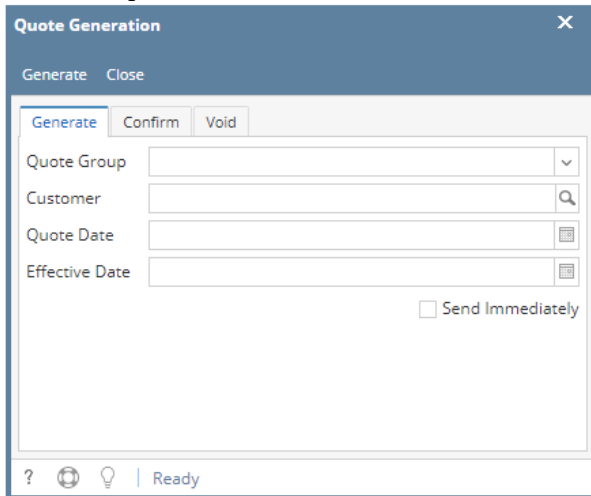


How to create new Quote

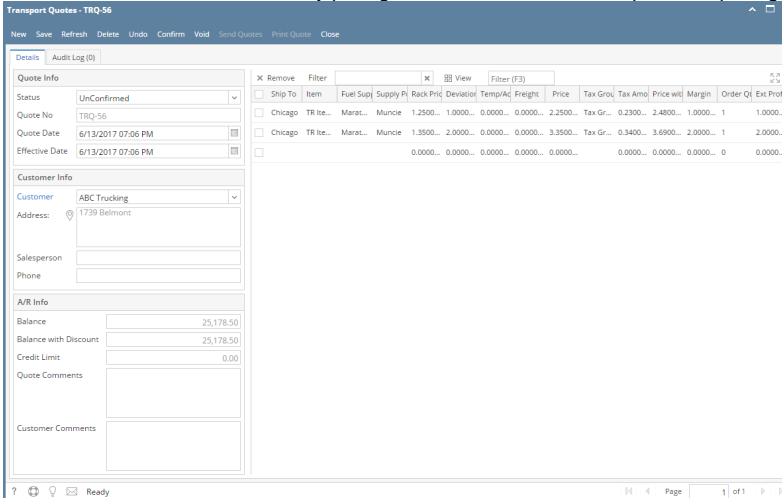
The following are the steps in generating a quote

1. Open the **Transport | 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



The 'Quote Generation' window is a modal dialog with a blue header and a close button (X). It contains a 'Generate' button and a 'Close' button. Below these are three tabs: 'Generate' (selected), 'Confirm', and 'Void'. The 'Generate' tab has four input fields: 'Quote Group' (dropdown), 'Customer' (text with search icon), 'Quote Date' (calendar icon), and 'Effective Date' (calendar icon). There is a checkbox labeled 'Send Immediately' at the bottom right. The status bar at the bottom shows a question mark, a globe icon, a lightbulb icon, and the text 'Ready'.

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

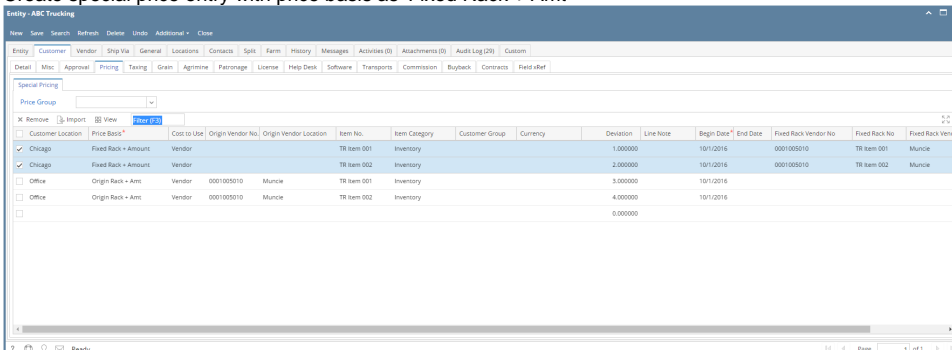


The 'Transport Quotes - TRQ-56' window is a complex form with a blue header and a close button (X). It has a menu bar with 'New', 'Save', 'Refresh', 'Delete', 'Undo', 'Confirm', 'Void', 'Send Quotes', 'Print Quote', and 'Close'. The main area is divided into several sections: 'Quote Info' (Status: UnConfirmed, Quote No: TRQ-56, Quote Date: 6/13/2017 07:06 PM, Effective Date: 6/13/2017 07:06 PM), 'Customer Info' (Customer: ABC Trucking, Address: 1739 Belmont, Salesperson, Phone), 'A/R Info' (Balance: 25,178.50, Balance with Discount: 25,178.50, Credit Limit: 0.00, Quote Comments, Customer Comments), and a 'Details' section with a table. The table has columns for 'Ship To', 'Item', 'Fuel Supj', 'Supply P', 'Rack Priq', 'Deviation', 'Temp/Adj', 'Freight', 'Price', 'Tax Gro', 'Tax Amo', 'Price w/ Margin', 'Order Q', and 'Ext Profit'. The status bar at the bottom shows a question mark, a globe icon, a lightbulb icon, and the text 'Ready'.

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'



The 'Special Pricing' window is a complex form with a blue header and a close button (X). It has a menu bar with 'New', 'Save', 'Search', 'Refresh', 'Delete', 'Undo', 'Additional', and 'Close'. The main area is divided into several sections: 'Special Pricing' (Price Group: dropdown), 'Price Basis' (dropdown), 'Cost to Use' (dropdown), 'Origin Vendor No.' (dropdown), 'Origin Vendor Location' (dropdown), 'Item No.' (dropdown), 'Item Category' (dropdown), 'Customer Group' (dropdown), 'Currency' (dropdown), 'Deviation' (text), 'Line Note' (text), 'Begin Date' (calendar icon), 'End Date' (calendar icon), 'Fixed Rack Vendor No.' (dropdown), 'Fixed Rack No.' (dropdown), and 'Fixed Rack Vend' (dropdown). The table has columns for 'Ship To', 'Item', 'Fuel Supj', 'Supply P', 'Rack Priq', 'Deviation', 'Temp/Adj', 'Freight', 'Price', 'Tax Gro', 'Tax Amo', 'Price w/ Margin', 'Order Q', and 'Ext Profit'. The status bar at the bottom shows a question mark, a globe icon, a lightbulb icon, and the text 'Ready'.

2. Customer > Customer tab > Transports tab > Quotes

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

For each field details refer to [Transport Quote](#) | Field Description

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

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

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'

Entity - Apple Spice Sales

New Save Search Refresh Delete Undo Additional Close

Entity General Customer Vendor Split Farm Locations Contacts Comments (0) History Attachments (0) Messages Custom Audit Log (85)

Detail Misc Pricing Taxing Grain Agrimine Patronage Applicator Help Desk License Transports Commission Buyback Contracts Field xRef

Special Pricing

Price Group:

X Remove Import Layout Filter Records (F3)

<input type="checkbox"/> Customer Location	Price Basis	Cost to Use	Origin Vendor No.	Origin Vendor Location	Item No.	Item Category	Deviation	Begin Date	End Date	Fixed Rack Vendor No	Fix
<input type="checkbox"/> Apple Location	Origin Rack + Amt	Vendor	0001005083	KC Sleeves	LPG	LPG	2.000000	6/15/2016	6/30/2017		
<input checked="" type="checkbox"/> Apple Location	Fixed Rack + Amount	Vendor			LPG	LPG	4.500000	6/15/2016	6/30/2017	0001005083	LP
<input type="checkbox"/> Apple Location	Origin Rack + Amt	Vendor	0001005083	KC Warehouse	LPG	LPG	5.000000	6/15/2016	6/29/2017		
<input type="checkbox"/>							0.000000				

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2.Customer > Customer tab > Transports tab > Quotes

Make Quote setup for customer location supply point and item

Entity - Apple Spice Sales

New Save Search Refresh Delete Undo Additional Close

Entity General Customer Vendor Split Farm Locations Contacts Comments (0) History Attachments (0) Messages Custom Audit Log (85)

Detail Misc Pricing Taxing Grain Agrimine Patronage Applicator Help Desk License Transports Commission Buyback Contracts Field 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				
X Remove	Layout	Filter Records (F3)	X Remove	Layout	Filter Records (F3)	X Remove	Layout	Filter Records (F3)
<input type="checkbox"/> Customer Location			<input type="checkbox"/> Categories			<input type="checkbox"/> Item		
<input type="checkbox"/> Apple Location		Supply Point	<input type="checkbox"/> LPG			<input type="checkbox"/> LPG		
<input type="checkbox"/> Apple Location		KC Warehouse						
<input type="checkbox"/> Apple Location		KC Sleeves						
<input type="checkbox"/> Apple Location		KC Bldg						
<input type="checkbox"/>								

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For each field details refer to [Transport Quote](#) | Field Description