

Price Quotes

Last Modified on 08/22/2024 1:30 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**.

Product Name	Quote Price	Quote Date	Quote #
28-0-0	180.33	08/03/2023	75
Ammonium Sulfate	495.00	05/15/2023	7
Dap (18-46-00)	411.37	10/27/2023	74
Dicamba	.65	05/15/2023	5
Roundup Weathermax (New)...	35.00	05/15/2023	6
Super Rainbow 8-0-28	400.00	07/12/2023	73

Date: 08/03/2023
Expire Date: 09/30/2023
Company Wide:
<Product>: 28-0-0
<Price>: 180.33
Type:
Terms:
<Salesperson>: TurNed

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*.

	Dept ID	Prod ID	Product Name	Date	Expire Date	<Price>	<Salesperson>	Company Wide
1	DFrt00	Potash	Potash (0-0-60)	08/22/2024	10/31/2024	362.00	TurNed	<input checked="" type="checkbox"/>

Buttons: Save, Cancel

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.

