Overview of Quotes

A quote for an item uses the sales quote, the item card, and the customer card:

Sales quote (Sales & Receivables): The sales quote stores information about the quote, including dates, statuses, and comments. Sales quotes can be automatically deleted when the quote becomes a sales order, or you can create sales orders (and blanket sales orders) from the quote and leave the quote in the system. If you requote on- going jobs every year, leave the quote in the system, then copy the quote to a new quote for the new year.

Item card (Inventory): The item card stores information about the item being quoted and is used to calculate labor and material costs. You can mark an item as a quote item, which prevents it from being used on anything except a quote. When in quote status, you can enter materials into the item BOM with only a description and unit cost.

When creating a quote for a new item, you must create a card for the finished good item. You do not need to create cards for the component/raw material items until the quote is accepted.

Customer card (Sales & Receivables): The customer card stores information about the sell-to customer. The information includes the sell-to contact, bill-to information, multiple ship-to addresses with dock information, invoicing information, and credit information.

Once a quote has been accepted and the quote item finalized into a finished good item, you can create unlimited sales orders from the quote. If the quote is for a blanket amount, you can create a blanket order from the quote, and then create sales orders from the blanket order. The blanket order tracks the quantity shipped and invoiced against the blanket quantity.

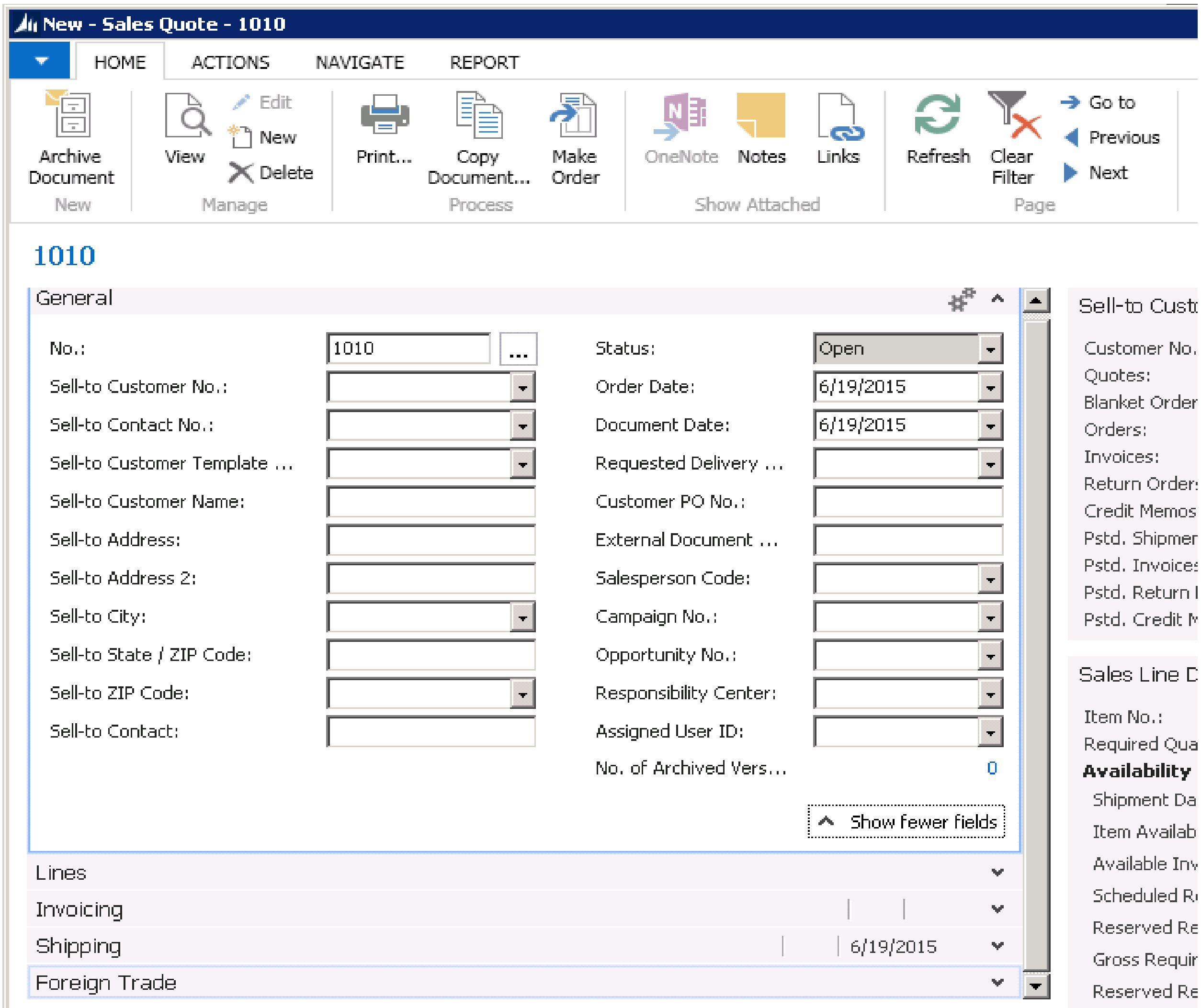
If the quote is not accepted, you can leave the quote, quote item, and customer (if the customer does not do other business with you) in the system for tracking quote history, then delete them at some time in the future when they are no longer useful.

Creating a Sales Quote

Customer and item cards must be set up before creating a sales quote.

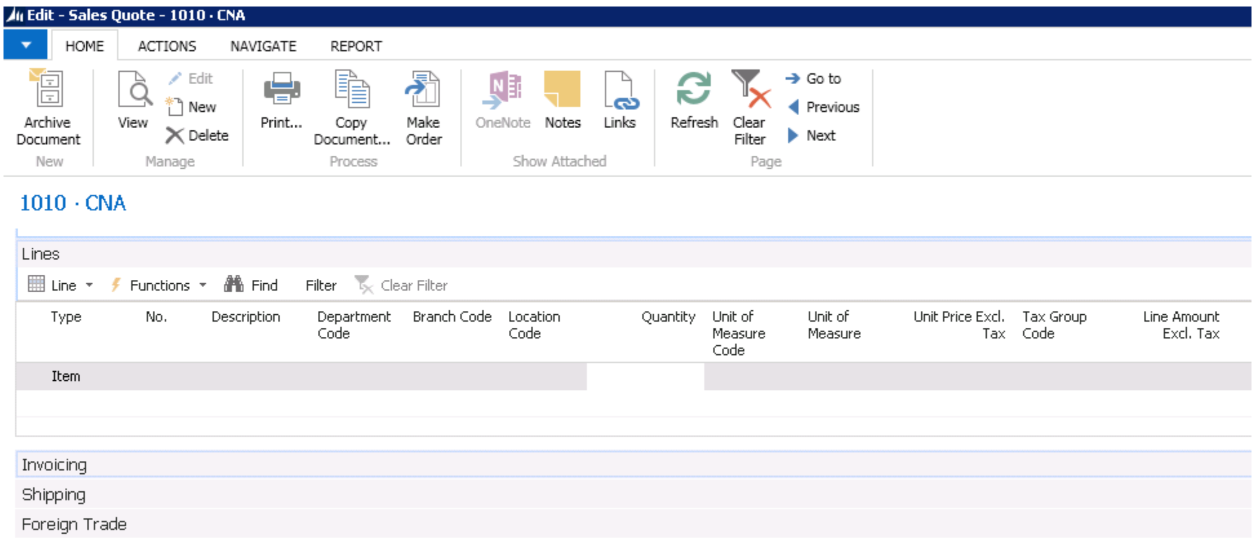
1. In the **Search** box, enter **Sales Quotes**, and then choose the related link.
2. On the **Home** tab, in the **New** group, choose **New**.
3. Complete the General Tab
    1. Fill in the **No.** field.

2. In the **Sell-to Customer No.** field, enter the customer's number. Related customer fields are filled in from based on the information from the customer card.
3. In the **Document Date** field, enter a date.
4. **Requested Deliver Date**. Optional field. Fill in the customers requested delivery date.
5. **Customer PO No**. Optional field. Fill in the customer's purchase order number.
6. **External Document No**. Optional field. This field is normally left blank. Later, when applying the payment to this order, the External Document No. field is used to record the customer's check number.
7. **Salesperson Code**. Optional field. Select the sales person responsible for this order. The system automatically enters the salesperson code from the customer card.
8. **Campaign No**. Optional field. If campaigns are tracked, select the campaign this quote belongs to.
9. **Opportunity No**. Optional field. If opportunities are tracked, select the opportunity number.
10. **Responsibility Center**. Optional field. Select the responsibility center for this order. The system automatically enters the responsibility center code from the person entering the order.
11. **Assigned User ID**. Optional field. Select the user assigned to this quote.

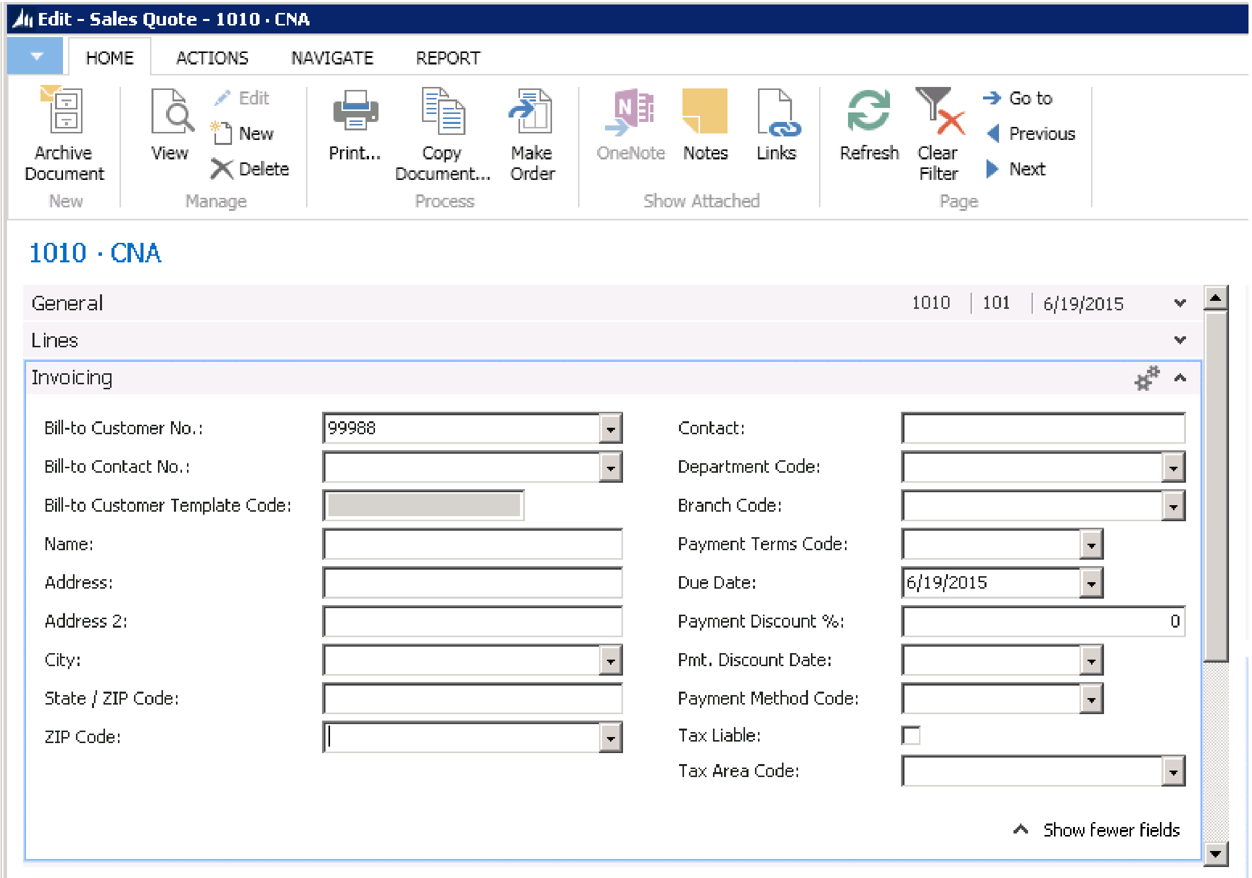


4. Complete the line(s)
    1. On the first quote line, in the **Type** field, select **Item**. (Instructions will assume an item will be quoted, any line type may be selected.) Note: If this is a new item, create an item with a quote status.
    2. In the **No.** field, enter the number of the item to be quoted.
    3. **Description**. The description field will auto fill based on the number selected for the **No**. field. The description can be overridden.
    4. In the **Global Dim 1** field enter the code if applicable. (If this is the first invoice, you will need to choose this column. The actual field name will be the name of your actual company's global dim 1.)
    5. In the **Global Dim 2** field enter the code if applicable. (If this is the first invioce, you will need to choose this column. The actual field name will be the name of your actual company's global dim 2.)
    6. **Location.** If you are using locations, enter a location.
    7. In the **Quantity** field, enter the quantity of items you want to appear on the quote.

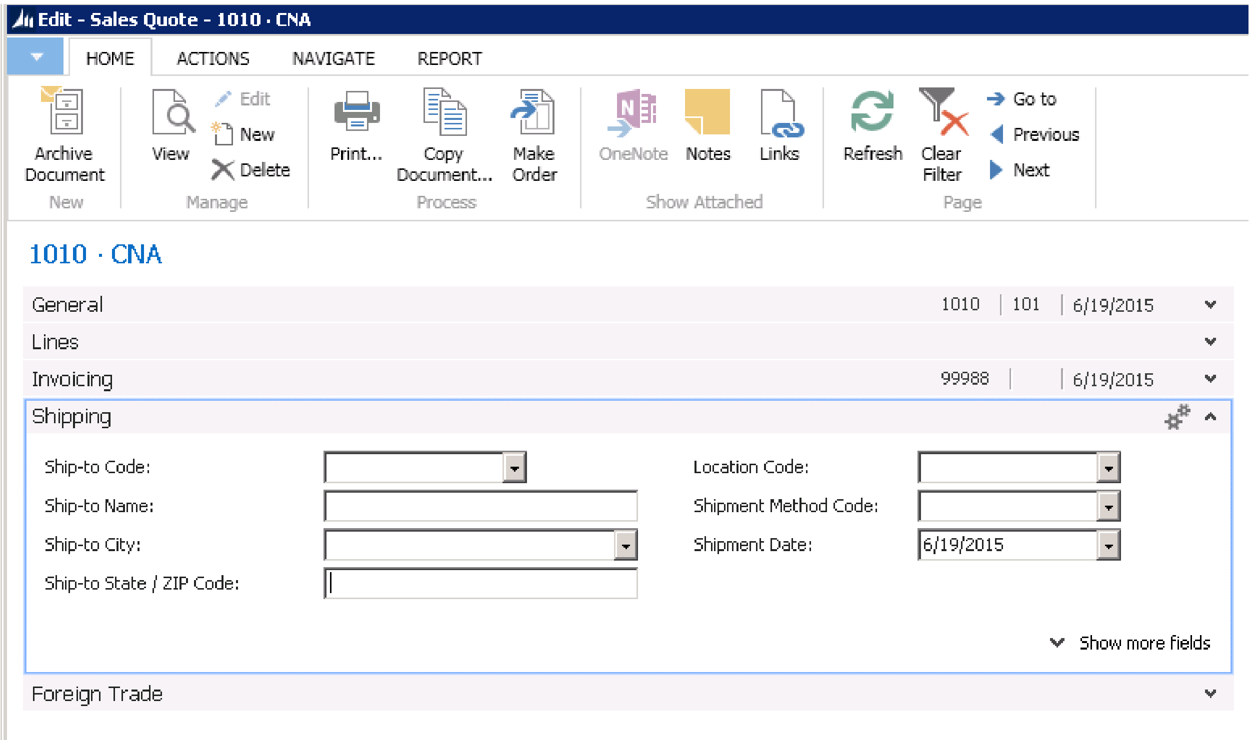
8. In the **Unit of Measure** field, enter the appropriate unit of measure.
9. **Unit Price Excl. VAT.** If this is an item and the price is set up on the item card, the field will pull the price based on the item card. If the price is not set up on the item card, enter a price. If another line type is being used, enter the price.
10. **Tax Group Code**. Select the appropriate code.
11. **Line Amount Excl. VAT**. This field will auto fill using the formula **Quantity** multiplied by **Unit Price Excl. VAT**.



5. Review the **Invoicing** tab.
    1. **Bill-to Customer No**. Update if necessary. Remaining customer fields will auto fill based on the number entered.
    2. **Payment Terms Code**. Will auto fill based on the customer card. Terms can be overridden.
    3. **Due Date**. Calculated field based on document date and terms.
    4. **Payment Discount %.** Optional. Enter percentage if applicable.
    5. **Payment Discount Date**. Optional. Enter date the discount will expire.
    6. **Payment method code**. Optional. Select from the pull down list.
    7. **Tax Liable**. Will auto fill based on customer card. Can be overridden.
    8. **Tax Area Code**. Will auto fill based on customer card. Can be overridden.



6. Review the **Shipping** tab.
    1. **Ship-to code**. Multiple ship-to addresses can be set up per customer. Select the appropriate code if not the default. Remaining address fields will populate based on the code selected.
    2. **Location Code**. Select the code if locations are used. Can also be assigned in the lines.
    3. **Shipment Method Code**. Optional field. Select code from the pull down list.
    4. **Shipment Date**. Optional field. Enter the requested shipment date.
7. Select OK or close the quote when done.

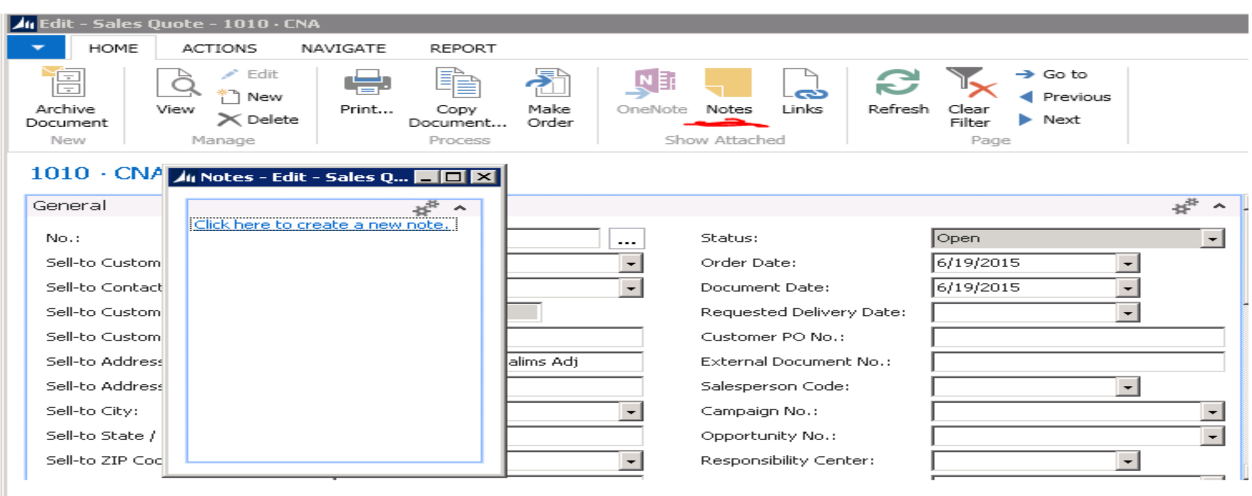


A quote or blanket orders can be converted to a sales order that can be converted to an invoice.

Add Comments to a Sales Quote

Use the comments to store details about the quote, special instructions, details about changes made to the quote, and any other information that you want to track.

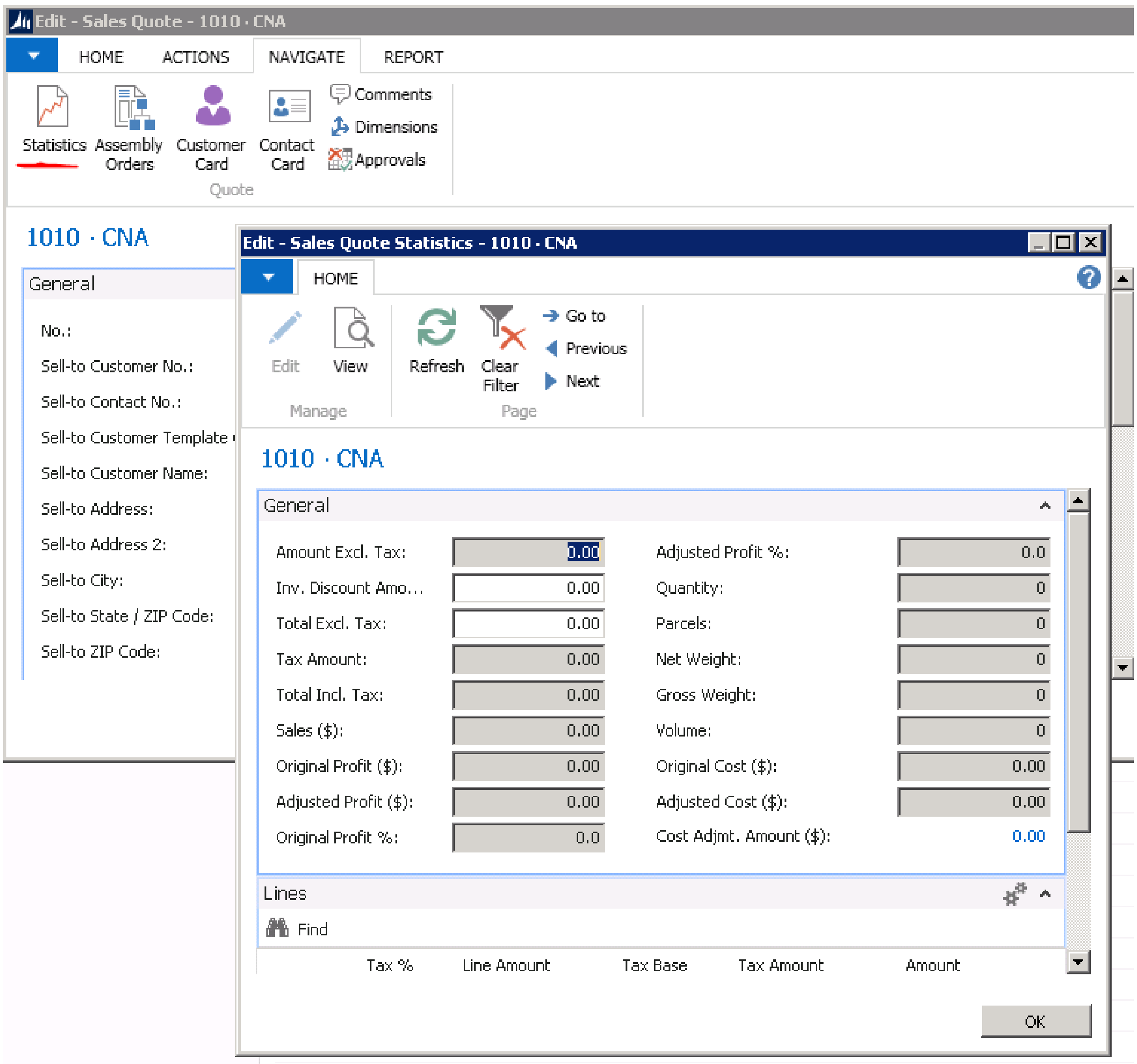
1. In the **Search** box, enter **Sales Quotes**, and then choose the related link.
2. Select the quote you want to add information to and choose **Edit.**
3. On the **Home** tab, **Show Attached** group, choose **Notes**.



View Sales Quote Statistics

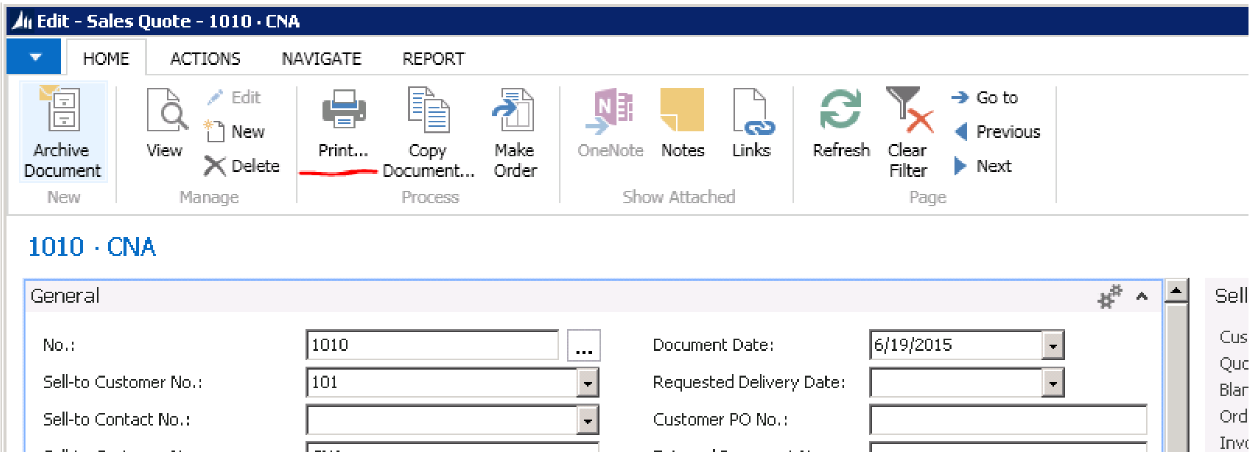
Statistics gives an overview of the quotes amounts like quantity, sales dollars, profit percentage, etc.

1. In the **Search** box, enter **Sales Quotes**, and then choose the related link.
2. Select the quote you want to add information to and choose **Edit.**
3. On the **Navigate** tab, **Quote** group, choose **Statistics**.



Print a Sales Quote

1. In the **Search** box, enter **Sales Quotes**, and then choose the related link.
2. Select the quote you want to print. On the **Home** tab, **Process** group, select **Print.**

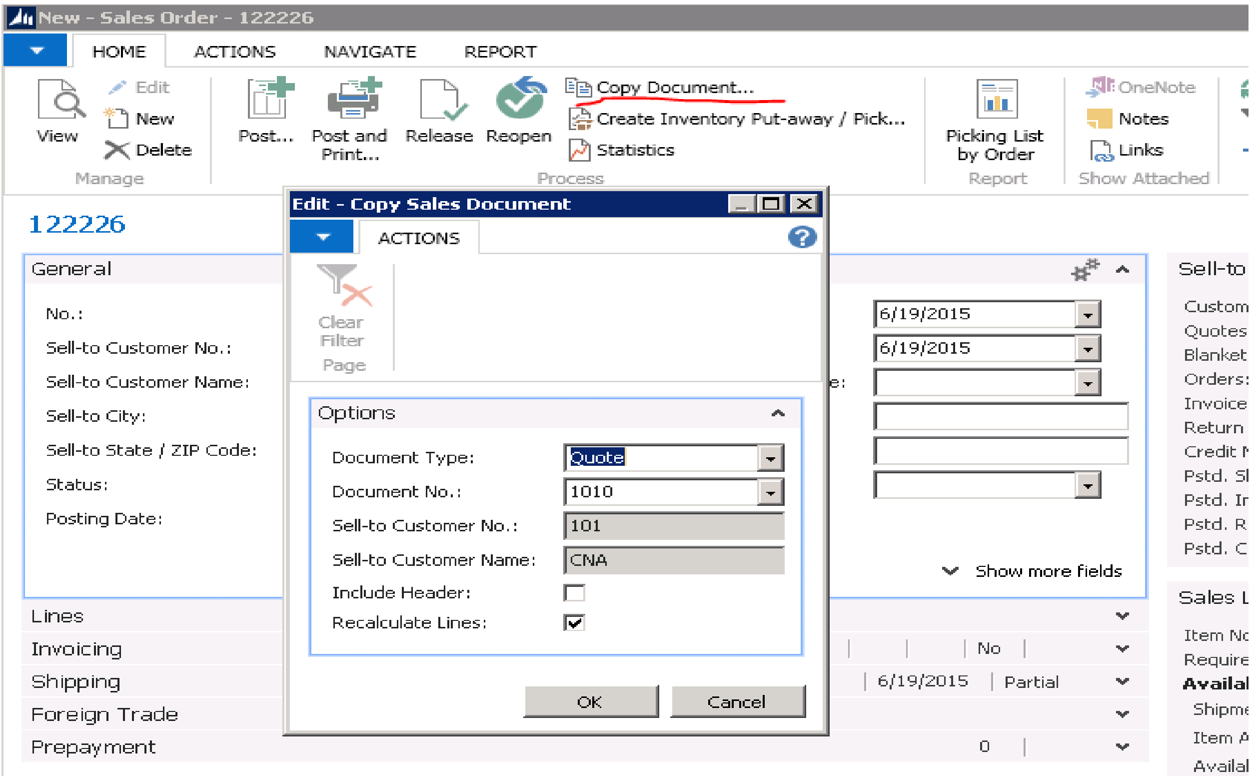


Create a Sales Order or Blanket Sales Order from a Sales Quote

If the quote is accepted by the customer, create a sales order or blanket sales order for the item. You can create a sales order from the quote document in two ways:

- **Delete the quote**: Use the **Make Order** function to create a sales order from the quote. The system deletes the quote. Comments are copied to the sales order. You cannot use the Make Order function to create a blanket sales order.
- **Retain the quote:** Open a sales order or blanket sales order and use the **Copy Document** function to copy the information from the quote to the order. You can optionally copy the comments from the quote.

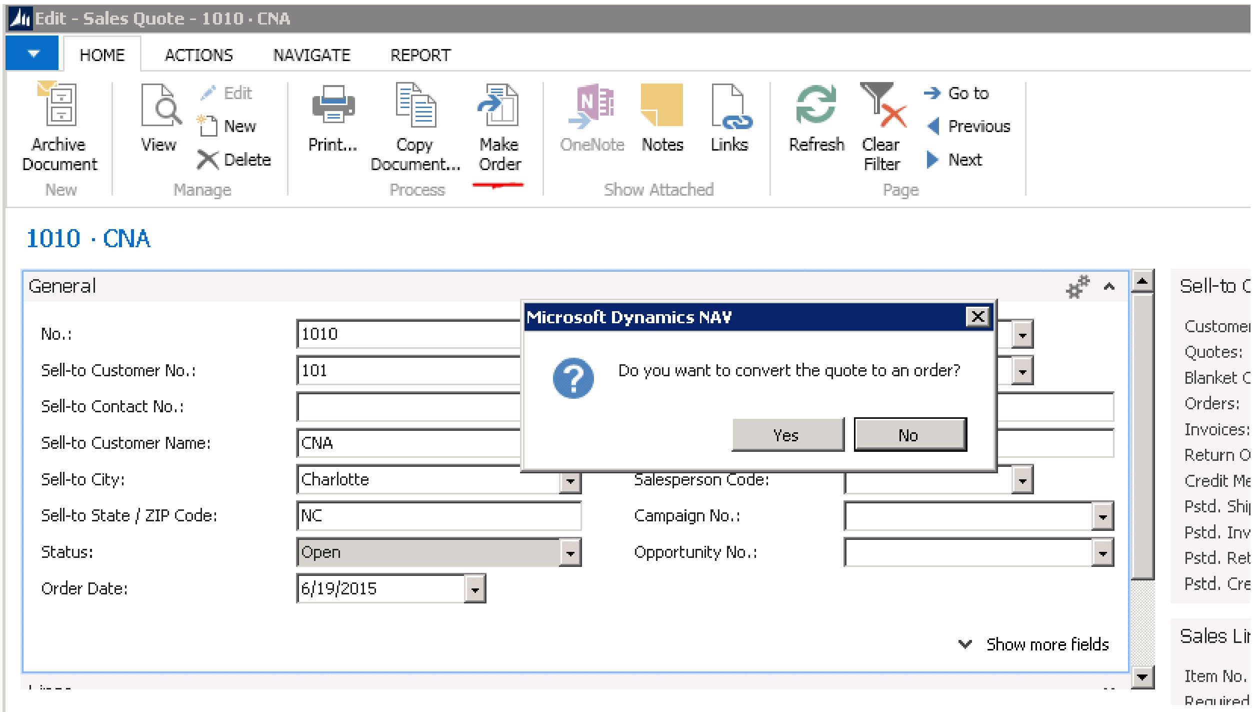
You can create as many sales orders from the quote as you want. The quote number will be referenced on the sales order. If you use blanket sales orders, you will create multiple sales orders from the blanket order. The quote number is referenced on the blanket sales order and any sales orders made from the blanket order. If you use this method, you can also use the Copy Document function to create a new quote when you want to requote the item.



Convert a Sales Quote to a Sales Order Using the Make Order Function

1. In the **Search** box, enter **Sales Quotes**, and then choose the related link.
2. Select the quote you want to add information to and choose **Edit.**
3. On the **Home** tab, **Process** group, choose **Make Order**.
4. Choose **Yes** on the confirmation message.
5. You may receive a message that states the quantity on hand is not sufficient. Choose **Yes**.
6. A message opens stating the quote has been changed to a sales order and the new sales order number will be referenced.

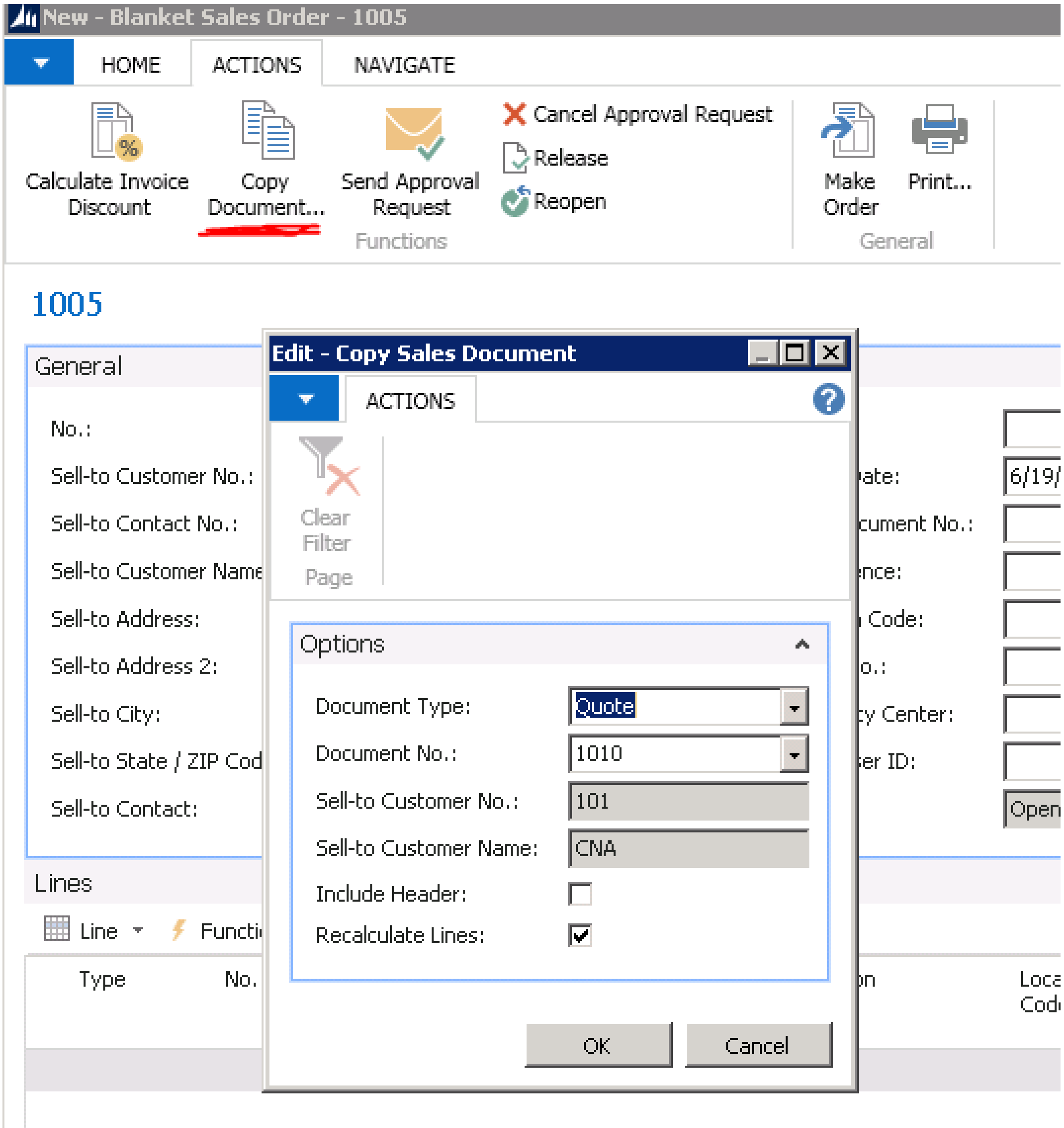
The system deletes the original quote. The sales order references the quote number on the **General** tab, **Quote No**. field.



Convert a Sales Quote to a Blanket Sales Order Using the Copy Document Function

1. In the **Search** box, enter **Blanket Sales Orders**, and then choose the related link.
2. On the **Home** tab, in the **New** group, choose **New**. Create a new blanket sales order.
3. On the **Actions** tab, in the **Functions** group, choose **Copy Document**
    1. **Document Type**: Select **Quote**
    2. **Document No**. Select the quote number to copy.
    3. **Customer No** and **Name** should fill in based on the Document No. field.
    4. **Include Header**. Check the box if you want the header information to pull over from the quote.
    5. **Recalcuate Lines.** Check the box if you want the system to recalculate the amounts on the lines.
    6. Choose **OK**
    7. If the system displays a message stating the quantities are not sufficient to fill the order, choose Yes to clear the message.
4. Review the order and update any fields that need to be updated. Pay attention to the date fields.

The system copies the information from the quote to the order. The new order does not reference the original quote number. The system retains the original quote so you can use the Copy Document function to make additional sales orders or blanket sales orders in the future.



For further information contact Vertex Support at (800) 536-3427 or support@vertexsystems.com. You can also search the HELP files by searching “Create Sales

Quotes" or visit the Microsoft Dynamics NAV library at http://msdn.microsoft.com/en-us/library/hh172840(v=nav.71).aspx