How to create new Quote

The following are the steps in generating a quote

- 1. Open the Transports | Quote. If there is no existing record yet, this will open a new Quote screen.
- 2. If there are existing records, click the **Process toolbar button** on the search grid to open a new screen. Quote screen will open with Quote generation window.
- 3. Enter the data in Quote generation screen to generate quote. Refer to Transport Quote | Field Description | Quote Generation screen Details to help you in filling out the fields.
- 4. Then click on generate button

Generate Close
Generate Confirm Void
Quote Group 🗸 🗸
Customer
Quote Date
Effective Date
Send Immediately
? 🛱 🖓 Ready

Will create an unconfirmed Quote by pulling the details from customer quote and pricing setup

Details Audit	Log (U)																	
Quote Info			×	Remove	Filter			×	88 View	Filter	(F3)							К.Я К.У
Status	UnConfirmed	~		Ship To	Item	Fuel Supp	Supply P	Rack Pric	Deviation	Temp/A	Freight	Price	Tax Grou	Tax Amo	Price wit	Margin	Order Q	Ext Profi
Quote No	TRQ-56			Chicago	TR Ite	Marat	Muncie	1.2500	1.0000	0.0000	0.0000	2.2500	Tax Gr	0.2300	2.4800	1.0000	1	1.0000
Quote Date	6/13/2017 07:06 PM			Chicago	TR Ite	Marat	Muncie	1.3500	2.0000	0.0000	0.0000	3.3500	Tax Gr	0.3400	3.6900	2.0000	1	2.0000
Effective Date	6/13/2017 07:06 PM							0.0000	0.0000	0.0000	0.0000	0.0000		0.0000	0.0000	0.0000	0	0.0000
Customer Info																		
Sustomer	ABC Trucking	~																
Salesperson																		
Phone																		
Phone A/R Info		25 178 50																
Phone A/R Info Balance	Nscount	25,178.50																
Phone A/R Info Balance Balance with Di Credit Limit	Viscount																	

Customer setup required to generate the Quote

1.Open Customer > Customer tab > Pricing tab

Create sp							d Rack	+ Amt'						
Entity - ABC Trucking	·			·										~ □
New Save Search Ref														
Entity Customer Ven	dor Ship Via General	Locations	Contacts Split	Farm History Me	essages Activities	(0) Attachments (0)	Audit Log (29) Cu	stom						
Detail Misc Approva	Pricing Taxing Gr	rain Agrimit	ne Patronage	License Help Desk 1	Software Transpo	rts Commission	Buybeck Contracts	Field xRef						
Special Pricing														
Price Group	~													
X Remove 📴 Import	El View Filter (F3)													
Customer Location	Price Basis*	Cost to Use	Origin Vendor No	D. Origin Vendor Location	Item No.	Item Category	Customer Group	Currency	Deviation	Line Note	Begin Date* End Date	Fixed Rack Vendor No	Fixed Back No	Fixed Rack Vend
Chicago	Fixed Rack + Amount	Vendor			TR item 001	Inventory			1.000000		10/1/2016	0001005010	TR item 001	Muncie
Chicago	Fixed Rack + Amount	Vendor			TR Item 002	Inventory			2.000000		10/1/2016	0001005010	TR item 002	Muncie
Office	Origin Rack + Amt	Vendor	0001005010	Muncie	TR litem 001	Inventory			3.000000		10/1/2016			
 Office 	Origin Rack + Amt	Vendor	0001005010	Muncle	TR Item 002	Inventory			4.000000		10/1/2016			
									0.000000					
4														•
? 🗘 🗘 🖂 Read	v												Page	1 of 1 🕨 🕨

2.Customer > Customer tab > Transports tab > Quotes

Make Quote setup for customer location supply point and item or category

Entity - ABC Trucking													
New Save Search Referab Dates Undo Additional - Cose													
Entry Costoner Vendor Ship Via General Locations Cenacts Split Farm History Messages Activities (b) Attachments (b) Audit Log (29) Costone													
Detail Misc Approval Pricing Taxing Grain Agrimine Patronage License HelpDetk Software Transports Commission Boyback Contracts Faid-deft													
Outers Freigt													
Quote All Available Rack Prices Show Freight Detail	Show Margin												
Show Tax Detail 🖉 Show Temp Adjustments 🗌	Show City/Vendor and City												
Who/Where			Categories			Item							
X Remove 🔠 View Filter (F3)		22	× Remove SB View	Filter (F3)	52		B View Filter (F3)		56				
Customer Location*	Supply Point*	Quote	Categories			Litem							
Chicago	Muncle	1	Inventory										
? 🛱 🖓 🖂 Ready								Page	1 of 1 1 1				
: 🕁 V 🖂 Neady							1	Poge	1 01 1 1				

For each field details refer to Transport Quote | Field Description

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- generation window.
 3. Enter the data in Quote generation screen to generate quote. Refer to Transport Quote | Field Description | Quote Generation screen Details to help you in filling out the fields.
- 4. Then click on generate button

Quote Generatio	n	^ X
Generate Close		
Generate Cor	nfirm Void	
Quote Group:	Test Quote	~
Customer:	Apple Spice Sales	~
Quote Date:	07/04/2016 11:03 AM	
Effective Date:	07/04/2016 11:03 AM	
0 0 V E	🛛 Ready	

Will create an unconfirmed Quote by pulling the details from customer quote and pricing setup

Transport Quoter	s - TRQ-135														^ _ ^
Details Audit L	Log (0)														
Quote Info		×	X Remove Filter: X BB Layout Q Filter Records (F3)								5.2 2.2				
Status:	UnConfirmed	- L	Ship To	Item	Fuel Suppl	Supply Poi	Rack Price	Deviation	Temp/Adju	Freight	Price	Price with	Margin	Order Qty	Ext Profit
Quote No:	TRQ-135		Apple L	LPG	Kaiba C	KC War	7.500000	5.000000	0.000000	0.000000	12.5000	0.000000	5.000000	1	
Quote Date:	07/04/2016 11:03 AM		Apple L	LPG	Kaiba C	KC Slee	7.500000	5.000000	0.000000	0.000000	12.5000	0.000000	5.000000	1	
Effective Date:	07/04/2016 11:03 AM						0.000000	0.000000	0.000000	0.000000	0.000000	0.000000	0.000000	0	
Customer Info															
Customer	Apple Spice Sales	~													
Address: 📎	1909 Carew Street														
Salesperson:															
Phone:	2609698450														
A/R Info															
Balance:	421,01	7.20													
Balance with Di	scount: 421,01	7.20													
Credit Limit:		0.00													
Quote Commer	its:														
Customer Com	ments:														
000	Ready											14 4 4	Page	1 of 1	

Customer setup required to generate the Quote

1.Open Customer > Customer tab > Pricing tab

Create special price entry with price basis as 'Fixed Rack + Amt'

	General Co	ustomer Vendor Split	Farm Locatio	ns Contacts	Comments (0)	History Atta	chments (0)	Message	es Custo	m Audit Log	(85)			
etai	Misc Pricir	ng Taxing Grain Agrir	nine Patronag	e Applicator	Help Desk Lic	ense Transp	orts Com	mission	Buyback	Contracts	Field xRef			
peo	ial Pricing													
Prio	e Group:	~												
R	emove 👌 Imp	ort BB Layout Q, Filter	Records (F3)											
]	Customer Locatio	on Price Basis	Cost to Use	Origin Vendor No	Origin Vendor Lo	ocation Iter	n No. Item	Category		Deviation	Begin Date	End Date	Fixed Rack Vendor No	
	Apple Location	Origin Rack + Amt	Vendor	0001005083	KC Sleeves	LPC	LPG			2.000000	6/15/2016	6/30/2017		
	Apple Location	Fixed Rack + Amount	Vendor			LPC	i LPG			4.500000	6/15/2016	6/30/2017	0001005083	
] 4	Apple Location	Origin Rack + Amt	Vendor	0001005083	KC Warehouse	LPC	LPG			5.000000	6/15/2016	6/29/2017		
										0.000000				

2.Customer > Customer tab > Transports tab > Quotes

Make Quote setup for customer location supply point and item

Entity - Apple Spice Sales			^ □ ×									
Entity General Customer Vendor Split Farm Locations Contacts Comments (0)	History	Attachments (0) Messages Custom Audit Log (85	0									
Detail Misc Pricing Taxing Grain Agrimine Patronage Applicator Help Desk Lice	ense T	Fransports Commission Buyback Contracts Field	d xRef									
Quotes Freight												
Quote All Available Rack Prices: Show Freight Detail: Show Margin:												
Show Tax Detail: Show Temp Adjustments: Show City/Vendor and City:												
Who/Where		Categories	Item									
× Remove BB Layout Q Filter Records (F3)		× Remove ⊞ Layout Q Filter Records (F3)	X Remove 🔠 Layout 🔍 Filter Records (F3)									
Customer Location Supply Point 0	Quote	Categories	Item									
Apple Location KC Warehouse	\checkmark	LPG	LPG									
Apple Location KC Sleeves	~											
Apple Location KC Bidg												
⑦ ① ○ 云 Edited												

For each field details refer to Transport Quote | Field Description