Chapter 6 - Daily Operations - Sales Quotes

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Tip

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1 Quick Start Summery

In Laymen’s terms, a Quote is a legal document, by which you agree to supply your customer with certain goods at a certain price within a certain date range. Quotes can be imported into Sales and Purchase Orders, GRN’s and Invoices.

Processing a Quote

- Click on Sales / Purchase Orders and Quotes, from the Quick access Menu
- Click on Sales Quote
- Choose your Printing option and click OK.
- Click on Process New Sales Quote
- Select your Customer.
- The body of the Quote will now appear.
- Select the amount of days your quote is valid for.
- Press Enter on your Keyboard to move to the next field.
- Fill in the date
- Choose the Rep by clicking on the down arrow, press Enter.
- Fill in the stock codes by typing in the first letter, e.g. L for Laptop, then choose the correct one and click select.
- Fill in the quantity and press [Enter].
- Now click on Finish and then [Save].
- On the next screen you have printing and email options or click escape.
- The Quote is now viewable by clicking on Reprint an existing Quote – in the Quote Module, or from the Debtor’s Record in the Super Menu, click on Quotes at the bottom, and on the Stock Record in the Super Menu – click on Quotes at the bottom.
2  What is a Quotation and why capture it in Revelation?

According to Private Law, a Quote is a formal (Printed and captured) statement of promise (submitted usually in response to a request for quotation) by potential supplier (You or your Company) to supply the goods (Stock Item) or services (Service Item) required by a buyer (Customer or Debtor), at specified prices, and within a specified period. It may also contain terms of Sale and payment, and warranties. Acceptance of the quotation (Sales Order) by the buyer constitutes an agreement binding on both parties.

If you issue a quote and one of the terms in the quote stipulates a period that the quote is binding for, you will have to have some form of proof that the terms have been met. By logging the quote on Revelation, it is both time and date stamped.

If the customer ever places the transaction in dispute, you will be covered.

Quotes that are logged, can easily be converted to Sales and/or Purchase order as well as serve as a very powerful sales tool in that you may print out expired or almost expired quotes in a report that you may give to you sales team to follow-up. In this way, competitors that abuse you will also be identified, as they will often request quotes on the same items but never order from you.

3  Issuing a Sales Quote on Revelation

From the Super Menu on the Left, Click on the “Menu” Button to display the Quick Access Menu. Now select the last option “Quotes and Sales/Purchase Orders”. Or use the Dropdown Menu on the top Toolbar.

Then Select the “Sales Quotes” button

You may also use the Top Dropdown toolbar to access the Sales Quotes or you may add a Quick Button on the new Programmable toolbar that will fast track you into the Quotes Choice Menu.
4 The Sales Quote Printer Choice Menu

You will now be presented with a Sales Quotes Printer Selection screen from where you may select several choices, depending on what you would like to achieve.

1) (See: Chapter 4 – Printer Choice menu, for more information).

2) This give the user the printer, layout and next available quote number. The quote number is only allocated to the quote once it is printed. This is due to the high number of users that may use Revelation simultaneously. If the number was issued beforehand, it would lead to gaps in the database when Quotes are not completed.

Tip: If the Multi Module option is switched on, one user may have multiple Quote open at the same time.

5 The Sales Quote MAIN Menu

This menu will now allow you to produce, edit and remove sales quotes from the system. Although Revelation allows sales quotes to be amended, in general this is NOT a healthy practice. The reason is simple; you will have more than one quote with the same quote number doing the rounds. We recommend that you rather open a new quote and import the quote you wish to amend, into the new quote. This reasoning will become apparent whenever a Sales Invoice amount is in a legal dispute. For this same reason Revelation does NOT EVER allow Sales Invoices to be amended. (This move limits Fraud).
5.1 Processing NEW Sales Quotes

Once you have selected the [Process NEW Sales Quote] Button, you will be prompted to select the client’s account that you would like to place the quote against.

5.1.1 Call-up and existing Customer’s Account (Normal and COD Debtors)

Clients that deal with you on a regular basis will have a Debtors account with you. You may have clients that do not trade with you or you would not like to give them a COD Account (See: ). For those clients you may open a Debtors Account Called COD. Use the Delivery address to specify the debtor’s details (Also See: 5.2.1.2).

Calling up an existing account can be done in three different ways. (See: Chapter 4 for more info on this)

You will now be presented with the search engine again. You may also choose to cancel the quote at this stage by clicking “Cancel”.

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5.1.2 Customer Information Screen

Depending on the setting under the User Preferences, you could or could not be presented with the Debtors Master Record Details and Notes. This is a very handy option as it allows the user to access as well as inform the client of potential issues that may delay the processing of the Quote to completion. (The client may be near the credit Limit, or overdue on payment).

![Customer Information Screen]

**WARNING:** If the client has access to this screen, they may notice unfriendly notes that could jeopardise your client relationship!? E.g. John is a bad payer, make sure he does not get discount.

**Tip:** To disable this screen, from User Preferences>>Invoice, un-tick the “Display full Debtors details during invoice/quotes” option.

Now clicked on the [OK] button, you will be presented with the main quotes screen. Depending on the Status of the client, you could also be presented with additional information such as if this is NOT an active client, or that this account is on hold due to OVERDUE alerts and would require a Supervisor Override, if the Supervisor Password is active.

![Frozen Account Status]

5.1.3 Main Quotes Page

You may now commence with the actual quote. Please take note that although this manual discusses all options in detail, you will find that the quote is fast and easy to produce. Depending on complexity and experience, the actual quote does not take more than a couple of seconds to complete.
The Main Quotes page Displays all the information available, some of the information presented will be pure information views, where-as other tabs may be edited. Use either your mouse, Enter key, Tab Key or the down arrow to move between tabs.

Tip: The following screen explanations are split into “Info Display” Screens, “Input Prompt” Screens or Both. The Info Display Screens display pre-defined information such as Account Numbers were as the input Prompt screen may have pre-defined information in them, but you may change the information to suit your quote, such as the quote Validity period.

5.1.3.1 Delivery Address (Info Display / Input Prompt)

This info Display screen displays the current quote customer details. Make sure that you are quoting the correct customer. In many cases incorrect selections have led to major discrepancies with nasty consequences. This is often the case in larger organisations where the possibility exists that clients could be having similar Names. A point in case would be a computer wholesaler with Omega Computers and Omega Technologies as clients. The one has an annual turnover equal to the other’s monthly turnover. In this case, rather make sure that you are making use of the pre-defined User Pricelist structures. Even if you have quoted the wrong client, you will still have given the correct pricing.

5.1.3.1.1 Customer Postal Address (Display Screen)

These days most mail is handled by e-mail. If however you still make use of traditional mail, confirm that the Postal address stated in this section is correct.
5.1.3.1.2 Delivery Address

When doing a Quote, it is assumed that you are in the early stages of contracting with the potential customer, and those details such as Delivery address may not yet be required. Due to this assumption, Revelation does not prompt you for a Deliver address unless this setting has been enabled under User Preferences >> Quotes >> “prompt for Delivery Address”.

If not enabled you may still select a delivery address by clicking on the Down arrow next to the Delivery address screen.

This will give you the following choice selections that you may insert:

The top part of the selection screen will indicate existing delivery addresses that you may click on and then press the Select Button (5). If you or your client require the goods to be collected from your premises, click on the “Collect” button(1). This screen will also allow you to maintain your customer’s details by allowing you to remove old or unwanted delivery addresses. Simply click on the address that you would like to remove and the click on the “Delete” button (2). The same goes for delivery address that you would like to update. By clicking on the “Edit” button (3), you will be given the opportunity to modify the chosen delivery address. Once completed, click on the [Save] button.
If you click on the “Add” button (4), a similar screen will be opened where you may add the new delivery address details. To close the delivery address field, click on the close button (6). For those customers that are using a Cash Debtors account for cash sales, you may search for customers using this field. See Amending a Quote. For this reason, be as thorough as possible when inserting delivery address.

5.1.3.2 Quote Details

This portion of the quote contains pertinent information to the contractual terms of the contract. Make sure that they are correct as you will fall back on them when things does not go according to plan.

5.1.3.2.1 VAT Inclusive Exclusive Display (Info Display)

When creating a new Debtors Account, on the [Control] page, one of the choices you will have is to select how the prices must appear on the client’s documentation. You may either choose excluding or Including Prices to appear on the documentation.

<table>
<thead>
<tr>
<th>Stockcode</th>
<th>Description</th>
<th>Excl Price</th>
<th>Included Price</th>
<th>Quantity</th>
<th>Discount (%)</th>
<th>Excl TOTAL</th>
<th>Included TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADAPTOR-01</td>
<td>MULTIPLE ADAPTOR</td>
<td>29.00001</td>
<td>22.80001</td>
<td>1</td>
<td>0.00</td>
<td>29.00</td>
<td>22.80</td>
</tr>
</tbody>
</table>

This Info Display simply indicates your choice. You may change this by going to the Super Menu>>Debtors and then calling up the Client. Now click on the “Control” page. Click the edit button and tick/un-tick the “Print Tax Excl. Invoice?” tab.

Tip: Remember to “hover” the mouse button over any choice button for a more detailed explanation as to what the selection box is for.

5.1.3.2.2 Account Number (Info Display)

Whenever a new Debtor is added, the system allocates a seven character account number to the debtor’s account. Many clients will use this number as a reference when they deposit the funds on acceptance of the quote. Make sure that it is correct.
5.1.3.2.3 Quote Days Validity (Info Display)

You may choose the default period that a quote is valid for when you setup your Revelation Company.

When you produce a quote, Revelation will insert this default period on the quote and then display the Expiry date in the subsequent info display box. You may now choose to amend or leave this period as is at this time.

Note how the Expiry date changes when the “Days Valid” option is amended.

5.1.3.2.4 Quote Issue Date (Info Display / Input Prompt)

When a user logs onto Revelation, they will be prompted for the date. The User that logs on first will set the default logon date for the day.

The Users that have access to changing the date may do so, depending on their function and requirement. Once logged on to a particular date, Revelation will use this date as the default date when doing quotes. When you require the entry date of the date to be different than the date that you are logged on as, you may change this date.

⚠️ TIP: You do not have to insert all 6 digits of the date, simply change the first to or four digits and then press enter.
5.1.3.2.5 Quote Expiry Date (Info Display)
If one looks at the definition of a quote above, it is important to know when a quote will expire. For this purpose we have built in a report that will indicate all quotes that are valid, about to expire or that have already expired.

5.1.3.2.6 Quote Number allocation (Info Display / Input Prompt)
When setting up your Revelation Company for the first time. It is possible to choose between an “Auto” or “Manual” Quote system.

This is usually done when reps make out quote on manual books and would like to then capture the quote after the fact. You may also change between them by ticking/un-ticking this option under System Preferences>>Order/Quote.

⚠️ **Hot Tip:** The more modern alternative to manual Sales Quote is to issue laptop and tablet PC’s to the Representatives. They are then linked to Revelation via an internet connection or by buying our Remote Invoice module. This module allows the Quotes, Orders and even Invoices to be “Sucked” into the main Revelation company data (Either by e-mail or direct link). See Add-on modules in this regard.

5.1.3.2.7 Rep Code Prompt (Info Display /Input Prompt)
Revelation has one of the most advanced Rep Code analysis and commission pay-out structure in any SME Accounting package. When a new Debtor account is opened, the system will prompt you for the DEFAULT rep that will be dealing with this client.
Whenever a new quote is issued, Revelation will use this Default code. You may change this rep-code if required. (See: Frequent Reports>>Rep Code Analysis for more detail).

⚠️ Tip: If you would rather like to have the user that is logged in to be the default rep then Go to Setup >> User Preferences >> [POS] >> Select “Default REP Code for Cash Sale invoices” and then tick the “Use above Rep for Debtor Invoices as well” box just below that.

5.1.3.2.8 Credit Limit Display (Info Display)

One of the most important considerations when opening a Credit facility is to determine the amount of credit that will be allowed. (Our aim is not to teach about the new Credit Act, but this should be a serious consideration when extending credit). You may decide this yourself or make use of a credit guarantee company that will specify the amount. By displaying the Credit amount on the quote screen, the person quoting will be able to determine if the quote will place financial constraints on the prospective deal and act accordingly.

5.1.3.2.9 Trade Discount (Info Display)

The word Trade Discount is derived from discount given to clients that are in the “SAME TRADE” as what you are, one Wholesaler trading with another. This discount is more widely used today to give general or overall discount to good clients. In essence, the trade discount that was pre-set when opening a new debtor’s account will populate the Overall Discount field at the end of any sales document. Before saving the quote, Revelation indicates what discount will be given at the end of the quote.

⚠️ WARNING: Make sure that you are NOT allowing Line and Overall Discount as this will constitute Discount on Discount.
5.1.3.2.10 Terms Display (Info Display)

Terms are the agreed period, in days, for carrying the clients account before payment is due. It is also pre-determined when creating a new client record. This may not be changed during transacting as terms form part of a legally binding agreement between the client and yourself. You may set the system to charge interest or “Auto freeze” account based on terms.

5.1.3.3 Quote Body inputs

You will now be able to insert the required information into the quote. Remember that you will be able to pull in previous quote for this client as well as other clients into this quote. Most quotes will usually start with message lines. You may now use the different tools provided to customise your quote.

5.1.3.3.1 Stockcode Input Prompts

You may now input all or part of the item’s stockcode as specified in your Stock (Inventory) file and press [Enter]. If a partial code is used, a window of matching items is displayed to choose from. By further typing in the rest of the stock code, Revelation will do a defined index search until the desired item is narrowed down.

If you prefer, you can left-click the down-arrow at the end of the current stockcode field and the entire stock file will be displayed in a Browse window from where you can choose the required item.

⚠️ Tip: Click on the [Show Pic], [Cross-Ref] and [Recent] buttons to see special information on the quote.

⚠️ Tip: Move the slider bar to the right to display more identifiers on the stockcode like Unit-of-sale, Bin location and Category code

5.1.3.3.1.1 Stockcode Input (F Key/Barcode/Down Arrow)

Use the F-Keys, (as described in Chapter 4 - F2, F3, F4 & F5) to search for the required stock. You may also use a barcode scanner to scan in the stock code. If you prefer, you may also be able to click on the down arrow next to the stockcode field in order to call up the stock list.

⚠️ Tip: Remember that you may Insert and Delete lines with the [Shift=Insert] and [Shift+Delete] keys. (See Chapter 4 for more information).
5.1.3.3.1.2 Special Codes Input (Chapter 4)

Press the [F9] key to call up a list of all the fields that are available to import into the Quote. You may also use the = options as described in Chapter 4.

- =S - Single Message Line
- =T - System Messages
- =O - Odd Items
- =P - Price Change (if not permanently on)
- =A - Assembly Invoice (If installed)
- =Q - Sales Quotes
- =R - Recipes & Kits

5.1.3.3.2 Description Input / Display Prompt

This input/display prompt indicates the description of the product that you have selected. If enabled, you may also amend the Description whilst quoting.

To enable this feature go to User Preferences>>Quotes and click on “Allow Stock items Description to be Modified”. Use this option with caution.

Otherwise Revelation will simply skip over this column when you hit the [Enter] button.

5.1.3.3.3 Price Input / Display Prompt (Excl./Incl.)

Depending on your initial choice of Exclusive or Inclusive Pricing Display for this client, you will be presented with the price for this item. If you are using a special Price list that was set up via the [Price List] option.
or the Special [StockPrice] link mechanism,

Revelation will use that price rather than the standard pricing for the item being quoted. By pressing the [Enter] button, you will be moved onto the next column or, if enabled, you could be allowed to modify the selling price of the item. You may change this Setting under User Preferences >> Quotes.

If this setting has been enabled, you will be prompted for a price. If you have set the customer’s account to excluding, you may insert an INCLUSIVE price and then click the [F5] key. Revelation will then calculate the excluding price for you. In some companies only higher prices will be allowed. Change this Setting under the User Preferences >> Invoicing.

Once enabled and you amend the pricing structure, the following message will appear when trying to give a price lower than the stated price. This phenomenon is called “Up selling”, and is usually used at auctions where the selling price is the minimum acceptable price for the item.

⚠️ Tip: When giving discount by amending prices, enable the Supervisor password structure and make sure that each user has got his “Minimum acceptable margin%” switched ON by setting a percentage and then...
Make sure that the Supervisor Password is set and the Prompt for this alert is ticked.

Also make use of the option to indicate cost price and margin at the button to ensure that the price is not under cost.

5.1.3.3.4 Tax Code Input / Display Prompt

Tax codes on stock items are usually present, as the Receiver has some pre-determined exempt items, like milk, that attract Zero VAT. The Debtors account is also usually set to either charge tax or not depending whether the client is a Foreign client or not. This is done when the Client’s account is created or amended.

If you have the correct prompts set, you may be allowed to modify the tax during the quoting process.
This would be in cases were the client could be a local client, but opened a branch in a neighbouring country to complete a contract. You will then be allowed to change the tax codes accordingly. Press the [F5] key when prompted for the Tax Code.

You may also change the client’s account to not charge tax until the desired period or invoice has been completed. This should only be done if the VAT Status quo changes for a prolonged period.

Note how the TAX portion on the quote has changed.

5.1.3.3.5 Quantity Input

Enter the quantity of the item that you are quoting on. You may however wish to work with a scanner. Sometimes it is quicker to scan an item twice than to actually change the quantity to two (as they do in supermarkets). If this is required, change the User Preferences>>Invoice to un-tick prompts for Tax Code, Price, Description and Quantity.
5.1.3.3.6 Line Discount Input

Line discount sets the discount for a particular line on the quote. This should not be confused with Overall Discount on the total quote. It is thus possible to allow overall discount on line discount. Rather decide which method is going to be used and set the system accordingly, per user. It would also be advisable to limit the amount of line discount that each user is allowed to allocate. See User Preferences>>Invoice.

Depending on the layout that you are using, when using Auto-discount, Revelation could print the line discount amount next to the Quantity column.

5.1.3.3.7 Line Total Display

Depending on what Tax display you chose for your Debtor, Revelation now tallies up the unit price with the quantity to indicate the total of the product line as an excluding or including total. If line discount was applicable, it would have been deducted.

This column can NOT be amended as all other calculation like the Total goods Value is based on this amount. When decimal quantity and currency is used, Revelation uses a rounding algorithm to calculate this total.
5.1.3.4 Post Body Information

Once all the Quote body information has been inserted, you may check that the totals are correct as well as, if the correct function has been enabled, check profitability, add freight and Check the VAT.

5.1.3.4.1 How to exit the Quote body

The body of the quote has been designed so that unlimited limes of information may be entered. It is for this reason that you will have to exit out of the document body. Use one of the following to exit the quote body:

- Escape button [Esc] – Hit the [Esc] key once on the stockcode field.
- Finish Button [Finish] – Hit the Finish button Once.

You should now check all the totals to ensure they are correct.

5.1.3.4.2 Overall Discount

This is the discount that is usually associated with Trade discount and is the discount given on the TOTAL Quote. Be careful not to give line and overall discount. To Control the amount of Overall discount go to User Preferences>>Invoice. You may set a percentage maximum discount that can be given by a user, or Switch off the prompt for overall discount on Debtors as well as Cash Sales. This will also switch of the overall discount on quotes. To enforce the maximum percentage discount, you must activate the supervisor password as well as tick the “Maximum Overall Discount% is exceeded” tick under “Prompt for Supervisor Override Password if…”

On quotes, also make sure that the Overall Discount is ticked.
5.1.3.4.3 Freight Amount
You may stipulate an amount here that will be charged for delivering the goods to the client. This amount will be placed under its own income field under the Trial Balance called “Freight Charged A/C”

You may also create a Service Item stockcode for freight and then link it to the same account. This will allow for fixed freight charges, whereas placing the freight in the field above, you will have to work of a freight charge chart.

5.1.3.4.4 Total Profit Display
Once the quote is in the post-body phase, Revelation will add up all the cost and selling prices per each item and then give you a profitability figure in both Currency and in Percentage.

See: User Setting>>Invoice Chapter 25 for more information on this function.

5.1.3.4.5 Goods Value Display
This is a Display screen of the Exclusive Total of all the goods on the invoice BEFORE discount and Freight (if the provided freight column was used).

5.1.3.4.6 Discount Display
If Overall discount (not line discount) was given to the client, the total discount will appear in this column.

5.1.3.4.7 Total Freight Display
If Freight was levied on this quote, the total freight amount will be levied here.

5.1.3.4.8 VAT Amount Display
The VAT amount in this column is levied on the Total of all the Vat types that you have set up and indicated in the “TX” column in the body of the quote as well as the Freight. The VAT is NOT worked out on the Goods Value column as this total may constitute taxable and non-taxable items.

5.1.3.4.9 TOTAL Quote Value Display
This is the Grand Total of the quote after Discount, Freight and VAT. This is the amount that the client will agree to once he accepts the quote.
5.1.3.4.9.1 Rounding Quotes
Although the Quote may not be rounded at this stage, if you have rounding switched on (See: Chapter 25) the printed Quote will be rounded of the setting in the rounding table.

Round Cash Sales down to nearest xxx Cents 5
Round Debtor Sales down to nearest xxx Cents 5

5.1.3.4.10 The Finish & Save button
To leave the body of the quote, click on the [Finish] button. You will now be prompted for overall discount and Freight (if these fields are enabled). Once you have checked your quote, you may store it onto the client’s record by clicking the [Save] button.

Tip: You may also use the [Esc] button to leave the body of the quote.

5.1.3.5 Post Quote Options
Once the quote has been saved, it will print. You will then be presented with the following Post quote selection screen. The quote number will now be displayed at the top. As mentioned before, due to the potentially large number of users quoting at the same time, quote numbers are only issued as the quote is saved.

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5.1.3.5.1  Print a Duplicate copy of this Sales Quote
This option services a dual function. You may want to print another copy of the quote that you have just completed or in the event that you chose the option to “Process Sales Quotes with option to Print AFTER processing” the quote, you may now print an original quote.

5.1.3.5.2  Process a New Sales Quote
This option will begin a new quote. Simply choose a client’s account, in order for you to repeat the quote process.

5.1.3.5.3  Process another Sales Quote to the same account
This option assumes that you would like to make out another quote for the client just quoted. You will be fast tracked to the “Days Valid” screen or

If, you have enabled the delivery address prompt, to the delivery address selection field.
5.1.3.5.4  E-Mail a copy of this Quote to the client

You will now have the opportunity to send the quote to the client via an e-mail. At the time of writing, Revelation utilises the Nova PDF engine to send quotes to the clients. See Terminal Preferences>>PDF files. If you have pre-entered an e-mail address for quotes when you setup the client’s Master record, it will be displayed in the field. Then revelation will send the e-mail attachment to that email address populated in this field.

You may over-type a new address or, if you have extra e-mail address setup under miscellaneous button, you may use it by clicking on the down-arrow. Once you have selected the required address, click the [Select] button (2). You may also add a new address by clicking the [New] button (1) or remove an old address by clicking the [Delete] button(3).

After the email has been successfully sent, the following notes screen will be displayed.

Once a quote has been logged against a debtors Account, you will be able to view it easily by simply calling up the Debtors account via the Super menu.

Now clicking on the “Quotes” Button. If the “show Cost and margin” tab under User Settings>>Invoice is switched on,
you will also be able to see the profit and margin on the quote.

A quote is one of the most important stages of any business deal, as it sets the tone and rules for the pending business transaction. With Revelation it is so simple to convert a quote to a Sales Order, Multiple Purchase Orders and to an Invoice. If the quote was done correctly, the rest will be easy to complete. There are various reports and exports to track the state of your quote and to track the performance of your sales and sales teams.

⚠️ Tip: Use the [Dashboard] button for a quick overview of your quotes status for the day, month and year, with comparisons to previous periods.

5.1.3.5.5 .Exit Post Quote Screen

This option will return you to the main Quote page.

5.2  Amend existing Sales Quotes

In General, it is not advised to amend quotes, as the client or perspective client, will have a copy of the original quote. Whenever the quote is in dispute, you will have more than one version of the quote with the same quote number doing the rounds. It now becomes an issue to prove which of the quotes was intended to govern the original intent. We advise to rather create a new quote and then import the original quote. You may then amend the details to your liking. Remember to state that the new quote replaces the old.

If however, circumstances dictate that the original quote be amended, then you may do this by calling up the original quote, and then simply amend it as if you were doing the original quote.
5.2.1 Quote Amend Selection

Click on the [AMEND existing Sales Quotes] button. You may now search for the original quote by making use of one of the following three search engines.

5.2.1.1 Search by Number

If you have the original quote number handy, simply place that in the “Search using Quote Number” field and the press the [Enter] key on the keyboard or the [OK] button. The intended quote will now be displayed.

5.2.1.2 Search By Delivery Address

This method is usually associated with CASH CLIENTS. It is not uncommon for companies to open a debtor’s account called C.O.D. or CASH SALES. In this event it is possible to have each Client distinguished by making use of the Delivery address in the Debtors field as shown further on.

⚠️ Tip: Make sure that you have selected the “This is a Cash Client” option on the Control page. Most businesses make the mistake in letting these clients go onto credit on this account. Rather open a debtor’s account for clients that don’t pay immediately.

When doing the Quote, call up the COD DEBTOR account. When prompted for the Delivery addresses then all up the account name of the customer that you would like to quote.
When you want to amend the quote, you may now use the details in the Delivery address to search for the client. The prompt will search for the information that was added to the 1st Address line in the Delivery Address. Insert the Company name (or part their-off) in the query line and then press the [Go] button.

If present, all the quotes for this Cash Client will be called up. Click on the [Display Quote] button to make sure that you select the correct Quote to amend.

⚠️ Tip: You may also use the other Address lines in the Delivery Address to search for customers quotes by clicking on the [2] [3] & [4] Buttons

### 5.2.1.3 List of Outstanding Quotes

When you want to amend a quote, but you do not know the quote number, you may call up the quote by doing a quote search per customer. Click on the [List of outstanding Quotes] button. You may now call up the selected customer by doing a normal search. Once the customer has been called up, a list of all the quotes that are logged against this account will be displayed. Use the [Display Contents] button to search for the correct quote. To amend the quote, simply click on the [Amend] Button.
5.2.2 Price update confirmation Screen

Regardless of what method you used to call up the quote, once in the amend mode, you will be asked to confirm if Revelation should automatically update the quote to the latest pricing on record in the stock file.

If you choose the [Yes] option, Revelation will search for and insert the latest pricing for the particular stockcodes on the quote for this customer (in the case of special pricing).

5.2.3 General Amendment to a Quote

You will now be presented with the original quote except the “Amend” sign will be displayed. Once you have effected all the changes, the Quote will replace the previous version as if it never existed.

To finish the amend screen, press the [Finish] button as per normal.
5.2.4 Post Amend Options
Once the quote has been amended, the post-amend Screen will appear.

5.2.4.1 Amend Another Sales Quote
This option will call up the quotes amend option screen. You may now choose other sales quote to amend by using the methods as described. Once you are complete, select the [Exit] button, this will take you back to the main quotes page.

5.2.4.2 Print a Duplicate of the Amended Quote
If you chose the option to NOT Print the quote when you started the process, you may now print the quote from here, or you may print copies of the quote.

5.2.4.3 E-Mail a Copy of this Quote
In order to inform the customer with the amended quote details, simply hit the e-mail button.

Depending if you have specified an address under the quote option of the Customers e-mail settings or not, the e-mail will be sent to this address or in the case that you did not specify an address for quote, the general address will be used.

Tip: To find out more about the e-mail options, click on the “”. A detailed explanation will follow.
5.3 **Cancel existing Sales Quotes**

It is highly recommended that quotes do not get deleted. One of the main reasons for this is the fact that old quotes will give a good indication of the performance and trends as well as quality control of your sales staff.

You may also pick up patterns on debtors account, especially those that never order from you. According to common as well as tax laws, source documents need to be on file for at least five years. Quotes are no different. If however you do need to get rid of a quote, you may either purge a range of quotes at month end (see Chapter 24), or you may select the quote one by one and then delete them by choosing the [Cancel existing quote] option above. As with “Amend” quote, you will have the option to call up the required quote.

Use the [Display Contents] button to locate the correct quote to be deleted. Once located, hit the [Delete] option. Now confirm your selection.

⚠️ **Please note:** The removed sales quote number will NOT be available for a new quote.
5.4 **Reprint existing Sales Quotes**

Revelation allows both existing and cancelled quote to be reprinted. The reason for this is obvious. To reprint an existing quote, click on the [Reprint Quote] button.

5.4.1 **Quote Reprint Selection Screen**

You will now be presented with a screen similar to the “Amend” quotes screen. You may now call up a quote to be reprinted by either inserting the quote number, doing an address search, or by searching the List of quote linked to the clients account number.

You may now also reprint Cancelled quotes. Although the quote is no longer linked to the clients normal account, we have found that need does exist to keep the cancelled quote on the database.

⚠️ **Please note:** Once the quote has been purged via the month-end, you will no longer be able to reprint or re-instate it.

Both the [List of Outstanding Quotes] and the [List of Cancelled Quotes] will give you the same options except for one option, “Reinstate Cancelled Quotes” in the case of the latter option.

5.4.1.1 **E-Mail Reprint Quote**

*See: 5.2.4.3*
5.4.1.2 Display Content First
This option will allow you to view the quote first before printing or E-mailing it.

5.4.1.3 Reprint Quote
This option will re-print the Quote to the quotes default printer. If you would like to print to another, first change the printer options as explained in 5.7.

5.4.1.4 Reinstate Cancelled Quotes
In the event that you would like to re-instate a deleted quote, you may select the required quite to be re-instated. Once the selection has been confirmed, it will be placed back on the Customer’s account.

The original information such as Expiry dates and validity periods will also be re-instated. (Expired quote will remain expired).

5.5 Print Quote Line-up
This option allows you to print a “Dummy” or blank quote. Use this option to make sure that your printer is lined up correctly (in the case of Dot-matrix Printers), or that the correct layout is used for this quote. In many companies, different layouts are used for different divisions in the company.

5.6 Set Quotes Parameters
In the event that your company uses more than one type of layout for quote, you may choose to temporarily change between different layouts. A good example would be were a car radio company also install tracking equipment. Usually the Tracking Company requires that you use their quote layout in order to make the deal legal (due to their own terms etc.).

5.7 Select Another Printer
It may further be that each of the layouts above has its own paper that should be used to print on. Instead of having to change paper all the time, load the paper in different printers. When changing quote types, use this option to also change printers.

5.8 Exit Quote Module
This option allows you to exit the quotes Module into the main Desktop.
6 Review
Notes