

<b>BOOKMINE BASICS – CUSTOMER QUOTES (AND ORDER FORMS)</b>	<b>1</b>
Customer Quotes Summaries interface	1
Starting a new Quote or resuming an existing Quote.	1
The Customer Quote Interface	2
Useful Tools in the Quotes Area (refer to fig)	3

## Bookmine Basics – Customer Quotes (and Order Forms)

The customer quotation area of BookMine is used to compose and send quotes for specific items to customers showing quantities, applicable discounts, selling price etc. These Quotes can be emailed or printed. The quote can also be printed in order form style – ideal for displays and school boxes.

If a customer responds with an order an invoice can be raised directly from the quote, retaining any special discounts which were included in the quote as well as the history of the quote. This is a very efficient way to produce invoices from quotes.

### Customer Quotes Summaries interface

From the main switchboard click on the **Customer Quotes** button which will bring you to the **Customer Quotes summary** screen. This interface is used for general maintenance of quotes. The commands along the lower portion of the screen **are used** to limit the display to quotes for a particular customer only or quotes for a particular period, as well as providing navigation buttons for the main stock and contacts screens. You can also email or print a quote from here without opening it in detailed format.

### Starting a new Quote or resuming an existing Quote.

1. From the main switchboard click on the **Customer Quotes** button which will bring you to the Customer Quotes summary screen.
2. **Click New Quote/F3/AltN** to begin a new quote (or resume modifying a pending quote).
3. Enter search criteria for the customer you wish to quote and press **Start SearchF3/AltS**
4. Once the customer is selected an empty new quote or an existing pending quote, if one exists, will be displayed on the **Customer Quote** interface (see fig). Consider, before adding any items, whether you will be quoting varying quantities or if all items included in the quote will have quantity set to 1. If you are quoting different quantities for each item it is advisable to have Tick On the radio button beside the **Always Prompt for Quantity Button**. This way you will be prompted for the quantity of each item as you add it rather than having to enter them at the end. If you are quoting single copies for all items untick the **Always Prompt for Quantity** so that you are not prompted to enter quantities while adding to the quote.
5. Adding items to a quote may be done either singularly or in groups. To add a single item click **Add Item to Stock Queue/Alt A** button. To add a group of items click **Add Stock View/Alt S**.

When adding items one by one using the **Add Item to Stock Queue** button Bookmine will assume that you wish to add one only of each item to the quote if you have not opted to be prompted for quantities and will continue prompting you for the next item to add in loop-style until you opt to cancel adding.

Using the **Add Stock View/Alt S** button is ideal and a quick method when adding a catalogue or list of books to a quote or all books by a particular author or publisher or any group of items that have at least one common denominator.

6. If you wish to remove an item from the quote use the **Remove from Quote/Alt R** button which can be found along the lower section of the screen (available only if quote is active).

## The Customer Quote Interface

The screenshot shows the 'Customer Quote' interface for 'Bookmine Marketing V8 Licensed to InfoMining Pty Ltd'. The interface is divided into several sections:

- Quote Details:** Quote ID 1, Date Raised 30/Mar/2007 12:33:58 PM, Date Locked, Quote Valid to, Status Active.
- Customer InfoMining:** Comment (visible in printed quote) 'We can supply all of the items listed immediately.', UserAnnotations (internal use only) 'ALERT!! Make sure this customer sends a purchase order before invoicing.', Post and Packing 25.50.
- Stock Items Table:**

Stock ID	ISBN/EAN	TITLE	Qty On Hand	Our Sell price	Quantity quoted	Price Quoted	Discount (%)	Price Extended	Exclude?
335252	978-055338086-6	New Moon Astrology	6	34.95	1	34.95	0.00	34.95	<input type="checkbox"/>
339486	978-073870665-8	Mapping Your Travels and Rel	9	39.95	1	39.95	10.00	35.96	<input type="checkbox"/>
368042	978-190504703-1	Divine Astrology	7	44.95	1	44.95	0.00	44.95	<input type="checkbox"/>
368091	978-190504774-1	When Stars Collide	17	49.95	1	49.95	12.50	43.71	<input type="checkbox"/>
379484	978-184293175-2	The Imperial Guide to Feng Sh	18	34.95	1	34.95	0.00	34.95	<input type="checkbox"/>
- Totals:** Non excluded Goods Total (Tax Inc) \$194.51, (Tax Exc) \$176.83.
- Buttons:** (F2) Exit..., Add Stock item to Q..., Add Stock View..., Clear Quote..., Duplicate Quote..., Remove from Quote..., Convert to Invoice..., Place On Hold..., Add to Catalog..., Output/Print Quote...

Callouts from the image:

- Display full details for this stock item (points to the 'Details...' button).
- Sort listing by any column ASC/DESC (points to the 'Quick Find' search box).
- Annotate with private and/or public comments as required (points to the 'Comment' and 'UserAnnotations' fields).
- Add single or multiple items to the quote. (Add all items in any catalogue to the quote, or all items on hand from a specific author, or from a specific supplier, etc) (points to the 'Add Stock item to Q...' button).
- Convert this quote to an invoice (points to the 'Convert to Invoice...' button).
- Send the quote – print or email the quote or export to Excel (points to the 'Output/Print Quote...' button).
- Exclude any item from the quote (points to the 'Exclude?' checkbox in the table).

7. When finished adding you may wish to include some comments with the quote. There are two **comments fields**, one visible to the customer in printed and emailed quotes, the other for internal use only. These should be used to record any special circumstances.
8. **Quote Valid Until:** You also may wish to include a date which this quote is valid until. To do this use the **Date Valid Until** box in the central section of the upper portion of the form.
9. Postage and packing can also be included if required by entering the amount in the light blue box marked **Postage and Packing** directly below the comments boxes.
10. Sending the quote: To print or email the quote click on **Output/Print Quote/Alt O**. A window will display showing the options for output. Choose one of the following:
  - i) **Print** – prints directly to printer
  - ii) **Print Preview** – displays the quote as it will appear when printed. If you wish to proceed to print select the Print option in the top left hand corner of the screen.
  - iii) **Email** – creates an email quote. The email will appear on screen to allow any further editing if required. When you are satisfied with the email quote press proceed and this email quote will be queued in the outbox ready to send when email is next sent.
  - iv) **Output to Excel** - Outputs all of the information into a quote.
  - v) **Order Form Style** – Outputs a printable version of the quote with all of the stock and other details in the quote but without the customer name and address details. Useful to give to customers when exhibiting single copies of books at schools and conferences.

When choosing any of these options you will be asked if you wish to lock the quote. This is highly advisable so that items cannot be added or deleted once the quote has been sent to the customer.

11. Finished? Run your eye down the checklist below to be sure you haven't missed anything.

1. Added all items required?
2. Made sure any discounts and/or special prices are shown?
3. Included any comments for the customer if required?
4. Included comments regarded this delivery which you do not want displayed to the customer?
5. Included postage and packing if applicable?
6. Printed or emailed the quote – or if not locked it?

## Useful Tools in the Quotes Area (refer to fig)

**Convert to Invoice/Alt C** – All items or just a selection of items in the quote may be invoiced directly without leaving the quote screen. If you wish to invoice all of the items in the quote simply click the **Convert to Invoice** button found along the lower section of the screen (or press Alt C), you will be prompted to make sure that you agree to add all non-excluded items in the quote. If you wish to invoice only some of the items in the quote, you can exclude those you do not wish to include by clicking the **Exclude box** adjacent to them. Once finished use the Convert to Invoice/Alt C function to add all non excluded items to an invoice.

**Place on Hold.** This function will place all non excluded items in the quote on hold for the customer being quoted. If you wish to only place some of the items on hold but not all, indicate the items you do not wish to put on hold by unticking the exclude box adjacent to the item described in the Convert to Invoice section above.

**Add to a Catalogue.** This function will place all, or a selection of the quoted items, if you have used the exclude function to limit the selection into a catalogue or list. A catalogue or list is a grouping of stock/inventory that can be easily manipulated for print or email output, invoicing or in a number of other useful ways.

**Duplicate a Quote** – Sometimes you will send an order form to multiple recipients from which they can place orders, filling in their contact details and the quantities they wish to purchase. In such cases you create a single Quote and print it in Order Form format. When these are returned you can create invoices for them directly from the original quote. This avoids having to re-enter all the items into each invoice individually. To achieve this, on receiving the order form duplicate the original quote. You are prompted to search for the customer to link it to. If they are not already in the database you can optionally create a new record for them. Once the quote is duplicated it can be modified to reflect the quantities on the order form, excluding any not ordered, and converted to an invoice as described above. This can be repeated for any number of orders that are generated from sending a specific quote out in order form mode.