

Quotations

All WinTree® - users have access to the 'Quotations' function after installing the 2019 version of WinTree® CONNECT.

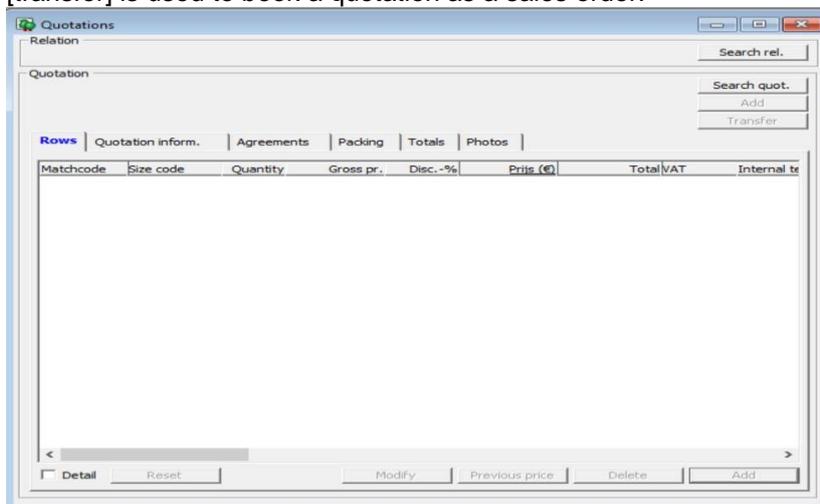
This function can be used to make and send non-binding quotations to contacts. Quotations can also be copied to other contacts, and booked as sales orders.

Headers and footers

Separate headers and footers, including e-mail text, can be made for quotations. First, go to File -> Basic information -> Texts -> Maintain text blocks and add a text block with the 'quotations' type. These texts can be linked to the quotations file by going to **File -> Basic information -> Texts -> Headers and footers**. Read the complete manual '[Texts](#)' for more information on entering texts.

Create a quotation

Open the Sale – Quotations menu, or use the  icon in the icon bar. In the contacts search screen, select the contact the quotation needs to be made for. The contact does not have to be a customer to have a quotation made for them. Using the quotations screen is similar to using the sales orders screen. [search rel.] is used to select another contact. [search quot.] is used to search for an existing quotation. [add] is used to add a new quotation. [transfer] is used to book a quotation as a sales order.



Use the [add] and [delete] buttons at the bottom right of the screen to add lines to the quotation, or delete them. Adding lines to the quotation is done in the same way as lines are added to sales orders. The difference is that quotations will never be sorted on stock. Determining the quotation price is done in the same way as in sales lines, provided the contact is also a customer. If this is not the case, it is possible the determination of the price is different. On the 'Quotation inform' tab, the [quotation text] button can be used to alter the header, footer and e-mail text. [Delete] can be used to delete the entire quotation.

Copy a quotation

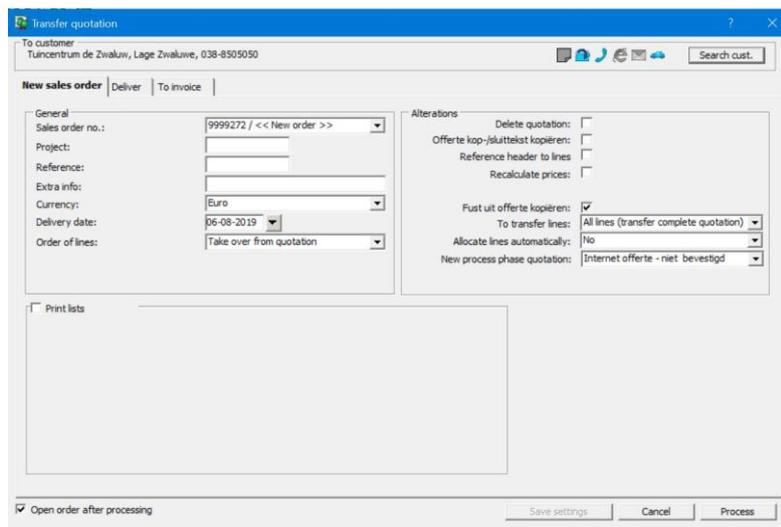
On the 'quotation inform.' tab, the [Kopiëren offerte] button can be used to copy the quotation to a new quotation for a different contact. Select the contact in the pop-up. It is also possible to turn on the 'recalculate' check box to recalculate the prices for the new quotation. The chosen contact has to be a customer to calculate the customer-specific prices.

Transfer a quotation

A quotation can be transferred to a sales order. To do so, the contact has to be a customer. 3 options are available when transferring:

- Transfer the entire quotation, including the quantities from the lines.
- Transfer the selected lines, including the quantities from the lines.
- Transfer the quantities present in the 'to order' column, which is used to determine which quantity is transferred to the sales order.

The screen that opens when the [transfer] button is clicked can be used to enter all kinds of information for the sales order. Use the 'to transfer lines' drop down menu to select a transfer option as described above. If values have been entered in the 'to order' column, the drop down will automatically select the 'take over from order' option.



It is also possible to select a different customer by clicking [search cust.] when transferring the quotation. A quotation can also be transferred to an already existing sales order. This screen can also be used to determine whether the sales order is directly made into a delivery note or even an invoice.

When transferring it is possible to automatically sort (option available in the pop-up menu). There will be sorted on own stock and sellable ingoing batches. Sales orders transferred from a quotation can be adjusted and filled out as usual.

Print or e-mail quotation

Quotations can be printed or e-mailed, just like sales orders, or order confirmations of a sales order. If multiple quotations have to be printed or e-mailed, use **File -> Print** or **File -> E-mail**.

Menu sales orders -> Change quotations

This menu will display all made quotations. Double-click on a quotation number to open the quotation and edit it. It is also possible to transfer a quotation from here. To do so, use the [Transfer] button after the quotation you want to transfer has been selected.

Other documents

In the menu **File -> Print**, besides being used to print quotations, can be used to select the following lists:

Quotations – Plant; a list in which, per plant, the quotations in which the plant is present is shown.

Quotations – contact; an overview of offered plants per contact.

Quotations – contact (compressed); a concise overview of offered plants per contact.

Quotation results; a per employee overview of quantities and values made into quotations and how many of these have been transferred to sales orders.