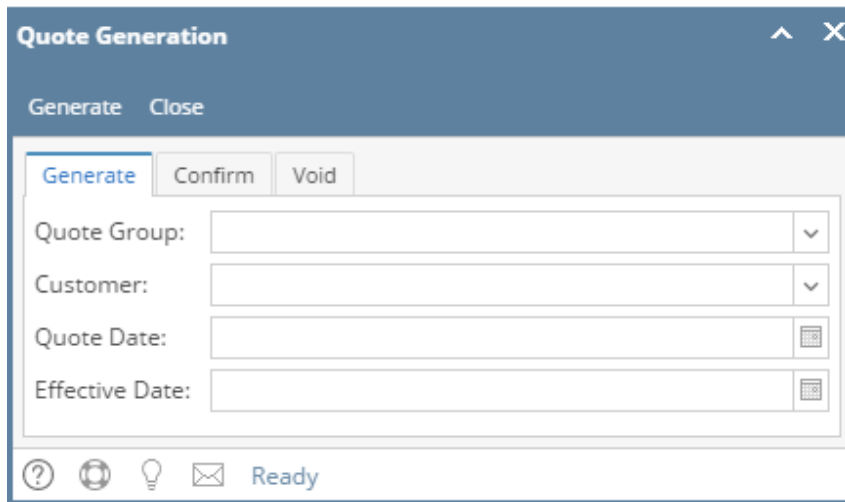


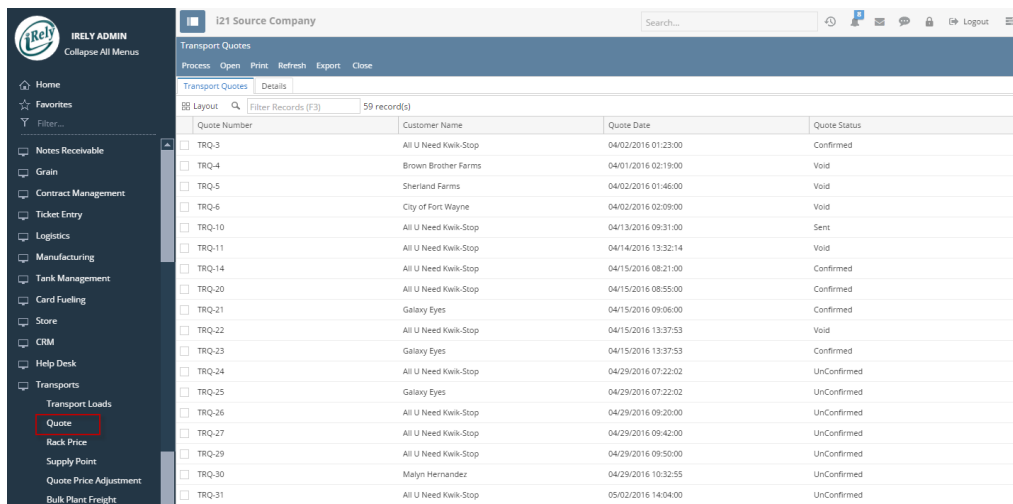
Transport Quote

The Transport Quote screen allows you to create, edit, and view quotes. This program is used to send Customer Quoting to highlight best pricing.



The image shows a 'Quote Generation' window with a title bar containing a maximize button and a close button. Below the title bar are two buttons: 'Generate' and 'Close'. The 'Generate' button is highlighted with a blue border. Below these buttons are three tabs: 'Generate', 'Confirm', and 'Void'. The 'Generate' tab is active. Below the tabs are four input fields: 'Quote Group:', 'Customer:', 'Quote Date:', and 'Effective Date:'. Each field has a dropdown arrow on the right. At the bottom of the window is a status bar with icons for help, refresh, lightbulb, and email, followed by the word 'Ready'.

Open the Quote screen from **Transports | Quote**. If there is no existing record yet, the menu will open a blank Quote screen with Quote Generation window, where you can create a new quote.



The image shows the 'i21 Source Company' application interface. On the left is a sidebar with a logo and a list of menu items: Home, Favorites, Filter..., Notes Receivable, Grain, Contract Management, Ticket Entry, Logistics, Manufacturing, Tank Management, Card Fueling, Store, CRM, Help Desk, Transports, Transport Loads, Quote (highlighted with a red box), Rack Price, Supply Point, Quote Price Adjustment, and Bulk Plant Freight. The main area displays a table of 'Transport Quotes'. The table has columns for Quote Number, Customer Name, Quote Date, and Quote Status. There are 31 rows of data, each with a checkbox in the first column. The table is filtered to show 59 records.

Quote Number	Customer Name	Quote Date	Quote Status
☐ TRQ-3	All U Need Kwik-Stop	04/02/2016 01:23:00	Confirmed
☐ TRQ-4	Brown Brother Farms	04/01/2016 02:19:00	Void
☐ TRQ-5	Sherland Farms	04/02/2016 01:46:00	Void
☐ TRQ-6	City of Fort Wayne	04/02/2016 02:08:00	Void
☐ TRQ-10	All U Need Kwik-Stop	04/13/2016 09:31:00	Sent
☐ TRQ-11	All U Need Kwik-Stop	04/14/2016 13:32:14	Void
☐ TRQ-14	All U Need Kwik-Stop	04/15/2016 08:21:00	Confirmed
☐ TRQ-20	All U Need Kwik-Stop	04/15/2016 08:55:00	Confirmed
☐ TRQ-21	Galaxy Eyes	04/15/2016 09:06:00	Confirmed
☐ TRQ-22	All U Need Kwik-Stop	04/15/2016 13:37:53	Void
☐ TRQ-23	Galaxy Eyes	04/15/2016 13:37:53	Confirmed
☐ TRQ-24	All U Need Kwik-Stop	04/29/2016 07:22:02	UnConfirmed
☐ TRQ-25	Galaxy Eyes	04/29/2016 07:22:02	UnConfirmed
☐ TRQ-26	All U Need Kwik-Stop	04/29/2016 09:20:00	UnConfirmed
☐ TRQ-27	All U Need Kwik-Stop	04/29/2016 09:42:00	UnConfirmed
☐ TRQ-29	All U Need Kwik-Stop	04/29/2016 09:50:00	UnConfirmed
☐ TRQ-30	Malyn Hernandez	04/29/2016 10:32:55	UnConfirmed
☐ TRQ-31	All U Need Kwik-Stop	05/02/2016 14:04:00	UnConfirmed

Quote Generation Screen :

Quote Group : Quote group drop down will list all the existing [customer group](#). Select the Quote group for which you wish to generate the quote.

Customer : Select the customer for which you wish to create quote.

Quote Date : Enter the date and time to create the quote. If not entering any date, field will take system date and time.

Effective Date : Enter the effective date and time of the quote. If not entering any date, field will take system date and time.

Quote Info :

Status : Drop down will list different quote status unconfirmed, Confirmed, Sent, Void. Select the status as you wish. At first upon generating quote status will be unconfirmed.

Quote No : This field is blank by default. A unique and system generated ID will fill in this field upon generating the quote. This ID is configured on [Starting Numbers](#) screen.

Quote Date : Enter the date and time to create the quote.

Effective Date : Enter the effective date and time of the quote.

Customer Info :

Customer : Will display customer for which quote has been generated. Select a Customer from the combo list box to which you wish to create the quote. Other fields address, Salesperson and phone are filled in with data from the selected Customer.

Address : Enter customer's address

Salesperson : Enter the salesperson associated

Phone : Enter customer's phone no:

A/R Info :

Balance : Will display customer's balance

Balance with Discount : Will display customer's balance with discount

Credit Limit : Will display customer's credit limit

Quote Comments : Enter the comments for quote

Customer Comments : Enter comments for customer

Grid Details :

Ship to :Field will auto populate with selected customers Ship to based on customer's special pricing and quote setup .Combo box will list all existing ship to location for selected customer. User can select any ship to from list.

Item : Field will auto populate with item from selected customer's special pricing and quote setup .Combo box will list all existing item.. User can select any item.

Fuel Supplier : Field will auto populate with Fuel supplier for the supply point in Customer's quote setup .

Supply Point : Field will auto populate with Supply point from Customer's quote setup .

Rack Price : Field will show the existing rack price for the Fixed rack vendor location entered in special pricing tab of customer.

Deviation : Will show the deviation amount entered for fixed rack in special pricing tab of customer.

Temp/Adjust : Will show the temp adjustment if exists for customer. User can enter his adjustments

Freight : Will show the existing freight for customer

Price : Price will be calculated as rack price + deviation + temp/adjust + freight

Price with Tax : Will show price by adding taxes

Margin : Difference between rack price and price

Order Qty : will show quantity ordered

Ext Profit : Order Qty * margin

Pages

[How to create new Quote](#)

[How to create Quote for multiple customer](#)

[How to confirm Quotes](#)

[How to void Quotes](#)

[How to send Quotes](#)

[How to Print Quotes](#)

[How to delete Transport Quotes](#)

[How to delete Transport Quotes grid line item](#)