QUOTE TO ORDER
User Guide

Version 1.0

Content

Introduction

This user guide will provide the overview of quote to order process

Quote Creation

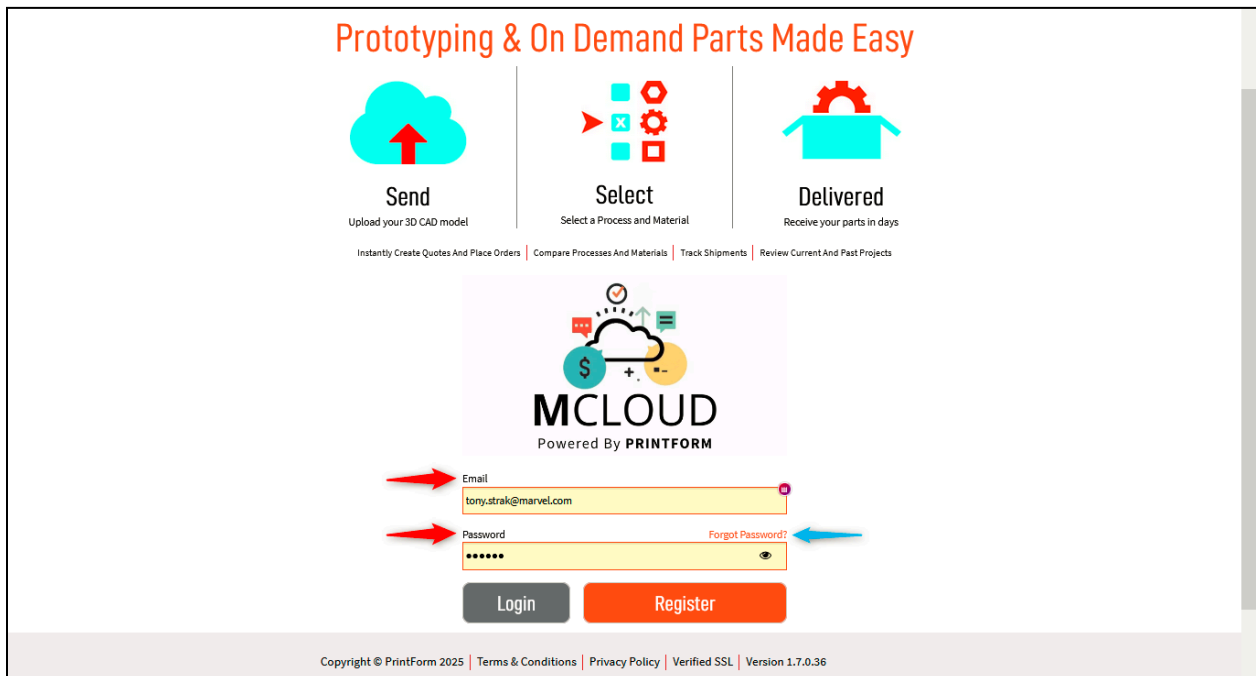The quote can be create by customer & CRM, please refer below steps :

1. Via Customer

Customers can create the quote by themself following through below steps:
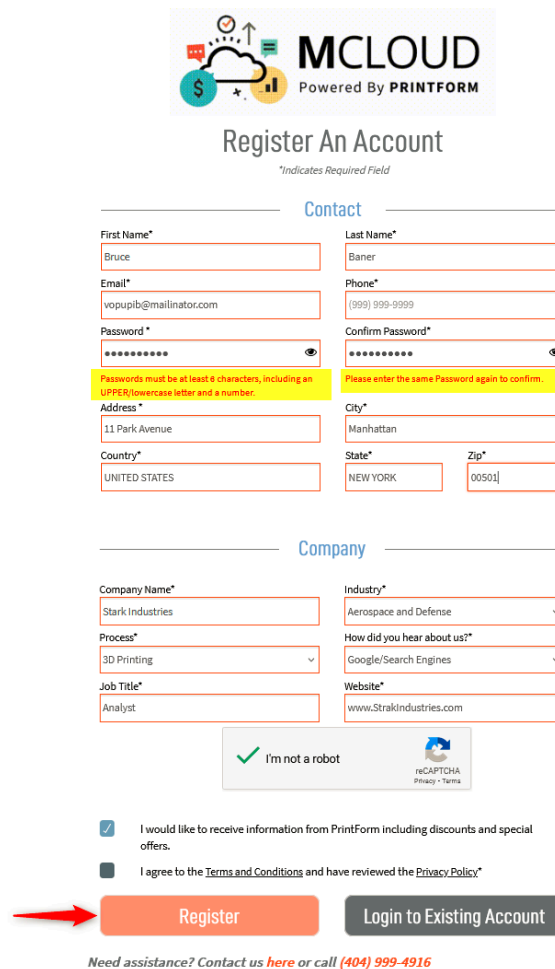
1.1 Registration Process

Customer can visit to printform website & get registered by them self though following steps:

- Open the website for Printform
  http://testpaasport.printform.com/paasport/register
- Enter the email & password
- Click on "**Register**"

- On registration account form, enter the all mandatory (*fields with * symbol*) informations for **Contact & Company**

- Password must be atleast 6 characters, including an UPPER/lower case letter and a symbol
- Verify as "I am not a robot" by clicking on checkbox
- Check the 2nd check box, after you read the **Terms and Condition** & **Privacy Policy**

   Note : You can not proceed further without accepting Terms and Condition & Privacy Policy

- Click on the "**Register**" button.

- Once your registration get successful then click on "**Login**" button
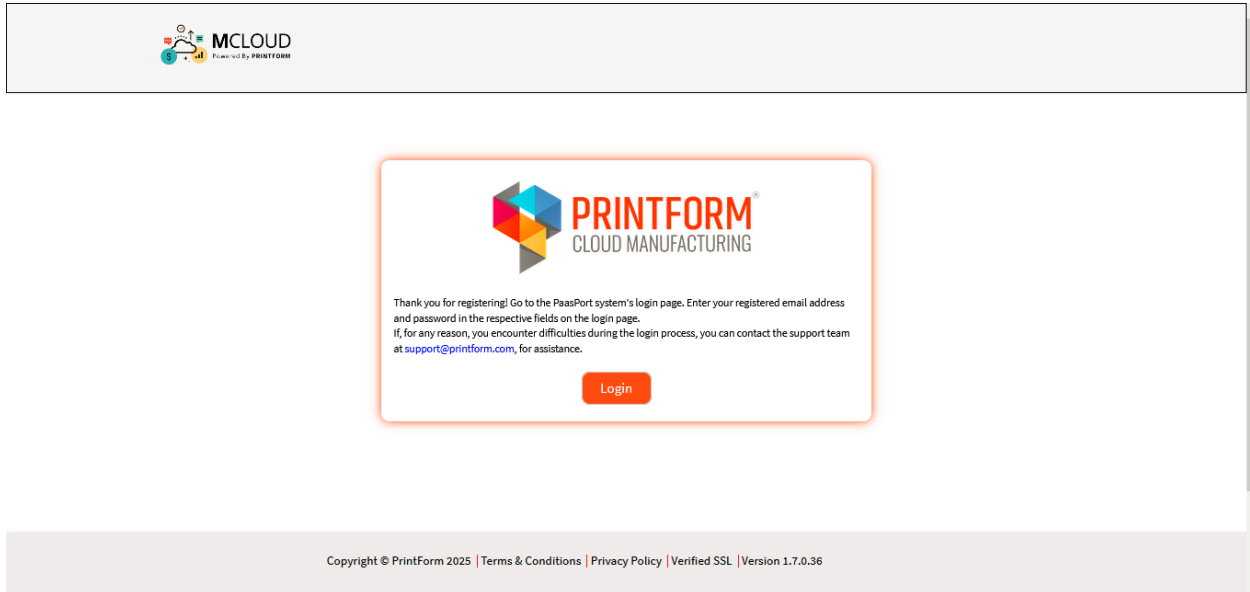
- Once your registration get successful then click on "**Login**" button

1.2 New Quote Creation (Via Customer)

- Login again with your credentials
- Now to create new Quote, click on "**Create New Quote**"
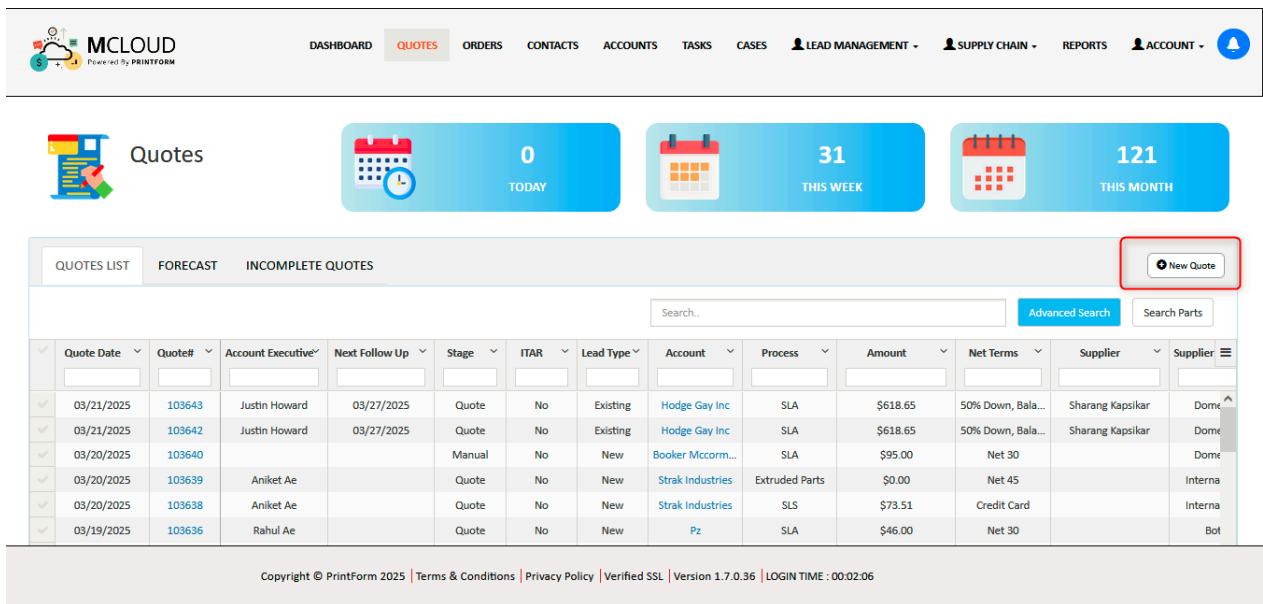
2. Via CRM Role

The CRM person can create the quote for customers as per their communications, following through below steps:
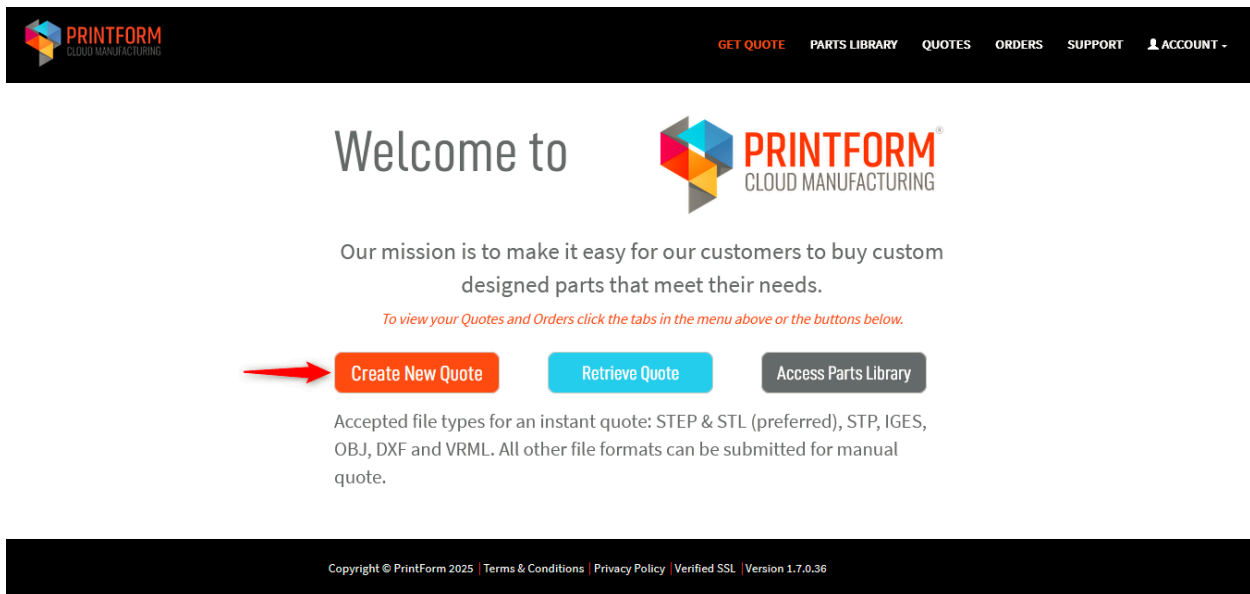
2.1 New Quote Creation (Via CRM)

- Open the website for Printform
  http://testpaasport.printform.com/paasport/register
- Login with your credentials
- Go to **Quote** Page & click on "**New Quote**"

- On Quote page, click on search icon of **First Name**
- **Search** the **customer contact** on pop window
- Select the customer

● Once customer is selected, click on "**Create Quote**" button

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- Click on "**No**" on ITAR notification pop up window

  Note *: You can not proceed by selecting "Yes"*

- Your quote is created

Addition of Parts on Quote

3.1 Normal Parts

After creation of quote, we can add the parts on the quote

- Click on **" ADD PARTS"**
- We can add multiple parts to a single quote

- Select file Click on **OPEN.**

- Dimensions of the part mentioned in the tab,
  1. INCH
  2. MM

Also 3D view button (user can view in diff angles).

- User can select the process for the part from the following options
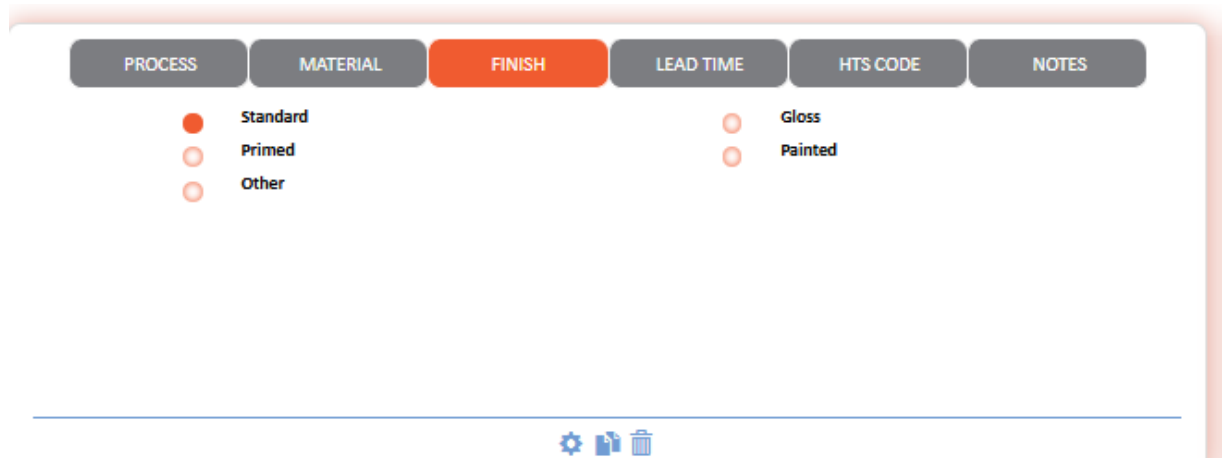
- User can select material as per requirements from the given options.
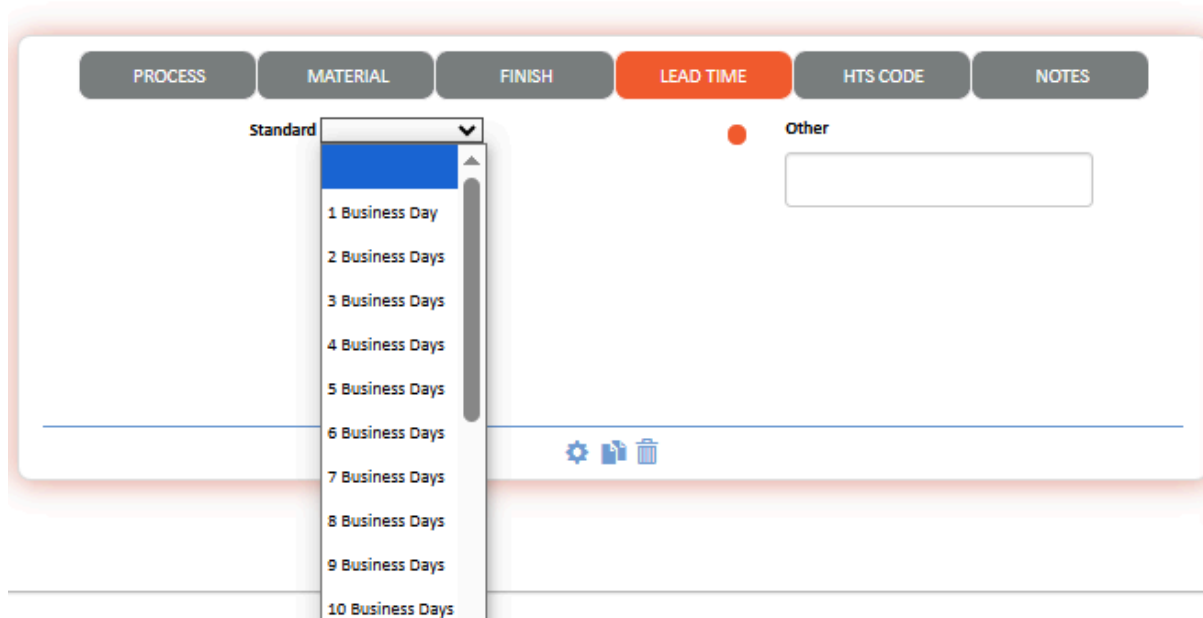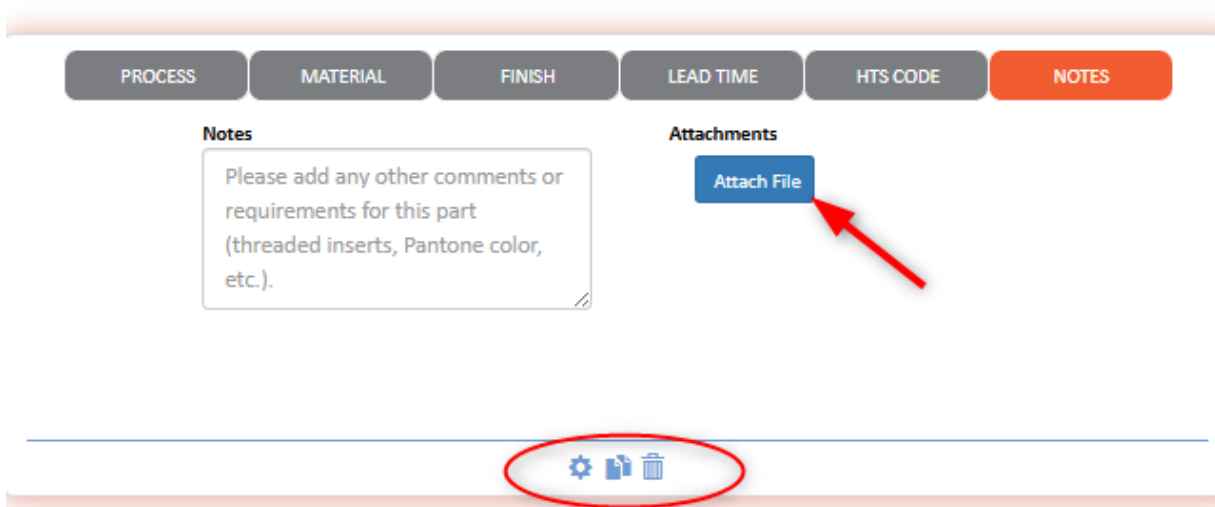
- Select Finish as per requirement from the given options.
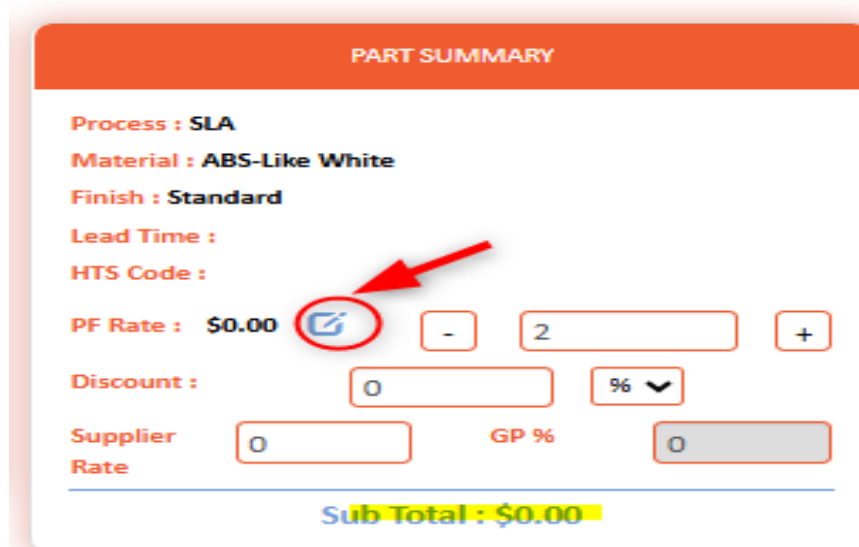
- Lead time is used for expected delivery days
- user can select it from given days in the dropdown and also to manually put desired days into other option.
- automatically 3 days set as lead time.
- USer can Add HTS Code .

- In Notes user able to add additional info regarding to the parts or able to attach files related to the parts.
- Below in circle their is 3 options (apply to all , duplicate and remove).
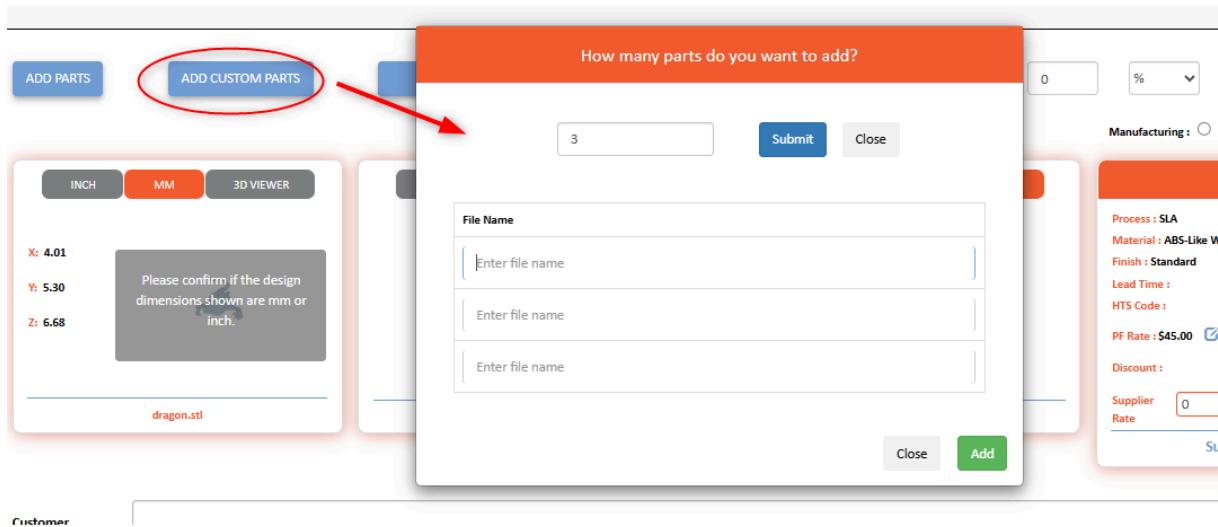
- In this part summary user can view all the selected option regarding the part
- User can change the quantity ('+' add quantity, '-' sub quantity)
- Can Add PF rate(click on edit icon)
    Note- 1-when PF rate mentioned sub total will calculate automatically
        2- In above header discount button will display)
- User can gave Discount for part
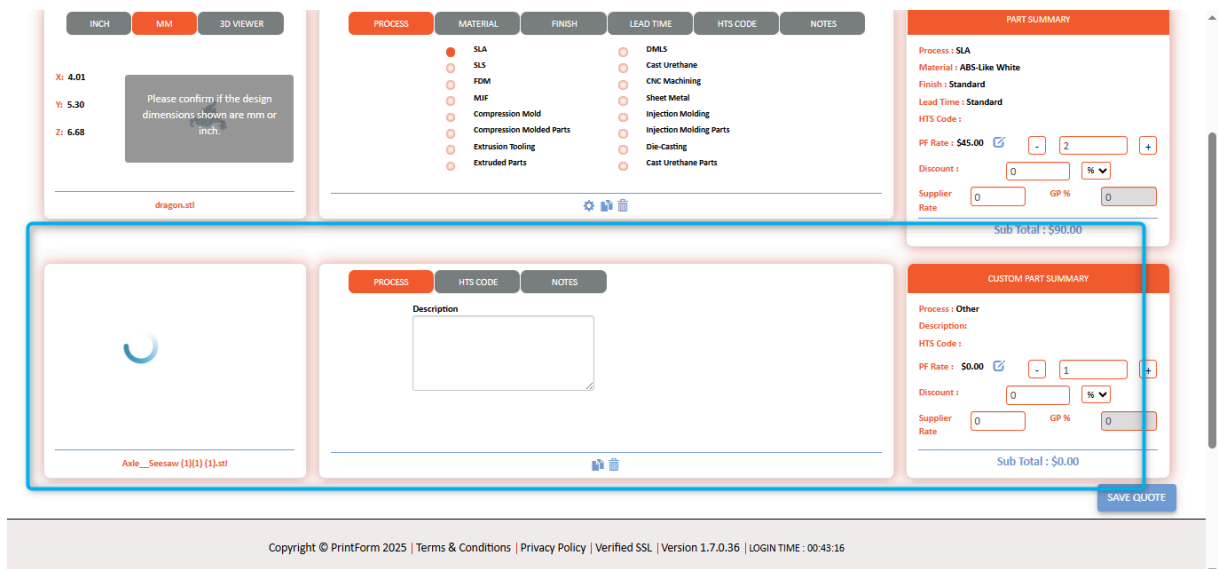
3.2 Custom Parts

- Click on **Add to custom parts** , Enter a file name and click on add button.
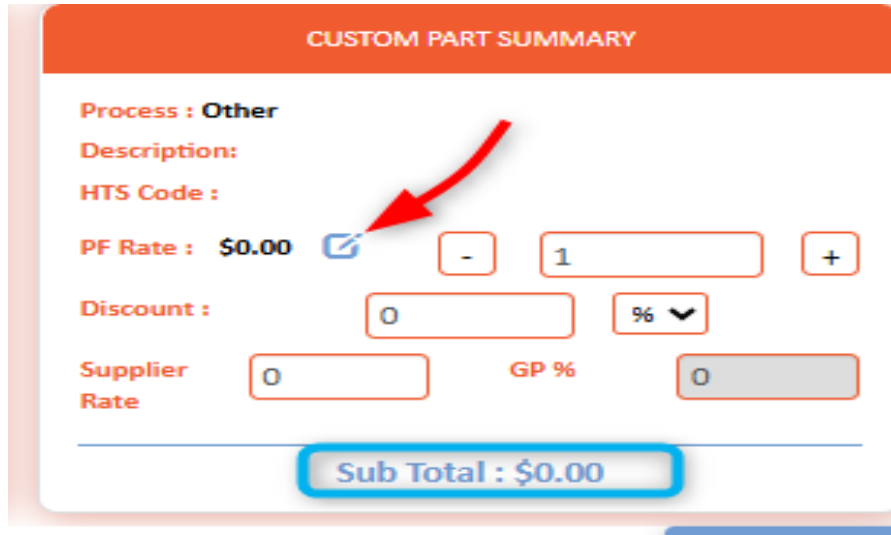
- User able to put process in description .
- Able to put HTS Code.
- In Notes user able to add additional info regarding to the parts or able to attach files related to the parts.

Below user able to write a note in customer notes section

- In this Custom part summary user can view all the option regarding the part
- User can change the quantity ('+' add quantity, '-' sub quantity)
- Can Add PF rate(click on edit icon)
  Note- 1-when PF rate mentioned sub total will get same amount.
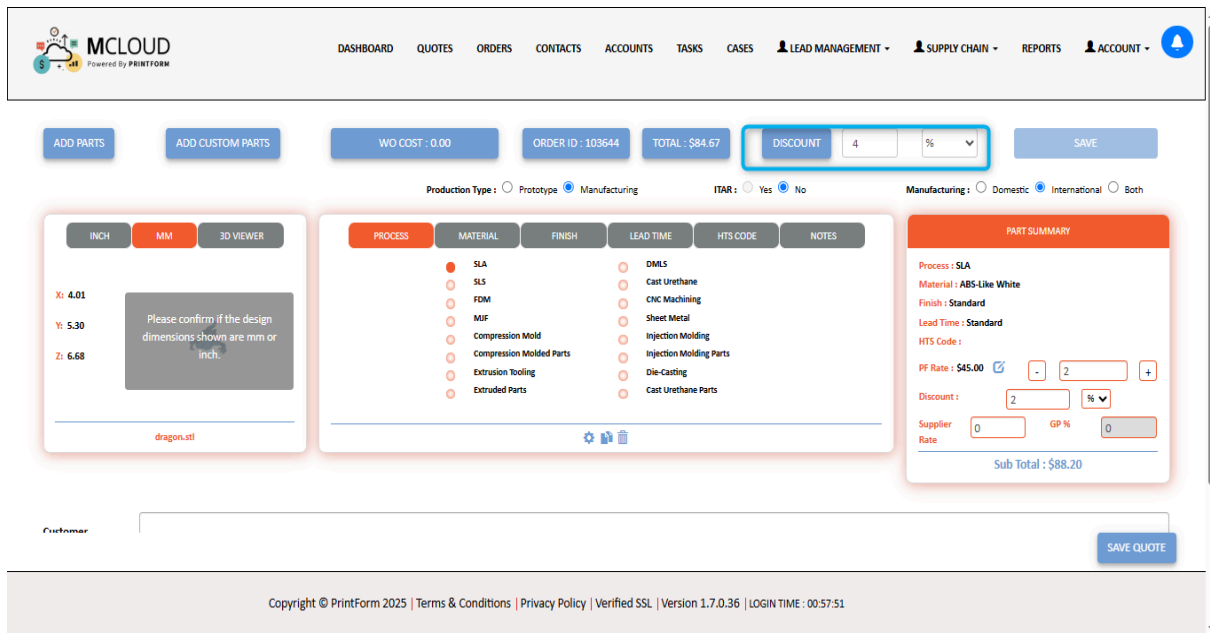
Header level discount feature

- User can able to put discount for all parts (discount can given in '%' and "$")

- Also in above section
1. User able to select production type('prototype', 'Manufacturing')
2. ITAR (International Traffics in Arms Regulation) by yes and no if it is 'yes' then you cant able to quote
3. Manufacturing gives 3 options(domestic,international ,both) as per requirement user can select it.

Quote fields in details all features

4.1 Quotes List

- Navigate to the quote page user will able to view Quote list.
- Quote list provide a detailed overview of all quotes in the system.
  It includes key information such as:

  - Quote Date: The date the quote was created.
  - Quote : The unique identifier for the quote.
  - Account Executive: The person responsible for the quote.
  - Next Follow-Up: The scheduled follow-up date.
  - Stage: The current stage of the quote (e.g., New, Existing).
  - Account: The account associated with the quote.
  - Process: The process or service being quoted.
  - Amount: The total amount of the quote.
  - Net Terms: The payment terms (e.g., Net 30, Net 45).
  - Supplier: The supplier information if applicable.
  ETC.

	Quote Date	Quote#	Account Executive..	Next Follow Up	Stage	ITAR	Lead Type	Account	Process	Amount	Net Terms	Supplier	Supplier
✓	03/21/2025	103644	Sojwal Ingle	03/28/2025	Quote	No	Existing	Strak Industries	SLA	$84.67	Net 45		Internal
✓	03/21/2025	103643	Justin Howard	03/27/2025	Quote	No	Existing	Hodge Gay Inc	SLA	$618.65	50% Down, Bala...	Sharang Kapsikar	Dome
✓	03/21/2025	103642	Justin Howard	03/27/2025	Quote	No	Existing	Hodge Gay Inc	SLA	$618.65	50% Down, Bala...	Sharang Kapsikar	Dome
✓	03/20/2025	103640			Manual	No	New	Booker Mccorm...	SLA	$95.00	Net 30		Dome
✓	03/20/2025	103639	Aniket Ae		Quote	No	New	Strak Industries	Extruded Parts	$0.00	Net 45		Internal
✓	03/20/2025	103638	Aniket Ae		Quote	No	New	Strak Industries	SLS	$73.51	Credit Card		Internal
✓	03/19/2025	103636	Rahul Ae		Quote	No	New	Pz	SLA	$46.00	Net 30		Bot
✓	03/19/2025	103635	Rahul Ae	03/28/2025	Quote	No	New	Pz	SLA	$140.01	Net 30		Bot
✓	03/19/2025	103633			Quote	No	New	Dell	SLA	$0.00	Net 30		Bot
✓	03/19/2025	103631			Manual	No	New	Dell	SLS	$0.00	Net 30		Bot
✓	03/19/2025	103628	Rahul Ae		Quote	No	New	Mk	Injection Molding	$8.00	Net 30		Bot

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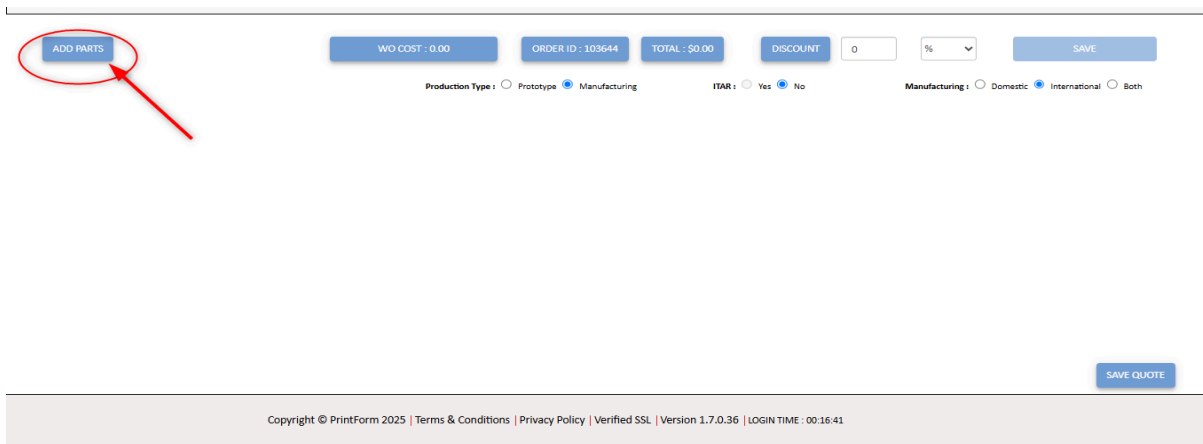● Click on any Quote# it will open Quote Information.
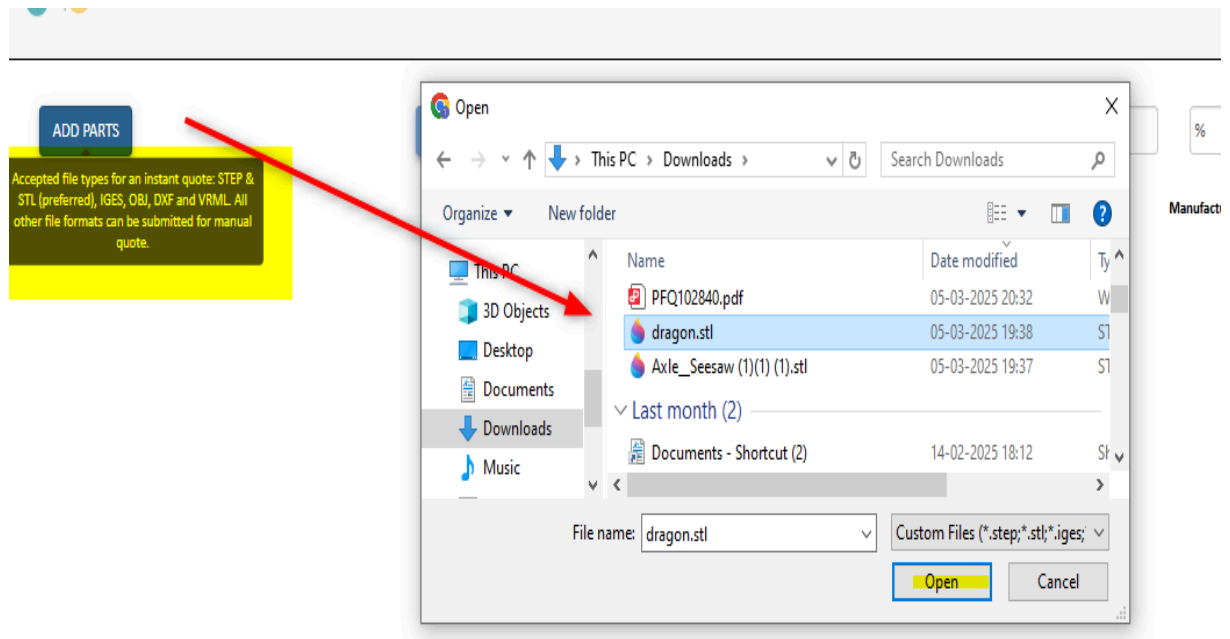

● User can view multiple tabs such as:
    1-Able to copy quote click on "**copy quote**" tab.
    [user will get one pop up message of quote alert]
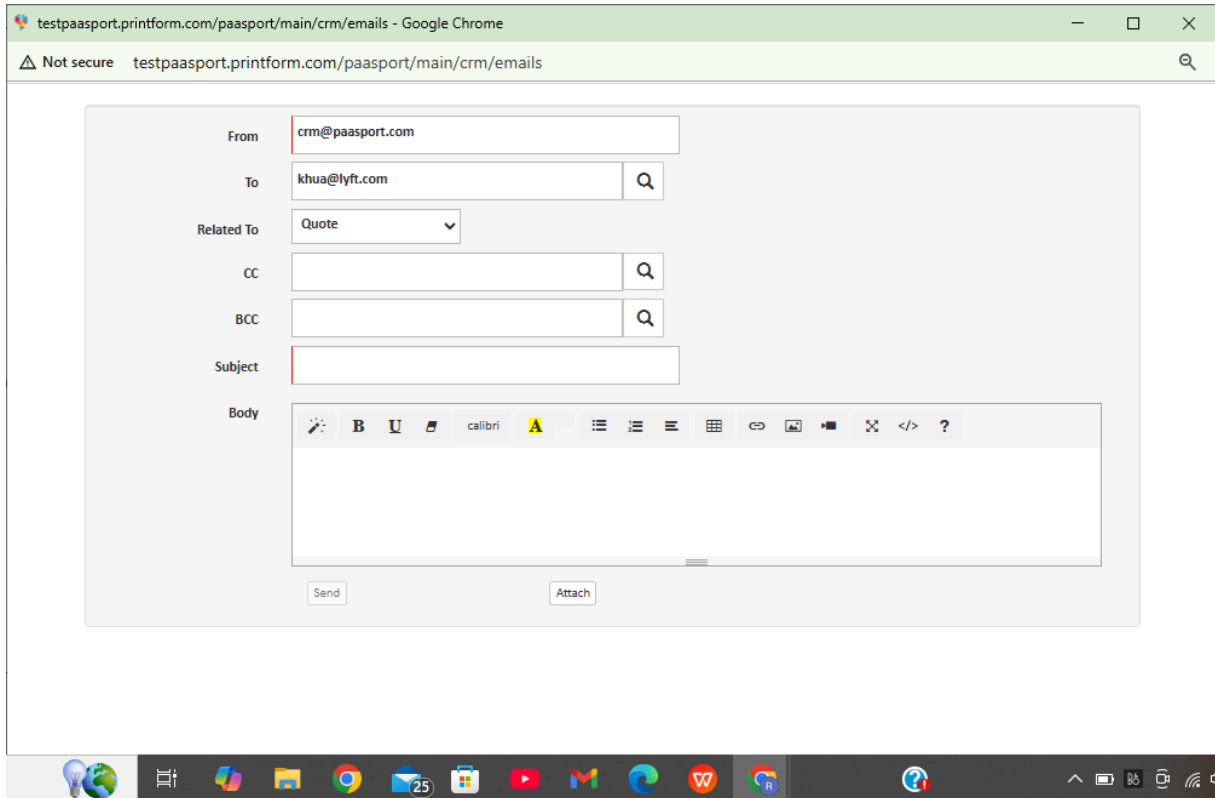
2- able to send an email click on "**send to emil**" tab.
- Fill all mandatory details also can attach documents,file .
- Click on send button
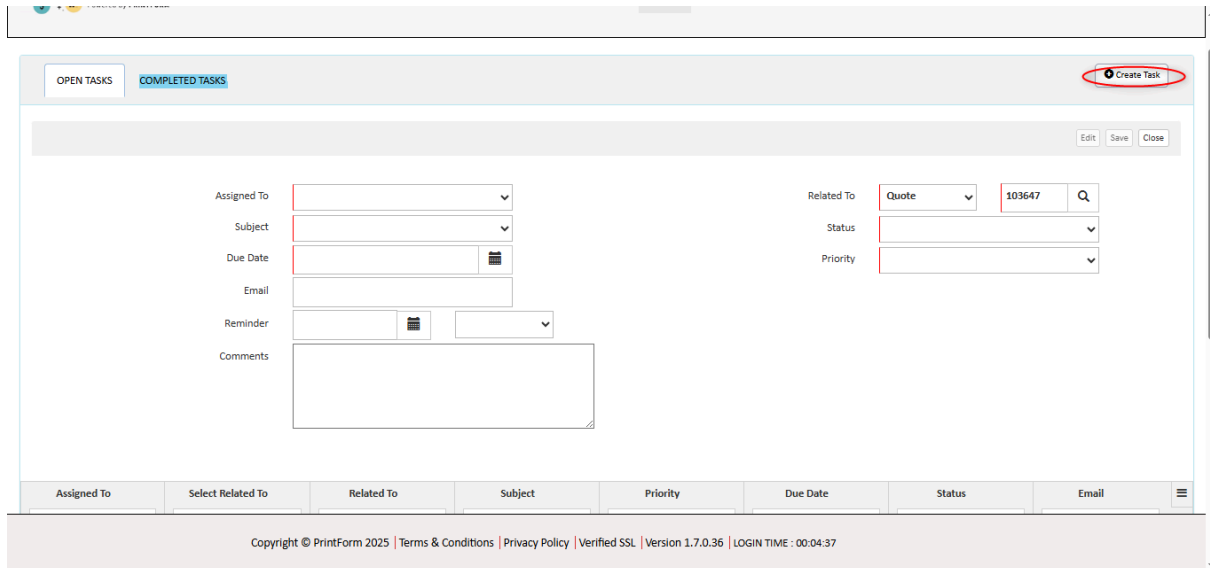
3- User can create new task click on **"new task"** tab.
It will redirect to tasks page
- User able to view two different sub tabs
  1.Open tasks - task created by user that are currently under process.
         -Only open tasks able to edit by assigned user

  2.completed tasks -task created by user that completed the process.
         -completed task is not able to edit by any user.

4.2 Edit Quote

- Click on "edit" tab
- Quote information displayed following fields will be available on the edit quote form.
- Quote ID -This field will be auto-populated when a quote gets created
- Stage-This field will be auto-selected to the option quote. Following options will show in the drop-down -
  - 1) Manual
  - 2) Request for quote
  - 3) Quote
  - 4) Follow up/Review
  - 5) Positive buying sign
  - 6) Negotiation
  - 7) Purchase order
  - 8) Closed lost
- Account executive / project manager-able to select (dropdown option)
- Manufacturing- select suppliers where options to select(domestic,international,both).
- The CRM person will be able to save the data for further processing after all required fields have been filled. By modifying the first name field, the CRM person can update the customer on the generated quote. On the first name field, a search option to select the preferred customer will show up.

4.3 Order details

- All details displayed in order details
- Below there is Five Tabs:

    ❖ On the created quote page following functionalities will be given to help the CRM for improving quotes –
    ❖ Edit quote – Using this button the CRM person will be able to edit information of the added parts.
    ❖ Place order – Using this button the CRM person will be able to place an order after thecustomer paid the amount of the quote.
    ❖ Email quote – using this button the CRM person should be able to send a copy of the quote directly through email to the customer.
    ❖ Download quote – Using this button the CRM person should be able to download quote in the PDF format.
    ❖ Supplier RFQ- we have to way to assign supplier first way is manual way

❖ Click on supplier RFQ -pdf will download and eamil to supplier the supplier put his prices again send back to AE they have conversation . so when the supplier confirm price then AE edit quote add Supplier rate ,save quote and select supplier from below.

4.4 Supply Chain

- All potential suppliers on the corresponding quote based on the specified manufacturing will be displayed following the successful creation of the quote. Only domestic suppliers will be displayed on the quote when domestic manufacturing is chosen. Likewise, suppliers will be displayed if international manufacturing is chosen.
- A CRM person will be able to simultaneously send requests for quotes to several suppliers.
- The CRM person will be able to view all suppliers' rates in a single window whenever suppliers submit their rates for quotes

- . A CRM person will be able to assign a quote to an eligible supplier from the same window.

Notes –

In the notes section following fields will be added to add notes

Assigning to Supplier

5.1 Old way

- Click on edit.

- When you scroll a bit below user will able to view **Supplier Details**
- User able to Select suppliers from supplier list (by drop down)
- Beside it you can select payment terms also.(by drop down)
- User can write a note in note section below supplier list

- After assigning supplier Click on Save button on the top .
- Scroll a bit in Quote details user able to view supplier RFQ tab
- Click on it download pdf

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SUPPLIER RFQ- .

- Click on supplier RFQ -pdf will download .

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REQUEST FOR QUOTE

Quote # : PFQ103647

Date : 03/22/2025

Account Executive	Est. Lead Time
Justin Howard	6 Business Days

Quote Details

Line #	Process	File Name	Material	Finish	Specification	Leadtime	Qty	Unit Price
1	FDM	71-0000534 _RevA_3-6- 2025.STEP	PC-ABS	Standard		6 Business Days	1	
2	FDM	71-0000535 _RevA_3-6- 2025.STEP	PC-ABS	Standard		6 Business Days	1	

Quote Notes

Line #	File Name	Special Instructions	Attachments	HTS Code
1	71-0000534_RevA_3-6-2025.STEP			
2	71-0000535_RevA_3-6-2025.STEP			

Parts List (All the X, Y, Z Dimensions shown are in Inches, and Volume is in Cubic Inches.)

File Name	X	Y	Z	Vol
71-0000534_RevA_3-6- 2025.STEP	0.00	0.00	0.00	0.00
71-0000535_RevA_3-6- 2025.STEP	0.00	0.00	0.00	0.00

Notes

Request for Quote (RFQ), which will be active and accepting responses within 24 hours

			Line #	File Name	S

- User able to email the pdf to supplier and then supplier put his prices again send back to AE they have conversation .
- so when the supplier confirm price then AE edit quote add Supplier rate ,save quote and select supplier from below.

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5.2 New way

- User can select suppliers from the supply chain.
- Click on request for Quote tab
- Supplier and AE will get notification

- Users will be able to view the review Quote button.
- Click on Review quote(user can see status)
- Supplier can accept and decline quotes and it will auto updated in status.

Get Pricing from Suppliers

- Once supplier accept Quote it put supplier rate(both supplier and crm will get notification)
- AE will receive notification and status will auto updated(submitted for review)
- AE have two option one select it or decline it .

- Once AE select it (Supplier get notification)
- AE select it (assigns supplier) .

Quote Updates

Update Supplier Quote Button Visibility:
- After successfully assigning a supplier beside the **"Review Quotes"** button, the user will see the **"Update Supplier Quote"** button.

Confirmation Pop-Up:
- Clicking the **"Update Supplier Quote"** button triggers a pop-up message asking: "Confirm Quote Update – Proceed to update quotes for all requested suppliers?"

The user can select:
- Yes: Updates quotes for all suppliers included in the original request.
- No: Cancels the action, leaving quotes unchanged.
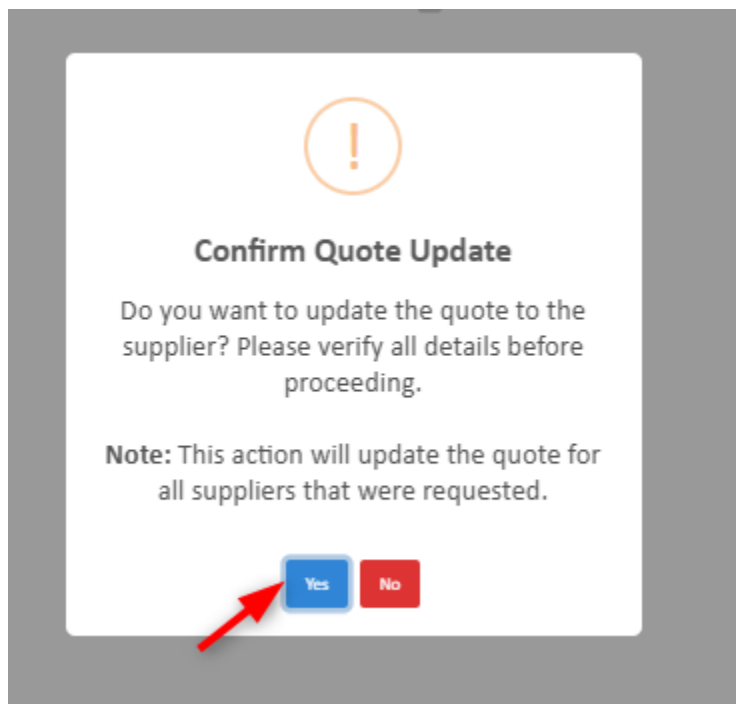
Update Execution:
- Selecting Yes instantly applies the update to all relevant suppliers.
- The system will reflect the changes across the platform once confirmed.

Order Placement

- Supplier Assignment:

   After an Account Executive assigns a supplier, the user can proceed to place the order.

- Initiate Order Placement:

   In the Order Details section, the user will see a "Place Order" button.

   Clicking this button redirects the user to the *Shipping Address* page.

- Shipping Address Page:

  Options available:

  Edit Button: Modify the current shipping address.

  Delete Button*: Remove the current address.

  Select Address Button*: Choose a previously saved shipping address (if available).

  Enter a New Shipping Address Button*: Add a new address.
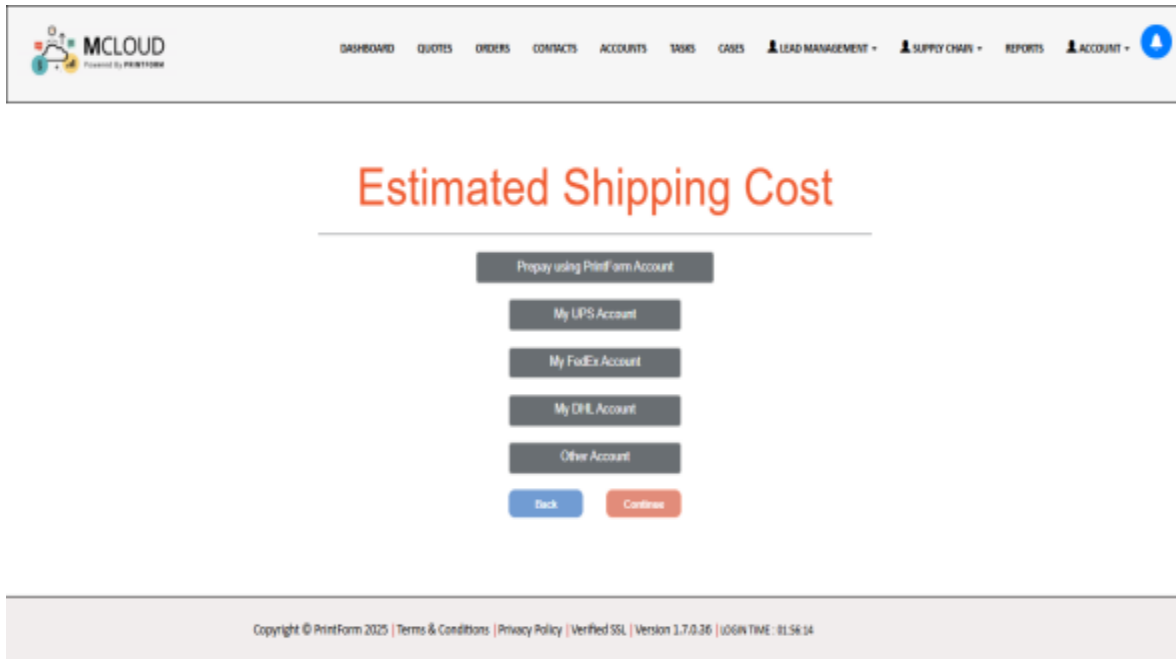
  After selecting/adding an address, click *Continue* to proceed.

4. Estimated Shipping Cost Page:

Select the account to be used for payment.

Click Continue to advance to the Payment Information page.

5. Payment Information Page:

  Two payment options:

    1. Upload Purchase Order:

      Attach the purchase order file.

      Enter the *PO number*.

    2. Credit Card: Select this option for card payment.

    Click *Continue* after choosing a payment method.

6. Confirmation Pop-Up:

  - A "Submission Successful" message appears to confirm the action.
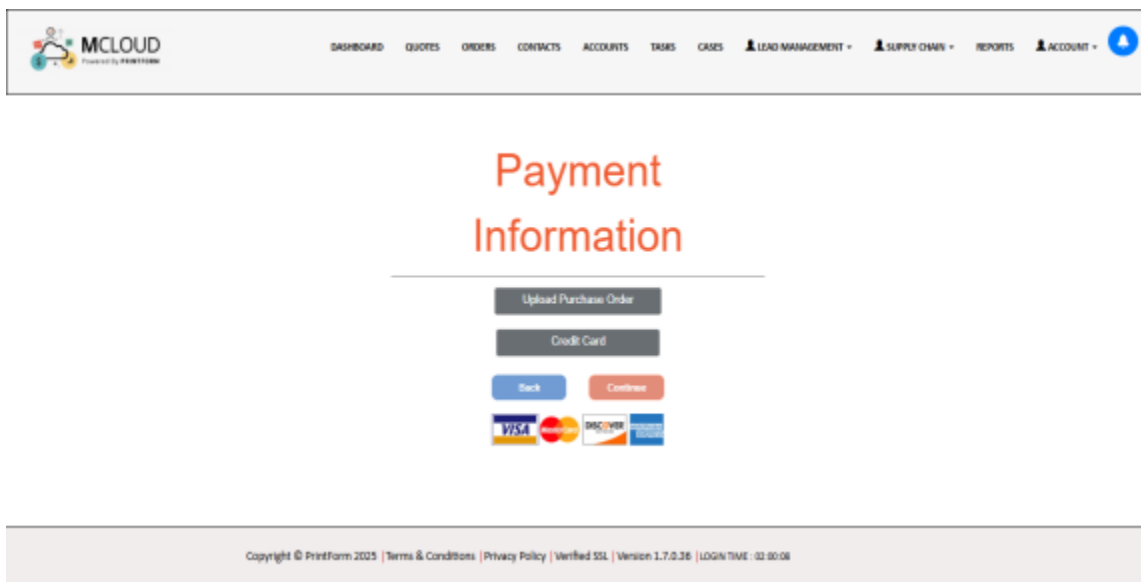
7. Final Review & Order Placement:

   The user is redirected to a *Review Page* displaying:

   Order Details (editable if adjustments are needed).

   Order Summary (to verify items, costs, and terms).

 Final Step:

   Check the *confirmation checkbox* to acknowledge accuracy.

   Click "Place Order" to finalize the process.

DETAILS	ORDER SUMMARY-PFQ103636								

DETAILS

Shipping Address

Petter Zack
Streat122,
Mexico, FD 3435366

(Edit)

Estimated Shipping Cost

Prepay Using PrintForm Account

(Edit)

Payment Information

Purchase Order
PO-6

(Edit)

Item #	Process	File Name	Material	Finish	Lead Time	HTS Code	Quantity	Unit Price	Line Total
1	SLA	Axle__Seesaw (1)(1) (1).stl	ABS-Like White	Standard	Standard		2	$23.00	$46.00
								Sub Total	$46.00
								Discount	0%
								Shipping	TBD
								Total	**$46.00**

Need assistance? Contact us here or call (404) 999-4916

☑ By placing your order, you agree to PrintForm
Privacy Policy and Terms & Conditions

[Edit Quote] [Place Order]

- Order placed successfully.

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Order Confirmation

Thank you for your order!
Your order ID is PFQ103636
To create another quote or return to your account, please click here.