

QUOTE NOTIFICATION

Utility created in Excel

Objective

Automate the task of generating a professional looking quotation document as PDF from a Excel quote file.

Additional Requirements

Perform validations to make user aware that not all required information was supplied.

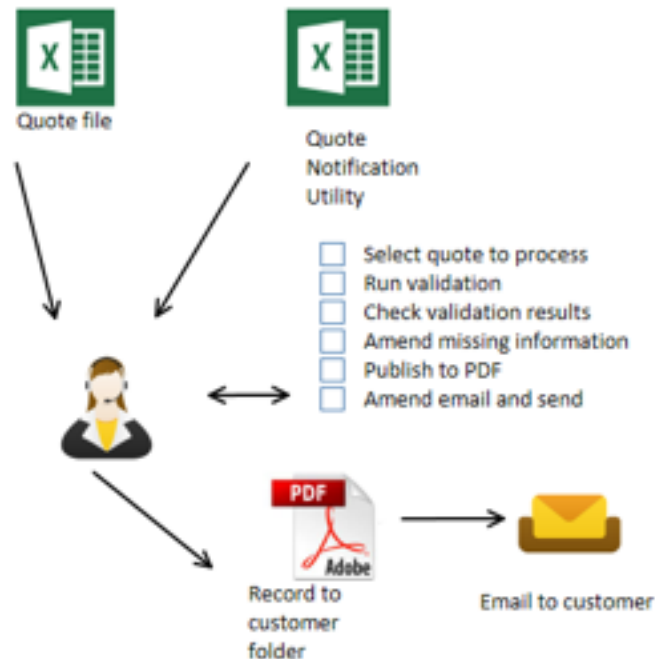
Save the generated PDF document in the customer document store for future reference.

Allow for addition of information to the quote and to customise the outgoing email content.

Result

The user is able to generate the quote with 6 clicks of the mouse unless all the required information was not supplied by the quoting team.

All the steps can be completed in less than 1 minute.



Solution Overview

The operator opens the utility and a quote file, activates the extraction process and then has to indicate the quote file to process. The data is extracted and the operator then initiates the validation process. A notification of success or failure of the validation is given and the operator has the opportunity to add additional information before commencing the publish step.

The PDF document is generated and saved in the selected customer document store and then attached to a draft email the user can customise to the situation.

Quote Notification									
Extract Quoted					Status				
Validate					Data validation passed				
Publish					Customer Name				
That's the Account to bill (email)					Customer Name				
					Duplicate Quote				
					Customer Reference				
					Email				
					adrian@connectglobal.com				
Submitted Description		Assigned Product Code	Quoted Quantity	Product Description / BA	Grade	Sale Price	Required Qty	Cost Price	Qty
Code: 1		PR0000	50	10 string	AA16-110	\$30.00	50	20	
Item's Description: 10 string of things Order Quantity: 10 Product Type: Foam Only Profile: Flat_Sheet Foam Grade: AA16-110 Length (mm): 1000 Width (mm): 400									