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SURE*fire*

BGEN-2l	*Page| 1 of 3*
Category	Product
Course	AR
Version	1.0
Client	Generic
Software	2.12.0.0

Customer Account Quotes

You can use the SUREfire Quotes function to record a purchase on 'account' via the BOS (rather than at the POS), or to provide a customer with a quote for a special order (perhaps for products you can range but don't normally stock).

Procedure to Create a Quote

Refer to page 3 to convert a quote into a sale.

1.	From the HOS/BOS **Receivables** menu, select **Quote**.	
2.	Click [New] .	
3.	Change the **Date** and **Expiry Date** if required. *Theses are a reference only; an expired quote can still be honoured in the system.*	
4.	In the **Code** field, type or search for the customer's account number to raise the quote against. *Any billing address details entered against the customer's account are populated.*	
5.	Select an alternative **Delivery Details**, if the order will be delivered to an address different to the customers billing address. *These are populated from the **Delivery Address** tab on the customer's account.*	
6.	If a Head Office (HOS) user, select the **Branch** (store) that the stock will be sold from if the quote is converted to an invoice. *Store users: leave this as your own store.*	

Hints and Tips

✓ You can create a **quote** for any customer who has an **AR Account** in the BOS. It doesn't matter what type of account they have (e.g. 'cash account' or line of credit 'account').
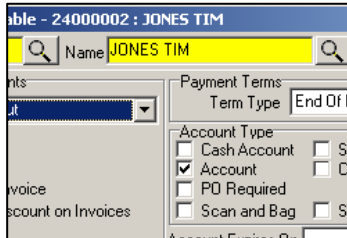
✓ HOWEVER, it's recommended that you only **convert a quote into an invoice** for 'account' type customers.
- Invoice sales are only reported for 'account' customers.
- The only way to track outstanding amounts owing is on the customer's AR account and via the EOP statement cycle.

✓ There are no SURE*fire* reports available that list the quotes/invoices created.

✓

✓ **To edit an existing quote**:
  1. Retrieve the customer's **Code.**
  2. Search for the **Quote No.** (if you don't know it).
 3. You can edit any parameters, in the same as during create mode.

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Hints and Tips

✓ A quote is saved based on the **Current Retail Price** in the stock record. This means that it's inclusive of any active promotions, but not of any loyalty level promotions or discounts.
  • If the promotion ends before the quote is converted into an invoice, the promotion price still applies to the quote.

✓ **Important**: The system will not stop you from adding items that have been **logically deleted** (by supplier) or **physically deleted** (ready to be permanently deleted from the system).
  • Make sure you have or can get the stock before you convert the quote into an invoice!

✓ If the customer has a **discount** saved against their AR account, (on the **Loyalty** tab) this is shown and reflected in the adjusted **Grand Total** for the quote (and will print).
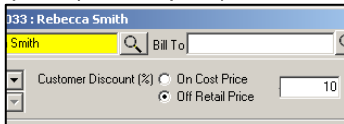
✓ Click [Undo] to cancel all data entries on the screen.

✓ The **Instructions** section isn't used in this version; any text will be removed when you save.
  • There is another text field underneath the products grid, but this is for internal use only; any text only shows on the **Quote** screen and the **Quote** tab on the AR account, it won't print on the quote or the invoice.

7.	In a blank **Code** field in the grid, scan, type, or search (via double-click) for the stock code or EAN to add to the quote; press **Tab** or **Enter** if you typed the code**.** *The current sell **Price** is populated.*	
8.	In the **Quantity** field, type the number of units being quoted. *The **Extended** price and totals are updated.*	

9.	**To:**	**then:**	
	add another product	return to step 7.	
	remove a product	click the cursor in the applicable row. Press [**Ctrl**] [**Del**] at the same time. *The row is highlighted red and will be removed when you save.*	
	finish	click [Save]. *A **Quote No.** is assigned.* Click **Yes** to print the quote. *A preview is displayed.* Click [🖨] to print the quote. Click [**X**] to close the preview.	

10.	**To:**	**then:**	
	create another quote	return to step 2.	
	finish	click [Close].	

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SYSTEMS

Procedure to Convert a Quote into an Invoice

Hints and Tips

✓ The act of creating an invoice means that you're processing a sale to account; the only difference is that you're doing this from the BOS rather than at the POS register.

✓ Sample invoice:
  • If you need to reprint the invoice at a later date, do this from the customer's AR account -> **Transaction** tab.
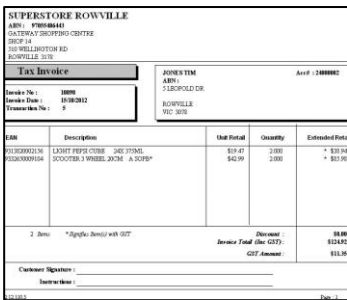
✓ Once you've created the invoice, the quote is updated to highlight this.

  • A warning will display if you click **Create Invoice** again; if you continue, you will be charging the customer twice (which is fine if it's a repeat order to save time creating a new quote that's identical to this one).

1.	From the BOS **Receivables** menu, select **Quote**.	

2.	**If you:**	**then:**	
	know the quote number to retrieve	in the **Quote No.** field, type the reference number. Press **Tab** or **Enter**.	
	need to search for the quote	click 🔍 next to the **Quote No.** field. It's recommended you search by a **Customer Code**; if you perform a blank search, the results will list every quote ever created. Click **Search**. Double-click the required quote to load.	

The quote details are retrieved.

3.	Click 🔲 Create Invoice	
4.	Enter your POS **Operator ID** and **password**.	
5.	Click **OK.**	
6.	Click **Yes** to print the invoice. *A preview is displayed; click 🖨 to print it.*	
7.	Click [**X**] to close the print preview.	
8.	**To:** then:	
	convert another quote	return to step 2.	
	finish	click 🔲 Close .	