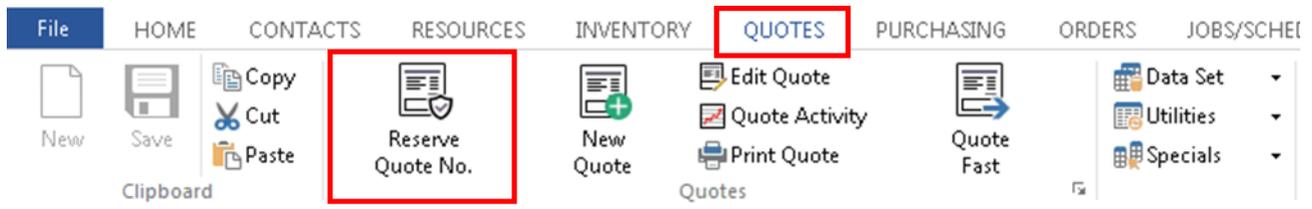


2005-101 - Reserve a Quote No

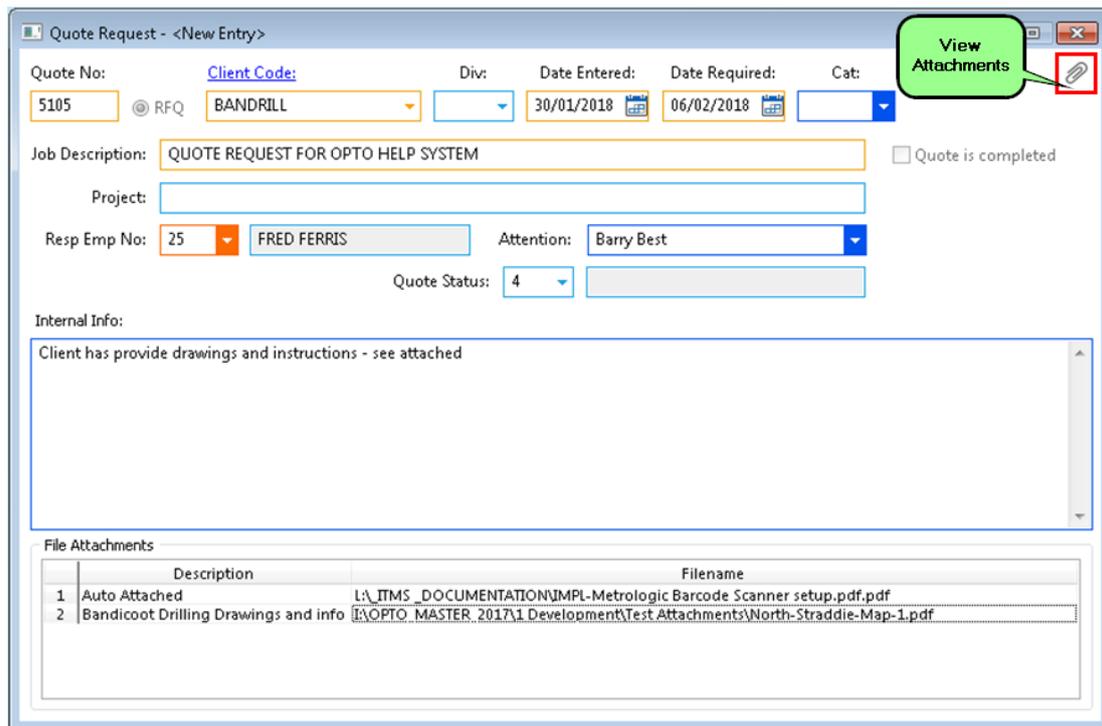
Overview:

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 OK, **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.

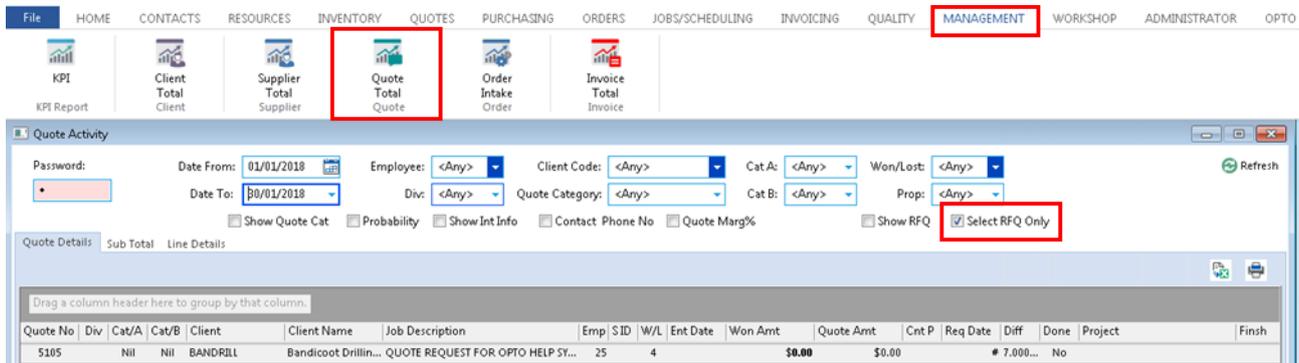


Description	Filename
1 Auto Attached	L:\ITMS_DOCUMENTATION\IMPL-Metrologic Barcode Scanner setup.pdf.pdf
2 Bandicoot Drilling Drawings and info	I:\OPTO_MASTER_2017\1 Development\Test Attachments\North-Straddie-Map-1.pdf

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** OK. 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.

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)



The quotes can be accessed from the 'Quote Activity' window by **dbl-clicking** 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** <F2> and select quote from the pop-up list, then **click** on **OK**.