

How to confirm Quotes

Confirm quote through Quote Generation screen

You can confirm the unconfirmed quotes through Quote Generation screen. Here it will confirm the unconfirmed quotes based on selection criteria. Using this confirm button you can confirm multiple Quotes.

Example below shows confirming quote by entering customer .

Existing records:

Transport Quotes			
Process Open Print Refresh Report +			
Transport Quotes Details			
View Filter (F3) 30 record(s)			
Quote Number	Customer Name	Quote Date	Quote Status
<input type="checkbox"/> TRQ-1	All U Need Kwik-Stop	9/8/2015 14:17:00	Sent
<input type="checkbox"/> TRQ-2	All U Need Kwik-Stop	9/9/2015 15:11:00	Void
<input type="checkbox"/> TRQ-3	All U Need Kwik-Stop	3/22/2016 15:52:00	Confirmed
<input type="checkbox"/> TRQ-4	All U Need Kwik-Stop	3/30/2016 15:57:00	Confirmed
<input type="checkbox"/> TRQ-5	All U Need Kwik-Stop	8/4/2016 09:40:29	Confirmed
<input type="checkbox"/> TRQ-6	All U Need Kwik-Stop	8/4/2016 13:03:00	Confirmed
<input type="checkbox"/> TRQ-13	Apple Spice Sales	10/10/2016 13:01:35	Void
<input type="checkbox"/> TRQ-14	Brown Brother Farms	10/11/2016 17:09:36	Void
<input type="checkbox"/> TRQ-17	Brown Brother Farms	11/29/2016 13:53:53	UnConfirmed
<input type="checkbox"/> TRQ-22	Brown Brother Farms	11/29/2016 13:57:11	UnConfirmed
<input type="checkbox"/> TRQ-28	ABC Trucking	12/5/2016 13:25:22	UnConfirmed
<input type="checkbox"/> TRQ-32	Brown Brother Farms	12/5/2016 13:46:08	UnConfirmed
<input type="checkbox"/> TRQ-33	ABC Trucking	12/5/2016 14:00:07	UnConfirmed
<input type="checkbox"/> TRQ-34	Brown Brother Farms	12/5/2016 14:02:15	Sent
<input type="checkbox"/> TRQ-36	Brown Brother Farms	12/15/2016 13:49:59	Sent
<input type="checkbox"/> TRQ-37	Apple Spice Sales	12/15/2016 14:13:21	UnConfirmed
<input type="checkbox"/> TRQ-38	Brown Brother Farms	12/15/2016 14:13:21	Sent
<input type="checkbox"/> TRQ-39	ABC Trucking	12/15/2016 14:13:21	Confirmed

Select as many Unconfirmed customers by checking the checkbox and click on Confirm button

Quote Generation


Confirm Close

Generate Confirm Void

<input type="checkbox"/>	Quote Number	Customer	Quote Date
<input checked="" type="checkbox"/>	TRQ-17	Brown Brother Farms	11/29/2016
<input type="checkbox"/>	TRQ-22	Brown Brother Farms	11/29/2016
<input type="checkbox"/>	TRQ-28	ABC Trucking	12/5/2016
<input type="checkbox"/>	TRQ-32	Brown Brother Farms	12/5/2016
<input type="checkbox"/>	TRQ-33	ABC Trucking	12/5/2016
<input type="checkbox"/>	TRQ-37	Apple Spice Sales	12/15/2016

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Quote status changed from unconfirmed to confirmed for the selected customer(s)

 Through Quote Generation confirm button only unconfirmed quotes will change to confirm status

Confirm Quote through Quote screen

Any quote can be changed to status confirmed through Quote screen. Either through confirm button or by selecting confirm value from status drop down.

Transport Quotes - TRQ-33

New Save Refresh Delete Undo **Confirm** Void Send Quotes Print Quote Close

Details Audit Log (0)

Quote Info

Status: UnConfirmed

Quote No: UnConfirmed

Quote Date: Confirmed

Effective Date: Sent

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:

Ship To	Item	Fuel Supp	Supply P	Rack Pric	Deviation	Temp/Adj	Freight	Price	Tax Gros	Tax Amo	Price w/t	Margin	Order Q	Ext Profit
<input type="checkbox"/> Chicago	TR He...	Marat...	Muncie	1.1000...	1.0000...	0.0000...	0.0000...	2.1000...	Tax Gr...	0.2100...	2.3100...	1.0000...	1	1.0000...
<input type="checkbox"/> Chicago	TR He...	Marat...	Muncie	1.2500...	2.0000...	0.0000...	0.0000...	3.2500...	Tax Gr...	0.3300...	3.5800...	2.0000...	1	2.0000...
<input type="checkbox"/>				0.0000...	0.0000...	0.0000...	0.0000...		0.0000...	0.0000...	0.0000...	0	0.0000...	

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If selecting from drop down, then you need to click on save .

If clicking on confirm button , will get save automatically.

Confirm quote through Quote Generation screen

You can confirm the unconfirmed quotes through Quote Generation screen. Here it will confirm the unconfirmed quotes based on selection criteria.Using this confirm button you can confirm multiple Quotes.

Example below shows confirming quote by entering customer .

Existing records :

Transport Quotes			
Process	Open	Print	Refresh Export Close
Transport Quotes Details			
Layout	Filter Records (F3)	59 record(s)	
Quote Number	Customer Name	Quote Date	Quote Status
<input type="checkbox"/> TRQ-23	Galaxy Eyes	04/15/2016 13:37:53	Confirmed
<input type="checkbox"/> TRQ-24	All U Need Kwik-Stop	04/29/2016 07:22:02	UnConfirmed
<input type="checkbox"/> TRQ-25	Galaxy Eyes	04/29/2016 07:22:02	UnConfirmed
<input type="checkbox"/> TRQ-26	All U Need Kwik-Stop	04/29/2016 09:20:00	UnConfirmed
<input type="checkbox"/> TRQ-27	All U Need Kwik-Stop	04/29/2016 09:42:00	UnConfirmed
<input type="checkbox"/> TRQ-29	All U Need Kwik-Stop	04/29/2016 09:50:00	UnConfirmed
<input type="checkbox"/> TRQ-30	Malyn Hernandez	04/29/2016 10:32:55	UnConfirmed
<input type="checkbox"/> TRQ-31	All U Need Kwik-Stop	05/02/2016 14:04:00	UnConfirmed
<input type="checkbox"/> TRQ-33	All U Need Kwik-Stop	05/04/2016 15:58:00	Confirmed
<input type="checkbox"/> TRQ-35	All U Need Kwik-Stop	05/04/2016 16:04:00	UnConfirmed
<input type="checkbox"/> TRQ-36	Galaxy Eyes	05/16/2016 11:47:00	Confirmed
<input type="checkbox"/> TRQ-38	All U Need Kwik-Stop	06/15/2016 14:30:44	UnConfirmed
<input type="checkbox"/> TRQ-39	Galaxy Eyes	06/15/2016 14:30:44	UnConfirmed
<input type="checkbox"/> TRQ-40	Malyn Hernandez	06/15/2016 14:30:44	UnConfirmed
<input type="checkbox"/> TRQ-42	All U Need Kwik-Stop	06/15/2016 14:31:18	UnConfirmed
<input type="checkbox"/> TRQ-43	Galaxy Eyes	06/15/2016 14:31:18	UnConfirmed
<input type="checkbox"/> TRQ-44	Malyn Hernandez	06/15/2016 14:31:18	UnConfirmed
<input type="checkbox"/> TRQ-46	All U Need Kwik-Stop	06/15/2016 15:32:59	UnConfirmed
<input type="checkbox"/> TRQ-47	Galaxy Eyes	06/15/2016 15:32:59	UnConfirmed
<input type="checkbox"/> TRQ-48	Malyn Hernandez	06/15/2016 15:32:59	UnConfirmed

Select a as many Unconfirmed customers by checking the checkbox and click on Confirm button

Quote Generation


Confirm Close

Generate Confirm Void

<input type="checkbox"/>	Quote Number	Customer	Quote Date
<input checked="" type="checkbox"/>	TRQ-24	All U Need Kwik-Stop	4/29/2016
<input type="checkbox"/>	TRQ-25	Galaxy Eyes	4/29/2016
<input type="checkbox"/>	TRQ-26	All U Need Kwik-Stop	4/29/2016
<input type="checkbox"/>	TRQ-27	All U Need Kwik-Stop	4/29/2016
<input type="checkbox"/>	TRQ-29	All U Need Kwik-Stop	4/29/2016
<input type="checkbox"/>	TRQ-30	Maly Hernandez	4/29/2016
<input type="checkbox"/>	TRQ-31	All U Need Kwik-Stop	5/2/2016

Ready

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Confirm Quote through Quote screen

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Transport Quotes - TRQ-27

New Save Refresh Delete Undo **Confirm** Void Send Quotes Print Quote Close

Details Audit Log (0)

Quote Info

Status: UnConfirmed

Quote No: UnConfirmed

Quote Date: Confirmed

Effective Date: Void

Customer Info

Customer: All U Need Kwik-Stop

Address: 1234 Main Street

Salesperson:

Phone: 260554115

A/R Info

Balance: 209,082.40

Balance with Discount: 209,082.40

Credit Limit: 0.00

Quote Comments:

Customer Comments:

Ship To	Item	Fuel Suppl	Supply Poi	Rack Price	Deviation	Temp Adj	Freight	Price	Price with	Margin	Order Qty	Ext Profit
<input type="checkbox"/> Main St...	D2D	Marath...	Muncie	0.000000	0.000000	0.000000	0.000000	0.000000	0.000000	0.000000	1	
<input type="checkbox"/> Main St...	LFG	Marath...	Muncie	5.000000	5.000000	0.000000	0.000000	10.0000...	0.000000	5.000000	1	
<input type="checkbox"/> Main St...	87G	Marath...	Muncie	1.450000	10.0000...	0.000000	0.000000	11.4500...	0.000000	10.0000...	1	
<input type="checkbox"/> Main St...	91G	Marath...	Muncie	0.000000	0.000000	0.000000	0.000000	0.000000	0.000000	0.000000	1	
<input type="checkbox"/>				0.000000	0.000000	0.000000	0.000000	0.000000	0.000000	0.000000	0	

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