
Point-of-Sale Basic Training - Quotes

Overview of Customer Quotes

The system has the capability to set up an order as a QUOTE for a particular customer or as an order that will be used frequently. Quotes are entered in Tag-n-Trak just like regular "L" type orders. Quotes are entered using Type Q rather than Type L.

You cannot close a Quote, but you can copy it to another quote, copy it to an "L" type order or **convert** the Quote to an "L" type order.

To enter a Quote, enter **Type: Q** on the order heading screen. Open the order and sell items as normal. Quotes do not affect quantity reserved or on-hand, so you will not see an "insufficient quantity" message.

Quotes may be converted to "L" type orders, however, you may not convert an "L" type order to a quote.

To convert a quote to an order, go to the Order Heading screen of the quote. With the cursor resting on Type: Q, press [F10]. The following message displays;

CONVERT THIS QUOTE TO AN I or L TYPE ORDER (I, L or N) L

Type "L" and press [Enter]. The order type will change from Q to L. Proceed as normal. Items may be added, quantities may be changed, backordered, etc.

How to Enter a Quote

To enter a Quote, select Point of Sale, Main Order Entry.

Often times, a house order is first entered as a quote, Order Type "Q," and then later copied or converted to an "L" type order.

The order header screen below provides an example of entering a "builder" or "contractor" customer "ID." Press [F2] key to move the cursor to the ship-to Name field. (Terminals can be set up to automatically stop at the ship-to name field.)

Enter the homeowner's name and address, Lot# or Subdivision in the address field(s). Later, you can search on any of these three fields (Name, address line 1, address line 2) when searching for a quote or order.

If there is a builder allowance: With the cursor resting in the Type field, press the [Up Arrow] to move the cursor to the "Allow" field and enter the builder allowance amount.

The cursor will stop at the P.O. # field if the builder requires a PO#.

The order Type will typically default to L. You will need to type over it with **Q for quote**.

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```

MM/DD/YYYY NOTE                POINT OF SALE                CUST NAME
Order: 0                        Cust: 2277955                Column: C +/- 0.000% Spec: B Prompt: A
Name: SALLY JOHNSON              Tax: Y MO 7.2500% Age: 1
Address: LOT 10                   Terms: A 2% 10TH NET PROX    Slp: GA
                                   PSlp: GA
                                   Lines: 0
City/St:                          Status:
Zip: (314) 227-7955
Contact: JAMES ARCHER            Stage Loc: Deliver: 06/30/2006
Credit: 11837 Allow: 1000.00    P.O.#: N 12486             Ship: DELIVER Type: Q

                                Bill To
Name: ARCHER CONSTR CO
Address: 18403 CREEK RD.
                                P.O. Box 7899
City/St: ST. LOUIS              MO
Zipcode: 63133

F2=TO NAME F3=INQ F4=PRT TTL F7=NXT ODR CUST F8=PRV ODR CUST TAB=SUM TTL
READ NOTES
    
```

Selling Line Items on Quotes with Room Locations

Once a quote has been opened, you may begin entering items to sell. When entering a quote for a house order, it will be helpful to enter the Room location. Enter the room location either by name or code. Press [F3] in the Room field to view a list of default room locations.

```

MM/DD/YYYY                POINT OF SALE                MAN
Order: 2963                Cust: 2277955                Name: SALLY JOHNSON
Column: C +/- 0.          Slp: GA Lines: 0
Tax: Y MO 7.2             001 Type: Q
-----+-----+-----+
Ln# Item Number          Room Description          Sell Price          Total
-----+-----+-----+
BSRM **BONUS ROOM
BTH2 **BATHROOM 2
BTH3 **BATHROOM 3
BTH4 **BATHROOM 4
DECK **DECK
DNRM **DINING ROOM
EAVE **EAVES-FLOODS
ENTY **ENTRY
FMLY **FAMILY ROOM
FOYR **FOYER
FPOR **FRONT PORCH
AC QAV: 0
Qty: 1 Item
Stk: S/O Room:          ax: Y Prc:_ 118.500
Info:                   lg: _ Cost:
Desc: 884 17X50 WHITE    et: Disc: 0.000
F2=TO QTY F3=INQUIRY    F4=ALT/SUPER F7=UPC TOGGLE F8=AUTO TOGGLE TAB=TOTAL
                                LBR : 0.00
    
```

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Note: Pressing [F3] a second time with the Room Location Lookup displayed will perform an item master lookup.

Highlight the desired room location and press [Enter].

If the room you need is not on the list, simply type it in the Room field.

Change the price if needed and then [F10] to sell the item on the quote. Quotes do not affect quantity reserved or on-hand, so you will not see an "insufficient quantity" message.

Continue entering items on the quote.

Note: Pressing a period in the room location field repeats the room location from the previously entered item.

MM/DD/YYYY	POINT OF SALE				MAN		
Order: 2963	Cust: 2277955	Name: SALLY JOHNSON					
Column: C +/-	0.000% Special: B	Ship: DELIVER	Slp: GA	Lines: 8			
Tax: Y MO	7.2500% CR: 11837	Status: O	03/20/2006	Type: Q			
Ln#	Item Number	VC	Ordrd	Dlvrd	Bkord TFL	Sell Price	Total
2	**FOYER						
1	40421	CAR	1		Y	118.500	118.50
3	1148AB	KIC	1		Y	11.340	11.34
5	**FAMILY ROOM						
4	FC52AB	CRA	1		Y	104.540	104.54
6	B5/52S-LOK	CRA	1		Y	13.370	13.37
8	**LIVING ROOM						
7	1148AB	KIC	1		Y	11.340	11.34
<p>Qty: 1 Item: _____ VC: ____ Tax: Y Prc: _____</p> <p>Stk: _____ Room: _____ Loc: _____ Flg: _ Cost: _____</p> <p>Info: _____ Net: _ Disc: _____</p> <p>Desc: _____ LBR : _____</p> <p>F2=TO QTY F3=INQUIRY F4=ALT/SUPER F7=UPC TOGGLE F8=AUTO TOGGLE TAB=TOTAL</p>							

Delete Line Item From Quote

A line item is deleted from a quote just as it is on a regular order. Use the [Up Arrow] key to move the cursor to the Ln# field, enter the line# to be deleted and press [Enter]. With the line information displayed at the bottom, press [F6] to delete.

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Totals Page Discount

The Discount field on the totals page of a quote is used to enter a **Gross Profit percent rather than a discount percent**. After entering the gross profit percent you would like to achieve on this quote, the system will calculate a bottom-line discount.

The following screen is an example of the totals page of a quote **BEFORE** a bottom line discount is given. There is a Gross Profit % of 41.89.

```

MM/DD/YYYY                POINT OF SALE
Order: 2963                Cust: 2277955        City/State:
Name: SALLY JOHNSON       Zip:                               Phone: (314) 227-7955
Address: LOT 10           Contact: JAMES ARCHER
Address:                  Terms Code: A 2% 10TH NET PROX
Price Level: C Adjustment: 0.000%  Tax - Flag: Y Cd: MO  Percent: 7.2500%
Spec Price: B            Status: O 03/20/2006  Ln: 8
P.O.#: N 12486          Avail CR: 11837  Ship: DELIVER  Age: 1 Slm:GA  Type: Q
-----ORDER CLOSING-----
Price Subtotal:          259.09                Special:          0.00
Discount:                0.00                Discountable Amt: 259.09
Tax: 7.2500              18.78                Labor:           0.00
                               Freight:          0.00  Other Charges:   0.00
                               1000.00  Taxable:        259.09  Nontaxable:     0.00
Total:                   +-----+  Tax Disc:        0.00  FET:            0.00
|                       |  Sales:          259.09  Returns:       0.00
|                       |  Cost:           150.55  Gross Profit %: 41.89
+-----+              1 = CASH          2 = CHECK        3 = VISA
                               4 = PRIOR DEP.  5 = TEMPORARY   6 = REFUND CHK
REC Method: Amt:          REC Method:      Amt:
Accts. Receivable:
Change *****          *****
F2=ENTER DISC  F7=RETURN ENTER MORE  F8=ACCUMULATE DISC  TAB=TOTAL
    
```

The [F2] Enter Disc function key is pressed to move the cursor to the discount field. A gross profit percent of 30.00 is entered. This calculates a bottom line discount of \$44.02.

```

-----ORDER CLOSING-----
Price Subtotal:          259.09                Special:          0.00
Discount: 0.000          44.02                Discountable Amt: 259.09
Tax: 7.2500              15.59                Labor:           0.00
                               Freight:          0.00  Other Charges:   0.00
                               1000.00  Taxable:        259.09  Nontaxable:     0.00
Total:                   +-----+  Tax Disc:        44.02  FET:            0.00
|                       |  Sales:          259.09  Returns:       0.00
|                       |  Cost:           150.55  Gross Profit %: 30.00
+-----+              1 = CASH          2 = CHECK        3 = VISA
                               4 = PRIOR DEP.  5 = TEMPORARY   6 = REFUND CHK
REC Method: Amt:          REC Method:      Amt:
Accts. Receivable:
Change *****          *****
F2=ENTER DISC  F7=RETURN ENTER MORE  F8=ACCUMULATE DISC  TAB=TOTAL
    
```

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Print a Quote

Press [Tab] to go to the Totals page. Press [F4] for the pop-up print menu. Select an appropriate form for printing your quote. In the example below, "Q" prints a quote with item numbers. The form "N" prints a quote without item numbers.

```
Select Printer: 1 ( 1=Default R=Receipt)
Select Document: Q
Print on Quote: (Item, Upc, Neither)
1-Invoice      2-Pick Ticket      3-Partial Shipment
5-Credit Memo  9-Overage Receipt  A-Acknowledgement
G-GP Review    N-Quote=NO Item#s  P-Quote No Totals
Q-Quote= w/Item#s
```