

Optimising Freehand Quotes

This feature is currently available on the **Palladium Enterprise 2011/2** versions only.

Feature Overview:

This feature allows you to create Quotes for Clients (and prospective Clients alike) while managing the margins of sales and service items (including prospective items). Additionally the Purchase and Sales Documents can be created on the fly, all from the same screen, offering traceability from the purchase of the item, to goods receiving through to the sale of the item.

How Does This Feature Help Your Business?

- Create quotes for Prospective Clients without having to Create a Customer Masterfile Record.
- Create quotes for Prospective Items without having to Create an Inventory Masterfile Record or use the function to control Buyouts.
- View and manage margins as a value or as a % of the total deal value
- On acceptance, have the ability to create the Inventory Items and Customer Records on-the-fly
- Create the Sales and Purchase Documents all from the same screen
- Have the option to view all Suppliers for a specific item, with the system selecting the preferred Supplier as default

FEATURE OPTIONS

Create a Quotation for a Prospective Customer or Prospective Inventory Item

Here you can create a quotation for a prospective OR a current customer, as well as a prospective OR current Inventory or Service Item. This allows you the ability to handle Buyouts whilst maintaining the appropriate margins. If you refer to the Vendor Field on the Item Line, you can also specify the details of the Vendor that was used to cost the quote. (Note that in the case of standard Inventory Items, the system will default the preferred Vendor for that Item and give you the ability to select another or assign a Vendor to that Item.

Converting the Quotation

Once the Customer has approved the quote, we can now convert the details to a Sales Document (Quote, Order or Invoice) as well to one or more Purchase Documents (Requisition, Order or Supplier Invoice) on-the-fly. If you have used a prospective Customer Or Item, the system will prompt you to select the Item or Customer or to Create these on the fly.

The screenshot shows the 'Freehand Quotes' application window. The main window displays a quote for 'Prospective Customer' with details like 'Ship To: Captain James T Kirk' and 'Doc Number: QS-000000023'. A dialog box titled 'Palladium Accounting 2012 Enterprise' is overlaid, asking: 'Inventory Item Number "Prospective" doesn't exist. Select "Yes" to Create an Item Number. Select "No" to Use an Existing Item Number.' The dialog has 'Yes', 'No', and 'Cancel' buttons. The background table shows a single item with a quantity of 2,000 and a price of 300.00, totaling 600,000.00.

Once the Items and Customer has been linked the system will create the Purchase Order on-the-fly and bring through the Sales Quote and Customer Details to trace the document through to fruition.

The screenshot shows the 'Purchase Order' application window. The main window displays a purchase order for 'Vendor: TST002' with details like 'Ship To: Sample Company' and 'Doc Number: PO-000000044'. A 'Copied Document Reference' box is highlighted in red, containing the 'Reference: QS-000000023' and 'Customer Name: Ashburton Reinforcing'. The background table shows a single item 'CleanFuel' with a quantity of 2,000 and a price of 300.00, totaling 600,000.00.

Receive Goods With Complete Traceability

When goods are received the Created From customer and Order details will be displayed on the Goods Received Voucher and processing screen, allowing you to effectively complete the order fulfilment cycle.

The screenshot shows the 'Receiving' window with the following details:

- Vendor:** TST002, ACME Novelty, 467 Church Street, York YO12VK, UK
- Delivered To:** Sample Company, 121 Lake View Road, Cnr Lake View & Hubbard Streets, Johannesburg Gauteng 1201, South Africa
- Doc Number:** GR-00000005
- PO Number:** PO-00000045
- Requested By:** 25 May 2015
- Date:** 18 May 2015
- Delivery Note #:** SD/99887-10A

The 'Document Items' table is as follows:

Number	Location	Description	Rec'd Qty	Unit	Copied Document Reference
1	CleanFuel	FortLauder	CleanFuel	2 000 EA	TST001 / SO-00000027

Note that the ability to trace the Document Reference above is also available in all the Create/Copy Purchase Order from Sales Orders function, with each individual copied sales order and customers details listed separately.