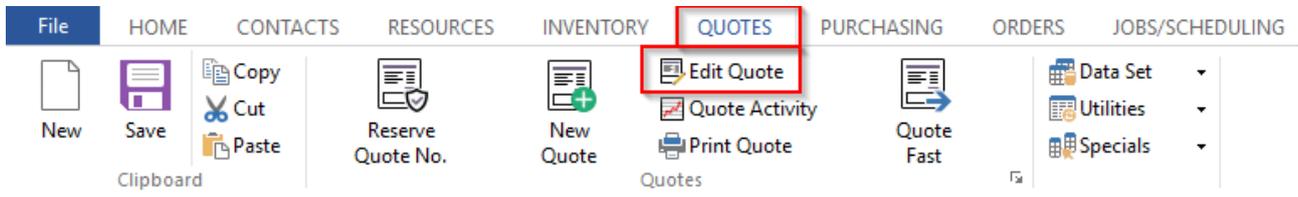


Editing a Quote

To Edit a Quote

From the OPTO ribbon, select the 'Quotes' tab and **click** on the 'Edit Quote' icon to open the 'Edit Quote' window. In the **Quote No** field **press <F2>** and select the required quote from the pop-up list then **click** on **OK**.



Edit the Quote as required and **press <F9>** to save changes.

The screenshot shows the 'Edit Quote' window. The 'Quote No' is 5104 and the 'Client Code' is BADGER. The job description is 'A Quote for the Opto Help Files'. The 'Date Issued' is 25/01/2018 and the 'Date Valid' is 24/02/2018. The 'Attention' is Barry Badgerson. The 'Emp No' is 1 and the employee name is Robert JONES. The 'S ID' is 32 and the 'Div' is 1. The 'Cat' is blank. The 'Project' is blank and the 'Markup' is 1.50. The 'Status' is PENDING. The 'Parts' table is as follows:

Part Code	Description	Qty	1	Each	Disc	Disc Each	Tax	Q/T	J/T	Lead
ASSB0001005	Machine Guard Plates	4		166.0000	.00	166.0000	6	P		5
ASSB300	Some type of assembly	2		662.0000	.00	662.0000	6	P		5

At the bottom, there are summary fields: 'Total Marg: %42.30', 'Total Cost: \$1,147.00', and 'Total Amount: \$1,988.00'. There are also checkboxes for 'RFQ Success Prob %', 'Multiple Part Prices', and 'Job No:'.

The user may notice that the 'Attachment' tab has moved position from the 'New Quote' window and a 'Notes' tab has been added. The 'Notes' tab is used to record and track Quality issues related to the quote. To make a note record for the quote, **click** on the 'Notes' tab to open and **click** on the 'Add a Note' button (circled below) to open the 'Add New Notes Record' window.

The screenshot shows the 'Edit Quote' window with the 'Notes' tab selected. The 'Add a Note' button is circled in red. The 'Category' is '<Any>', the 'Sub-Category' is '<Any>', and the 'Action' is '<Any>'. There is a search bar and a refresh button. Below the buttons, there is a table for 'Notes Created for this Quote (0)'. The table has columns for 'Notes No', 'Date', 'Category', 'Sub-Category', 'Emp', 'Notes Info', and 'Act'.

Press <F9> to save.

To Print a Quote

In the 'Quotes' tab **click** on the 'Print Quote' icon to open the 'Print Quote' window. Set options by **clicking** on the radio buttons to select or deselect, then **click** on the 'Print' button when ready to print.

Print Quote

Quote No

5104

Options

Show Part Code

Yes

No

Price Format

2 Decimals

4 Decimals

Space Quote

Yes

No

Show Total

Yes

No

Email this Quote

Description Only

 Print