



eTurns

# Quotes

Help documentation



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Use the Quotes module to send prospective vendors a list of materials, with its quantities, for a price quote. Quotes can be processed based on user permission(s) in a unsubmitted, submitted, or approved state.

## Guidelines

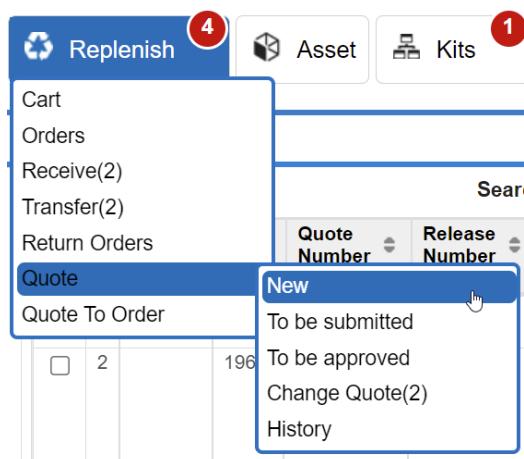
### 1. Quick Reference Guide – Create a New Quote

To create a new Quote, point the mouse over Replenish, Quotes and click on New.

- Click on the Supplier drop-down arrow and choose supplier(s)
- Click Save
- Search for item(s) or highlight row(s) of item(s) to add to the Quote.
- Click the Add button for each line item or the Add button at the bottom of the page.
- Click Close.
- Click the Quote Status drop-down arrow and choose Approved.
- Click Save.
- Click Yes.

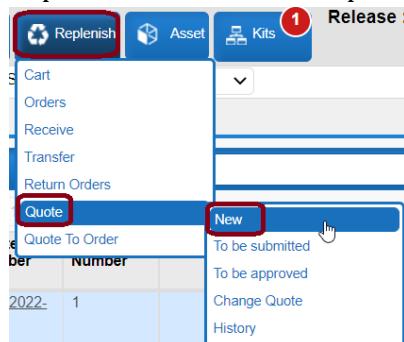
A new Quote has been created and ready to be turned into an Order.

- Click on the Quote Number of the newly created quote
- Select row(s) of items or select all
- Click on Create Order Button
- Click the Supplier drop-down arrow and choose the supplier to send the order to
- Click Save
- Click Yes



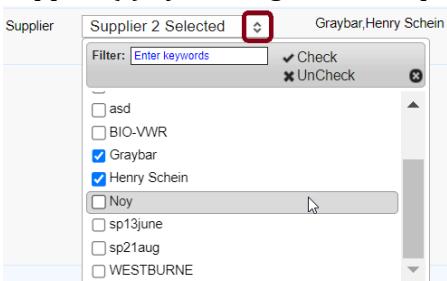
## 2. Create a New Quote - with General Details

To create a new Quote, point the mouse over Replenish, Quotes and click on New.



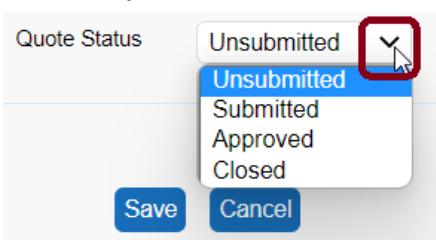
The Quotes Header page is displayed:

- Choose supplier(s) by clicking on the drop-down arrow. Quotes will be sent to the supplier(s) selected.



- The Quotes module will send the Quotes to the supplier(s) selected. It disregards the default supplier set in the item(s) page and allows the user to select the supplier to Quote from.

- Quote Number – is the identifier of the Quote.
- Required Date – is setup in the Supplier's page *Default Order Required Days*.
- Quote Status – initially starts as unsubmitted, but after adding items the Quote status can be selected.
  - Unsubmitted – Quote created but not submitted to the supplier (Quote will not be sent to supplier).
  - Submitted – Quote submitted but not approved (Quote waiting on approval).
  - Approved – Quote has been approved (Quote will be sent to the supplier).
  - Closed – Quote has been closed. An unsubmitted or Submitted Quote can be closed.





- Comment – text field that can be used to describe the Quote.
- Release Number – unique identifier assigned by the software to distinguish between Quotes regardless of Quote number or Quote name.
- UDF – user defined field for Quotes.
- Click “Save” button.

Quotes

Room : NoyStock Rm | Created On Date : 9/12/2022 2:38:14 PM | Created By : noysa | Updated On Date : 9/12/2022 2:38:14 PM | Updated By : noysa

Quote Number \* 9/12/2022-12 Required Date \* 9/12/2022 Quote Status Unsubmitted Supplier Supplier 1 Selected Graybar

Comment

Release Number 1

Save Cancel

Add New Item

# of Line Items : 0 Total Cost : \$ 0.00

The “Add new item(s) to Quote” page will be displayed, after clicking **Save** in the Quotes Header page.

Add new item(s) to Quote

Search  X

Show 10 Records < 1 2 3 4 5 ... 22 >

#	Add new	Qty	Item Number	Last Cost	Room	Created On Date	Updated On Date	Updated By
1	Add	7500	01-213-104	25.00	NoyStock Rm	9/14/2018 11:47:43 AM	9/12/2022 1:19:24 PM	noysa
2	Add	15	06-666-1A	150.00	NoyStock Rm	9/14/2018 11:47:43 AM	9/12/2022 12:28:45 PM	noysa
3	Add	200	1001570	0.00	NoyStock Rm	12/28/2018 7:27:49 PM	9/12/2022 12:10:04 PM	noysa
4	Add	1	1014947	1000.00	NoyStock Rm	12/28/2018 7:27:50 PM	9/12/2022 12:10:05 PM	noysa

- Select the items to Quote and click the **Add** add button to accept the displayed quantity.
  - The Qty column displays the default Quote quantity of the item.
  - Enter or select the UDF fields if applicable.



- Select the items to Quote individually and click the **Add** button or highlight row(s) of items and click the **Add** button at the bottom of the page to add multiple items all at once.

Date Updated

From

To

8	<input style="border: 1px solid #0070C0; padding: 2px 5px; border-radius: 5px;" type="button" value="Add"/> <input style="width: 30px; border: 1px solid #ccc; padding: 2px; margin-right: 10px;" type="text"/> 11032021	35.00	NoyStock Rm	11/3/2021 9:38:18 AM	12:27:49 PM	9/12/2022 12:10:06 PM	Noy	noysa					11032021	Henry Schein			
9	<input style="border: 1px solid #0070C0; padding: 2px 5px; border-radius: 5px;" type="button" value="Add"/> <input style="width: 30px; border: 1px solid #ccc; padding: 2px; margin-right: 10px;" type="text"/> 200 1126131	19.99	NoyStock Rm	12/28/2018 7:27:50 PM	9/12/2022 12:10:06 PM		noysa	noy production	HS1007	Henry Schein Inc.	1126131	Henry Schein					
10	<input style="border: 1px solid #0070C0; padding: 2px 5px; border-radius: 5px;" type="button" value="Add"/> <input style="width: 30px; border: 1px solid #ccc; padding: 2px; margin-right: 10px;" type="text"/> 1 1156308	0.00	NoyStock Rm	12/28/2018 7:27:50 PM	9/12/2022 12:10:06 PM		noysa	noy production	2009828-024	Henry Schein Inc.	1156308	BIO-VWR					

■ Denotes on hand quantity of item is less than critical quantity  
■ Denotes on hand quantity of item is less than minimum quantity

Add

Close

Search or use Narrow Search for items to be Quoted.

- The items to be Quoted can be filtered by the Narrow Search or Search options.

**Narrow Search By:**

Supplier

Manufacturer

Category

Cost:

Stock Status:

Average Usage:

Turns:

Item Type

User (Created by)

User (Updated by)

Date Created

Date Updated

**Search**

- Supplier:** Filter items to be Quoted by supplier. Check/uncheck the box corresponding to the name of supplier. This will display the items to be Quoted, filtered by supplier(s).
- Manufacturer:** Filter items to be Quoted by manufacturer. Check/uncheck the box corresponding to the name of manufacturer. This will display the items to be Quoted, filtered by manufacturer(s).

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- c. Category: Filter items to be Quoted by category. Check/uncheck the box corresponding to the name of the category. This will display the items to be Quoted, filtered by categories.
- d. Cost: Filter items to be Quoted based on a range of cost.
- e. Stock Status: Filter items to be Quoted based on their current stock status, whether Out of Stock, Below Critical, Below Minimum or Above Maximum.
- f. Turns: Filter items to be Quoted based on a range of the number of turns.
- g. Item Type: Filter items to be Quoted by Item type, Item, Quick list, Kit or Labor.
- h. User (Created By): Filter items to be Quoted by user created by.
- i. User (Updated By): Filter items to be Quoted by user updated by.
- j. Date Created: Filter items to be Quoted by Date Created from and to range.
- k. Date Updated: Filter items to be Quoted by Date Updated from and to range.

- After selecting the items to Quote, click on the **Close** button at the bottom of the *Add New Item(s) to Quote* page.
- The Quotes page will be displayed with the number of line items Quoted and the total sell price.
  - Total Sell Price is the sell price of all items Quoted.
- Quote Status – choose from the following Quote status:
  - Unsubmitted – Quote created but not submitted to the supplier (Quote will not be sent to supplier).
  - Submitted – Quote submitted but not approved (Quote waiting on approval).
  - Approved – Quote has been approved (Quote ready to be sent to supplier).
  - Closed – Quote has been closed. An unsubmitted or Submitted Quote can be closed.
- Click Save.

**Quotes**

Room : NoyStock Rm | Created On Date : 9/12/2022 2:38:14 PM | Created By : noysa | Updated On Date : 9/12/2022 2:42:56 PM | Updated By : noysa

<input checked="" type="radio"/> Quote Number * 9/12/2022-12	Required Date * 9/12/2022	Quote Status Unsubmitted <b>Unsubmitted</b> Submitted Approved Closed	Supplier	Supplier 1 Selected	Graybar
<input type="button" value="Save"/> <input type="button" value="Cancel"/>					

**Add New Item**

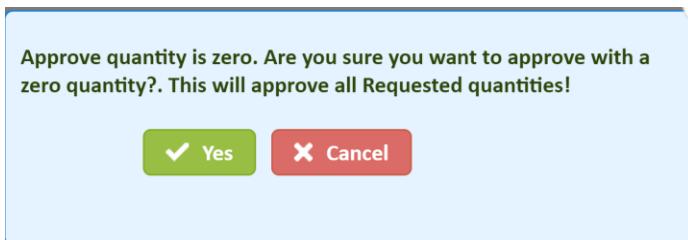
# of Line Items : 4 | Total Cost : \$ 19,910.00

Search															
Show	10	Records <	1	>											
#	ID	Item Number	Bin	Requested quantity	Approved quantity	Required Date	Ordered Quantity	On Hand Quantity	Staged Quantity	Description	UOM	GL Account	Last Cost	Mark up	Sell Price
1		01-213-104	WMain	7500	0	9/12/2022	0	485110	4	25ft Aluminum Foil 4	EA	8179	25.00	15	28.75
2		06-666-1A	Noy-WMain	15	0	9/12/2022	0	2463	6	Large Kimwipes	PK	8179	150.00	25	187.50

Buttons on the left: Edit, To be submitted, To be approved, Change Quote, Story



- Clicking Yes will populate the approved quantity with the requested quantity.



Quotes will be sent to suppliers integrated through EDI. For non-integrated suppliers, a scheduled report called Quote to Supplier can be setup. Navigate to Reports, then click on Schedule Report(s).

### 3. Create Order(s) from a Quote

A quote sent to supplier(s) can be turned into an order. Create an order from a quote that does not have a quote status of closed. Open the Quotes module by pointing the mouse over Replenish and click on Quotes. This opens the Quote History Tab, or the historical data of the Quotes.

The screenshot shows the eTurns application interface. At the top, there's a navigation bar with links for Reports, Dashboard, Administration, and Poll All. Below the navigation is a header with the company name 'Rock testing' and a user 'Noy Testing'. The main area is titled 'ROCK' with a release version of '4.6.100.0'. On the left, there's a sidebar with filters for New, To be submitted, To be approved, and Change Quote. The 'History' tab is currently selected. In the center, there's a grid table for Quotes. The table has columns for #, Expand, ID, Quote Number, Status, # of Line Items, Cost, Change Quote Revision, Created On Date, Created By, Updated On Date, and Updated By. The first few rows show quotes with IDs 336, 335, 334, 333, 332, 331, 264, 196, 181, 180, and 179. A context menu is open over the first quote (ID 336), with the 'Quote' option highlighted. The menu also includes options like 'Cart', 'Orders', 'Receive', 'Transfer', and 'Return Orders'.

Open an existing Quote (that's not closed), by clicking on the Quote Number hyperlink.

#	Expand	ID	Quote Number
1		336	9/12/2022-12



- The details page of the Quote will be displayed.
- Select the row(s) of line items (highlight in dark blue color) that will be created into an order.
- Click on Create Order button.

Quotes

Room : NoyStock Rm | Created On Date : 9/12/2022 10:58:04 AM | Created By : noya | Updated On Date : 9/19/2022 8:15:24 AM | Updated By : noya

Quote Number \* 9/12/2022-8 Required Date \* 9/12/2022 Quote Status Transmitted Supplier Supplier 2 Selected Graybar,Henry Schein

# of Line Items 2 Total Cost : \$ 1,017.58

Search <input type="text"/>																		
Show	10	Records < 1 >	#	ID	Item Number	Item Two 2	Bin	Requested quantity	Approved quantity	Required Date	Ordered Quantity	On Hand Quantity	Staged Quantity	Description	UOM	GL Account	Last Cost	Mark up
1	643	1049206	New Bin	1	1	9/12/2022	0	72760	0	Noy - Pillowcase HSI 21 in x 30 in Tissue / Poly White 100/Ca	EA	8114	17.58					
2	642	1014947	VWHMain	1	1	9/12/2022	0	69285	1	Sponge Gauze HSI All-Gauze Premium Ctn/Wvn 2x2 8PI Strl LF 100/Pk, 30 PK/CA	BG	8114	1000.00					

[Close Quote](#) [Close Quote Line Item](#) [Create Order](#)

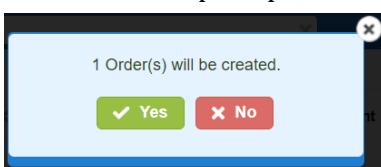
The *Quote to Order* prompt will be displayed.

Quote To Order

<input type="checkbox"/> Supplier	Order Number	Order Status	Release Number	# of Line Items	Comment	Required Date	Shipping Method	Staging Name	Customer	Shipping Vendor	Shipping Tracking #	Drop ship address
<input checked="" type="checkbox"/> WESTBURN	9/19/2022-156	Approved	1	1	/	9/24/2022						1 b

[Save](#) [Cancel](#)

- Supplier – name of the supplier(s) when the Quote was created.
- Order Number – identifier of the Quote that will be created into an order.
- Order Status – can be unsubmitted, submitted, approved or transmitted.
- Required Date – is setup on the Supplier's page *Default Order Required Days*.
  - It is the lead time in number of days to receive the Order from the Supplier.
- Click the Save button.
- Click Yes when prompted.



The Quote has been created into an Order and can be received in the Orders Module.



Note: Line items that have been created into an Order is displayed in grey color.

Quotes

Room: NoyStock Rm | Created On Date: 9/12/2022 10:58:04 AM | Created By: noysa | Updated On Date: 9/19/2022 8:15:24 AM | Updated By: noysa

Quote Number: 9/12/2022-8 | Required Date: 9/12/2022 | Quote Status: Transmitted | Supplier: Supplier 2 Selected | Graybar/Henry Schein

# of Line Items: 2 | Total Cost: \$ 1,017.58

Save Cancel

Search  Go To Page:

#	ID	Item Number	Item Two	Bin	Requested quantity	Approved quantity	Required Date	Ordered Quantity	On Hand Quantity	Staged Quantity	Description	UOM	GL Account	Last Cost	Mark up	Sell Price	Quote Item Cost	Supplier	On Quoted Quantity	Quote UDF In line Items	Comment	On Order Quantity
1	643	1049206	New Bin	▼	1	1	9/12/2022	0	72760	0	Noy - Pillowcase HSI 21 in x 30 in Tissue / Poly White 100/Ca	EA	8114	17.58	0	17.58	17.58	Henry Schein	0	add'l comment	/	100
2	642	1014947	WMain	▼	1	1	9/12/2022	0	69285	1	Sponge Gauze HS All-Gauze Premium Ctn/Wvn 2x2 gph 100% 100/PK, 30 PIG/CA	BG	8114	1000.00	0	1000.00	1000	Henry Schein	100		/	0

1 - 2 of 2

- To send a quote to a different Supplier than what is initially displayed, click on the supplier drop-down arrow and choose a different Supplier.
  - The fields Order Number, Order Status and Required Date can also be edited prior to creating an Order.
  - Click Save to create a Quote to Order.

Quote To Order

Supplier	Order Number	Order Status	Release Number	# of Line Items	Comment	Required Date	Shipping Method	Staging Name	Customer	Shipping Vendor	Shipping Tracking #	Drop ship address
WESTBURNE	9/19/2022-157	Approved	1	1		9/24/2022						1 b

WESTBURNE ▼  
3333-PH-Fisher  
3334-BIO-Fisher  
3363-CL-Fisher  
3364-CH-Fisher  
asd  
BIO-VWR  
Graybar  
**Henry Schein**  
Noy  
sp13june  
sp21aug  
WESTBURNE

Save Cancel



## 4. Open Existing Quotes

To open the Quotes module, point the mouse over Replenish and click on Quotes. This opens the Quote History Tab, or the historical data of the Quotes.

#	Expand	ID	Quote Number	Quote To Order Number	Date	Status	# of Line Items	Cost	Change Quote Revision	Created On Date	Created By	Updated On Date	Updated By
1		336	9/12/2022-12	1	9/12/2022	C	0	0.00		9/12/2022 2:36:16 PM	noysa	9/13/2022 9:44:42 AM	noysa
2		335	9/12/2022-11	1	9/12/2022	C	1	18750.00		9/12/2022 1:18:58 PM	noysa	9/12/2022 1:19:23 PM	noysa
3		334	9/12/2022-10	1	9/12/2022	C	2	18900.00		9/12/2022 12:16:31 PM	noysa	9/12/2022 12:20:18 PM	noysa
4		333	9/12/2022-9	1	9/12/2022	C	1	18750.00		9/12/2022 10:58:02 AM	noysa	9/12/2022 10:58:40 AM	noysa
5		332	9/12/2022-8	1	9/12/2022	C	2	1017.58		9/12/2022 10:56:06 AM	noysa	9/12/2022 12:10:01 PM	noysa
6		331	9/12/2022-7	1	9/12/2022	C	2	18900.00		9/12/2022 10:53:51 AM	noysa	9/12/2022 12:09:41 PM	noysa
7		264	7/11/2022-6	1	7/11/2022	C	2	222.00		7/11/2022 2:39:02 PM	noysa	7/11/2022 2:41:00 PM	noysa
8		196	6/21/2022-5	1	6/21/2022	C	3	0.00		6/21/2022 2:37:26 PM	noysa	9/12/2022 12:10:03 PM	noysa
9		181	3/16/2022-4	1	3/16/2022	C	0	0.00		3/16/2022 2:52:17 PM	noysa	9/12/2022 12:09:42 PM	noysa
10		180	3/16/2022-3	1	Test sched email approve reject	C	10	303246.00		3/16/2022 2:49:59 PM	nlachica	9/12/2022 12:10:06 PM	noysa
11		179	3/16/2022-2	1	Test sched email	C	0	0.00		3/16/2022 2:45:14 PM	nlachica	9/12/2022 12:09:42	nlachica

To open an existing Quote, click on the Quote Number hyperlink.

#	Expand	ID	Quote Number
1		336	9/12/2022-12

- The details page of the Quote will be displayed.
- Click on the plus icon to open the header details.

#	ID	Item Number	Bin	Requested quantity	Approved quantity	Required Date	Ordered Quantity	On Hand Quantity	Staged Quantity	Description	UOM	GL Account	Last Cost	Mark up	Sell Price
1	647	01-213-104	WHMain	7500	7500	9/12/2022	0	485110	4	25ft Aluminum Foil 4	EA	8179	25.00	15	28.75



The header details page is displayed.

- Supplier – name of the supplier(s) when the Quote was created.
- Quote Number – identifier of the Quote.
- Required Date – is setup on the Supplier's page *Default Order Required Days*.
  - It is the lead time in number of days to receive an order from the Supplier.

**Quotes**

Room : NoyStock Rm | Created On Date : 9/12/2022 12:18:29 PM | Created By : noysa | Updated On Date : 9/12/2022 12:20:18 PM | Updated By : noysa

Quote Number \* 9/12/2022-10      Required Date \* 9/12/2022      Quote Status Closed      Supplier Graybar,Henry Schein

To be submitted

Comment

Release Number

**Unclose Quote** **Cancel**

# of Line Items : 2 | Total Cost : \$ 18,900.00

- To setup Required Date or *Default Order Required Days*, go to the Supplier's page.
  - Point your mouse over Administration, Supporting Information and click on Suppliers.
  - The Default Order Required Days is the lead time Required Date on the Quote page.

**Suppliers**

Room : NoyStock Rm | Created On Date : 11/6/2018 11:01:28 AM | Created By : noysa | Updated On Date : 9/12/2022 12:20:18 PM | Updated By : noysa

Edit

To be approved

**General Details**

Supplier Name *	WESTBURNE
Supplier Color *	#d99694
Description	<input type="text"/>
Branch Number	<input type="text"/>
Maximum Order Size	<input type="text"/>
Default Order Required Days	5

- Quote Status
  - Unsubmitted – Quote created but not submitted to the supplier (Quote will not be sent to supplier).
  - Submitted – Quote submitted but not approved (Quote waiting on approval).
  - Approved – Quote has been approved (Quote ready to be sent to supplier).
  - Closed – Quote has been closed. An unsubmitted or Submitted Quote can be closed.

**Quotes**

Room : NoyStock Rm | Created On Date : 9/12/2022 2:38:14 PM | Created By : noysa | Updated On Date : 9/12/2022 2:42:56 PM | Updated By : noysa

Quote Number \* 9/12/2022-12      Required Date \* 9/12/2022      **Quote Status** **Unsubmitted**

Supplier Supplier 1 Selected

To be submitted

Add New Item

# of Line Items : 0 | Total Cost : \$ 0.00



- Comment – text field that can describe the Quote.
- Release Number – unique identifier assigned by the software to distinguish between Quotes regardless of name.
- UDF – user defined field for Quotes.

Quotes

Room: NoyStock Rm | Created On Date: 9/12/2022 2:38:14 PM | Created By: noysa | Updated On Date: 9/12/2022 2:42:56 PM | Updated By: noysa

Quote Number: 9/12/2022-12 | Required Date: 9/12/2022 | Quote Status: Unsubmitted | Supplier: Supplier 1 Selected | Graybar

Comment:

Release Number: 1

Save | Cancel

Add New Item

# of Line Items: 0 | Total Cost: \$ 0.00

To be submitted | To be approved

Note: To Edit an existing Quote, please refer to Sections 6 and 7.

Viewing an existing Quote with a collapsed or closed header:

- Add New Item – a new item can be added to a Quote with a Quote status that is not closed.
- Search – type keywords in the search field to view existing items within a Quote.
- # of Line Items – displays a count of the number of items in the Quote.
- Total Cost – total of the sell price column, which is the sell price of all items Quoted.
  - Item(s) Quoted are displayed in the grid.

Quotes

Room: NoyStock Rm | Created On Date: 9/14/2022 11:17:52 AM | Created By: noysa | Updated On Date: 9/14/2022 11:18:09 AM | Updated By: noysa

Quote Number: 9/14/2022-13 | Required Date: 9/14/2022 | Quote Status: Unsubmitted | Supplier: Supplier 1 Selected | BIO-VWR

Save | Cancel

Add New Item

# of Line Items: 1 | Total Cost: \$ 18,750.00

Search

Show: 10 | Records: < 1 >

#	ID	Item Number	Bin	Requested quantity	Approved quantity	Required Date	Ordered Quantity	On Hand Quantity	Staged Quantity	Description	UOM	GL Account	Last Cost	Mark up
1	655	01-213-104	WMain	7500	0	9/14/2022	0	462780	4	25ft Aluminum Foil 4	EA	8179	25.00	

To be submitted | To be approved | Change Quote



## 5. Quote Status

When a new Quote is created, the Quote Status starts off in an Unsubmitted state.

The screenshot shows the 'Quotes' creation page. At the top, there are fields for 'Quote Number' (9/14/2022-13), 'Required Date' (9/14/2022), and 'Quote Status' (Unsubmitted). A red box highlights the 'Unsubmitted' dropdown. Below these are buttons for 'Save' and 'Cancel'. On the left, there's a vertical sidebar with tabs: 'New' (selected), 'Edit', and 'To be submitted' (which has a red circle with a minus sign).

### a. To Be Submitted tab.

- The *To Be Submitted Tab* contains Quotes in an Unsubmitted Quote Status "U".
- The Red Circled Number indicates the number of Quotes that are in an Unsubmitted status.
  - Unsubmitted – Quote created but not submitted (Quote will not be sent to the supplier).
- Quotes in the Unsubmitted status need to be Submitted or Approved for the Quote to be processed.
- Click on the Quote Number hyperlink.

The screenshot shows the 'Quotes' search results page. A red box highlights the 'Search' input field. The main table lists quotes with columns including ID, Quote UDF, Quote Number, Release Number, Comment, Required Date, and Quote Status. The 'Quote Status' column for the first quote shows 'U' (Unsubmitted). A red box highlights the 'U' in the 'Quote Status' cell. Below the table, a legend defines the status codes: U = Unsubmitted, S = Submitted, A = Approved, T = Transmitted, I = Incomplete, P = Incomplete Past Due, C = Closed. On the left, there's a vertical sidebar with tabs: 'New' (selected), 'Edit', and 'To be submitted' (which has a red circle with a minus sign).

- The Quotes detail page will be displayed.
- Click on the Quote Status drop-down arrow and choose Submitted.

The screenshot shows the 'Quotes' detail page. At the top, there are fields for 'Quote Number' (9/14/2022-13), 'Required Date' (9/14/2022), and 'Quote Status' (Unsubmitted). A red box highlights the 'Unsubmitted' dropdown. A dropdown menu is open, showing 'Submitted' as the selected option. Below these are buttons for 'Save' and 'Cancel'. On the left, there's a vertical sidebar with tabs: 'New', 'Edit', and 'To be submitted' (which has a red circle with a minus sign). At the bottom, there's a table with columns for Item Number, Bin, Requested quantity, Approved quantity, Required Date, Ordered Quantity, On Hand Quantity, Staged Quantity, Description, UOM, GL Account, Last Cost, and Mark up. One row is highlighted in blue.



- If user's permission settings do not have the authority to *Allow a Quote to be Approved*, the Quote will go to the To Be Approved status.
- If the user permission settings have authority to *Allow a Quote to be Approve*, the Quote will go to the Approved status.
- To set User permissions settings, point the mouse over **Administration, Authentication** and click on **Users**.

The screenshot shows the eTurns application interface. At the top, there is a navigation bar with links for 'Reports', 'Dashboard', 'Inventory', 'Consume', and a search bar. Below this is a dropdown menu for 'Administration' which is currently expanded to show 'Authentication' (selected), 'Site Configuration', 'Supporting Information', and 'BillOfMaterial'. Under 'Authentication', there is a sub-menu with 'Enterprise', 'Company', 'Rooms', 'Roles', and 'Users'. The 'Users' option is highlighted with a blue box and has a sub-menu with 'Edit', 'List', and 'Add new'. A mouse cursor is hovering over the 'Permission' tab in the 'List' sub-menu.

- Click on the Admin Permissions tab.
- Scroll down to the **Quote** section.
- Select the appropriate permissions and save.

The screenshot shows the 'Admin Permissions' screen. Under the 'Quote' section, several checkboxes are checked, indicating they are selected:

- Allow an quote to be Approved
- Allow an quote to be Submitted
- Allow an quote to be Unapprove
- Allow an quote to be UnClosed
- Allow Change Quotes
- Quote To Order

### a. To Be Approved tab.

- If a Quote is in the To Be Approved tab, a user with *Allow an Quote to be Approved* permission needs to approve the Quote.
- Click on the To be Approved tab.
- Click on the Quote Number (hyperlink).

The screenshot shows the 'Quotes' search results page. On the left, there is a sidebar with filters for 'Supplier', 'User (Created by)', 'User (Updated by)', 'Date Created', 'From' and 'To' date fields, 'Date Updated', 'From' and 'To' date fields, and a 'UDF1' field. The 'To be approved' filter is highlighted with a red box. The main area shows a table of quotes with columns: #, Expand, ID, Quote Number, Release Number, Comment, Required Date, Quote Status, # of Line Items, and Change Quote Revision. One quote is highlighted with a red box: ID 340, Release Date 9/14/2022, and Quote Number 1. A note at the bottom states: U = Unsubmitted, S = Submitted, A = Approved, T = Transmitted, I = Incomplete, P = Incomplete Past Due, C = Closed.



The Quote details page will be displayed.

- Under Quote Status, click on the drop-down arrow and choose Approved.
- Click the Save button.
- The Quote has now been Approved and is ready to be created into an order.

Quotes

Room : NoyStock Rm | Created On Date : 9/14/2022 12:06:18 PM | Created By : nlachica | Updated On Date : 9/14/2022 12:06:43 PM | Updated By : nlachica | Print

Quote Number : 9/14/2022-14 Required Date : 9/14/2022 Quote Status : Submitted Approved Supplier : Supplier 2 Selected Graybar/Henry Schein

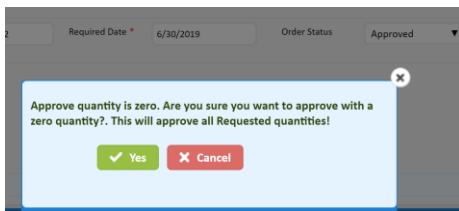
To be submitted To be approved Change Quote

Add New Item

# of Line Items : 2 Total Cost : \$ 18,900.00

#	ID	Item Number	Bin	Requested quantity	Approved quantity	Required Date	Ordered Quantity	On Hand Quantity	Staged Quantity	Description	UOM	GL Account	Last Cost	Mark up	Sell Price
1	657	06-666-1A	Noy-WHMain	15	0	9/14/2022	0	2463	6	Large Kimwipes	PK	8179	150.00	25	187.50
2	656	01-213-104	WHMain	7500	0	9/14/2022	0	462780	4	25ft Aluminum Foil 4	EA	8179	25.00	15	28.75

- Click Yes when prompted and it will populate the approved quantity with the requested quantity.



## b. Change Quote tab.

- Approved Quotes that have not yet been turned into an order are in the Change Quote tab.

Quotes

New To be submitted To be approved Change Quote

Narrow Search By:

- Quote Status
- Supplier
- User (Created by)
- User (Updated by)
- Date Created
- From \_\_\_\_\_ To \_\_\_\_\_
- Date Updated
- From \_\_\_\_\_ To \_\_\_\_\_
- UDF1

Show 50 Records < 1 >

#	Expand	ID	Quote UDF	Quote Number	Release Number	Comment	Required Date	Quote Status	# of Line Items	Cost
1		340		9/14/2022-14	1		9/14/2022	T	2	18900.00
2		335		9/12/2022-11	1		9/12/2022	T	1	18750.00

U = Unsubmitted, S = Submitted, A = Approved, T = Transmitted, I = Incomplete, P = Incomplete Past Due, C = Closed



### c. Create an Order

Quotes that have been Approved are in the Change Quote tab.

#	Expand	ID	Quote UDF	Quote Number	Release Number	Comment	Required Date	Quote Status	# of Line Items	Cost
1		340		9/14/2022-14	1		9/14/2022	T	2	18900.00
2		335		9/12/2022-11	1		9/12/2022	T	1	18750.00

U = Unsubmitted, S = Submitted, A = Approved, T = Transmitted, I = Incomplete, P = Incomplete Past Due, C = Closed

- Click on the Quote Number
- Click on the row(s) of items (highlighted in dark blue) to select items to order.
- Click on the Create Order button.
  - Items created into an order can be received in the orders or receive modules.

#	ID	Item Number	Bin	Requested quantity	Approved quantity	Required Date	Ordered Quantity	On Hand Quantity	Staged Quantity	Description	UOM	GL Account	Last Cost	Mark up	Sell Price
1	647	01-213-104	WhMain	7500	7500	9/12/2022	0	462780	4	25ft Aluminum Foil 4	EA	8179	25.00	15	20

Save Cancel

# of Line Items: 1 | Total Cost: \$ 18,750.00

Close Quote Close Quote Line Item Create Order

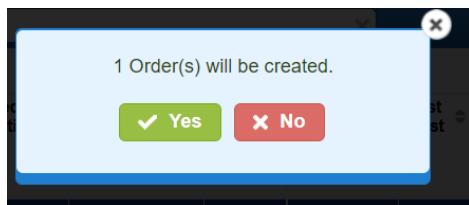
- The Quote To Order prompt is displayed.
- Choose the Supplier to create an order from.
- Click Save

Supplier	Order Number	Order Status	Release Number	# of Line Items	Comment	Required Date	Shipping Method	Staging Name	Customer	Shipping Vendor	Shipping Tracking #	Drop ship address
<input checked="" type="checkbox"/> WESTBURN <input type="button" value="X"/>	9/14/2022-155	Approved	1	1		9/19/2022						1 b

Save Cancel



- Click Yes to create an order.

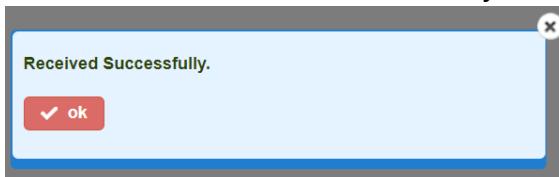


Receive the item quoted, which was converted into an order, by going to *Replenish, Orders, Receive*

- Click the **Receive** button for the item quoted.

The screenshot shows the 'Order Receive' screen in the eTurns application. A context menu is open over a quote row, with the 'Receive(1)' option highlighted. Other options in the menu include 'New', 'To be submitted', 'To be approved', and 'Change Order(1)'. The main grid shows a single quote row with details: Order Number 01-213-104, Item 25ft Aluminum Foil 4, Date 9/14/2022-155, and Quantity 7500. The 'Receive' button in the grid is also highlighted.

- The Received Successfully prompt will be displayed.
- Click Ok and the item will be incremented by the quantity received.



- If all items in a Quote was converted into an order, the Quote status will change to closed.

The screenshot shows the 'Quotes' screen in the eTurns application. The quote status is set to 'Closed'. The quote details are: Quote Number 9/12/2022-12, Required Date 9/12/2022, and Supplier Graybar. The quote has 1 line item with a total cost of \$ 18,750.00. The quote status dropdown is highlighted with a red box.



## d. History Tab.

The History tab displays all the historical Quotes for the stockroom.

**Quotes**

Search  ×

Show 50 Records < 1 >

#	Expand	ID	Quote UDF	Quote Number	Release Number	Comment	Required Date	Quote Status	# of Line Items	Cost	Change Quote Revision
1		340		9/14/2022-14	1		9/14/2022	T	2	18900.00	
2		339		9/14/2022-13	1		9/14/2022	U	1	18750.00	
3		336		9/12/2022-12	1		9/12/2022	C	1	18750.00	
4		335		9/12/2022-11	1		9/12/2022	C	1	18750.00	
5		334		9/12/2022-10	1		9/12/2022	C	2	18900.00	
6		333		9/12/2022-9	1		9/12/2022	C	1	18750.00	
7		332		9/12/2022-8	1		9/12/2022	C	2	1017.58	
8		331		9/12/2022-7	1		9/12/2022	C	2	18900.00	
9		264		7/11/2022-6	1		7/11/2022	C	2	222.00	
10		196		6/21/2022-5	1		6/21/2022	C	3	0.00	
11		181		3/16/2022-4	1		3/16/2022	C	0	0.00	
12		180		3/16/2022-	1	Test sched	3/16/2022	C	10	303246.00	

U = Unsubmitted, S = Submitted, A = Approved, T = Transmitted, I = Incomplete, P = Incomplete Past Due, C = Closed

## e. Change Log Tab.

The change log is a historical audit trail of the updates and/or changes to the Quote. To view the change log, click on a row of a Quote transaction (highlighting it dark blue) while on the History tab, and then click on Change Log tab. The changes will be displayed in yellow.

**History**

**Change Log**

10	196	6/21/2022-5	1		6/21/2022	C	3	0.00	6/21/2022 2:37:26 PM	noysa
11	181	3/16/2022-4	1		3/16/2022	C	0	0.00	3/16/2022 2:52:17 PM	noysa
12	180	3/16/2022-	1	Test sched	3/16/2022	C	10	303246.00	3/16/2022	nlachica

Unclose Quote

U = Unsubmitted, S = Submitted, A = Approved, T = Transmitted, I = Incomplete, P = Incomplete Past Due, C = Closed

**Quotes**

Search  ×

Show 10 Records < 1 >

Action	Quote Number	From Where	Release Number	Comment	Required Date	Quote Status	# of Line Items	Cost
insert	6/21/2022-5	Quote	1		6/21/2022	U	0	0
edit	6/21/2022-5	Quote	1		6/21/2022	A	0	0
edit	6/21/2022-5	SaveQuote>ToTransmitFromApproved	1		6/21/2022	T	0	0
edit	6/21/2022-5	SaveQuote>ToTransmitFromApproved	1		6/21/2022	T	1	0
edit	6/21/2022-5	SaveQuote>ToTransmitFromApproved	1		6/21/2022	T	2	0
edit	6/21/2022-5	SaveQuote>ToTransmitFromApproved	1		6/21/2022	T	3	0
edit	6/21/2022-5	SaveQuote>ToTransmitFromApproved	1		6/21/2022	C	3	0
edit	6/21/2022-5	SaveQuote>ToTransmitFromApproved	1		6/21/2022	C	3	0
edit	6/21/2022-5	SaveQuote>ToTransmitFromApproved	1		6/21/2022	C	3	0
edit	6/21/2022-5	SaveQuote>ToTransmitFromApproved	1		6/21/2022	C	3	0

1 - 10 of 10

**Note:** The Change log is displayed in view only mode. No changes/edit can be made.



## 6. Edit/Update a Quote

Edit or update an existing Quote with an Unsubmitted Quote Status. Click on the Quote Number (hyperlink) on the To Be Submitted Tab and the Quote details page will be displayed.

The screenshot shows the Quotes list screen. The 'To be submitted' tab is highlighted. A quote with ID 339 and quote number 9/14/2022-13 is selected. The quote status is U (Unsubmitted). The status column and the quote number are both highlighted with red boxes.

**Note:** The Status of the Quote must be Unsubmitted to enable editing. If the Quote Status is closed, unclose the Quote. If the Quote Status is Transmitted, Close the Quote and click on Edit Quote Line Items.

- The Supplier can be changed. Click on the drop-down arrow to choose another supplier.
- The Quote Number can be edited.
- The Required Date can be changed for the Quote or per line item.
- The Status can be updated from Unsubmitted to Submitted, Approved or Closed.
- Click on the **Add New Item** button to add new items to the Quote.
- Change Bin locations by clicking on the drop-down arrow. Quotes created into an order and received will increment the quantity of the item in its bin location.
- The Requested Quantity can also be edited.
- Click Save.

The screenshot shows the Quotes detail screen. The 'To be submitted' tab is highlighted. The quote number is 9/14/2022-13, status is Unsubmitted, and the supplier is BIO-VWR. The 'Add New Item' button is highlighted. The quote line item table shows one item with ID 655.



## 7. Update a Closed Quote

Only the Required Date, at the item level, can be updated if a Quote is closed. No other section of a closed Quote can be updated, and the Quote Status remains Closed.

Click on the Quote Number of an existing closed Quote.

The screenshot shows a search interface for quotes. On the left, there's a sidebar with buttons for New, e submitted (with a red notification dot), To be submitted, To be approved, Change Quote, and History. The main area has a search bar with 'Search' and dropdowns for 'Show 50' and 'Records < 1 >'. A 'Narrow Search By:' section includes dropdowns for 'Supplier' and 'User (Created by)'. To the right is a table with columns: #, Expand, ID, Quote UDF, and Quote Number. The row for quote ID 336 is selected. The quote number '9/12/2022-12' is highlighted with a red box.

The details page of the Quote will be displayed:

- Click on the Required Date field at the line-item level.
- Choose a date from the calendar menu.
- When finished click Done, this saves the changes to the Required Date.

The screenshot shows the details page for quote number 9/12/2022-11. The top navigation bar includes Room: NoyStock Rm, Created On Date: 9/12/2022 1:20:57 PM, Created By: noysa, Updated On Date: 9/12/2022 1:21:22 PM, Updated By: noysa, and a Print icon. Below the header, there are fields for Quote Number (9/12/2022-11), Required Date (9/12/2022), Quote Status (set to 'Closed'), Supplier (Graybar, Henry Schein), and Supplier 2 Selected. Buttons for 'Unclose Quote' and 'Cancel' are present. The main content area displays a table of line items. The first line item has ID 647, Item Number 01-213-104, Bin WHMain, Requested quantity 7500, Approved quantity 7500, and a calendar dropdown showing the date 31/12/2022. The calendar is open for September 2022, with the 14th highlighted. The table also includes columns for Ordered Quantity, On Hand Quantity, Staged Quantity, Description, UOM, GL Account, Last Cost, Mark up, and Sell Price. A note at the bottom states: '\* Indicates required field(s.)'. The 'Done' button at the bottom of the calendar is highlighted with a red box.



## 8. Unclose a Closed Quote

Unclose a Quote to edit the quote details, such as but not limited to Requested Quantity, Required Date, Quote Item Cost or Bin location. When a Closed Quote is Unclosed, it will revert to its previous Quote Status (Unsubmitted, Transmitted or Incomplete) but will not undo any quoted items already sent.

The *Edit Quote Line Items* function reverses everything that was processed in a closed Quote. To unclose a Quote, click on the Name of an existing closed Quote.

Search				
Quote Number	Release Number	Comment	Required Date	Quote Status
9/12/2022-12	1		9/12/2022	T
9/12/2022-11	1		9/12/2022	T
9/12/2022-10	1		9/12/2022	C

- Click on the **Unclose Quote** button.

**Quotes**

Room: NoyStock Rm | Created On Date: 9/12/2022 12:18:29 PM | Created By: noysa | Updated On Date: 9/12/2022 12:20:18 P

To be submitted

Quote Number * 9/12/2022-10	Required Date * 9/12/2022	Quote Status <b>Closed</b>
-----------------------------	---------------------------	----------------------------

**Unclose Quote** **Cancel**

# of Line Items : 2 | Total Cost : \$ 18,900.00

- The page will refresh and display the Quotes page, with the Quote Status reverting back to its previous Status (Unsubmitted, Transmitted or Incomplete).
- Edit the Quote if needed (following instructions on Sections #6 & #7 Edit/Update Closed Quote)
  - Edit/Change Supplier
  - Edit/Change Quote Number
  - Edit/Change Required Date for the Quote or per line item
  - Add New Item
  - Add items from Catalog
  - Edit/Change Bin location
  - Edit/Change Requested quantity
  - Edit/Change Approved quantity
- Save.

**Quotes**

Room: NoyStock Rm | Created On Date: 9/12/2022 10:55:49 AM | Created By: noysa | Updated On Date: 9/19/2022 8:48:44 AM | Updated By: noysa

To be submitted

**9/12/2022-7 add** **Required Date \* 9/19/2022** **Quote Status Unsubmitted** **Supplier Supplier 2 Selected** **3333-PH Fisher/BIO-VWR**

**Add New Item**

# of Line Items : 2 | Total Cost : \$ 19,794.48

**Save** **Cancel**

**Search**

#	ID	Item Number	Bin	Requested quantity	Approved quantity	Required Date	Ordered Quantity	On Hand Quantity	Staged Quantity	Description	UOM	GL Account	Last Cost	Mark up	Sell Price	Quote Item Cost	Supplier	On Quoted Quantity	Comment
1	641	05-096-1A	Noy-WH-WM	30	0	9/12/2022	0	2463	6	Large Kimwipes	PK	8179	150.00	25	187.50	150.00	WESTBURNE	45	
2	640	01-213-104	WH-WM	7500	0	9/12/2022	0	470980	4	25# Aluminum Foil 4	EA	8179	25.00	15	28.75	25.99	WESTBURNE	22500	

## 9. Edit Quote Line Items

The Edit Quote Line Items reverses everything that was processed in a Closed Quote Status and reverts the Quote Status to Unsubmitted.

- To Edit Quote Line Items, click on the Name of an existing Closed Quote.

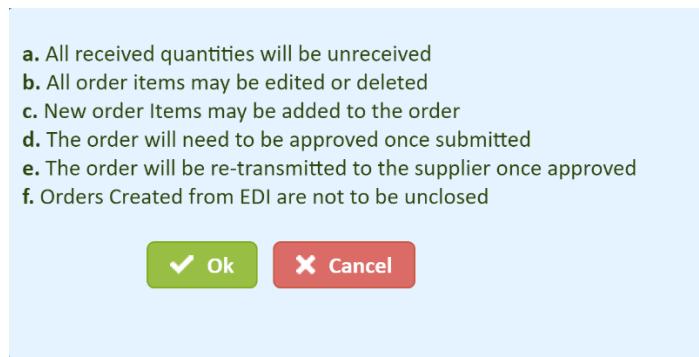
Search <input type="text"/>				
Quote Number	Release Number	Comment	Required Date	Quote Status
9/12/2022-12	1		9/12/2022	T
9/12/2022-11	1		9/12/2022	T
9/12/2022-10	1		9/12/2022	C

- Click on Edit Quote Line Items button.

#	ID	Item Number	Bin	Requested quantity	Approved quantity	Required Date	Ordered Quantity	On Hand Quantity	Staged Quantity	Description	UOM	GL Account	Last Cost	Mark up	Sell Price	Quote Item Cost	Supplier	On Quoted Quantity
1	643	1049206	New Bin	1	1	9/12/2022	0	72760	0	Noy - Pillowcase HSI 21 in x 30 in Tissue / Poly White 100/Ca	EA	8114	17.58	0	17.58	17.58	Henry Schein	0
2	642	1014947	WMain	1	1	9/12/2022	0	69285	1	Sponge Gauze HSI All-Gauze Premium CleanWash 2x2 8P Str LF 100/Pk 30 PK/CA	BG	8114	1000.00	0	1000.00	1000	Henry Schein	0

Figure A

- The following prompt is displayed.
- Click OK.



- All received quantities will be unreceived
- All Quote items may be edited or deleted



- c. New Quote items may be added to the Quote
- d. The Quote will need to be approved once submitted
- e. The Quote will be re-transmitted to the supplier once approved
- f. Quotes Created from EDI are not to be unclosed

Compare Figure A and Figure B.

The screenshot shows the 'Quotes' screen in the eTurns application. At the top, there are several input fields: 'Room: NoyStock Rm', 'Created On Date: 9/12/2022 10:55:49 AM', 'Created By: noysa', 'Updated On Date: 9/19/2022 8:46:44 AM', 'Updated By: noysa', and a file icon. Below these are buttons for 'Quote Number' (9/12/2022-7-add), 'Required Date' (9/19/2022), 'Quote Status' (highlighted with a red box), 'Supplier' (Supplier 2 Selected), and a dropdown for 'Supplier 2 Selected' showing '3333-PH-Fisher,BIO-VWR'. At the bottom are 'Save' and 'Cancel' buttons. To the left, there's a vertical sidebar with buttons for 'Edit' (highlighted with a blue box), 'To be submitted', 'To be approved', 'Change Quote', and 'History'. In the center, there's a table titled 'Search' with columns for ID, Item Number, Bin, Requested quantity, Approved quantity, Required Date, Ordered Quantity, On Hand Quantity, Staged Quantity, Description, UOM, GL Account, Last Cost, Mark up, Sell Price, Quote Item Cost, Supplier, On Quoted Quantity, and Comment. Two rows of data are shown, both with 'Requested quantity' and 'Approved quantity' set to 0. The first row is for item 641, Large Kimwipes, and the second for item 640, 25ft Aluminum Foil 4.

Figure B

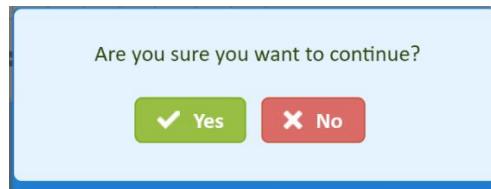
- The Requested Quantity and Approved Quantity column is now zero (0).
- Quote Status has changed to Unsubmitted.
- Edit the Quote if needed (following instructions in Section #6 & #7 Edit/Update Quote)
  - a. Edit/Change Supplier
  - b. Edit/Change Quote Number
  - c. Edit/Change Required Date for the Quote or per line item
  - d. Add New Item
  - e. Add items from Catalog
  - f. Edit/Change Bin location
  - g. Edit/Change Requested quantity
  - h. Edit/Change Approved quantity
- Change Quote Status to Submit, Approved or Close.
- Save.

## 10. Delete a Quote

To delete a Quote, click on the row(s), highlighting it in dark blue, and click on Delete icon or press Delete key on your keyboard.

#	Expand	ID	Quote UDF	Quote Number	Release Number	Comment	Required Date	Quote Status	# of Line Items	Cost	Change Quote Revision	Created On Date	Created By	Updated On Date	Updated By	Room	Added From	Edited From	Received On Date
1		340	9/14/2022-14	1			9/14/2022	T	2	18900.00	9/14/2022 12:04:33 PM	nachica	9/14/2022 12:29:31 PM	noysa	NoyStock Rm	Web	Web	9/14/2022 12:31:16 PM	
2		339	9/14/2022-13	1			9/14/2022	U	1	18750.00	9/14/2022 11:16:07 AM	noysa	9/14/2022 11:16:24 AM	noysa	NoyStock Rm	Web	Web	9/14/2022 11:18:09 AM	

- Click yes to delete the selected row(s).



- Confirmation of the Quote(s) deleted.

#	Expand	ID	Quote UDF	Quote Number	Release Number	Comment	Required Date	Quote Status	# of Line Items	Cost	Change Quote Revision	Created On Date	Created By	Updated On Date	Updated By	Room	Added From	Edited From	Received On Date
1		340	9/14/2022-14	1			9/14/2022	T	2	18900.00	9/14/2022 12:04:33 PM	nachica	9/14/2022 12:29:31 PM	noysa	NoyStock Rm	Web	Web	9/14/2022 12:31:16 PM	
2		336	9/12/2022-12	1			9/12/2022	T	1	18750.00	9/12/2022 2:36:16 PM	noysa	9/14/2022 1:43:01 PM	noysa	NoyStock Rm	Web	Web	9/14/2022 1:43:01 PM	
3		335	9/12/2022-11	1			9/12/2022	T	1	18750.00	9/12/2022 1:18:58 PM	noysa	9/14/2022 2:49:34 PM	noysa	NoyStock Rm	Web	Web	9/14/2022 2:49:34 PM	
4		334	9/12/2022-10	1			9/12/2022	T	2	18900.00	9/12/2022 12:16:31 PM	noysa	9/14/2022 9:23:33 PM	noysa	NoyStock Rm	Web	Web	9/14/2022 9:23:33 PM	
5		333	9/12/2022-9	1			9/12/2022	T	1	18750.00	9/12/2022 10:58:02 AM	noysa	9/19/2022 8:10:46 AM	noysa	NoyStock Rm	Web	Web	9/19/2022 8:10:46 AM	
6		332	9/12/2022-8	1		Unlocked a quote add comment	9/12/2022	T	2	1017.58	9/12/2022 10:55:06 AM	noysa	9/19/2022 8:15:24 AM	noysa	NoyStock Rm	Web	Web	9/19/2022 8:15:24 AM	
7		331	9/12/2022-7 add	1		added comments	9/19/2022	U	3	19800.48	9/12/2022 10:53:51 AM	noysa	9/19/2022 9:12:02 AM	noysa	NoyStock Rm	Web	Web	9/19/2022 9:12:02 AM	
8		264	7/11/2022-6	1			7/11/2022	C	2	222.00	7/11/2022 2:39:02 PM	noysa	7/11/2022 2:41:00 PM	noysa	NoyStock Rm	Web	Web	7/11/2022 2:40:41 PM	
9		196	6/21/2022-5	1			6/21/2022	C	3	0.00	6/21/2022 2:37:26 PM	noysa	9/12/2022 12:10:03 PM	noysa	NoyStock Rm	Web	Web	9/12/2022 12:10:03 PM	
10		181	3/16/2022-4	1			3/16/2022	C	0	0.00	3/16/2022 2:52:17 PM	noysa	9/12/2022 12:09:42 PM	noysa	NoyStock Rm	Web	Web	9/12/2022 12:11:42 PM	
11		180	3/16/2022-3	1		Test sched email approve reject	3/16/2022	C	10	303246.00	3/16/2022 2:49:59 PM	nachica	9/12/2022 12:10:06 PM	noysa	NoyStock Rm	Web	Web	9/12/2022 12:12:06 PM	
12		179	3/16/2022-2	1		Test sched email	3/16/2022	C	0	0.00	3/16/2022 2:45:14 PM	nachica	9/12/2022 12:09:42	nachica	NoyStock Rm	Web	Web	9/12/2022 12:11:42 PM	

U = Unsubmitted, S = Submitted, A = Approved, T = Transmitted, I = Incomplete, P = Incomplete Past Due, C = Closed

1 - 13 of 13

1 Deleted successfully

- To view deleted Quotes, click on the settings wheel and check the box *Only Deleted*.

Edited From: Web

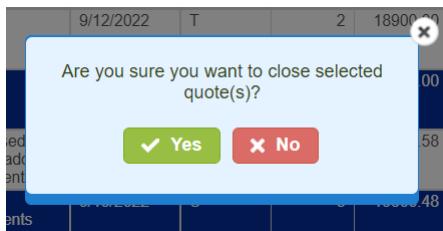
Only Deleted

## 11. Close Multiple Open Quotes

To close multiple open Quotes, click on the row(s) highlighting it in dark blue and click on the close icon

#	Expand	ID	Quote UDF	Quote Number	Release Number	Comment	Required Date	Quote Status	# of Line Items	Cost	Change Quote Revision	Created On Date	Created By	Updated On Date	Updated By	Room	Added From	Edited From	Received On Date
1		340	9/14/2022-14	1			9/14/2022	T	2	18900.00		9/14/2022 12:04:33 PM	niachica	9/14/2022 12:29:31 PM	noysa	NoyStock Rm	Web	Web	9/14/2022 9:12:31 PM
2		336	9/12/2022-12	1			9/12/2022	T	1	18750.00		9/12/2022 2:36:10 PM	noysa	9/14/2022 1:43:01 PM	noysa	NoyStock Rm	Web	Web	9/14/2022 9:14:01 PM
3		335	9/12/2022-11	1			9/12/2022	T	1	18750.00		9/12/2022 1:18:58 PM	noysa	9/14/2022 2:49:34 PM	noysa	NoyStock Rm	Web	Web	9/14/2022 9:24:34 PM
4		334	9/12/2022-10	1			9/12/2022	T	2	18900.00		9/12/2022 12:16:31 PM	noysa	9/14/2022 9:23:53 PM	noysa	NoyStock Rm	Web	Web	9/14/2022 9:23:53 PM
5		333	9/12/2022-9	1			9/12/2022	T	1	18750.00		9/12/2022 10:58:02 AM	noysa	9/19/2022 8:10:46 AM	noysa	NoyStock Rm	Web	Web	9/19/2022 9:8:10:46 AM
6		332	9/12/2022-8	1	Unlosed a quote(6 addt)		9/12/2022	T	2	1017.58		9/12/2022 10:56:06 AM	noysa	9/19/2022 8:15:24 AM	noysa	NoyStock Rm	Web	Web	9/19/2022 9:8:15:24 AM
7		331	9/12/2022-Zadd	1	added comments		9/19/2022	U	3	19800.48		9/12/2022 10:53:51 AM	noysa	9/19/2022 9:12:02 AM	noysa	NoyStock Rm	Web	Web	9/19/2022 9:9:12:55 AM
8		264	2/11/2022-6	1			7/11/2022	C	2	222.00		7/11/2022 2:39:02 PM	noysa	7/11/2022 2:41:00 PM	noysa	NoyStock Rm	Web	Web	7/11/2022 7:2:41:00 PM
9		196	6/21/2022-5	1			6/21/2022	C	3	0.00		6/21/2022 2:37:26 PM	noysa	9/12/2022 12:10:03 PM	noysa	NoyStock Rm	Web	Web	9/12/2022 9:12:10:03 PM
10		181	3/16/2022-4	1			3/16/2022	C	0	0.00		3/16/2022 2:52:17 PM	noysa	9/12/2022 12:29:42 PM	noysa	NoyStock Rm	Web	Web	9/12/2022 9:12:29:42 PM
11		180	3/16/2022-3	1	Test sched email approve reject		3/16/2022	C	10	303246.00		3/16/2022 2:49:59 PM	niachica	9/12/2022 12:10:06 PM	noysa	NoyStock Rm	Web	Web	9/12/2022 9:12:10:04 PM
12		179	3/16/2022-2	1	Test sched email		3/16/2022	C	0	0.00		3/16/2022 2:45:14 PM	niachica	9/12/2022 12:09:42 PM	noysa	NoyStock Rm	Web	Web	9/12/2022 9:12:11:04 PM

- Click yes to close the selected row(s).



- Confirmation of Quote(s) closed.

#	Expand	ID	Quote UDF	Quote Number	Release Number	Comment	Required Date	Quote Status	# of Line Items	Cost	Change Quote Revision	Created On Date	Created By	Updated On Date	Updated By	Room	Added From	Edited From	Received On Date
1		340	9/14/2022-14	1			9/14/2022	T	2	18900.00		9/14/2022 12:04:33 PM	niachica	9/14/2022 12:29:31 PM	noysa	NoyStock Rm	Web	Web	9/14/2022 9:12:31 PM
2		336	9/12/2022-12	1			9/12/2022	T	1	18750.00		9/12/2022 2:36:10 PM	noysa	9/14/2022 1:43:01 PM	noysa	NoyStock Rm	Web	Web	9/14/2022 9:14:01 PM
3		335	9/12/2022-11	1			9/12/2022	T	1	18750.00		9/12/2022 1:18:58 PM	noysa	9/14/2022 2:49:34 PM	noysa	NoyStock Rm	Web	Web	9/14/2022 9:24:34 PM
4		334	9/12/2022-10	1			9/12/2022	T	2	18900.00		9/12/2022 12:16:31 PM	noysa	9/14/2022 9:23:53 PM	noysa	NoyStock Rm	Web	Web	9/14/2022 9:23:53 PM
5		333	9/12/2022-9	1			9/12/2022	T	1	18750.00		9/12/2022 10:58:02 AM	noysa	9/19/2022 8:27:00 AM	noysa	NoyStock Rm	Web	Web	9/19/2022 9:8:27:58 AM
6		332	9/12/2022-8	1	Unlosed a quote(6 addt)		9/12/2022	T	2	1017.58		9/12/2022 10:56:06 AM	noysa	9/19/2022 8:15:24 AM	noysa	NoyStock Rm	Web	Web	9/19/2022 9:8:15:24 AM
7		331	9/12/2022-Zadd	1	added comments		9/19/2022	C	3	19800.48		9/12/2022 10:53:51 AM	noysa	9/19/2022 9:27:01 AM	noysa	NoyStock Rm	Web	Web	9/19/2022 9:8:27:58 AM
8		264	2/11/2022-6	1			7/11/2022	C	2	222.00		7/11/2022 2:39:02 PM	noysa	7/11/2022 2:41:00 PM	noysa	NoyStock Rm	Web	Web	7/11/2022 7:2:41:00 PM
9		196	6/21/2022-5	1			6/21/2022	C	3	0.00		6/21/2022 2:37:26 PM	noysa	9/12/2022 12:10:03 PM	noysa	NoyStock Rm	Web	Web	9/12/2022 9:12:10:03 PM
10		181	3/16/2022-4	1			3/16/2022	C	0	0.00		3/16/2022 2:52:17 PM	noysa	9/12/2022 12:29:42 PM	noysa	NoyStock Rm	Web	Web	9/12/2022 9:12:29:42 PM
11		180	3/16/2022-3	1	Test sched email approve reject		3/16/2022	C	10	303246.00		3/16/2022 2:49:59 PM	niachica	9/12/2022 12:10:06 PM	noysa	NoyStock Rm	Web	Web	9/12/2022 9:12:10:04 PM
12		179	3/16/2022-2	1	Test sched email		3/16/2022	C	0	0.00		3/16/2022 2:45:14 PM	niachica	9/12/2022 12:09:42 PM	noysa	NoyStock Rm	Web	Web	9/12/2022 9:12:11:04 PM

U = Unsubmitted, S = Submitted, A = Approved, T = Transmitted, I = Incomplete, P = Incomplete Past Due, C = Closed

Record(2) closed successfully.



## 12. Print or Export the Quote

Print or export the Quote by clicking the row(s), highlighting it in dark blue, and clicking on the printer icon



. Print or export through the following options:

Quote Number	Release Number	Comment	Required Date	Quote Status	# of Line Items	Cost	Change Quote Revision	Created On Date	Created By	Updated On Date	Updated By	Room	Email	Quotes	Received On Date	
9/14/2022-14	1		9/14/2022	T	2	18900.00		9/14/2022 12:04:33 PM	nlachica	9/14/2022 12:29:31 PM	noysa	NoyStock Rm			9/14/2022 12:31:16 PM	9/14/2022 12:31:16 PM
9/12/2022-12	1		9/12/2022	T	1	18750.00		9/12/2022 2:36:16 PM	noysa	9/14/2022 1:43:01 PM	noysa	NoyStock Rm			9/14/2022 1:43:01 PM	9/14/2022 1:43:01 PM
9/12/2022-11	1		9/12/2022	T	1	18750.00		9/12/2022 1:18:58 PM	noysa	9/14/2022 2:49:34 PM	noysa	NoyStock Rm			9/14/2022 2:49:34 PM	9/14/2022 2:49:34 PM
9/12/2022-10	1		9/12/2022	T	2	18900.00		9/12/2022 12:16:31	noysa	9/14/2022 9:23:53 PM	noysa	NoyStock Rm	Web	Web	9/14/2022 9:23:53 PM	9/14/2022 9:23:53 PM

- a) **Email:** Click the row(s) to email as an attachment in Excel or PDF format.

Send Report In Email

Note: Please use a comma to separate multiple email addresses in To: and cc: fields.

To:  
cc:  
Subject:  
Body:

Excel  PDF

BtnCancel BtnSendEmail

- b) **Quotes:** Displays the Quote in a new browser tab that can be saved or exported to Excel, PDF or Word document.

Export to : Excel(.xls) Excel(.xlsx) Word(.doc) Word(.docx) PDF IMAGE

9/19/2022 9:50:08 AM

Quote

1 of 1

Comapny Name	Noy Testing	Room Name	NoyStock Rm			
Quote Number	9/14/2022-14	Release Number	1			
Comment		Required Date	9/14/2022			
Quote Status	Transmitted	Created By	nlachica			
Last Updated By	noysa					
Item Number	Requested Quantity	Approved Quantity	Updated By Name	Bin Name	Cost	Total
01-213-104	7500	7500	noysa	WHMain	\$25.00	\$18,750.00
06-666-1A	15	15	noysa	Noy-WHMain	\$150.00	\$150.00
				Total		\$18,900.00



- c) Excel: Converts the Quote to an excel spreadsheet. Click on the downloaded excel spreadsheet to open the file.

**Quotes**

Search  Go To Page

Narrow Search By: # Expand ID Quote UDF Release Number Comment Required Date Quote Status # of Line Items Cost Change Quote Revision Created On Date Created By Updated On Date Updated By Room Added From Edited From Received On Date

Supplier: 1 340 9/14/2022-14 1 9/14/2022 T 1 18900.00 9/14/2022 12:04:33 PM nlachica 9/14/2022 12:29:31 PM noysa NoyStock Rm Web Web 9/14/2022 12:31:16 PM 12

User (Created by): 2 336 9/12/2022-1 9/12/2022 T 1 18750.00 9/12/2022 1:18:58 PM noysa 9/14/2022 1:43:01 PM nlachica 9/14/2022 1:49:34 PM noysa NoyStock Rm Web Web 9/14/2022 2:48:20 PM 1

User (Updated by): 3 335 9/12/2022-1 9/12/2022 T 1 18750.00 9/12/2022 1:18:58 PM noysa 9/14/2022 1:43:01 PM nlachica 9/14/2022 1:49:34 PM noysa NoyStock Rm Web Web 9/14/2022 2:48:20 PM 1

Date Created: 4 334 9/12/2022-1 9/12/2022 T 2 18900.00 9/12/2022 12:16:31 PM nlachica 9/14/2022 9:23:50 PM noysa NoyStock Rm Web Web 9/14/2022 9:23:53 PM 12

From: 5 333 9/12/2022-1 9/12/2022 C 1 18750.00 9/12/2022 10:38:02 AM noysa 9/19/2022 9:27:00 AM noysa NoyStock Rm Web Web 9/19/2022 9:27:36 AM 11

To: 6 332 9/12/2022-1 Unclosed a quote add'l comment 9/12/2022 T 2 1017.58 9/12/2022 10:38:05 AM noysa 9/19/2022 8:15:24 AM noysa NoyStock Rm Web Web 9/19/2022 8:15:24 AM 11

UDF1: 7 331 9/12/2022-2 add comments 9/19/2022 C 3 19800.48 9/12/2022 10:53:51 AM noysa 9/19/2022 9:27:01 AM noysa NoyStock Rm Web Web 9/19/2022 9:27:58 AM 10

8 264 7/11/2022-6 1 7/11/2022 C 2 222.00 7/11/2022 2:39:02 PM noysa 7/11/2022 2:41:00 PM noysa NoyStock Rm Web Web 7/11/2022 2:40:41 PM 2

9 196 6/21/2022-5 6/21/2022 C 3 0.00 6/21/2022 2:37:26 PM noysa 9/12/2022 12:10:03 PM noysa NoyStock Rm Web Web 9/12/2022 12:12:01 PM 2

10 181 3/16/2022-4 3/16/2022 C 0 0.00 3/16/2022 2:52:17 PM noysa 9/12/2022 12:09:42 PM noysa NoyStock Rm Web Web 9/12/2022 12:11:40 PM 2

11 180 3/16/2022-3 Test sched email approve reject 3/16/2022 C 10 303246.00 3/16/2022 2:49:59 PM nlachica 9/12/2022 12:10:09 PM noysa NoyStock Rm Web Web 9/12/2022 12:12:04 PM 2

12 179 3/16/2022-1 Test sched email 3/15/2022 C 0 0.00 3/16/2022 2:45:14 PM nlachica 9/12/2022 12:09:42 PM noysa NoyStock Rm Web Web 9/12/2022 12:11:40 PM 2

13 01-213-104 7500 7500 noysa WHMain \$25.00 \$18,750.00

14 06-666-1A 15 15 noysa Noy-WHMain \$150.00 \$150.00

15 Total \$18,900.00

U = Unsubmitted, S = Submitted, A = Approved, T = Transmitted, I = Incomplete, P = Incomplete Past Due, C = Closed

Quote\_2022-09-19\_16\_55.xls

1 - 13 of 13

- The file opens in an excel spreadsheet.

Quote						
9/19/2022 9:54:57 AM 1 of 1						
Comapny Name		Noy Testing		Room Name		NoyStock Rm
Quote Number		9/14/2022-14		Release Number		1
Comment				Required Date		9/14/2022
Quote Status		Transmitted		Created By		nlachica
Last Updated By		noysa				
Item Number Requested Quantity Approved Quantity Updated By Name Bin Name Cost Total						
01-213-104	7500	7500	noysa	WHMain	\$25.00	\$18,750.00
06-666-1A	15	15	noysa	Noy-WHMain	\$150.00	\$150.00
				Total		\$18,900.00

- d) PDF: Converts the Quote to a PDF format. Click on the download icon

RPT\_6882913a\_dcea\_4c23\_8128\_fb4a0442712c

1 / 1 100%

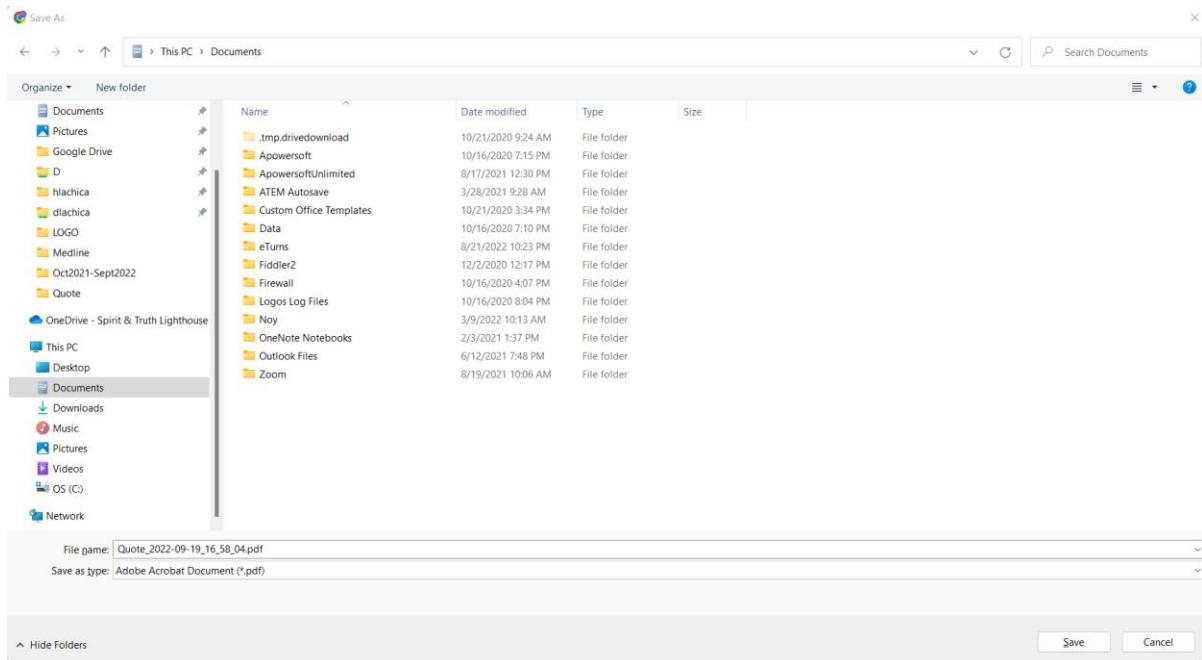
**Quote**

9/19/2022 9:57:07 AM 1 of 1

Comapny Name		Noy Testing		Room Name		NoyStock Rm
Quote Number	9/14/2022-14	Release Number	1	Required Date	9/14/2022	
Comment				Created By	nlachica	
Quote Status	Transmitted					
Last Updated By	noysa					
Item Number	Requested Quantity	Approved Quantity	Updated By Name	Bin Name	Cost	Total
01-213-104	7500	7500	noysa	WHMain	\$25.00	\$18,750.00
06-666-1A	15	15	noysa	Noy-WHMain	\$150.00	\$150.00
				Total		\$18,900.00



- Save the downloaded file as a PDF.



## 13. Quotes and EDI integration

For suppliers integrated through EDI, check the box “Send EDI to Vendor” in the supplier’s page. Integrating Quotes via EDI will require development and coding.

- To setup, point the mouse over Administration, Supporting Information and click on Suppliers.

#	ID	Supplier
1	22491	Noy
2	21854	asd
3		
4	11727	sp13june



- The Suppliers List page is displayed.
- Click on a Supplier name hyperlink.

#	ID	Supplier	Description	Address	City	State	Zip Code
4	11727	sp13june					

- The Supplier details page is displayed.

General Details

Supplier Name: sp13june  
Supplier Color: #9A8326  
Description  
Branch Number  
Maximum Order Size  
Default Order Required Days

Address Details

Address  
City  
State  
Zip Code  
Country  
Contact  
Phone  
Fax  
Email

Other Details

Send EDI to Vendor   
Vendor Return ASN   
Supplier Needs Kit Components

- Check the box, *Send EDI to Vendor* checkbox

**Other Details**

Send EDI to Vendor   
Vendor Return ASN   
Supplier Needs Kit Components

- And click Save.

For Suppliers that are not integrated through EDI, uncheck the Send EDI to Vendor box.

- The Quotes will be sent to the supplier by another means, other than EDI.

## 14. Search Quotes page

Two options to search the Quotes page:

### a. Main Search:

Enter the keyword in the search box. The keyword search results are highlighted in yellow. Search results are filtered after the third character is typed.

#	Expand	ID	Quote UDF	Quote Number	Release Number	Comment	Required Date	Quote Status	# of Line Items	Cost
1		336		9/12/2022-12	1		9/12/2022	T	1	18750.00
2		335		9/12/2022-11	1		9/12/2022	T	1	18750.00
3		334		9/12/2022-10	1		9/12/2022	T	2	18900.00
4		333		9/12/2022-9	1		9/12/2022	C	1	18750.00
5		332		9/12/2022-8	1	Unclosed a quote add'l comment.	9/12/2022	T	2	1017.58
6		331		9/12/2022-7 add	1	added comments	9/19/2022	C	3	19800.48

### b. Narrow Search by:

This function is used to filter or narrow down the scope of search for user convenience. It is an alternate or can be used in conjunction with the (main) Search function.

- To open Narrow search, click on the small Triangular icon on the top left corner of the screen.
- The following screen is displayed:

#	Expand	ID	Quote UDF	Quote Number
1		336		9/12/2022-12
2		335		9/12/2022-11
3		334		9/12/2022-10
4		333		9/12/2022-9
5		332		9/12/2022-8
6		331		9/12/2022-7 add

U = Unsubmitted, S = Submitted, A = Approved, T =



- Click on the double-arrow and check the box to narrow the search. The numbers in parenthesis indicate the number of items found with the narrow search criteria.

**Narrow Search By:**

Quote Status

Filter:   Check  UnCheck

Transmitted (5)  Closed (8)

To

Date Updated

From

To

UDF1

**Clear**

**Note:** Fields within the narrow search may vary from module to module.

**Narrow Search By:**

Supplier 1 selected

Filter:   Check  UnCheck

3333-PH-Fisher (63)  
 3334-BIO-Fisher (6)  
 3363-CL-Fisher (7)  
 3364-CH-Fisher (7)  
 BIO-VWR (207)  
 Graybar (47)  
 Henry Schein (108)  
 sp13june (3)  
 WFESTRI IRNF (84)

- Number in () is the # of items for that search result
- Filter: Enter keywords to search within the selected category  
**Filter:**
- Check the box to filter a search result.  
  Check  Uncheck
- Click  Check  Uncheck  Check to select all
- Click  Uncheck to remove all selections
- Click to close the Narrow Search filter
- This applies to all Narrow Search functions

Field	Description
Quote Status/ Supplier	<p>It is used to filter the module to the selected Narrow Search field. Click on up-down arrow key. Dropdown appears:</p> <div style="display: flex; justify-content: space-around;"> <div style="width: 45%;"> </div> <div style="width: 45%;"> </div> </div> <p>User can select or unselect all of the items of the list using the Check or Uncheck button. The module reflects the filter selections made.</p>
User Created by	<p>It is used to filter the module for the 'Created by' field. Click on up-down arrow key. Dropdown appears:</p> <div style="width: 45%; margin-left: auto; margin-right: 0;"> </div> <p>User can select or unselect all of the items of the list using Check or Uncheck button. The module reflects the filter selections made.</p>

User Updated by	<p>It is used to filter the module for the 'Updated by' field. Click on up-down arrow key. Select the pre-defined search filter or enter a new keyword in the Filter box and then click on Check. The module reflects the filter selections made.</p> <p>Dropdown appears:</p> <p><b>Note:</b> To reset the selections made click on </p>
Date Created and Date Updated	<p>Used to filter the 'Created On' and 'Updated On' fields respectively. User may enter the date manually or select from the calendar drop-down. Enter 'From-To' time period to be filtered. The module displays the search results for the selected time period.</p> <p><b>Note:</b> To clear the entire selection, click </p>

**Note:** At a point in time only one of the searches will work.

## 15. View records and Go To specific Pages

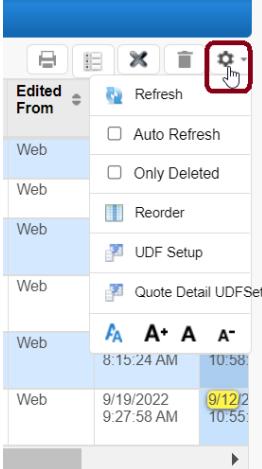
Click on the drop-down arrow and select the number of records to display in a page. Type the page number in the Go To Page field and click Go, to go to a specific page.

The screenshot shows the Quotes module interface. On the left, there is a 'Narrow Search By:' panel with various filters like Quote Status, Supplier, and User (Created by). The main area is a grid of quote records. At the top of the grid, there is a 'Show' dropdown menu with options: 10, 25, 50, 100, 250, 500, and 1,000. A red box highlights this dropdown. Below it is a 'Records < 1' button. The grid columns include: #, Quote UDF, Quote Number, Release Number, Comment, Required Date, Quote Status, # of Line Items, Cost, Change Revision, Created On Date, Created By, Updated On Date, Updated By, Room, and Action. The first few rows of data are visible.

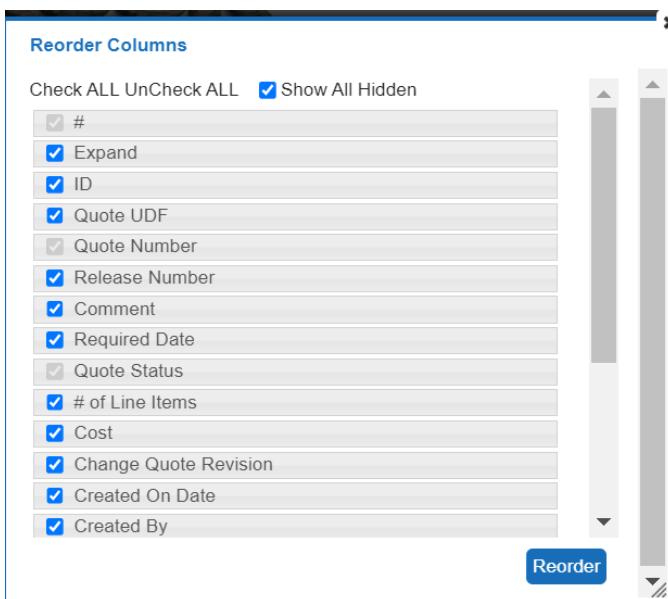
**Note:** Show records functionality enables user to select from 10, 25, 50, 100, 250, 500 and 1,000 items to be displayed per page. The number of records selected will affect the time it takes to display in a page. The greater the number of records the longer it takes to display the page.

## 16. Wheel Settings

Click on the Wheel Settings icon to display various settings on the module.



- Refresh: This option refreshes the module and displays the latest changes.
- Auto Refresh: This option automatically refreshes the screen.
- Only Deleted: This option displays only the deleted items. To select, check the box Only Deleted.
- Reorder: This option enables the user to reorder the columns of the quote module.
  - User may drag and drop fields to be arranged by preference.
  - User can also select which fields are displayed or hidden. Check or uncheck the box corresponding to a field to display or hide.
  - Check All or UnCheck All boxes.
  - Check box to Show All Hidden fields.



- Click Reorder to apply the selection(s).

e) UDF Setup: Setup up to 5 User Defined Fields to further describe each Quote.

UDF Setting for Quotes												
ID	Column Header	UDF Name	Control Type	Default Value	Required	Include in Narrow Search	Created On Date	Updated On Date	Updated By	Created By	Make Inactive	UDF Max Length
3549	UDF1	Quote UDF	Textbox		<input type="checkbox"/>	<input checked="" type="checkbox"/>	9/12/2022 2:38:47 PM	9/14/2022 11:01:24 AM	noysa	noysa	<input type="checkbox"/>	200
3550	UDF2	UDF2			<input type="checkbox"/>	<input checked="" type="checkbox"/>	9/12/2022 2:38:47 PM	9/12/2022 2:38:47 PM	noysa	noysa	<input type="checkbox"/>	200
3551	UDF3	UDF3			<input type="checkbox"/>	<input checked="" type="checkbox"/>	9/12/2022 2:38:47 PM	9/12/2022 2:38:47 PM	noysa	noysa	<input type="checkbox"/>	200
3552	UDF4	UDF4			<input type="checkbox"/>	<input checked="" type="checkbox"/>	9/12/2022 2:38:47 PM	9/12/2022 2:38:47 PM	noysa	noysa	<input type="checkbox"/>	200
3553	UDF5	UDF5			<input type="checkbox"/>	<input checked="" type="checkbox"/>	9/12/2022 2:38:47 PM	9/12/2022 2:38:47 PM	noysa	noysa	<input type="checkbox"/>	200

- Click on UDF column header name to define the UDF and save.

UDF Setting for Quotes

Created On Date : 9/12/2022 2:38:47 PM | Created By : noysa | Updated On Date : 9/14/2022 11:01:24 AM | Updated By : noysa

Is Deleted	<input type="checkbox"/>	
UDF1 *	Quote UDF	
Required	<input type="checkbox"/>	
Include in Narrow Search	<input checked="" type="checkbox"/>	
Control Type *	Textbox	
UDF Max Length	200	Maximum length exceeded
Default Textbox Value	<input type="text"/>	
<b>Save</b> <b>Cancel</b>		



The UDF will be displayed in the column header.

Room: NoyStock Rm | Created On Date: 9/14/2022 12:06:18 PM | Created By: nlachica | Updated On Date: 9/14/2022 12:31:16 PM | Updated By: noysa

Quote Number \* 9/14/2022-14 Required Date \* 9/14/2022 Quote Status Transmitted Supplier Supplier 2 Selected Graybar,Henry Schein

Comment

Release Number 1

Save Cancel

a) Quote Detail UDF Setup: Setup up to 5 User Defined Fields in the Quote (line items) details section.

Room: NoyStock Rm | Created On Date: 9/14/2022 12:06:18 PM | Created By: nlachica | Updated On Date: 9/14/2022 12:31:16 PM | Updated By: noysa

Quote Number \* 9/14/2022-14 Required Date \* 9/14/2022 Quote Status Transmitted Supplier Supplier 2 Selected Graybar,Henry Schein

# of Line Items: 2 Total Cost: \$ 18,900.00

Search <input type="text"/>																					
Show	10	Records	<	1	>	Go To Page: <input type="button" value="Go"/>															
#	ID	Item Number	Item Two 2	Bin	Requested quantity	Approved quantity	Required Date	Ordered Quantity	On Hand Quantity	Staged Quantity	Description	UOM	GL Account	Last Cost	Mark up	Sell Price	Quote Item Cost	Supplier	On Quoted Quantity	Comment	On Order Quantity
1	657	06-066-1A	Noy-WHMain ▾	15	15	9/14/2022	0	2463	6	Large Kimwipes	PK	8179	150.00	25	187.50	150	WESTBURNE	15	<input type="text"/>	0	
2	656	01-213-104	WHMain ▾	7500	7500	9/14/2022	0	470280	4	25ft Aluminum Foil 4	EA	8179	25.00	15	28.75	25	WESTBURNE	7500	<input type="text"/>	0	

b) *A, A, A:* Allows the user to increase or decrease the font size of the Items.

## 17. Miscellaneous settings

Grid in History tab may have the following functionality:

- 1) Resizing of columns
- 2) Re-Ordering of columns using drag & drop of column header
- 3) Single column and multi column sorting (using shift key)
- 4) Multi selection of rows by clicking each row.