CAPITAL V8

Capital Business Software Tutorial Series

Quoting Using Capital Business Manager V8 1.0

CAPITAL OFFICE BUSINESS SOFTWARE

Capital Business Software Tutorial Series

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Section 1

Basic Navigation

Various Techniques You Can Use To Navigate Through Quotations

To save time in the future, print a copy of this document. Click **Print** on the **File** menu. With the printed document in hand, position yourself in front of the software and work through the following exercises.

Begin by launching the software and then return to this tutorial.

The Explorer Bar

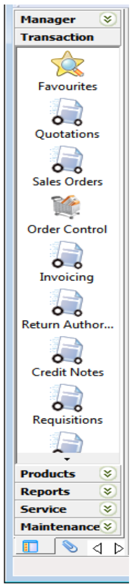
The Explorer Bar is the primary means to open new areas of the software. Such as the customers area, stock area, cash manager, and the various transactions found in the system. The Explorer Bar is found on the left of the application's main work area. To open a new area click on the applicable icon.

The Explorer Bar is divided into a series of bands. The standard band titles include:

Transactions
Products
Reports
Service
Maintenance

To view the grouping of functions associated with each band, click on the band name with your mouse.

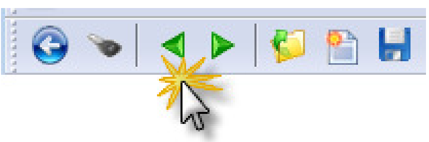
For example, to start a new invoice, click on the **Transaction** band and view the various transaction types you can create.



To begin a new quote, click on the **Quotations** icon.

The Explorer Bar remains to the left of the application even when a new quotation is opened. You can open another transaction at this point while leaving the quote transaction open, by clicking again on the Explorer Bar. For example, click on the **Sales Orders** icon to open a sales order.

You now have two transactions open at the same time. To return to the



quote transaction press the green go back button on the tool bar above the transaction.

Continue to press the go back and go forward area buttons to toggle through all open areas in the software. You can also view the list of all open areas by selecting Window from the menu at the top of the application.

To open the same area more than once hold down the SHIFT key and click on the area with your mouse. For example, to open two quotations at once, click on the **Quotations** icon and then hold down the SHIFT key to open further quotes. (If you don't hold down the SHIFT key, clicking on the icon will just take you back to whatever area is already open that is represented by that icon.)

To close an area, locate the blue arrow close button in the top left hand corner of the application and click on it. To close all open areas select Close All from the Window menu at the top right of the application. To then close the application locate the blue arrow close button in the top left hand corner of the application and click on it.

Using the keyboard you can also press ALT+F4 to close the application.

Section

2

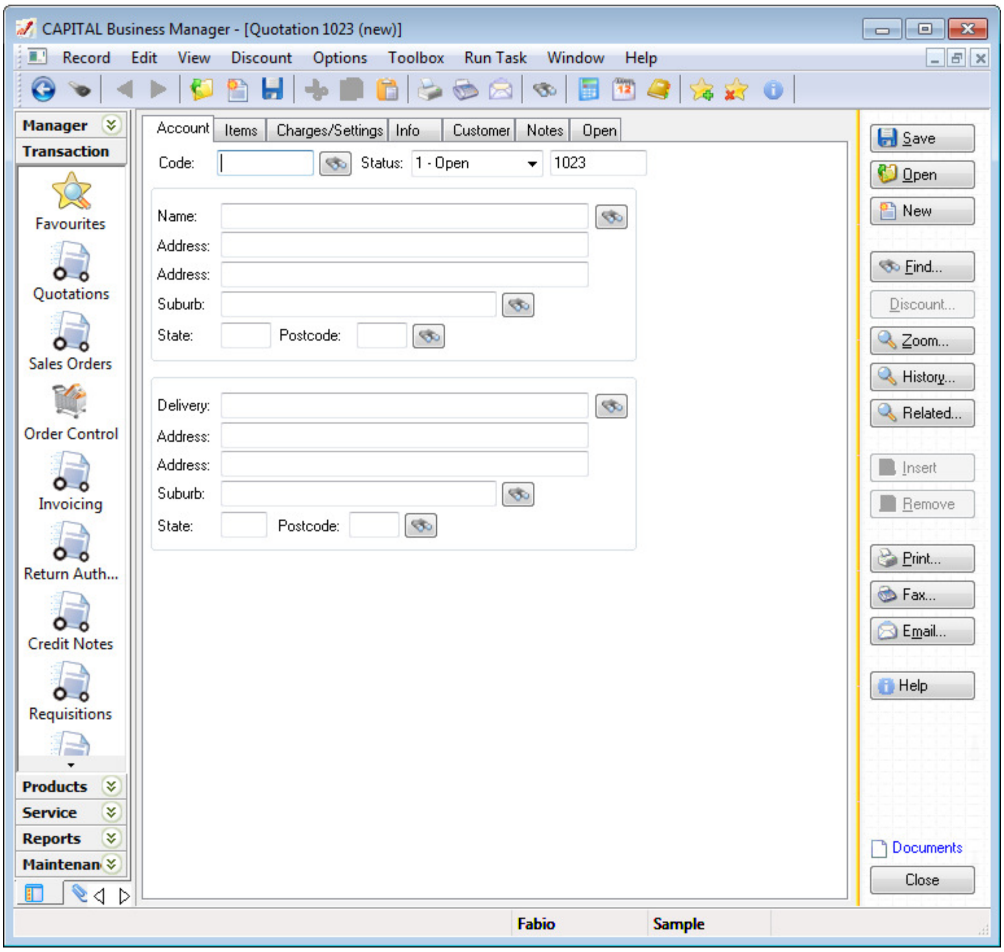
Entering a Quote

The Three Steps Needed For Creating a Quote

There are three basic steps involved in creating a quote. This section will cover the main data entry activity necessary before the transaction can be saved.

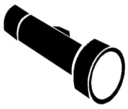
1. Select a customer.
2. Enter the product items or service codes that are to be quoted.
3. Enter other details such as dates, contact details, salesperson codes, etc.

When you first open a quote the following screen appears:



Selecting a Customer

At this point, press F12 to present a list of your customers, or click on the binoculars button next to the word **Code** or just type in the customer's account code if you know it.



An 'account code' is a short unique reference to a customer's account record. It can be up to 8 characters long. Account codes are handy because you can type them in quickly if you happen to know what the customer's account code is.

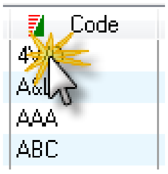
If your quote is not for an existing customer it may be a good idea to set-up a generic account to cover all your customers or potential customers, who may not yet have accounts. This might have a code such as 'COD' or 'GENERAL'.

If you press F12 or click on the binoculars to display a list of customers, you can use the up and down arrow keys or the PGUP and PGDN keys to scroll through the list. Once you find the customer you want, press the **Select** button found on the right side of the list, or double-click with your mouse. This list is called "the record list."

At times it may be difficult to find the customer you want if the customer list is not sorted in the way you need it to be.

Ways To Sort A Record List

Fortunately, the sorting of the record list can be changed by clicking on the column heading of the column you wish to sort the list by. The column heading must have a red/green block next to the column heading name for it to be sortable that way.



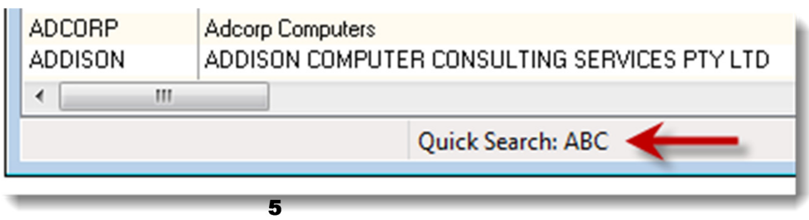
When the bottom block turns a solid green the list is sorted by that column in ascending sequence. Click on the column heading again to reverse the sorting. The top block will turn a solid red and the record list will be sorted in descending sequence.

You can also change the sorting of the record list by using the keyboard. Press SHIFT+F10 and then select the applicable "Sort by" method from the pop-up menu.

Quick Search

Rather than use the arrow and PGUP and PGDN keys to scroll through the record list, there is a faster way to find what you are looking for: Just begin to type. The information that most closely matches what you have typed will come into view. But it's important to remember that information is searched for, based on the currently sorted column. If your column is sorted by customer name, then as you type, the software will try to find the customer by searching for a match under the customer name column.

For example, if you typed 'ABC' using your

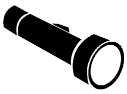


keyboard the Quick Search feature would display these characters below the record list.

To erase what you have typed and re-start the Quick Search, hold down the CTRL key and press Backspace. Then restart your search by typing again.

Global Text Search

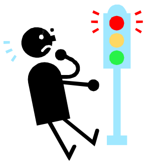
If the information you are looking for cannot be found in a specific column on the record list, you can press the **Find** button on the left side of the list. The Find button can be used to match *any* information within the record itself, such as a phone number, contact, street and so on. This is referred to as a 'Global Text Search'.



A Global Text Search can be slow if your record list is large. It may also produce too many matches to search through if the information you are looking for is not very specific. This is usually not a problem for a customer list, but some businesses do have a very large number of customers!

Nonetheless, it is a good method to use when you are searching for a specific and relatively unique set of letters or numbers. (Such as a phone number, or person's full name.)

A Global Text Search will select the first record that matches the string of characters you have entered. If this is not the record you are seeking, press the F3 button to continue the search for the next match.



Don't use the Global Text Search function to locate a transaction number. Besides being slow, it will also probably match information you are not looking for or not find the transaction number anyway. Always use Quick Search to search by transaction number.

The Accounts Panel

Once you have selected a customer account, the address details of that customer will be placed in the address area automatically.

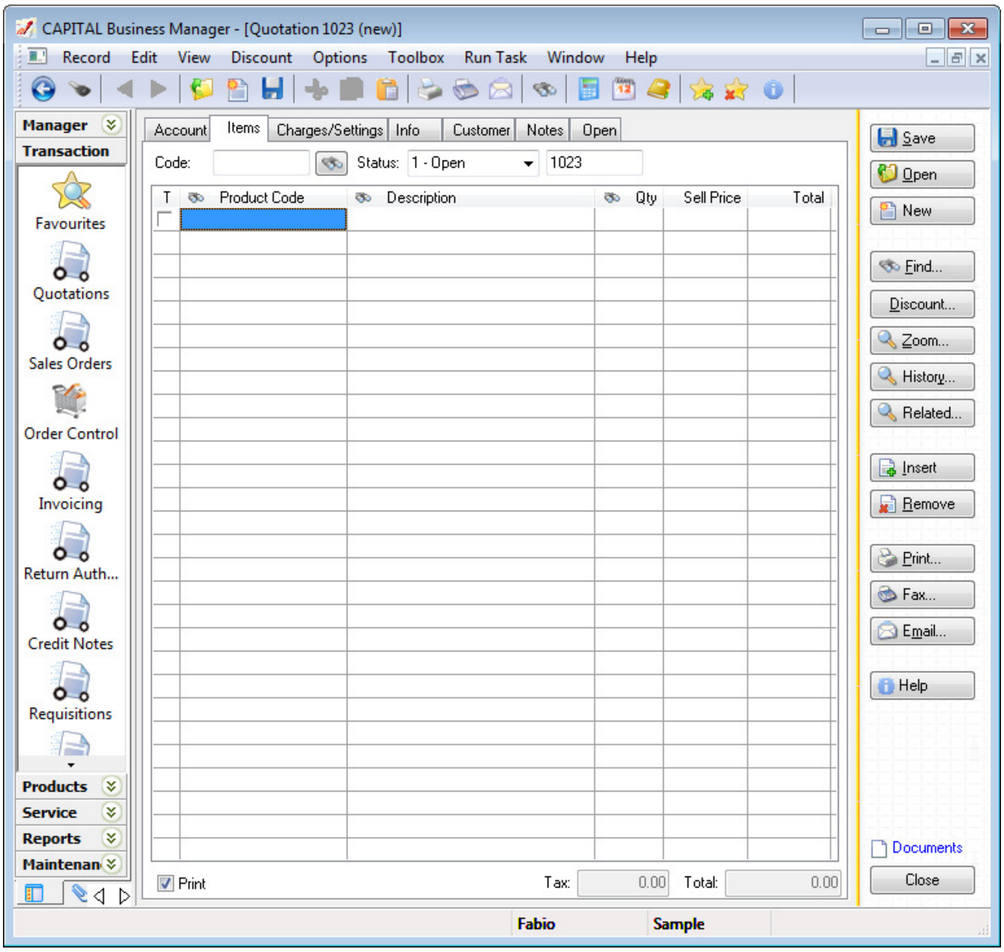
You should experiment by pressing the binocular buttons next to the various address lines to see what they do. Some will take you to a contacts area where you can enter additional delivery addresses if required. Other buttons will open the National Postcodes list, which displays all the suburbs and postcodes for Australia.

If the information is correct leave it as it is. However, if anything needs to be changed for this particular transaction, type the correct information over the information that is wrong or missing. If you want to permanently change the information for every quote for your customer, then it is probably better to change the account details on the Customer Record instead. (How to do this is discussed in a separate tutorial.)

The Product Items Panel

To access the product items panel click on the **Items** button at the top of the transaction. The items grid will be displayed.

The items grid follows the concept of a 'spreadsheet' so as to allow you to rapidly enter product information associated with the quotation. A transaction typically displays 5 columns, although there may be more or less depending on how your software has been set-up.



The T (tag) Column The **T** column is an advanced feature that lets you 'tick' line items on a transaction so that they can be copied elsewhere, or deleted in bulk, etc. Tagging is discussed further in a separate tutorial. For now it is best to ignore it so we can focus on the most important elements.

Product Code Column The Product Code column is where you enter your product codes. Click on the 'cell' directly below this column and type in the product code you wish to add to the transaction. If you're unsure what the product is, you can press F12 or click on the Product Code column heading to open the **Stock PowerFind** window. This is a window that will help you search for products and it works a bit differently from the way other search windows work. PowerFind will be discussed in more detail in the next section.

To practice with entering product codes, try typing the letter **A** and pressing the TAB key. The first product code that begins with the letter A should automatically be added to the transaction's list of line items. The description, quantity and other information associated with the product item will also be retrieved from the product's stock record.

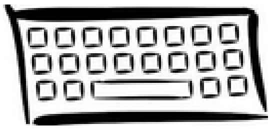
Description Column The Description column is similar to the Product Code column. Here you enter the description instead of the item's product code, which is handy if you don't know what the item's product code is. Or if you have already entered the product code, you can change the product description here for this transaction.

How To Edit

If you make a mistake at this point you have numerous options. To edit what you have just typed, press the INS key or double-click on the 'cell' you wish to change using your mouse. Next type into the cell what you wish to change.

If you want to delete the entire entry, one way is to press the **Remove** button found on the right side of the grid.

Qty Column The Qty column is short for 'quantity' and this is where you enter the number of units that your customer will be quoted. Depending on how your software has been set-up, you may enter fractions here. For example 20 or 5 or 2.5.



Remember to press the TAB key to move to the next column to the right. If you wanted to move in the other direction, press the SHIFT+TAB combination instead. (Hold down the SHIFT key then while still held down, also press TAB.) If you did not want to move away from the 'cell', you could press ENTER or RETURN. This would just accept the input you made. You could also press ENTER or RETURN to move down the grid one product item at a time.

Sell Price Column The sell price is filled in automatically for you if it's available. This information is sourced from the product's stock record. If a sell price is not available you will need to type one in. If the correct 'cell' under this column is highlighted, just type the number into it. If there is a cents component, type the dollar amount, then a full stop, then the cents amount. Then press ENTER or RETURN to move to the next row.

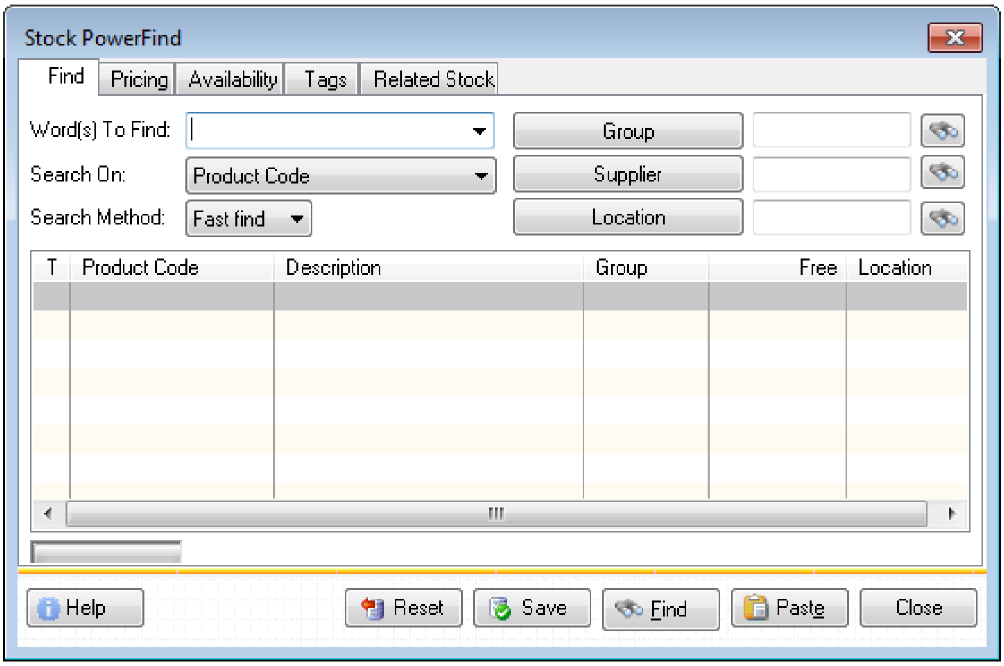
Total Column The Total column is the line item total. This is simply the quantity multiplied by the sell price. This column cannot be directly changed by you, as it is determined by a calculation.

When you have moved to the next row (you can also use the up and down arrow keys to navigate around the grid as well), you are ready to enter your next product item. Simply repeat the above steps for adding additional items to your transaction.

Stock PowerFind

The Stock PowerFind window is a tool that is used to help you locate product items found in your stock control area. To open this window move to the **Product Code** or **Description** columns and press F12.

The PowerFind window will also open automatically if you type in an item's product code that is not recognized. But if you enter a description that is not recognized the software will assume that you are entering a comment instead.



In the **Words To Find** area type part of the product code you are looking for and then press ENTER or RETURN. A list of any matches will be displayed. To select the correct item, highlight it with your mouse and double-click or use the arrow keys and press ALT+E (hold down the Alt key and then press E).

If you're unsure what the product code is, you could try searching by description instead. To do this, tab down to the "Search On" list and select Description. Then repeat your search by pressing ENTER or RETURN again.

For example, if you don't know the product code but you do know that the word Odyssey appears somewhere in the description, then do the following:

1. Press F12 to open the PowerFind window.

2. Type Odyssey into the Words To Find area.

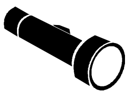
3. Press TAB to move to the "Search On" list and press the letter D.

Note: If "Description" is not selected right away, keep pressing D until the word "Description" does appear.

4. Press ENTER or RETURN to execute the search.

5. All matching items will now appear in the list of matches. You can use the up and down arrow keys at this point to select the item you wish to paste into your transaction. Then double-click with your mouse or press ALT+E.

6. This last action will automatically close the PowerFind window and your selected item should appear in the grid.

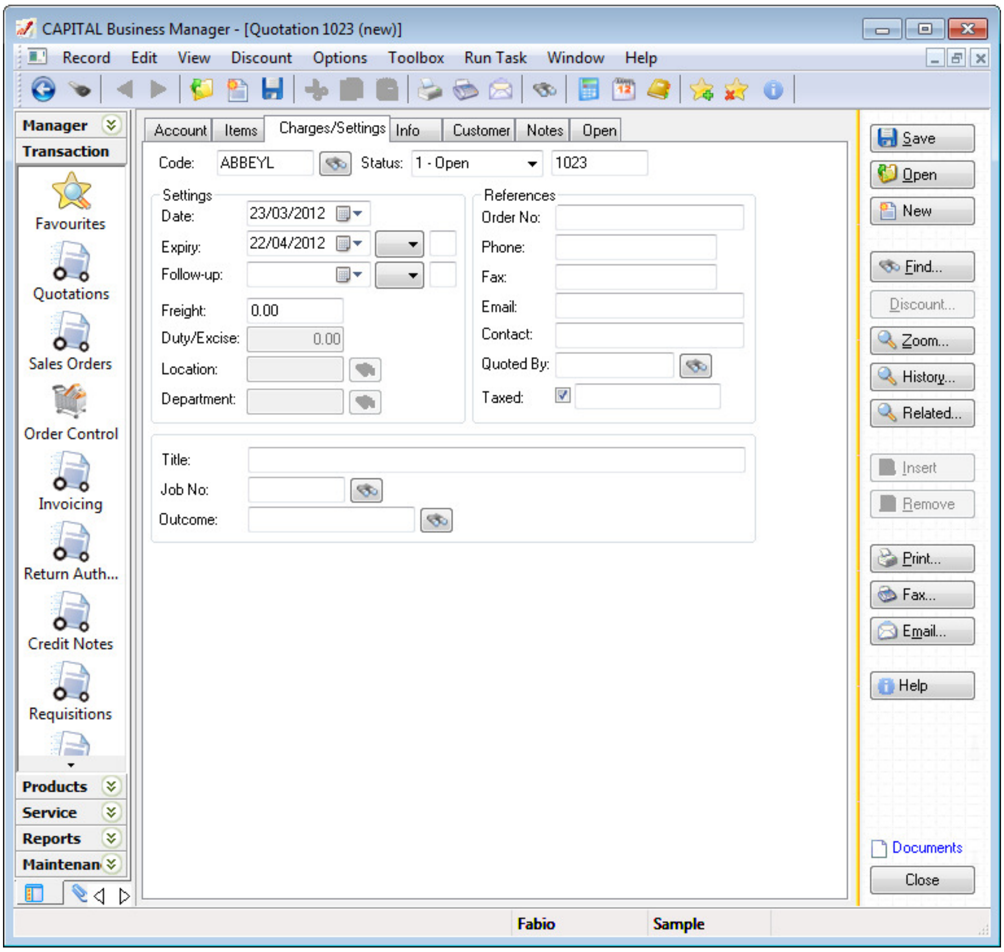


The PowerFind window is very powerful. You can search on all sorts of criteria. You can also limit your search to particular product groups, or suppliers, and so on. Narrowing down what you are looking for can make it easier to find the right match. However, it's not necessary that you understand every advanced feature at this stage. It's best to use it for basic searches, such as product codes and description key words, and learn about its other capabilities as your confidence builds.

The Charges / Settings Panel

To access the Charges and Settings panel click on the **Charges/Settings** button at the top of the transaction.

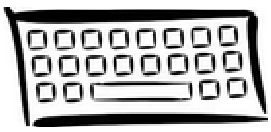
In this area you can review and alter other important information about the quotation, such as its dates, contact details, and whether freight will apply (should the quote proceed).



Date The Date is of course the date of the quote. This will default to today's date but if you need to back date or forward date a quote, you can do so here by changing it.

Expiry The date at which the quote expires. To what extent this may or may not have meaning in your business would be determined by your terms and conditions of sale.

Follow-up The date at which follow-up of this quote is required. Because you can sort your quotation list by Follow-up it can be useful to enter a date here so that you can view what quotes you need to follow up on.

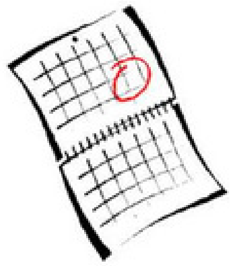


Your software is rather strict about the way dates are entered into the system so it is worthwhile to spend a few minutes to point out some things about entering dates.

Firstly, you can clear a date and start over by pressing the DEL key. The will erase what you have typed so you can type a new date from scratch. To paste today's date back into a date field press F2.

When entering dates you must enter them in DD / MM / YY format if you are in the Australian region. For example, if you were entering the 2nd of March 2013, you would enter on your keyboard 2 followed by slash (/) followed by 3 followed by slash (/) followed by 13.

If you made a typing mistake press the up and down arrow keys to increment or decrement the number. For example, if you typed 12 instead of 13, press the up arrow key to increment the year by 1.



You can also use the left and right arrow keys to move between segments of the date. If the day is selected, pressing the right arrow key will move you to the month, and pressing right arrow again will move you to the year. Pressing left arrow will move you in the opposite direction.

When you are finished with the date, press the TAB key to complete the entry.

And of course, you can click on the calendar symbol next to the date to open the calendar. From the calendar you can click on the day you want or use the arrow keys to navigate around the calendar. Another quick way to open the calendar from within a date is to press F12.

Phone
Fax/Email
Contact

Enter these additional contact details into the quote if doing so will help you follow-up on the quotation later on.

Freight

Enter a freight amount here if applicable and this amount will be added to the quote's total.

Title
Job No

If you are quoting on some aspect of a project, you can type the name of the project into the Title entry, or the Service Manager Job Number into the Job No entry.

Quoted By

If a commission applies then it's important to enter a salesperson's code. Every salesperson in your business can be assigned a code, in order to relate the (possible) sale back to the salesperson responsible.

Outcome

If you want to record later on, what the outcome of the quote was, you can assign a short-outcome description here. I.e., the reason why the quote was won or lost.

Product Codes & Comments

Not every line item on a quotation transaction need be assigned a Product Code. You can move directly to the Description column and enter a comment line. A comment line is basically a line of text under the Description column that does not have a Product Code next to it.

A comment may also extend over more than one line. If your comment doesn't fit on a single line, the system will automatically split the entry over multiple lines for you.

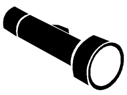
T	Product Code	Description	Qty	Sell Price	Total
	442CW	Ballentine 2004 Block 11 Pocai Vineyards	1	8.10	8.10
		This is the last item on this run.			
		Further orders cannot be accepted.			

These types of comments are referred to as 'free floating' comment lines because they do not always carry over into other transactions.

A 'free floating' comment is therefore to be used when the comment is relevant to the quotation but not necessarily relevant to any transactions that may be derived from the quote.

You *can*, however, carry a comment onto other transactions by linking that comment to a product item. These are referred to as 'linked' comments.

Why is this important?



Well, assuming that the quote is accepted, you may wish to convert the quote into a sales order. If that happens, the items that were originally placed on the quote may end up appearing on pick lists for your warehouse staff and in the "Back Order Control Centre" which is an area of the software that tracks what has and hasn't yet been shipped.

Pick lists are typically sorted by 'bin' and/or 'product code' so your items may not appear in the same order they appear on your quote. Or an order might get part shipped and split or combined in other ways.

A 'linked' comment *stays attached to the product line item it was linked to.*

Creating a 'linked' comment is really easy: move to the description of a line item that has a product code and press the INS key.

Now type your comment *under* the product's description and press ENTER or RETURN. Your comment will be 'linked' to item 442CW as per the example below. When the item is eventually invoiced, its description and 'linked' comment will carry through to the resulting transaction.

T	Product Code	Description	Qty	Sell Price	Total
	442CW	Ballentine 2004 Block 11 Pocai Vineyards	1	8.10	8.10
		This is the last item on the run.			
		Further orders cannot be accepted.			

Observe that a ‘free floating’ and a ‘linked’ comment do not necessarily look any different from one another. It is the method of entry that determines how the comment is treated, and this has no effect on how the comment appears.

Section 3

Saving Quotes

What To Do Once The Quote Has Been Entered

Saving your transaction is the easiest part of the process! All you need to do is press the **Save** button found on the right side of the transaction window.

At this stage you could be prompted to print the quote or the quote may print automatically, or no printing may take place. What happens exactly here depends on how your software has been set-up.

If you are prompted to print then press the **Print** button.

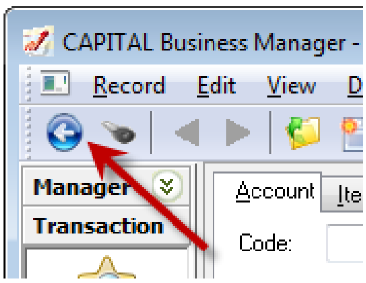
Again, depending on how your software has been set-up, you may be prompted further, such as which printer to print to. If you aren't asked these questions, then a printed copy of the quote would typically be sent directly to its designated printer.

At this stage, the software has done several things:

1. It has saved your quotation in the database.
2. It has printed the quote if applicable.
3. It has opened a new, blank quote, ready for you to repeat the entry process for your next customer.

If you don't wish to enter further quotations, press the blue close button found at the top right hand corner of the application window.

This will return you back to the main window where you can commence some other action, or to the last window you had open.



Section 4

Amending Your Quote

On How To Edit What You Did And Fix Mistakes

Editing a quote is easy. All you need do is open the quotations area, find the quote, make your changes, and re-save (and re-print) it. This section will explain each of these steps.

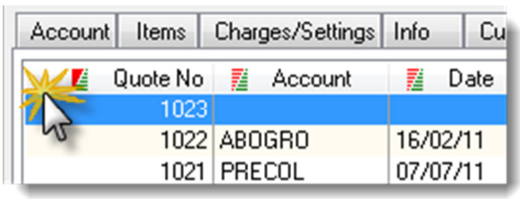
Finding Your Quote

Assuming you already have a quotation in your system that has been entered previously, your first step will be to retrieve it. (If you have not already done so, then review Sections 1-3 on how to create quotes.)

First begin by opening a new quote. If you are unsure on how to do this, review Section 1 of this tutorial.

Next, click on the **Open** button found at the top of the transaction. The list of all quotes in the system will appear.

If you do not know the quotation number, type in the account code of the customer directly onto the grid. The list of quotations relating to that customer will come into view.



But if you do know the quotation number, first click on the **Quote No.** column using your mouse. Then directly type the transaction number you are looking for onto the grid. The transaction will then come into view. Once the quote has been highlighted, press ENTER or RETURN, or press the **Open** button or double-click with your mouse.

The transaction will now open.

Making Your Changes

At this stage all you need to do is amend whatever needs to be changed on the quote as described in sections 1-3 of this tutorial.

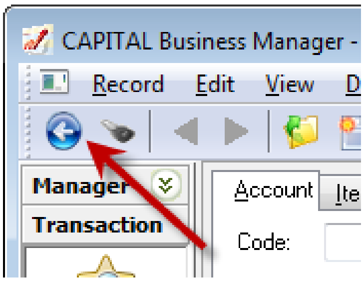
When you have finished making your changes, press the **Save** button.

At this point you may also be prompted for other information, such as being asked to confirm the salesperson assigned to the transaction, the freight amount to charge, and so on. Whether you are prompted to answer many questions or confirm the information related to your quote, will depend on how the software has been setup.

However, you will be asked one additional question. Which is do you wish to replace the original version of your quotation with your revised version? Respond by pressing the Yes button.

After the quotation is saved you may also be prompted to print a copy of the quote, or printing may occur automatically depending on your software's settings.

Finally, a new blank quote will appear, which will allow you to continue with further quotation processing if you wish.



If you don't wish to process another transaction, press the blue close button found at the top right hand corner of the application window. You will be returned to the main area or to the area you were previously working in.

Section 5

Accepting Or Rejecting Your Quote

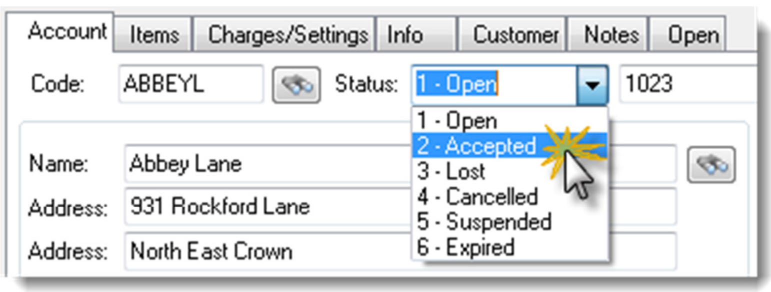
How To Record An Outcome – Changing The Status Of Your Quote

At some stage it is useful to record the outcome of your quote. Was it accepted? Was it rejected? What was the reason? This can be helpful later if you wish to do analysis on how successful you were at quoting.

In order to do this you must:

1. Go to the quotations area.
2. Find the quote.
3. Change the status of the quote.
4. Resave the quote.

Please review Section 4 on how to open and find quotes. Once you have the quote open you can indicate the outcome by changing its Status setting. This is found at the top of the transaction window.



The various status options are explained below:

Open The quote is newly issued or still current.

Accepted The quote was successful and accepted by the customer.

Lost	The customer did not accept the quote.
Cancelled	The quote was cancelled, i.e., you found out that the goods were no longer available so could not be supplied.
Suspended	The quote is no longer active or current. You can 'unsuspend' a quote later by changing its status to something else.
Expired	The quote exceeded its expiry date before it was accepted

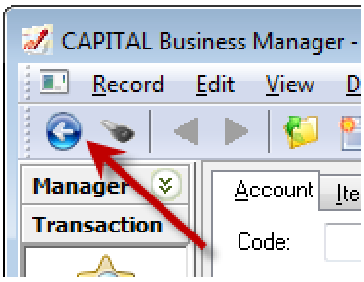
If you are only changing the status of the quote there will usually be no need to print it again. In that case, select from the quotation menu Options and uncheck the setting 'Send To Printer'. Removing the tick from this entry will stop the quote from being printed again.

When you have finished making your changes, press the **Save** button.

At this point you may also be prompted for other information, such as being asked to confirm the salesperson assigned to the transaction, the freight amount to charge, and so on. Whether you are prompted to answer many questions or confirm the information related to your quote, will depend on how the software has been setup.

You will also be asked one additional question: Do you wish to replace the original version of your quotation with your revised version? Respond by pressing the Yes button.

Finally, a new blank quote will appear, which will allow you to continue with further quotation processing if you wish.



If you don't wish to process another transaction, press the blue close button found at the top right hand corner of the application window. You will be returned to the main area or to the area you were previously working in.

Section

6

Quick Review

Important Points To Remember

- When clicking on the Explorer Bar hold down the SHIFT key to open the same area more than once.
- When using Quick Search, press CTRL+<backspace> to clear what you have typed and start the search over.
- Pressing F12 will open a look-up list or calendar when available.
- Press F3 to continue a Global Text Search.
- The quickest way to close the whole application is to press ALT+F4

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