Quote Summary

Quote Summary Search Screen
This is the first screen that appears after clicking the “Quote Summary” link in the portal.

Steps (* are required)
- Enter Quote No: and press Search OR
- Change account if desired.
- Enter Mfr Item No to find if desired.
- Enter Project to find in orders if desired.
- Modify Issue date range if desired.
- Select specific Quote Type (or leave alone for all quote types).

* Press Search to find quotes using the entered criteria.

Search results are shown.

Quote No
If you have a particular quote in mind, you can enter it here and press Enter or the Search button. The system will display the Quote Detail.

Account No
You may enter an account number associated with the quotes you want to look up. Initially this will be filled in with the first default account. Click the ‘Acct List’ button to see and select from the list of accounts available to you in the Customer Browser Screen.

Mfr Item No
You may enter a manufacturer item number here to find all quotes that have this item in any of their line items.

Project
You may enter any part of a project name for the quote. Upper/lower case is irrelevant.

Date Range
This will narrow the search results to quotes that have taken place between the Issue Date From and To dates. The default selection is for the last thirty days. You cannot enter a date range any wider than 540 days.

Quote Type
You may search for All Quote Types or select a specific quote type to find.
Search Button
Press the Search button after you have entered any of the above fields. You can enter only one of Quote No or Mfr item No. If only one quote matches, the Quote Detail is shown, otherwise for Date/Item/Account/Type searches, the list of matching quotes is shown (See screen 1b).

Clear Button
Press this button to clear the search input fields and results and start from the beginning.

Help Button
Press this button to see this help page.
Customer Browser Screen

This screen is produced when the Acct List button is pressed. It produces a list of accounts linked to your user id. If there is an account that is not listed that should be there, you should contact support.

Steps (* are required)
To filter the list, enter Account #, Customer Name, City, or State and press Search.
Page up or down through the list to view all Customer Numbers/Accounts.
* Return a Customer Number from the list by clicking the box on the left.

Field/Button Definitions

Account#
Enter a single Account number to find and press Search.

Customer Name
Enter the first part of a customer name to find and press Search.

City/State
Enter any combination of City and State and press Search.

Search button
Enter any combination of City and State and press Search.

Row selection
Click the box to the left of the row to make a selection and return with this Account number.

Cancel button
Press this button to return to the previous screen with no selection.

Clear button
Press this button to clear the Account#, Customer Name, City, State fields and to see the entire list again.

Help button
Press to see this help page.
Quote Summary Search Results Screen

Pressing the Search button may result in output in the lower portion of the screen. If no records are found, you should change the search criteria and try again.

**Steps** (* are required)
- Page through the list to find the desired quote.
- * Select a row to see the [Quote Detail Screen](#).

**Field Definitions**

**Quote Number/Quote Type:**
The quote number and type of the quote.

**Effective From/Valid To:**
Starting effective date and ending valid date that the quote is valid for.

**Total Value:**
Total net value of the quote. Not shown if you cannot see pricing due to differences with agents.

**Currency:**
Currency code for the currency that the quote is using.

**Project:**
Project associated with the quote.
Quote Detail Screen

The Quote Detail screen provides detailed information about the Quote that was selected from the Quote Summary Screen. Initially the Item Details are shown as below.

### Quote Details

<table>
<thead>
<tr>
<th>Quote Details</th>
<th>Revision</th>
<th>Quote Type</th>
<th>Issue Date</th>
<th>Project/Job Info</th>
<th>Quote Total</th>
<th>Currency</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Quoted To:</strong> 200115</td>
<td></td>
<td><strong>Ship To:</strong> 200115</td>
<td></td>
<td></td>
<td>1/1/2008</td>
<td>USD</td>
</tr>
<tr>
<td><strong>Test Name 1</strong></td>
<td></td>
<td><strong>Test Name 2</strong></td>
<td></td>
<td></td>
<td>1/1/09/2000</td>
<td></td>
</tr>
<tr>
<td><strong>Test Name 1</strong></td>
<td></td>
<td><strong>Test Name 2</strong></td>
<td></td>
<td></td>
<td>1/1/09/2000</td>
<td></td>
</tr>
<tr>
<td><strong>P.O. Box 101</strong></td>
<td></td>
<td><strong>P.O. Box 101</strong></td>
<td></td>
<td></td>
<td>1/1/09/2000</td>
<td></td>
</tr>
<tr>
<td><strong>SOUTH BEND, IN 46619</strong></td>
<td></td>
<td><strong>SOUTH BEND, IN 46619</strong></td>
<td></td>
<td></td>
<td>1/1/09/2000</td>
<td></td>
</tr>
</tbody>
</table>

#### Steps (* are required)

- View Item Details or select the Quote Groups Tab or Additional Comments Tab.
- Press Previous Page button to return to the Quote Summary Search Screen.

### Field/Button Definitions

#### Previous Page Button

Press this button to return to the Quote Summary Search Screen.

#### Print Quote

Press this to request generation of a printed quote document. A download link is shown which you then press. A new window is shown so you can view, save, or email the document. Not available if you are not allowed to see pricing.

### Item Details Field Definitions

#### Line Item

A sequential number indicating the line item on this Quote. Note that rejected items are not displayed.

#### Catalog/Mfr Item Number and Description

The Catalog number or Manufacturer Item Number with a Description.

#### Brand

Brand name for the item.
Quote Group
Quote Group identifier that defines the pricing discounts.

Qty/Qty UM
Quantity of this item and quantity unit of measure.

Quote Price/Per
Unit Price of the item and number of items this price is per.

Total
Total extended price for this line item.
**Quote Groups Tab**

Any quote group definitions are shown in the Quote Groups tab as below:

<table>
<thead>
<tr>
<th>Quote Group</th>
<th>Group Discount %</th>
<th>Quote Group Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>746</td>
<td></td>
<td>Navajo 4 Wallmount</td>
</tr>
<tr>
<td>717</td>
<td></td>
<td>Navajo 4 Large</td>
</tr>
<tr>
<td>723</td>
<td></td>
<td>SS Wallmount</td>
</tr>
<tr>
<td>731</td>
<td></td>
<td>Navajo 12 Wallmount</td>
</tr>
<tr>
<td>732</td>
<td></td>
<td>Navajo 12 Wallmount</td>
</tr>
<tr>
<td>733</td>
<td></td>
<td>Navajo 12 Wallmount</td>
</tr>
<tr>
<td>734</td>
<td></td>
<td>Navajo 12 Wallmount</td>
</tr>
<tr>
<td>735</td>
<td></td>
<td>Navajo 12 Large Disc.</td>
</tr>
<tr>
<td>736</td>
<td></td>
<td>Navajo 12 Large Disc.</td>
</tr>
<tr>
<td>738</td>
<td></td>
<td>Navajo 12 JC</td>
</tr>
</tbody>
</table>

**Quote Detail with Quote Groups**

**Quote Groups Field Definitions**

**Quote Group**
Quote group code.

**Group Discount %**
Discount for this quote group in percentage.

**Quote Group Category**
Description of the quote group.
Additional Comments Tab

The Additional Comments tab provides additional information for the quote as below:

### Quote Details

<table>
<thead>
<tr>
<th>Quote Number</th>
<th>Revision</th>
<th>Quote Type</th>
<th>Issue Date</th>
<th>Project Job Info</th>
<th>Quote Total</th>
<th>Currency</th>
</tr>
</thead>
<tbody>
<tr>
<td>20126007</td>
<td></td>
<td>Ship &amp; Detail Quote</td>
<td>7/30/2006</td>
<td></td>
<td>00</td>
<td>USD</td>
</tr>
</tbody>
</table>

- **Quoted To:** 200031
- **Ship To:** 200031
- **Effective Date:** 7/30/2006
- **Expiration Date:** 1/1/2007
- **Ship By:**
- **Agent:**
- **Sales Groups:** INDIANA (M)

### Additional Comments Field Definitions

#### Delivery Terms/Point of Delivery

Delivery Terms and the Point of Delivery for these terms.

#### Est. Gross Weight

Estimated Gross Weight for shipping.

#### Payment Terms

Short Payment Terms.

#### Merchandise Total/Surcharge/Quote Total

Prices for merchandise total, surcharge/handling charges and the resulting quote total.

#### Terms and Conditions

Complete terms and conditions text.

#### Header Notes/Shipping Instructions

Header notes that apply to the entire quote and shipping instructions.