Using Quotes

Prior to a major purchase or large construction job, customers often ask for an estimate of the projected costs.

BisTrack allows you to create a Quote listing all of the needed products and detailed pricing but without committing actual stock.

In this training course you will be shown how to enter a new Quote.

You will also be introduced to the follow up process along with marking quotes as accepted or rejected.

Select the ‘Quote’ option from the ribbon area of the ‘Home’ tab.

The New Quote window is similar to the Sales Order form.

Select the correct customer.

Quotes are given an ‘Expiry date’.

This date is filled in automatically according to the default number of days set for quotes to expire.

It can be overridden as needed.

Quotes can be given a ranking classification if rankings have been set up. When viewing a list of quotes it is possible to filter or group by this ranking.

Products are added to the quote just as you would on a sales order.

Clicking on the red flag opens the ‘Follow Up Quote’ window.

‘Create new follow up’ is checked.

The date and time determine when follow up reminders are generated and sent to the person whose name appears in the ‘By’ field.

The ‘By’ field indicates who entered the quote and whose calendar the notes will be added to. This field can be changed if needed.

Clicking ‘OK’ saves the note.

The quote is completed by clicking on the ‘Complete’ button, pressing ‘F12’ or ‘Alt’ ‘M’.

The quote can be emailed or faxed to the customer depending on your system set up.

Press ‘Next’.

Now click ‘Finish’.

The quote is saved and a quote number assigned.

When a new Quote is completed it is given the status of ‘Open’.

Quotes entered with a follow up date are easy to stay on top of as the entry is posted onto the Calendar of the person responsible.

Click on ‘My Calendar’ in the Planning group of options on the ‘Home’ tab.

Calendars can be set to display the Day, Week or Month.

This calendar’s view is set to Week.

Follow up notes that have not been cleared are shown on calendar.

Hovering over the note displays additional details.

To open, double-click or right-click and choose ‘Open Notepad Note’.

From here, choose ‘Open Quote’.

At this point you can make additions or changes to the quote while following up with the customer, including entry of additional follow up notes.

‘Save and Close’ stores any changes made and the status remains Open.

You are returned to the ‘Notepad Note’ window and any needed additional information can be entered.

To enter the date, the Auto Text icon is clicked and Date selected.

Enter your notes and press ‘OK’.

The ‘Find Documents’ function can also be used to look for Quotes requiring follow up.

Set the ‘Look for’ filter to ‘Quotes’ and ‘Quotes For Follow Up’.

Use the ‘Where’ filters to further refine the search.

For example, ‘Where’ Created by Contains your name.

Right click the correct line and choose ‘Follow Up Quote’.

The ‘Find Documents’ right-click menu also includes the options ‘Accept Quote’ and ‘Reject Quote’.

These perform the same actions clicking on the ‘Accept’ or ‘Reject’ buttons when the actual quote is displayed.

After clicking Accept Quote you are given the option to ‘Accept entire quote’ or ‘Accept these lines’.

When ‘Accept these lines’ is chosen you will put a checkmark beside the product lines being accepted.

The buttons at the bottom let you ‘Accept to an Order’, ‘Accept to Call Off’ or ‘Accept to Template’.

Call Off Orders and Templates will be discussed in future Training on Demand courses.

After Accepting to an Order, The New Order window displays the ‘Q’ icon indicating these lines have come from a quote.

Clicking on the ‘Notes’ button and opening the ‘Notes’ tab shows the quote number the order was accepted from.

Complete the order as normally would.

The quotes status is changed to ‘Accepted’.

Accepted quotes can be opened and viewed but not changed.

To reject a quote, select the ‘Reject quote’ option.

Confirm the rejection by selecting ‘Yes’.

Select a reason for the rejection from the drop down list.

With the status of these quotes updated, the follow up flag in ‘Find Documents’ is automatically cleared.

You should now have a good understanding of how to create a new quote, add follow up notes and target dates, how to accept the quote and turn into a Sales order, and how reject the quote and clear all follow up reminders.

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Corporate Office
804 Las Cimas Parkway
Austin, TX 78746
USA
Toll Free: +1.888.448.2636
Direct: +1.512.328.2300
Fax: +1.512.278.5590

Latin America and Caribbean
Blvd. Antonio L. Rodriguez #1882 Int.104
Plaza Central, Col. Santa Maria
Monterrey, Nuevo Leon, CP 64650
Mexico
Phone: +52.81.1551.7100
Fax: +52.81.1551.7117

Europe, Middle East and Africa
No. 1 The Arena
Downshire Way
Bracknell, Berkshire RG12 1PU
United Kingdom
Phone: +44.1344.468468
Fax: +44.1344.468010

Asia
238A Thomson Road #23-06
Novena Square Tower A
Singapore 307684
Singapore
Phone: +65.6333.8121
Fax: +65.6333.8131

Australia and New Zealand
Suite 2 Level 8,
100 Pacific Highway
North Sydney, NSW 2060
Australia
Phone: +61.2.9927.6200
Fax: +61.2.9927.6298