



Sales Quote Review Portal

This portal lets you review and process sales quotes.

The info in this portal includes:

- Current pending quotes
- Quotes in history (resolved as sales or rejected)

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Required Setup

To access pending quotes there is no special setup required for the portal. History quotes are available only if you have activated this option in the Inventory/Sales control record, IS-08-02, field 24 Other Options:

Keep Quote History for Orders?

Enter “Y” to move each resolved quote to a separate history file. Quotes turned into orders will be copied to history. Quotes that are rejected and deleted will be copied to history. This allows you to analyze quotes and compare quoted amounts to actual invoiced amounts.

If you activate history, the Quote Listing (IS-01-03-02) will offer the option to move the quotes to history instead of the option to purge.

Accessing the Sales Quote Review Portal

You may access this portal from the QuickScreens menu. Select the “IS – Sales Quote Review” icon from the menu (request ID is QSQUOTEMGR). This portal requires a security level of 5 for Order Entry.

Pending Quotes Tab

When you access the Quote Manager Manager portal you will see a list of current pending quotes. You will see only the quotes for which your salesperson security grants access.

Pending Quotes

Quote History

- View/Edit Quote

Close Batch of Quotes

Add a new Quote

?

Documentation

	Order #	Date	Item Total	Salesperson	Bill-to Name	Cust#	#Lines	Phone
	3111	11/20/13	\$0.00	A&B	Manfred Morris	2	0	313-21
	3130	12/05/13	\$0.00	A&B	Manfred Morris	2	0	313-21
	3343	01/24/14	\$0.00	BTR	test prospect	111	0	334-71
	3492	03/13/14	\$1,742.00	AEM	John Doe	100	5	555555
	3531	03/24/14	\$0.00	AEM	testing	223	0	334-82
	3532	03/24/14	\$0.00	AEM	testing	223	0	334-82
	3536	03/24/14	\$367.45	AEM	Carl Sanders	1	4	334-44
	3537	03/24/14	\$36.90	A&B	Manfred Morris	2	3	313-21
	3543	03/25/14	\$0.00	AEM	Carl Sanders	1	0	334-44
	3585	04/02/14	\$0.00	AEM	Carl Sanders	1	0	334-44
	3649	04/22/14	\$559.65	AEM	JR's Auto Sales	173	2	334-81
	3653	04/23/14	\$0.00	AEM	Carl Sanders	1	0	334-44
	3698	05/06/14	\$0.00	AEM	Carl Sanders	1	0	334-44
	3770	05/21/14	\$0.00	AEM	Carl Sanders	1	0	334-44
	3771	05/21/14	\$18.95	AEM	Carl Sanders	1	1	334-44
	3838	06/06/14	\$0.00	JKW	Acme Incorporated	5	0	123-45
	3839	06/06/14	\$0.00	JKW	Acme Incorporated	5	0	123-45
	3847	06/09/14	\$21.95	AEM	Carl Sanders	1	1	334-44
Total Records: 48			\$252,406.45				106	

Quote Info

Turn to Order

Close the Quote

Order Number:

3492

Order Date:

03/13/14

Customer:

John Doe

(# 100)

1942 Professional Circle

Auburn, AL 36830

Salesperson:

AEM

Total Price:

1,742.00

Line Items:

5

Item ID	Description	Qty	Total
100	747 Swingline Desk Stapler	10.000	8.00
105	Panasonic Phone/Answering Sys	1.000	.00
106	Wiring Set-up for Phone System	2.000	344.00
Main/SVC	Maintenance and Service	1.000	285.00
LY650-8343UT	Lenovo IdeaPad Y650-8343UT	1.000	1,105.00
			1,742.00

Pending Quotes List

Highlight a record to display more details about the quote in the pane to the right.

Quote Info

✓ Turn to Order

✗ Close the Quote

Order Number:

236

Order Date:

09/10/09

Customer:

Manfred Morris

(# 2)

987 Dogwood Lane

Opelika, AL 36801

Salesperson:

BTR

Total Price:

50.33

Line Items:

2

Item ID	Description	Qty	Total
100	747 Swingline Desk Stapler	2.000	49.90
200	Plastiklips	100.000	.43
			50.33

Pending Quote View

Turn Quote to Order

(Available only if your default billing operator allows you to turn a quote into an order)


Click on the Turn to Order button to indicate that the quote has been accepted and should now become an order. This will perform the same process as turning a quote into an order in IS-01-03-01. If you are keeping Quote History this will also copy the quote to history before turning it into an order.

Close the Quote

(Available only if you have activated quote history)

Click on the Close the Quote button to move the quote from the open order file to the quote history file.

View/Edit a Quote

You may click on the go button  beside a quote to access the Order Entry portal for the quote. Here you may review and edit the quote information.

Close Batch of Quotes

You may click on the Close Batch of Quotes button to specify a group of quotes to close. The following screen will appear:

The screenshot shows a window titled "Quote History". It contains a form with two columns of input fields. The first column lists various criteria for selecting quotes to close: Quote Status, Beginning Quote Closed Date, Ending Quote Closed Date, Beginning Order Date, Ending Order Date, Beginning Customer #, Ending Customer #, Beginning Salesperson, and Ending Salesperson. The second column contains the corresponding input controls: a checkbox for Quote Status, and text boxes for the date and customer/salesperson fields. At the bottom right of the window are "OK" and "Cancel" buttons.

Close Batch of Quotes

Quote Status:

You may enter a single quote status or leave blank for ALL. This is the user-defined quote status in field 16 of Order Entry.

Range of Quote Close Dates:

Enter a range of estimated Quote Close dates (from field 16 of Order Entry) or press [Enter] for ALL.

Range of Order Dates:

Enter a range of Order dates or press [Enter] for ALL.

Range of Customer Numbers:

Enter a range of customer numbers or press [Enter] for ALL.

Range of Salespersons:

Enter a range of salespersons or press [Enter] for ALL.

The program will then move all selected quotes to history.

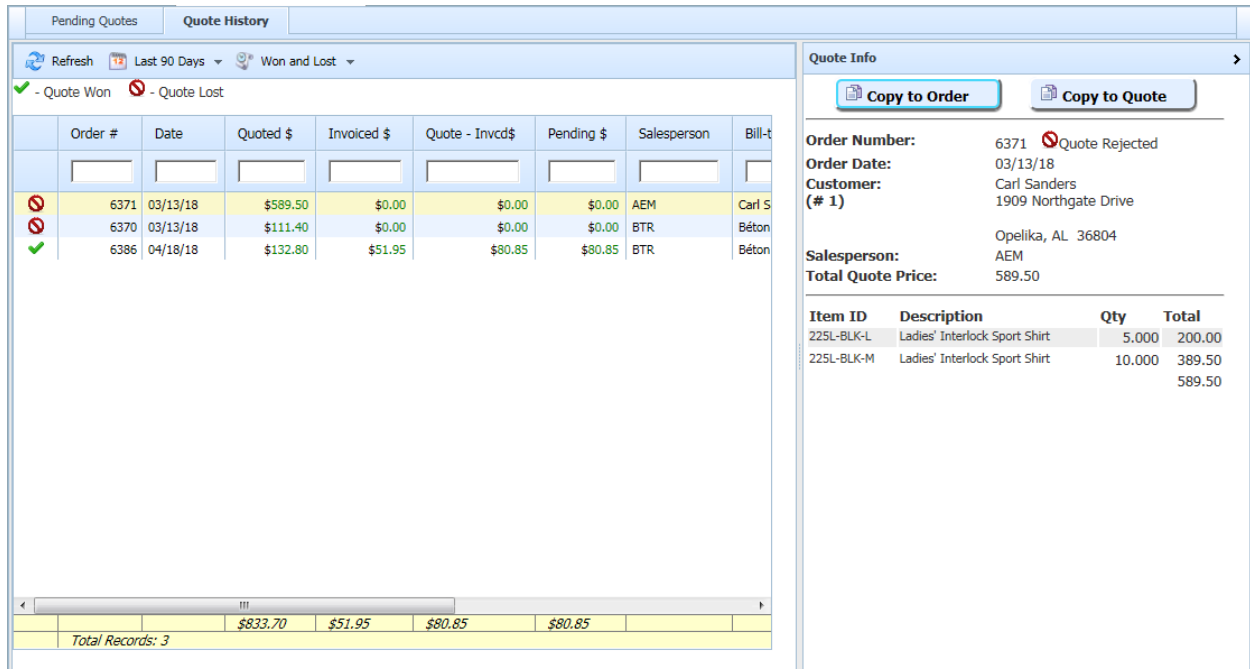
Add a New Quote

You may click on the Add a New Quote link to open a window with the Order Entry portal so that you may create a new quote.

Quote History Tab

(Available only if you have activated Quote History)

This tab displays a list of quotes from quote history.



	Order #	Date	Quoted \$	Invoiced \$	Quote - Invc\$	Pending \$	Salesperson	Bill-to
🚫	6371	03/13/18	\$589.50	\$0.00	\$0.00	\$0.00	AEM	Carl S
🚫	6370	03/13/18	\$111.40	\$0.00	\$0.00	\$0.00	BTR	Béton
✅	6386	04/18/18	\$132.80	\$51.95	\$80.85	\$80.85	BTR	Béton
			\$833.70	\$51.95	\$80.85	\$80.85		
Total Records: 3								

Quote Info
Order Number: 6371 Quote Rejected
Order Date: 03/13/18
Customer: Carl Sanders
1909 Northgate Drive
Opelika, AL 36804
Salesperson: AEM
Total Quote Price: 589.50

Item ID	Description	Qty	Total
225L-BLK-L	Ladies' Interlock Sport Shirt	5,000	200.00
225L-BLK-M	Ladies' Interlock Sport Shirt	10,000	389.50
			589.50

Quote History List

Above the list are some filtering options:

Range of Dates:

When you access the history list the default is to show quotes from the last 30 days. You may select one of the following date options:

- Today
- Last 7 Days
- Last 30 Days
- Last 90 Days
- Last Year
- All Dates

Won and Lost:

When you access the history list the default is to show both won and lost quotes. You may select one of the following options:

- Won and Lost
- Won Only (only quotes turned into orders)
- Lost Only (only quotes that were not turned into orders)

Quote Info

Copy to Order

Copy to Quote

Order Number:
6371
Quote Rejected

Order Date:
03/13/18

Customer:
Carl Sanders
1909 Northgate Drive

Salesperson:
Opelika, AL 36804
AEM

Total Price:
589.50

Item ID	Description	Qty	Total
225L-BLK-L	Ladies' Interlock Sport Shirt	5.000	200.00
225L-BLK-M	Ladies' Interlock Sport Shirt	10.000	389.50
			589.50

History Quote View – Lost Sale

Copy to Order

(Available only if your default billing operator allows you to enter an order)

Click on the Copy to Order button to indicate that you want to copy this history quote to a new pending quote and turn the quote into an order. The new quote/order will be assigned a new order number.

Copy Quote

(Available only if your default billing operator allows you to enter a quote)

Click on the Copy Quote button to indicate that you want to copy this history quote to a new pending quote. The new quote will be assigned a new order number.

Additional Invoice Information for Won Quotes

The view pane for Won Quotes has additional information:

Quote Info

Copy to Order

Copy to Quote

Order Number:

6386

Quote Accepted

Order Date:

04/18/18

Customer:

Béton Provincial

(# 2)

4647 champ Blvd YHTGR

Béton

Charlotte, MI 45333

Salesperson:

BTR

Total Quote Price:

132.80

Total Invoiced:

51.95

Pending: 80.85

Quoted - Invoiced:

80.85

Item ID	Description	Qty	Total
100	7 1/4" long stapler	3.000	45.00
100-TAN	747 Swingline Desk Stapler	4.000	87.80
			132.80

Summary

Invoice History

History Quote View – Won Sale

Invoice Totals

For a Won Quote the view pane shows:

- **Total Invoiced** - the total amount invoiced for the related order.
- **Pending** – the total amount not yet invoiced for the related order.
- **Quoted – Invoiced** – the difference between the quoted amount and the invoiced amount.

Invoice History Tab

You may click on the Invoice History tab at the bottom of the screen to view any invoices for the related order.

TaskWise Opportunities and Quote History

In SouthWare TaskWise there is an opportunity tracking system that helps you record and manage sales opportunities. You may create sales quotes related to opportunities. Opportunities also allow you to indicate and monitor the status of opportunities, including data such as the source of leads, current stage of the sales cycle, and the reason a sale was won or lost.

If you have activated Quote History and use TaskWise opportunities with sales quotes, when you close an opportunity you have the option to move the quote to quote history. This will include both sales you won and sales you lost.

Technical Notes

Here are the new NetLink requests used in the Sales Quote Review portal:

- QSQUOTELIST – displays the list of pending quotes
- QSQUOTELISTH – displays the list of history quotes
- QSQUOTEMGR – displays the tabs and serves as the hub for the portal
- QSQUOTEVW – displays the details for a pending quote
- QSQUOTEVWH – displays the details for a history quote
- QSQUOTEINVCLIST – displays a list of the invoices for a won quote