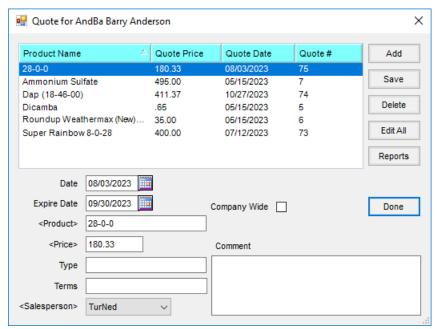
Price Quotes

Last Modified on 08/22/2024 1:30 pm CDT

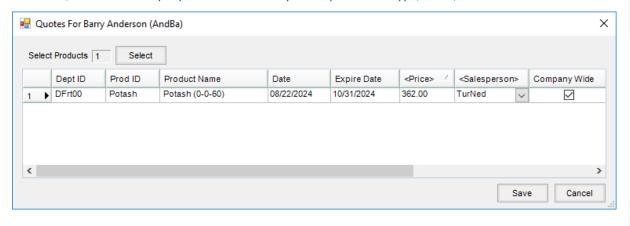
Create verbal quotes on Customer profiles for reference.

- 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**.



- 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*.



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.

