Entering a Quote- Potential Customer

SOP 107
Revision H, 01/11/2022
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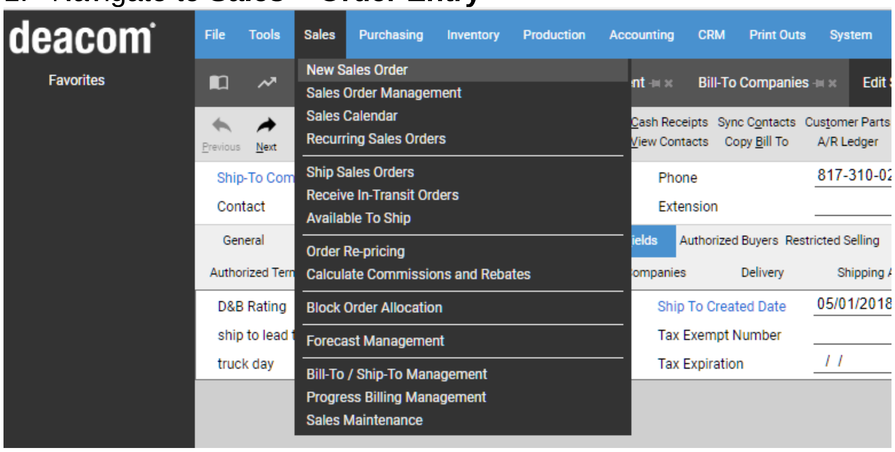
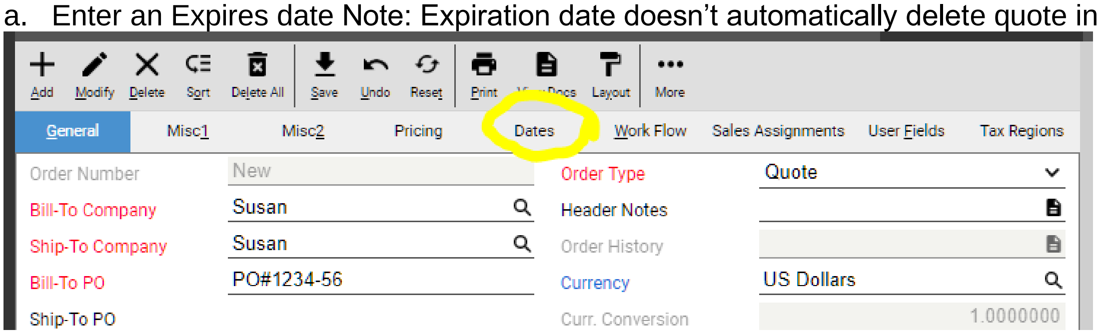
PURPOSE:
Orders that have not been approved by the customer can be marked as Quotes. There are times when you will be quoting a potential customer rather than an existing customer. This SOP provides the steps to follow when quoting a potential customer.

PROCESS STEPS:

1. Navigate to **Sales > Order Entry**



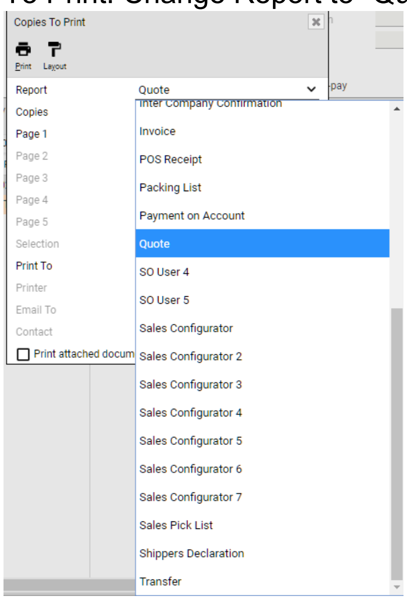
2. On the General Tab
   a. Select Bill-To Company of your Salesperson "*Lastname* Quote" (i.e., BIRCH QUOTE, COPE QUOTE, DAVIS QUOTE…). Change by clicking on the magnifying glass and selecting.
   Note: The default Ship-To Company and other header fields will be auto-populated by selecting the Bill-To Company, or over-ridden by the user.
   b. Change the order type to "**Quote"**
   c. Enter any desired header notes
3. On the Misc1 tab, confirm the Freight and Ship Via fields are correct. If incorrect, change by clicking on the magnifying glass and selecting another option.
4. On the Dates tab
   a. Enter an Expires date Note: Expiration date doesn't automatically delete quote in Deacom.



5. On the User Fields tab
   Note: This section is required to create the desired Quote Form.
   a. Enter the Potential Cust Name
   b. Enter the Potential Cust Street
   c. Enter the Potential Cust City St Zip

6. Click the Add button to begin adding parts to the sales order. The 'Edit Sales Order Line' window will open.

   a. In the Part Number box, click on the magnifying glass to search for the part.
      Note: If you do not know the product number, Click Contains button and type description in "Search all columns…" bar
   b. Enter the Quantity for the part
   c. Confirm the Unit Price shown is correct. If the Unit Price is incorrect, change to the correct price.
   d. Click Next to add additional parts.
      Note: <u>Freight Outbound Sales Charge/Freight Outbound Oklahoma Sale</u> or <u>Fuel Surcharge/Fuel Surcharge Oklahoma</u> if applicable
   e. Click Save and exit the 'Edit Sales Order Line' window.
7. Return to the General tab
8. Click Save – this will generate an Order number in the Order Number field
9. Print or e-mail the quote to the customer
   a. For Email: Click Print, change Print To drop-down to Email
   b. To Print: Change Report to "Quote", and Print To drop-down to "Printer" or "PDF"



10. When customer agrees to quote, have them submit a credit application to Tulco A/R.
11. Tulco Accounting Department(A/R) will create the Bill-To and Ship-To.

Changing the quote to a sales order:

1. Navigate to **Sales > Sales Order Management**
2. Change the order type to "Quote"
3. Enter any other desired information in the filters
4. Click View
5. Highlight (single-click) the desired Quote
6. Click Modify button
7. Clear Bill-To Company
8. Clear Ship-To Company
9. Click on Bill-To Company and choose the new customer
10. Chose the appropriate Ship-To Company
11. Change order type to "Sales Order"

   a. Enter the Customer Purchase Order Number into the Bill-To PO field, and Ship-To PO if that information is provided
   b. **Note:** You can change quantities if desired by: highlight (single-click) the desired Sales Order Entry line and Click Modify button.
12. On the Misc1 tab, confirm the Freight and Ship Via fields are correct. If incorrect, change by clicking on the magnifying glass and selecting another option.
13. Click the Dates tab and fill in the applicable date fields:
   a. Enter the **Wanted** Date
   b. The Due to ship date will calculate based on the delivery lead time.
      Note: Due to ship is the date used to drive demand in MRP and must be filled in for demand to flow properly.
14. Return to the General tab
15. Click Save – this will generate an Order number in the Order Number field

REVISIONS

Rev	Date	Change
I/R	5/30/18	New
A	5/30/18	Change steps to align with other processes
B	7/5/18	Change name of Bill-To per Tulco-AR
C	7/16/18	Revise Bill-To/Ship-To picking process “Lastname Quote”
D	8/22/18	Added Tulco “additional parts” notes
E	3/14/19	Change Fuel/Freight name changes
F	4/26/19	Change notes for deposit = positive/credit = negative
G	10/30/20	Change to v16 Menu names
H	1/11/22	Remove Credits/Deposits Items language