

Package Quotes

The Package Quotes extension adds functionality for combining multiple items to be sold to a customer as a “package deal”. You can view cost price, sell price and GP% all in one window when calculating a package price with a customer. Quotes can be printed and stored for recalling when being invoiced to the customer.

Package Quote Station settings

To enable the Package Quotes and Sales extension a station setting will need to be enabled for each station that will process quotes in your store.

Go to ALT A, F3 and then click change on the station you are editing. On the Details 2 tab alter the following settings.

Package Processing (See Fig. 1)

None – Turns off Package Quotes for the station.

Consolidated – Will produce a quote at the end that will only display one package price.

Individual Lines – Will produce a quote with pricing per product line.

Ask – Lets you decide on Consolidated or Individual Lines at the time of producing the quote.

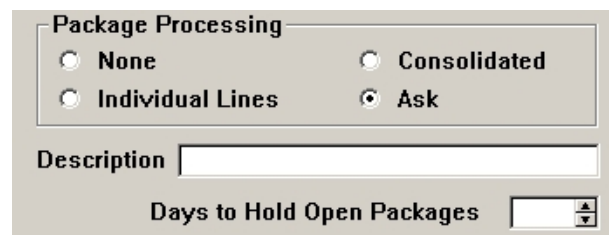


Fig. 1

Description – Change the name used for Package Quotes.

Days to Hold Open Packages – Sets the number of days before WinSTORE will automatically purge any in-complete package quotes. A blank value will hold the quote in the system until you either delete it manually or invoice the quote.

Optional footers exist that can be set for Quotes and Delivery Notes.

These can be changed by access the System Defaults – More section (ALT A, F2, click the More button). On the Details 2 tab edit the Quote Footer lines and the Delivery Note lines.

Package Quotes

Quote Processing (See Fig. 2)

Scan products onto the POS screen and press CTRL Q or click the Quote action button at the bottom of the screen.

Click Add Line to add extra items to the quote.

Click Edit to edit the pricing information on the highlighted line.

Click Remove to remove the highlighted line from the quote.

You can alter pricing on a line by line basis or you can edit the "GP %", "Net" or "Dis %" total fields at the bottom of the screen.

Click Cancel to abandon the quote process.

Click Sell to process the quote and invoice immediately.

Click More to add customer information and print and store a quote and, if necessary, print a delivery docket.

Quote											
Description	ID	SOH	S00	Cost	Retail	GP %	Qty	Net	Dis %	Dis \$	
AHP CAR 4X100MMHS DIC FULL RANGE CA		1		215.46	399.00	29.8	1	337.72	15.36	61.28	
AIRPLANE R/C MINI RECHARGEABLE 21 GC		9		26.97	49.95	29.8	1	42.28	15.36	7.67	
				242.43	448.95	29.8	2	380.00	15.36	68.95	

Fig. 2

Quote Details (See Fig. 3)

If you selected more on the previous screen, this screen will allow you to add customer information for the quote. You can manually type this information or select an existing customer from your WinSTORE database.

Click Quote to produce an A4 printout of the quote for the customer.

Click Delivery to produce an A4 delivery note docket to be sent with the goods.

Click Sell if the customer will be purchasing the quote you have just prepared.

Click OK to save this information to be recalled at a later time when the customer makes the purchase.

Quotes will be stored for the number of days set in your station settings as above.

Quote

Number Custom Store Install

Date

Salesperson

Package Desc

Contact Name ...

Address 1

Address 2

Suburb

City

Home Phone Mobile

Work Phone Fax

E-Mail


Notes

Fig. 3

Package Quotes

Completing a Package Quote

When a customer returns to purchase the quote you have prepared press CTRL Q before scanning any items to the POS screen. A list of any outstanding quotes will be listed on screen (See Fig. 4).



The screenshot shows a window titled "Select Package/Quote". At the top, there is a text input field labeled "Number". Below this is a table with the following columns: Number, Date, Time, Stn, Operator, Status, Qty, and Description. The table contains one row of data: 1, 16/10/2009, 3:13PM, 1, AA, Custom, 1, Resense Limited. Below the table, there are several buttons: Process, Print, Delete, Docket, Filter, Print All, and Exit.

Number	Date	Time	Stn	Operator	Status	Qty	Description
1	16/10/2009	3:13PM	1	AA	Custom	1	Resense Limited

Fig. 4

Highlight the required quote and click process. The quote will then be loaded into the "Quote Processing" screen for any further modification.

Once you click Sell on the quote processing screen the quote is then processed to the POS screen to be invoiced to your customer.

If a quote is no longer required you can click on Delete to remove it from the system.