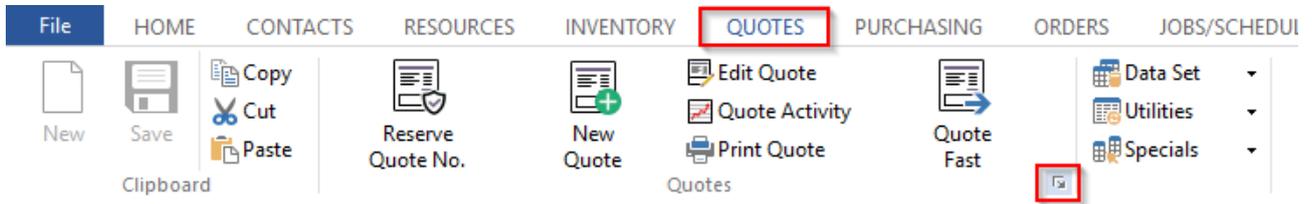


Creating a Quote

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.



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.

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 OK**. **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 OK. **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 OK. *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.

Part Code	Description	Qty 1	Each	Disc	Disc Each	Tax	Q/T	J/T	Lead
p									

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

Part Code	Part Description	Sub	On Hand	Alloc	Job	To Do
PART100	Non-productive works	0	0	0	0	0
PART002	Test Part 2	0	0	0	0	0
PART1000	A New Part - Stainless Steel Assembly	0	-1	0	0	1
PART101	Part 100 INV NSTK One Material & WC	0	565	2	0	0
PART_1	Main Control Station 2.5 Mirror S/S with box - MEDECO	0	0	0	0	0
PART_2	Hall Lantern Assy Opal lens chime P1-LD33	0	0	0	0	0
PL-3MM-MS-300X200	MS PLATE 3MM - 300 X 200	0	0	0	0	0
PL-MS	PLATE - MILD STEEL	0	0	0	0	0
PROD_STOP	PRODUCTION STOP TEST PART	0	47	0	0	0

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>

Quote No: Client Code: Job Description: Contract Price Use Size M/Upd

Parts More Info Attachments

Date Issued: Date Valid: Date Required: Attention: Show Cost Show Rev Pref/Cost Last Std Part

Emp No: Robert JONES SID: Div: Cat: Pre Disc: Days:

Project: Markup:

Part Code	Description	Qty 1	Each	Disc	Disc Each	Tax	Q/T	J/T	Lead
PART-NP	Non-productive works	6	.0000	.00	.0000	6	P	<input checked="" type="checkbox"/>	5
NCR-PART	REWORK-RAIL_SS_65MM - BADGER MINING	1	257.0000	.00	257.0000	6	P	<input checked="" type="checkbox"/>	5
NEW_PART	NEW ASSEMBLY PART	5	1080.5970	.00	1080.6000	6	P	<input checked="" type="checkbox"/>	3

Multiple Part Prices Quote completed

Success Probability %

Total Cost: Total Amount:

Total Margin:

Quote Window Buttons

= 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.

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.

	Description	Filename	Email	Print
1	Auto Attached	L:\ITMS_DOCUMENTATION\IMPL-Metrologic Barcode Scanner setup.pdf.pdf	Yes	No

The other tabs display information automatically generated by the data entered into the system in relation to the areas of the tabs.