

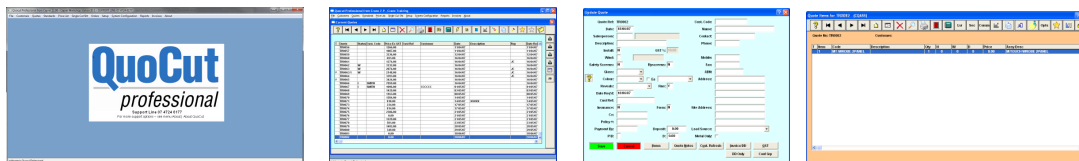
## PREPARING A QUOTATION

### 1. Preparing a quotation allows the user the following options:

- Prepare quote information for a variety of windows/doors, louvres, security, basic commercial, showers and robes
- Produce a printed quotation with relevant information on items quoted
- Print a drawing page to attach to the quotation
- Produce a variety of fabrication cutting sheets and reports
- Analyse costs and gross profit
- Print a delivery docket and/or invoice
- Record diary notes relevant to each quotation for future reference (the diary notes function also records an audit trail of each calculation and cost analysis)
- Record won/loss and completed information
- Archive past quotes

### 2. To create a quotation proceed as follows:

- Select Quotes | Current



- Select the 'Add Quote' icon
- Complete whatever details on the quotation screen as required
- Add a 'quote note' if relevant – e.g. 'Supply only'
- Select Items
- Select 'Add Item' then select select :
  - General item for windows, doors, showers and robes
  - Preset security items, select the Preset Security Configurations (refer Security Module for further information)
  - Platinum Louvres for related to the Platinum louvre product
  - New Commercial for basic residential commercial applications



- Enter code for item in the 'Code' field – e.g. MK5C .. (Sliding door) or AB (AB Pivot showers) or MT (Magic Touch wardrobe)
- Select required configuration and **SAVE**
- Complete item dimensions and other options as required
- Add an item note if relevant

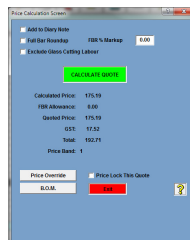
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- Select Panel if glass thickness is greater than the designated minimum default or Out of Square requirements for Showers (see OOS Fact Sheet)
- Select Drawing to confirm correct configuration and select **SAVE**
- Select 'Calculator' icon to calculate item/s during quoting process
- Select 'Red Door' icon to exit item screen

**Note: Quote Items can also be copied by using the yellow star to tag, select copy and then select paste**

### 2.1 Calculation of a quotation

The calculation process has the following options



- Using full bar roundup (see applicable fact sheet)
- Select Price button to record a different price and then select 'Price lock this quote' to protect the quoted price from being recalculated during the calculation of a cost analysis
- Check the Bill of Materials to ensure all items are priced and calculated with a markup

### 3. Other options for quotations

The icon toolbar offers the following functionality once a quotation has been completed:

- Print a quotation
- Reports and cutting sheets
- Recording diary notes
- Copying quotations as revisions or new quote
- Recording job status
- Generating invoices and/or delivery dockets
- Print various drawing reports
- Delete or archive quotes