Product Quotes Given to Farmers

Informal product quotes given to farmers are often not conveyed soon enough to who is doing the invoicing and may result in an Invoice that does not reflect the price quoted by the salesperson. By using the *Product Quote* feature of Agvance, these verbal promises are apparent at invoicing.

Point of sale transactions, such as Delivery or Blend Tickets, Invoices, Bookings, Field Plans, and Sales Orders, indicate the Quote Status of the current customer using these icons. When generating the Invoices, quickly refer to the quotes by selecting the **Notebook** icon and applying the correct pricing.

New Product Quotes may be added at the Customer *Profile* screen by selecting the **Quote Status** icon.

The expiration dates on the quotes are informative but will not keep the Quote Status from being activated on the *Point of Sale* screens. This allows the opportunity to decide if the quoted price should still be in effect for this sale.

The status icon indicates the following conditions:

- **Closed Notebook** – No product quotes exist for this customer.
- **Open Notebook (white)** – Product quotes exist but not for any of the products listed on this particular transaction.
- **Open Notebook (red)** – Product quotes exist for at least one of the products selected on this particular transaction.

At the *Invoice, Blend Ticket, Booking,* or *Field Plan* screens, a red notebook indicates that there are product quotes for at least one line item on the transaction. Double-click in the *Unit/$* column and a screen displays with the quoted prices along with the List Price and Costs. Double-click on the correct price to bring back to the *Invoice* screen as the per unit selling price for this product. The quoted prices, List Prices, and Costs are also available at the *Delivery Ticket* screen by selecting **Price Delivery** if pricing the Delivery Ticket. Double-click in the *Unit/$* column to display and optionally select the price per unit.

Product quotes may be deleted by going to *Hub / Utilities / Delete Aged Customer Quotes.* All product quotes that expire on or before the specified date will be deleted.

Reports for any or all quotes may be run by editing any customer, selecting the **Quote Notebook** icon, and then choosing **Reports** on the *Quote* screen.