

Quotations

Because first impressions are everything

To the outside world, quotes are your business's "shop window", projecting your image and efficiency, as well as your pricing. Attaché Quotations reduces the time it takes to prepare quotes and helps automate processes from start to finish — quote to order to invoice — thus eliminating re-keying.

Key benefits

- Create and modify quotes for existing and temporary customers
- Fax and email quotes quickly and easily with Attaché Alex
- Re-use quotes, orders and invoices from any customer
- Customise your quote layouts and data entry screens
- Read quotes into orders and invoices
- Create quotes from simple kits and templates

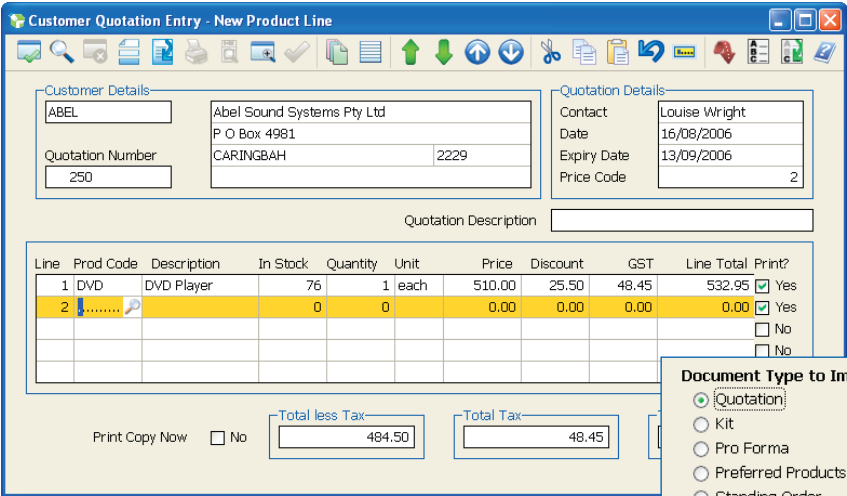
standing orders, standard templates (pro formas) or preferred products' lists.

When displaying prices from items read-in, you can accept the prices from the re-used document or apply the standard product pricing, including any special pricing set up using the Customer Special Pricing option.

You can also import items within a quote, such as product kits. Items can be manually added or deleted and prices changed prior to being accepted, re-sent or read-in as an order.

Creating quotes

Quotes can be raised from scratch or read-in from previous quotes, orders, invoices,



Customer Details

ABEL | Abel Sound Systems Pty Ltd
 P O Box 4981
 CARINGBAH | 2229

Quotation Details

Contact: Louise Wright
 Date: 16/08/2006
 Expiry Date: 13/09/2006
 Price Code: 2

Quotation Number: 250

Quotation Description: _____

Line	Prod Code	Description	In Stock	Quantity	Unit	Price	Discount	GST	Line Total	Print?
1	DVD	DVD Player	76	1	each	510.00	25.50	48.45	532.95	<input checked="" type="checkbox"/> Yes
2			0	0		0.00	0.00	0.00	0.00	<input checked="" type="checkbox"/> Yes

Total less Tax: 484.50 | Total Tax: 48.45

Print Copy Now No

Document Type to Import from

- Quotation
- Kit
- Pro Forma
- Preferred Products List
- Standing Order
- Customer Order
- Customer Invoice

Quotes for existing and prospective clients

Quotes can be raised for both existing customers and prospective (temporary) customers. Once accepted, you can automatically turn a temporary customer into a permanent one — without wasting time re-keying information.

Alternative products

Instantly see stock availability when raising a quote. Using the alternative products facility in Attaché Products & Services, you can immediately view a list of products (and their stock level) which you can then use as substitutes if a requested item is out of stock.

Turning quotes into orders and invoices

You can choose to automatically read-in quotes into orders or directly into an invoice. This eliminates re-keying and ensures orders are invoiced with prices and quantities as quoted.

Unsuccessful quotes can be retained or they can be deleted based on a range of expiry dates, customers and/or quotation numbers.

Additional features

- Quotation details and profit analysis reports
- Customised reporting with Attaché ODBC
- Set expiry date defaults — for example, 30 days from quote date

Requirements

Quotations requires Attaché Customers. The typical business would also have Order Entry/ Invoicing and Attaché Products & Services. Attaché Alex is also highly recommended.

Item Code	Description	Quantity	Par	Price	Amount
(Product Code)	Description	(QTY)	(Par)	(Price)	Total Tax
(Scribe Code)	Description	(QTY)	(Par)	(Price)	Total Tax
(Product Code)	Description	(QTY)	(Par)	(Price)	Total Tax

Customise to your needs

The ability to easily design your data entry screens and layouts means that you can customise Quotations to suit your needs.

- Tailor entry screens
- Design your own layouts
- Create multiple designs



Attaché Software Australia Pty. Limited
18 Berry Street, North Sydney NSW 2060
PO Box 1070, North Sydney NSW 2059
Tel +61 2 9929 8700
Fax + 61 2 9925 0481

Attaché Software New Zealand Pty. Limited
Level 5, 93 Grafton Road, Parnell, Auckland
PO Box 37-623, Parnell, Auckland
Tel + 64 9 302 9390
Fax + 64 9 302 9391

Email info@attachesoftware.com
Website www.attachesoftware.com

Fax and email quotes via Attaché Alex

The Attaché Alex document delivery service lets you send quotes by fax or email directly from your Attaché system. You can then see whether the quote has been received (or more importantly, if it hasn't). This improves response times and customer service. The time and cost savings Alex provides may pay for Quotations many times over.