)(O=Cls)(R=Reprice)(Q=Inq)(CI=Custinq)
#=Inv, /=Lookup, IDxxx
```

3. Type "pq" and press enter to enter the quotes screen. Press Enter and then type customer name, number or Cash Sale number (501 in this case)

```
12 OCT 2018 P71          CEA - QLD - QUOTES              STORE05  2525

Quote#   Cust #  Name                 Phone       Pay    Ctrmn Ot Pl
         501     CEA CASH SALES - QLD (07)3715-3200 CASH              1
Make JB  Cust Po#           Tax EX#            ID#
Ln# Part# / Description............ Qord Sts List.... Sale.... Extended  Pl








AVAI      LIST           STK          ASSOC
BN1       TRADE          STS    SRC   COMPNT
BN2       COST           GRP          ALTER                    TOT
NEW#                     OLD#                                  TAX
REMARKS                                                        BAL
   This customer has open QUOTES, display (Y/N)    N
```

If the customer has any open quotes a message will appear at the bottom of the screen Press "Y" here if you wish to access an open quote.

4. Enter your counterman ID and press enter.

```
12 OCT 2018 P71              CEA - QLD - QUOTES          STORE05  2525

Quote#   Cust #  Name                 Phone       Pay    Ctrmn Ot Pl
         501     CEA CASH SALES - QLD (07)3715-3200 CASH   CB       1
Make JB  Cust Po#           Tax EX#            ID#
Ln# Part# / Description............ Qord Sts List.... Sale.... Extended  Pl








AVAI      LIST           STK          ASSOC
BN1       TRADE          STS    SRC   COMPNT
BN2       COST           GRP          ALTER                    TOT
NEW#                     OLD#                                  TAX
REMARKS                                                        BAL

Enter a valid counter man number
```

5. Press enter to skip the order type.

```
12 OCT 2018 P71              CEA - QLD - QUOTES          STORE05  2525

Quote#   Cust #  Name                 Phone       Pay    Ctrmn Ot Pl
         501     CEA CASH SALES - QLD (07)3715-3200 CASH   CB    DA 1
Make JB  Cust Po#           Tax EX#            ID#
Ln# Part# / Description............ Qord Sts List.... Sale.... Extended  Pl
  1 |








AVAI      LIST           STK          ASSOC             ~GP$       0.00
BN1       TRADE          STS    SRC   COMPNT            ~GP%        0.0
BN2       COST           GRP          ALTER              TOT       0.00
NEW#                     OLD#                            TAX       0.00
REMARKS                                                  BAL       0.00
```

6. Type the part number required and press enter then type the quantity needed and press enter.

```
12 OCT 2018 P71              CEA - QLD - QUOTES          STORE05  2525

Quote#   Cust #  Name                 Phone       Pay    Ctrmn OT PL
         501     CEA CASH SALES - QLD (07)3715-3200 CASH   CB    DA 1
Make JB  Cust Po#           Tax EX#            ID#
Ln# Part# / Description............ Qord Sts List.... Sale.... Extended   Pl
  1 32/915701         ELEMENT -AI    1         80.72   80.72   80.72     1
  2 |








AVAI      LIST           STK          ASSOC             ~GP$      41.95
BN1       TRADE          STS    SRC   COMPNT            ~GP%       51.9
BN2       COST           GRP          ALTER              TOT      80.72
NEW#                     OLD#                            TAX       8.07
REMARKS                                                  BAL      88.79
```

From here repeat step 6 as many times as needed.

7. When entering parts onto the quote, check availabilities and comment each line as needed. Type "m" then enter. Then the line number, "space" then "c".

```
REMARKS                                          BAL    88.79
  (Line# Code)(PC=Price Code)(PO=Cust PO#)(TN=Tax Exempt#)(ID=ID#)  1 c
O=Qord,P=Sale,K=Cst,LI=Lst,TR=Trd,TX=Txcd,C/CM=Com,D=Dis,L=Pl,B=Bin
```

Availability at other stores (top of screen)

```
WA -01      :  3 VIC-02    :   2 SA -03     :    2 NSW-04    :    3
MKY-06      :  0 NSWDC-11  :   1 VICDC-12   :  23
```

Own branch availability (bottom left)

```
AVAI 0#
BN1 A6-1-1
BN2
NEW#
REMARKS
```

8. Type out the availability message eg. *"Ex Melb 1-2 days."* Then press enter.

```
REMARKS
  Current Comments= Ex Melb 1-2 Days.
```

9. Press enter again and then "a" and enter to return to step 5 and repeat the process.

```
12 OCT 2018 P71           CEA - QLD - QUOTES          STORE05  2525

Quote#    Cust #  Name                 Phone      Pay   Ctrmn Ot Pl
          501     CEA CASH SALES - QLD (07)3715-3200 CASH  CB   DA 1
Make JB   Cust Po#           Tax EX#              ID#
Ln# Part# / Description........... Qord Sts List.... Sale.... Extended   Pl
  1 32/915701        ELEMENT -AI    1      80.72   80.72    80.72   ^1
  2

AVAI      LIST       STK      ASSOC         ~GP$    41.95
BN1       TRADE      STS  SRC COMPNT        ~GP%    51.9
BN2       COST       GRP      ALTER         TOT     80.72
NEW#                      OLD#              TAX      8.07
REMARKS                                     BAL     88.79
(A=Add)(D=Del)(E=Ent)(M=Mod)(Pn=Pg#)(O=Opt)(R=Reprice)(Q=Inq)(CI=Custinq) a
```

Any line tha has a comment will have an arrow character next to the price code as shown above (highlighted)

10. Press "e" then enter when the quote is ready to be completed.

```
12 OCT 2018 P71           CEA - QLD - QUOTES          STORE05  2525

X    Quote#                                501
1    Code,Comments


2    Sale Type      R            3  Tax Exempt No.
4    Pay-Method     CASH         5  Picker / Time
6    Order Date     12/10/18     7  Checker
8    Required Date  12/10/18     9  Packer
10   Cust Po#                    11 Run No.
12   Ship To JCB CEA (QLD CASH SALES)  13 Ship Via
             103 AXIS PLACE          X  Bill To
             LARAPINTA
             QLD 4110
X    Total (No Tax)     80.72   18 Credit Card #
X    GST                 8.07   19 Authorization #
14   Misc                0.00   20 Deposit Chg.       0.00
15   Freight             0.00   21 Order Type     DA
16   Restock Chg.        0.00
17   Surcharge           0.00   23 Name For Invoice    No
X    Total Quote        88.79   Total Line Items    80.72
 (E=Ent)(D=Del)(Line#)(L=LineItms)(Q=Inq)(CI=Custinq)(CC=CLComm)
```

11. On the quote close out screen (above) ensure that all necessary fields are completed. Press the field number then enter and type the info required. See below:

Field	Description	Use
1	Comments	Always enter contact name, vehicle details and phone number.
4	Pay Method	Select from a range of pay types. See list at the bottom of the screen for available options.
12	Ship to Address	Enter the full shipping address for the order
13	Ship Via	Use "/" to lookup ship method. ALWAYS make sure repair orders have WS in this field
15	Freight	Enter any applicable freight charges.

9. See completed fields highlighted below.

```
12 OCT 2018 P71           CEA - QLD - QUOTES          STORE05  2525

X    Quote#                                501
1    Code,Comments   John Smith
                     525-60 2984815

2    Sale Type      R            3  Tax Exempt No.
4    Pay-Method     CASH         5  Picker / Time
6    Order Date     12/10/18     7  Checker
8    Required Date  12/10/18     9  Packer
10   Cust Po#                    11 Run No.
12   Ship To John Smith          13 Ship Via TNT ROAD
             123 Backhoe Rd          X  Bill To
             Diggerville
             QLD 4000
X    Total (No Tax)    110.72   18 Credit Card #
X    GST                11.07   19 Authorization #
14   Misc                0.00   20 Deposit Chg.       0.00
15   Freight            30.00   21 Order Type     DA
16   Restock Chg.        0.00
17   Surcharge           0.00   23 Name For Invoice    No
X    Total Quote       121.79   Total Line Items    80.72
 (E=Ent)(D=Del)(Line#)(L=LineItms)(Q=Inq)(CI=Custinq)(CC=CLComm)
```

10. Press "e" and then enter. Then "p" and enter to finalise the quote. Press "n" to print and then change the printer name to "EMAILFM".

```
 (S=Save)(P=Print & Save)(T=Print Quote)
(Accept(Y/N) N )(Printer EMAILFM        )
```

11. In the "to" field type in your email address and then keep pressing enter to close out the quote. The email quote will be in your inbox ready to be forwarded to the customer. Quote Complete!