2005-101 - Reserve a Quote No

Overview:

The 'Reserve Quote No.' feature enables the user to reserve a quote number when a request is received. The quote may not be able to be completed at that time for a multiple of reasons but the quote number is reserved for the client keeping quoting in the correct sequence.

On the OPTO Ribbon select the **Quotes** tab and then **click** on the 'Reserve Quote No' icon



Click on the drop-down arrow for the client code or **press** <F2> to select the required client from the list and **click** on <u>OK</u>, **press** <TAB> to display the client's details. Continue to **press** <TAB> to fill the 'Date Issued' field and **click** in the 'Date Required' field and enter the date the quote is required. Enter a description for the quote in the 'Job Description' field. Enter data in the 'Div' and 'Cat' field if necessary.

Quote Request - <new entry=""></new>										
Quote No: Client Code: 5105		Div: Date Entered: Date Required: Cat:								
Job Description: QUOTE REQUEST FOR OPTO HELP SYSTEM										
Project	:									
Resp Emp No	: 25 FRED FERRIS	Attention: Barry Best 🗸								
Quote Status: 4 👻										
Internal Info:										
Client has prov	vide drawings and instruction	s - see attached								
File Attachmen	ts									
Description		Filename								
1 Auto Att 2 Bandico	ached ot Drilling Drawings and info	LN_IIMS _DOCUMENTATIONVIMPL-Metrologic Barcode Scanner setup.pdf.pdf I:\OPTO_MASTER_2017\1 Development\Test Attachments\North-Straddie-Map-1.pdf								

Click in the 'Resp Emp No' and **click** on the drop-down arrow or **press** <F2> and select employee responsible to follow the request to the quote creation. **Press** <TAB> to advance to the 'Attention; field and **click** on the drop-down arrow or **press** <F2> and select the appropriate client contact from the pop-up list and **click** <u>OK</u>. Enter any information in regards to the client or quote in the 'Internal Info' area.

To attach files to this record, **click** on the line under the 'Description' heading and type in a brief description. **Press** <TAB> to advance to the 'Filename' field **press** <F2> or double-**click** and browse your computer system for the files you wish to attach. **Click** on the required files to highlight and then **click** on the **Open** button. The file path is save to that area. To view the attached files, **click** on the **View Attached Files** button.



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To view reserved quotes – Open the *Management* tab and then **click** on the 'Quote Total' icon to display the window. Enter your password (This is a different password to the log-on password. You must have permission and password to proceed) and then enter the date period for your search. **Click** in the 'Select RFQ Only' box and then **click** on the *Refresh* button. (RFQ = Request For Quote)

File HOME CONT	ACTS RESOURCE	es inventory qu	OTES PURCHASING	ORDERS JOBS	S/SCHEDULING I	NVOICING QUALITY	MANAGEMENT	WORKSHOP	ADMINISTRATOR	орто	
KPI Clie KPI Clie KPI Report Clie	nt Supp tal Tot nt Supp	olier Quote tal Total plier Quote	Order Intake Order	Invoice Total Invoice							
Quote Activity										×	
Password:	Date From: 01/01/7 Date To: <u>30/01/7</u> Show Q ine Details	2018 📰 Employee: 2018 🗸 Div: 2uote Cat 🔲 Probability	<any> Client Client Quote Cat Show Int Info</any>	Code: <any> tegory: <any> intact Phone No</any></any>	Cat A: Cat B: Quote Marg%	<any> Won/Lost <any> Prop: Show RFQ</any></any>	<any> ♥ <any> ♥ ♥ Select RFQ Only</any></any>	/	😁 Ref	resh	
Drag a column header here to group by that column.											
Quote No Div Cat/A Cat/ 5105 Nil Ni	B Client BANDRILL	Client Name Job Des Bandicoot Drillin QUOTE	ription REQUEST FOR OPTO HELP SY.	Emp SID W/L E	nt Date Won Amt	Quote Amt Cnt \$0.00 \$0.00	P Req Date Diff # 7.000	Done Project No	Fin	sh	

The quotes can be accessed from the 'Quote Activity' window by dbl-**click**ing on the 'Quote No.' The user can add additional information to the report by using the drop-down lists and/or tick boxes on this window. **Or by**

Opening the **Quotes** tab, and then **click** on the 'Edit Quote' icon to display the 'Please Select a Quote' pane. Enter the required quote number or **press** $\langle F2 \rangle$ and select quote from the pop-up list, then **click** on <u>OK</u>.

