

# SALES QUOTES

## KEY POINTS:

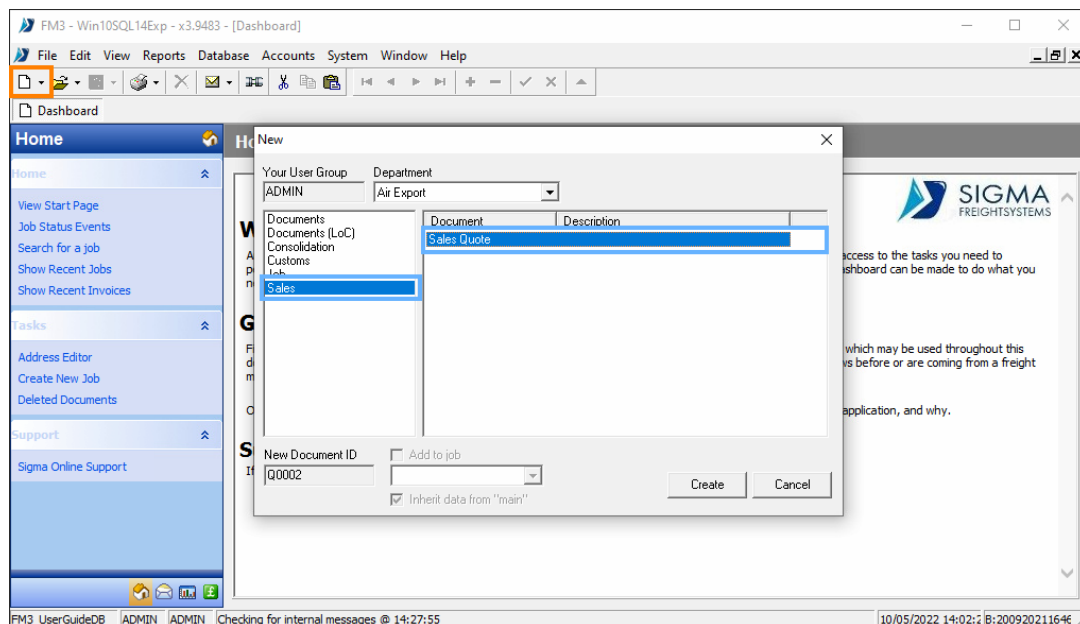
- Sales Quotes are created under 'Sales' > 'Sales Quote' of the new document page.
- Quotes can be used to make jobs.

## TERMS

1. Sales Quote – A document outlining a proposed job.

## CREATE A NEW QUOTE

Click the **blank page** in the top left corner of FM3, select '**Sales**' and '**Sales Quote**', to create a new Sales Quote.



The screenshot displays the Sigma Freight Systems software interface. The window title is 'FM3 - Win10SQL14Exp - x3.9483 - [Sales Quote (Q0002)]'. The menu bar includes File, Edit, View, Reports, Database, Accounts, System, Window, and Help. The toolbar contains various icons for document management and navigation. The main window is divided into several sections:

- Left Sidebar:** Contains a 'Documents' section with a 'Sales Quote' link and an 'Actions' section with links for 'Add New Document', 'Print Document', 'Document Status', 'Enter Charges', 'View Emails', 'View Job History', 'View attachments', 'Copy Job Q0002', and 'Post Quote'.
- Quote Form:** Includes fields for Date (10/05/2022), Service (RE 3000), Goods Description (Road Freight Export 3:1), Origin (GB), and Dest (GB). Other fields include Dept (RE), Terms, Job Type (Export), Consign Type, and Mode (Road). There are also sections for Client/Contact/Free Text/Notes, Point of loading, Point of discharge, Transit Time (days and hours), Service Freq, and Service Days.
- Bottom Section:** Displays Quote Status (NEW), Quote Owner, Profit (loss), Margin %, Total Sales, and Total Costs.

The status bar at the bottom shows 'FM3\_UserGuideDB ADMIN ADMIN Checking for internal messages @ 14:53:49' and a timestamp '10/05/2022 14:02:18:200920211646'.

This is an empty Quote.

## MENU

The menu in Sales Quotes is much like that in jobs, with Document Status and Charges, however there is a 'Post Quote' option, which allows quotes to be upgraded to jobs.

This image shows a close-up of the 'Actions' menu in the Sigma Freight Systems software interface. The menu is titled 'Q0002 Documents' and lists the following options:

- Add New Document
- Print Document
- Document Status
- Enter Charges
- View Emails
- View Job History
- View attachments
- Copy Job Q0002
- Post Quote

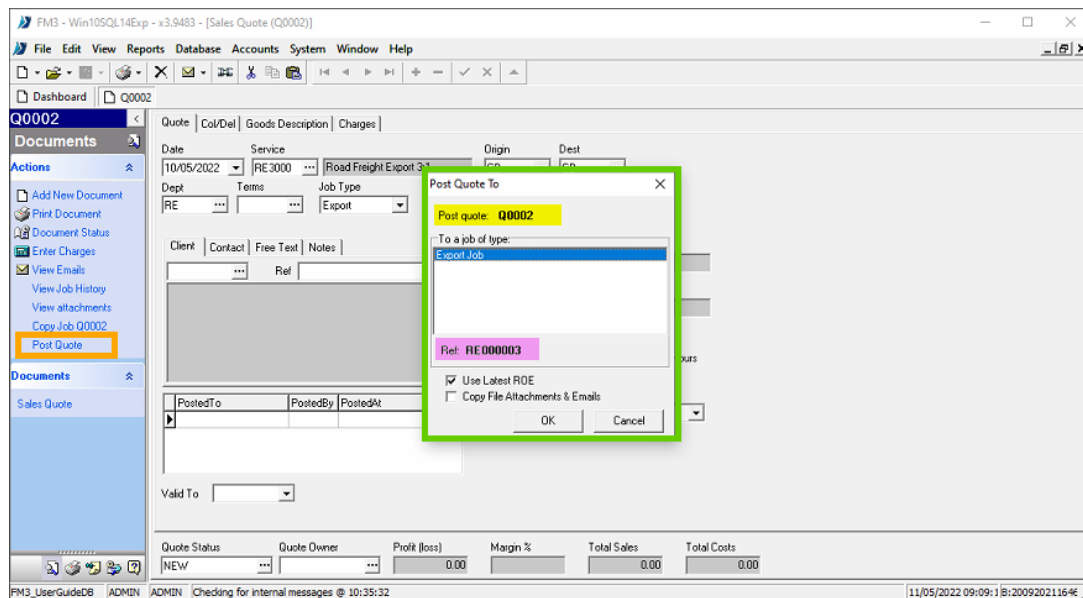
Below the 'Actions' section, there is a 'Documents' section with a 'Sales Quote' link.





## POSTING TO A JOB

After clicking the 'Post Quote' button, this pop-up will appear and provide information regarding the move over to a job. This includes the Quote reference and the proposed new Job ref.



Click 'OK' on this screen and 'Yes' to the following pop-up to confirm the new job creation. The details from this quote will pull through and populate this job.

