

## Quoting (QuDTS)

The quoting function is flexible and adapts to the way you do quotes. When the screen is entered, the first customer is displayed. Use the [ < ], [ > ], or [Go] buttons to scroll or go directly to a customer. The tabs organize the quotes into current quotes and quotes that have expired. Using the DTS for your quotes has several advantages. The first is organization. If a customer calls to review or have you resend or modify a quote, you can pull it up by going to the company and then double clicking on the quote.

Job Name	Customer Job	X	Quote	Bid Date	Fax Date	Expires
2012-100	APPIAN WAY	X	1	01/02/2012	01/02/2012	03/31/2012

### Customize Tab

**Quote Style:** This field controls the format of the printed quote. The quotes can print with your logo at the top.

**Fax Signer:** This information is printed on the quote.

**Description:** The very large text is the default wording that is placed on all new quotes. This is where your generic text for each quote is set up. This text is copied into each new quote, but then you can change it so that it is specific to the quote. Changing the wording on the quote does not change this template text.

Customer Job | History | Address | Customize

Quote Style: QUDTS  
Fax Signer: F. FLINTSTONE, OFFICE MANAGER

This is the body of the quote. This information is a template that gets copied into all new quotes. This information can then be changed so that it is specific to the quote that it was copied into.

MIXED CASE IS PROVIDED FOR EMPHASIS.

\*\*\* Standby time is charged after the first 15 minutes.

\*\*\* Customer takes possession of the material at the plant.

## Adding New Quotes

The quotes are automatically numbered. Enter the Project Number and Project Name. The column titles are changeable per quote! Some companies might quote hourly truck rental as well as material sales. Simply highlight the text in the column title and change to your needs. Notice that the column titles can range more than one line.

Enter information in the quote detail lines. When the cursor enters the field, a unique list of whatever has previously been entered appears. This helps you rapidly complete your quotes. To enter text that has not previously been entered, simply cancel the pick list and type your information into the field. It will then become part of the list.

Column 1	Column 2	Column 3
Equipment Type	Daily Rate	Weekend Rate
Transfer Trailers	\$85.00	\$87.00
Bottom Dumps	\$88.00	\$90.00

**[Edit Text]** New quotes are given the generic text you entered on the Customize tab. Select this button to review and modify the text so that it is specific to this quote.

**[View-Print Quote]** This button displays the quote. You may then print or create a PDF copy of the quote.

**[Copy This Quote]** If you want to send this quote to another customer, select this button and then the customer. A new quote for the customer will be created based off this quote. If you want to send this customer a variation of an existing quote, then select the same customer!