

How to create Quote for multiple customer

You can create Quotes for Multiple Customers based on selection criteria

Customer group with multiple customers set for quote

Customer Group - Daily Quotes

New Save Search Refresh Delete Undo Close

Details

Group Name *Daily QuotesDescriptionDaily Rack Price Quoting

X RemoveViewFilter (F3)

<input type="checkbox"/>	Customer No.	Name	Special Pricing	Contracts	Buyback	Quote	Volume Discount
<input type="checkbox"/>	0001005060	All U Need Kwik-Stop	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	0001005004	Apple Spice Sales	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	0001005006	Brown Brother Farms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	0001005057	ABC Trucking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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To generate quote enter only the customer group

Quote Generation

GenerateClose

GenerateConfirmVoid

Quote GroupDaily Quotes

Customer

Quote Date6/13/2017 07:20 PM

Effective Date6/13/2017 07:20 PM

You can create Quotes for Multiple Customers based on selection criteria

Customer group with multiple customers set for quote

Customer Group - Test Quote

New Save Search Refresh Delete Undo Close

Details

Group Name: Description:

☐ Remove ☐ Layout

<input type="checkbox"/>	Customer No.	Name	Special Pricing	Contracts	Buyback	Quote
<input type="checkbox"/>	0001005004	Apple Spice Sales	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	0001005006	Brown Brother Farms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	0001005085	Galaxy Eyes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Ready Page 1 of 1

To generate quote enter only the customer group

Quote Generation

Generate Close

Generate Confirm Void

Quote Group:

Customer:

Quote Date:

Effective Date:

Ready