Quoting Client

1. Obtain vendor quote approval & verify client quote amount with TL
2. Quote client using “Client Quote Email template” (below)
3. Note move with “Client Quote Move Note” template (below)
4. Enter client quote (move details tab)
5. Place move on hold – hold reason: “pending client quote approval”

Client Quote Email template

Hello,

Please see below quote and advise if approved.

Quote:

Thank you,

Client Quote Move Note

- Vendor name
- Vendor quote
- Availability PU & delivery
- Client quote amount:
- Quoted client: (email or phone, client rep name if applicable)

Client Approves Quote:

1. Note move with approval – copy/paste emailed approval to include signature with name of who approved.
2. Change move status from hold > verified & assign move to working party
3. Step 2 – If PUL info was not available until quote approval, call PUL and complete step 2. DO NOT PROCEED UNTIL CONTACT HAS BEEN MADE WITH PUL – See TL if PUL is unable to provide info or contact cannot be made with PUL.
4. Confirm all documents vendor will need in addition to dispatch PPW are uploaded to move. (Ex docs: pick up authorization, repo authorization, hold harmless, VSF, et.)
    a. Files > File Type: “Vendor I Miscellaneous”
5. Dispatch – verbally recap all info and verify all-in quote at dispatch. Confirm & update ETA to reflect accurately on move. ****Remove "Quote Only" from PO BEFORE sending vendor PPW***** Include Dispatch Disclaimer on dispatch PPW.
    a. Provide any new details from Step 2 that become available after quote approval, update vendor with info. If vendor quote changes as a result, client will need to be re-quoted.
6. Update client with ETA
7. **Remove "Quote Only" from PO**

Client Denies Quote:

1. See TL for cancel approval.
2. Note move with denial – copy/paste emailed denial to include signature with name of who denied.
3. Cancel move – cancel reason: "client denied quote approval"