

Price Quotes

Last Modified on 08/08/2022 2:38 pm CDT

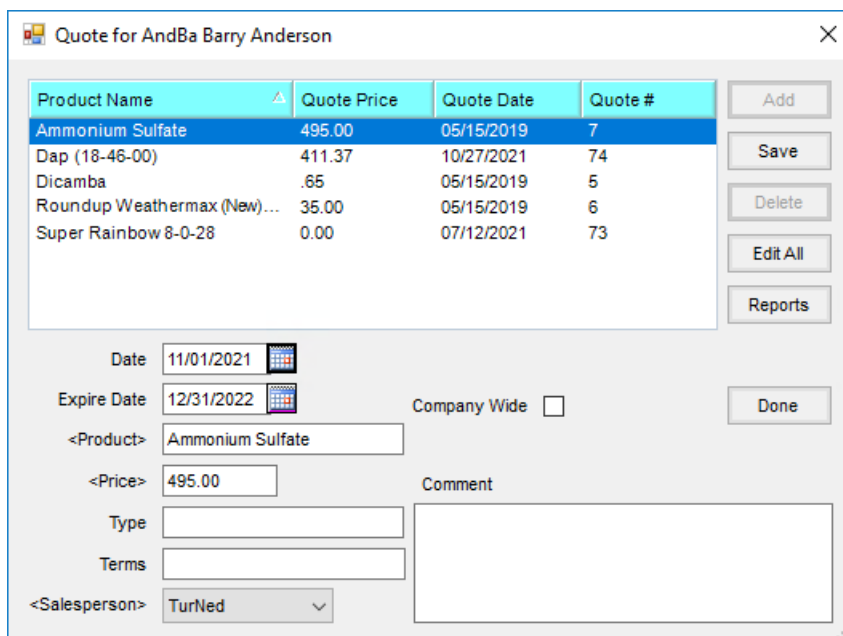
Create verbal quotes on Customer profiles for reference.

1. In the Hub or Accounting module, navigate to *File / Open / Customers*.
2. Select the customer and choose **Edit**.
3. On the *Edit a Customer* window, select the **Quote** button.

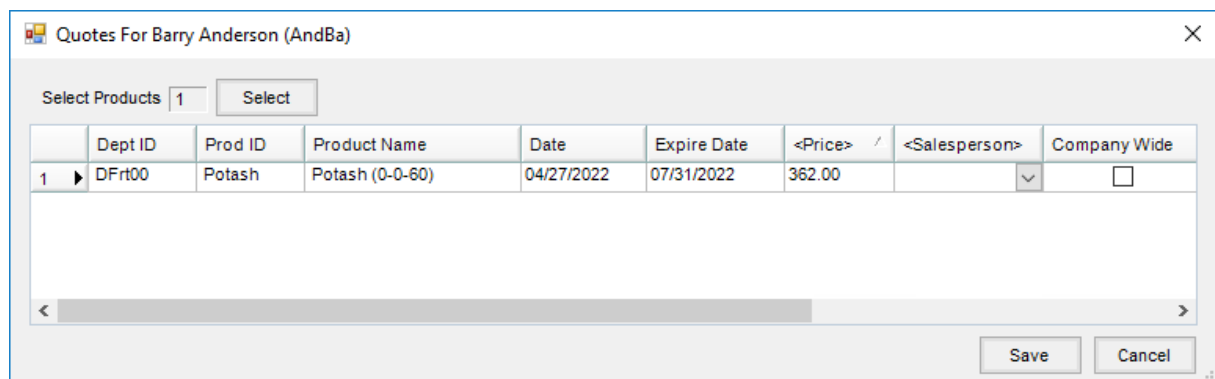


4. If a quote exists for the customer, a window displays listing the available quotes. Choose **Add** to create a new quote. If no quotes previously existed, a window automatically displays to create a new quote.

Note: To edit existing quotes, highlight the appropriate line and make any edits in the area below. Select **Edit** **All** to make changes to all quotes or add additional line items if needed. Once finished, select **Save**.

A screenshot of the 'Quote for AndBa Barry Anderson' window. It features a table with columns: Product Name, Quote Price, Quote Date, and Quote #. The table lists five items: Ammonium Sulfate (495.00, 05/15/2019, 7), Dap (18-46-00) (411.37, 10/27/2021, 74), Dicamba (.65, 05/15/2019, 5), Roundup Weathermax (New)... (35.00, 05/15/2019, 6), and Super Rainbow 8-0-28 (0.00, 07/12/2021, 73). To the right of the table are buttons: Add, Save, Delete, Edit All, and Reports. Below the table are input fields for Date (11/01/2021), Expire Date (12/31/2022), Company Wide (checkbox), <Product> (Ammonium Sulfate), <Price> (495.00), Comment, Type, Terms, and <Salesperson> (TurNed). A Done button is also present.

5. Choose **Select** then the products quoted. Select **Done**.
6. On the *Quotes For* window, enter the *Expire Date*, *Price*, and *Salesperson*. If the quote should be available for all locations, choose the *Company Wide* checkbox. Optionally enter the *Type*, *Terms*, and *Comment*.

A screenshot of the 'Quotes For Barry Anderson (AndBa)' window. It shows a 'Select Products' section with a '1' in a box and a 'Select' button. Below is a table with columns: Dept ID, Prod ID, Product Name, Date, Expire Date, <Price>, <Salesperson>, and Company Wide. The first row shows: 1, DFrt00, Potash, Potash (0-0-60), 04/27/2022, 07/31/2022, 362.00, and Company Wide checkbox. At the bottom are 'Save' and 'Cancel' buttons.

7. Choose **Save**. A unique Quote # is assigned to each quote.

Note: When Delivery Tickets, Blend Tickets, Invoices, Bookings, and Field Plans are added, the quote status is indicated using symbols:

- **Closed Notebook** – No quotes exist for this customer.



- **Open Notebook** – Quotes exist but not for any of the products listed on this transaction.



- **Red Open Notebook** – Quotes exist for at least one of the products selected on this transaction.

