Creating a Quote

Set-Up the 'Date Valid' Field on the Quote

From the OPTO ribbon, select the 'Quotes' tab and **click** on the drop down arrow (circled below) to open the 'Parameters – QUOTE' window.

File	HOME	CONTACTS	RESOURCES	INVENTOR	QUOTES	PURCHASING	ORDERS	JOBS/SC	HEDUL
New	Save Clipboard	🖺 Copy 🖌 Cut note Paste	Reserve Quote No.	New Quote	Edit Quote Z Quote Activity Print Quote Quotes	Quote Fast	₽	ata Set Itilities pecials	• • •

Enter the number of days for which the quote is to be valid in the **Default Due Date** field (circled below) and **press** <**F9**> to save.

Parameters - QUOTE			
General Defaults Print Email			
General Defaults Print Email [2] Quote Parameter, Terms fr [3] Division [2] Category Required [2] Category Required [2] Category Required [2] Use Multiple in Parts Price [2] Use Vorkcenter in Parts Price [2] Use 2 Decimal in Each Quoi [3] Use VC Waste Markup, Ad [2] Use Workcenter Charge and [2] Use Workcenter by Descrip [2] Sort Workcenter by Descrip [2] Disable Emp Code (Edit Qu	Om Client: Quote Fast Default [2] Laser Quote [2] select Markup [2] Not Quote Ca [2] Not Quote Ca [2] Vose Factor in [2] Vose Factor in [2] Print Discoun [2] Print Discoun [R&D [3] Book [2] Use Cost not Clopte)	Def Laser Setup (from Parts) ilculation Def Setup (Setup t Quote Lead Nesting harge for Calc [2] Ac completed status [2] Qu	(sec) (sec) (min) (min) (min) (min) (min) (2) Part Code (2) Space (2) Decimal 2/4 (2) No Total (2) No Total (2) e-mail (2) e-mail (2) Part Code (2) Space (2) Part Code (2) Part Code (2) Part Code (2) Space (2) Part Code (2)
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To Create a Quote

Open the **Quotes** Module, **click** on 'New Quote' option to display the 'Quote – 1 - <New Entry>' window. In the 'Client Code' field, **press** <**F2**> and select the client from the pop-up list, then **click** <u>OK</u>. **Press** <**TAB**> to display the 'Client Name'. **Press** <**TAB**> to move to the 'Job Description' field, and type in a brief description of the item in relation to the quote. **Press** <**TAB**> to proceed to the 'Date Issued' field, the current date will be entered, change if necessary. **Press** <**TAB**> to move on to the 'Date Valid' field, if this has been set-up it will fill automatically. **Press** <**TAB**> to move forward to the 'Date Required' field, and type in the date. **Press** <**TAB**> to proceed to the 'Attention' field **press** <**F2**> and select the client's contact person from the pop-up list and **click** on <u>OK</u>. **Press** <**TAB**> to move to the 'Emp No' field and either enter your employee number or **press** <**F2**> and select an employee from the pop-up list then **click** on <u>OK</u>. *This employee field is usually the employee creating the quote*. Fill remaining fields if necessary. **Press** <**TAB**> to progress to the 'Part Code' field, **enter the first letter of the part** then press <**TAB**> the parts list will appear.

Quote - <new entry=""></new>			- • •
Quote No: <u>Client Code:</u> 5106 BADGER •	Job Description: Test Job	Contract Price Use Size	M/Upd 🖉
Parts More Info Attachments			
Date Issued: Date Valid: Date Requir 05/02/2019 07/03/2019 III III	ed: Attention: Show Cost Show Cost	ow Rev Pref/Cost Last) Std () Part
Emp No: 1 Robert JONES	S ID 32 V Div: V C	at: Pre Disc: Day	/5:
Project: Test Job		Markup: 1.50	🐔 💁 🖶
Part Code De	escription Qty 1	Each Disc Disc Each Tax	Q/T J/T Lead
Multiple Part Prices	Quote completed Total Cost:	\$.00 Total Amount:	\$.00
Success Probability %	Total Margi	n: %.00	

Select required parts or materials from the pop-up list and then **click** on <u>OK</u>.

Quote - <new entry=""></new>						
Quote No: <u>Client Code:</u>	Job Description:	Contract Pr	ice 🗌	Use Size	□ M/	Upd 🖉
5106 BADGER	▼ Test Job				💮 Re	efresh
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ate Issued: Date Valid: D	late Required: Attention: Show Cost Show	v Rev 💿 Pr	ef/Cost (Last	◯ Std	○ Part
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Part Code Part Code Part Code PART 49 PART00 PART00 PART101 PART11 PART12 PART2	Part Description Part Description Inon-productive works Test Part 2 A New Part - Stahless Steel Assembly Part 100 IN NSTK One Material & WC Main Control Station 2.5 Mirror 5/5 with box - MEDECC Hall Lanter Assy Opal leng Stime 71433	ach Disc Sub 0 0 0 0 0 0 0 0 0 0	Disc Fac On Hand 4 0 -1 565 0 0	h Tax Alloc 0 0 2 0 0 0 0 0	T\O Job 0 0 0 0 0 0 0 0	I/T Lea To Do 0 1 0 0 0 0
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Adjust the quantities where necessary and **press <TAB>** to advance to the next field, check prices are correct, remembering to **press <TAB>** out of each field. **Press <F9>** to save the Quote when finished.

Quote - <new entry=""></new>	
Quote No: Client Code: Job Desc 5106 BADGER Test Job Parts More Info Attachments	ription:
Date Issued: Date Valid: Date Required: Attent 05/02/2019 07/03/2019 Image: Comparison of the second	tion: Show Cost Show Rev OPref/Cost Last Std Part 32 Div: Cat: Pre Disc: Days: Markup: 1.50
Part Code Description PART-NP Non-productive works NCR-PART REWORK-RAIL_SS_65MM - BADGER M NEW_PART NEW ASSEMBLY PART	Qty 1 Each Disc Disc Each Tax Q/T J/T Lead 6 .0000 .00 .0000 6 P 5 5 IINING 1 257.0000 .00 257.0000 6 P 5 5 1080.5970 .00 1080.6000 6 P 3
Multiple Part Prices Quo Success Probability %	e completed Total Cost: \$3,620.00 Total Amount: \$5,660.00 Total Margin: %36.04

Quote Window Buttons

I view the Attached Drawing File for this Part
= Export List to Microsoft Excel
= Print
= material part enquiry
= Add environmental levy

The More Info tab has areas to enter text to be displayed on the quote and also an area for internal information.

💷 Quote - <new< th=""><th>/ Entry></th><th></th><th></th><th></th></new<>	/ Entry>			
Quote No: C	lient Code: DADGER -	Job Description: Test Job	Contract Price	☐ M/Upd 🖉 ⊕ Refresh
Parts More Inf	• Attachments			
Top Text:	Test that appears on top of quo	te		~ ~
Remarks:	Remarks text for quote			~
Terms:	Terms text for quote			~
Delivery:	Delivery text for quote			~
Design: Bottom Text:	Design text for quote	uote		<u>-</u>
Internal Info				V
internal millo.	internai notes that are not dipla	yea on the quote		Ç

The Attachment Tab

Can be used to attach drawing and or instruction in regards to the quotes. To attach a file, type a description of the items in the *Description* field. **Press <TAB>** to advance to the *Filename* column and **press <F2>** to browse your computer to find the file. **Click** on the required file to highlight and **click** on the 'Open' button. The file path will now be recorded in that field. To view the attached file **click** on the 'view attached files button' on the 'Parts' tab.

Quote - <new entry=""></new>			- • •
Quote No: <u>Client Code:</u>	Job Description:	Contract Price	🗌 M/Upd 🛛 🖉
5106 BADGER -	Test Job		💮 Refresh
Parts More Info Attachments			
File Attachments			
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The other tabs display information automatically generated by the data entered into the system in relation to the areas of the tabs.