

CUSTOMER QUOTATION

This document describes how to create customer quotations.

A/ Quotation Function

You can create customer quotations from customer account profile. Click "Quotation" tab on customer information entry page.

The screenshot shows a customer account profile form. At the top, there are 'save' and 'cancel' buttons. The form contains several input fields: Account ID (57123), Company Name (K & K Shipping inc), Address (15 farquhar ave), City (LOS ALAMITOS), State/Zip (CA - CALIFC / 90720), Primary Email (diana.vidal@testing.com), and Portal Control (WEB ACCESS ON). On the right side, there are labels for Status, Contact Person, Country, Credit Limit/Terms, Penalty Type, and Phone (2). A red arrow points from the 'Quotation' tab in the navigation bar to the 'save' button. Below the form is a navigation bar with tabs: Account Type, Delivery Locations, Email List, Notes, and Quotation (highlighted in green). Below the navigation bar are 'new' and 'refresh' buttons. A table below shows a list of quotations with columns: Quotation#, Created, Subject, and To Location. The table is currently empty, showing '[No record found]'.

B/ Entry

Click "New" button to create, then input information as follows.

The screenshot shows the 'Quotation' entry form. At the top, there are 'save' and 'close' buttons. The form title is 'CUSTOMER QUOTATION' and the customer is 'K & K Shipping inc'. The Quotation# is '[Auto-Generated]' and it was last modified by 'brian'. Below this, there is a note: 'Input amount for charge items for this customer.' The form contains several input fields: Quotation Subject, Expiration, Delivery To City (Not specified), and Remarks. Below these fields is a table for 'Charges Items' with columns for 'Charges Items' and 'Rate'. The table lists various charges and their rates, all currently set to 0.00.

Charges Items	Rate
CHASSIS FEE	0.00
CHASSIS SPLIT (DROP-OFF)	0.00
CHASSIS SPLIT (PICK-UP)	0.00
DELIVER WAITING	0.00
DEMURRAGE	0.00
DETENTION	0.00
DRY RUN CHARGE	0.00
FREIGHT RATE	0.00
LIFTGATE CHARGE	0.00
OVER WEIGHT FEE	0.00
PERDIEM CHARGE	0.00

C/ Print and Email

Once you save the quotation, you can print the quotation and email it directly from the system.

Email Quotation

DEMO AMERICAN TRUCKING...
 1234 Raymond Avenue, Temple City, CA 91780
 TEL: (626) 333-4444

To :

K & K Shipping inc
 15 farquhar ave
 LOS ALAMITOS CA 90720
 Tel:

Customer Quotation

Quotation Number : **1**
 Expiration Date: 01/31/2022

Printed on : 1/16/2022 11:01:00 PM

Subject : **TESTING ONE**
 To Location : **ALHAMBRA**
 Remarks:
TeSTING

Charge Description	Rate
CHASSIS FEE	\$75.00
CHASSIS SPLIT (DROP-OFF)	\$86.00
DEMURRRAGE	\$10.00

[... End of Quotation ...]

Order Tables Operation Master Tables Shipment Reports Accounting Logout

Account Database

Quotation
save
close
print

CUSTOMER QUOTATION
 CUSTOMER: **K & K Shipping inc** Quotation#: 1

Input amount for charge items for this customer. Last Modified: 1/16/2022 11:00:51 PM by brian

Quotation Subject:

Expiration:

Delivery To City:

Remarks:

Charges Items	Rate
CHASSIS FEE	75.00
CHASSIS SPLIT (DROP-OFF)	86.00
CHASSIS SPLIT (PICK-UP)	0.00
DELIVER WAITING	0.00
DEMURRRAGE	10.00
DETENTION	0.00
DRY RUN CHARGE	0.00
FREIGHT RATE	0.00
LIFTGATE CHARGE	0.00

D/ Email Template

See below for an example of email your customer will receive.

Quotation 5 from [redacted] Yahoo/Inbox ★

 [redacted] To: [redacted] Sun, Jan 16 at 10:37 PM ★

To: 73 DISTRUBUTION

You have received quotation from AEF Shipping Inc.. Please confirm upon receipt. Let us know if you have any questions.

Thank you for your business - we appreciate it very much.

Sincerely,
[redacted]

Tel: [redacted]
Email: [redacted]

[redacted], EL MONTE, CA 91731
[redacted]

Customer Quotation

To :
[redacted]
168 [redacted]
CITY OF INDUSTRY CA 91764
Tel:626-[redacted]

Quotation Number : **5**
Expiration Date: 01/31/2022
Printed on : 1/16/2022 10:37:19 PM

Subject : **BRIAN TESTING**
To Location : **ALHAMBRA**
Remarks:
TESTING ONLY

Charge Description	Rate
CHASSIS RENTAL	\$1.00
Chassis Split for Bring Own chassis	\$2.00
Clean Truck Fee	\$3.00