

## **Header – Alternate Quote**

### **Instructions for creating an alternate quote.**

Launch eRapid Quotes from Citrix and select desired user.

System Message: **Welcome to Quote System**

[Quote Home](#) | [Help](#) | [Contacts](#) | [LOGOFF](#)

**TRAINING SYSTEM**

NEW QUOTE	EDIT/SEARCH QUOTE
<p>QUOTE TYPE: <input type="text" value="NEW"/> ▼</p> <p>PRODUCT: <input type="text" value="-----Select One-----"/> ▼</p> <p style="text-align: center;"><input type="button" value="START"/></p>	<p>PRODUCT: <input type="text" value="-----Select One-----"/> ▼</p> <p>SEARCH METHOD: <input type="text" value="-----Select One-----"/> ▼</p> <p>SEARCH FOR: <input type="text"/></p> <p>FACTORY ORDERS: <input type="checkbox"/></p> <p style="text-align: center;"><input type="button" value="SEARCH"/></p>
CUSTOMER MASTER	MISCELLANEOUS
<ul style="list-style-type: none"><li>■ <a href="#">Edit a customer</a></li><li>■ <a href="#">Create new customer</a></li></ul>	<ul style="list-style-type: none"><li>■ <a href="#">Quote Request Form</a></li></ul>

**E-RAPID**

Click on the down arrow for “Quote Type” in the “New Quote” block.

Select “Alternate” from the drop down.

Click on “Product” and select the desired product from the list.

**NEW QUOTE**

QUOTE TYPE:  ▼

PRODUCT:  ▼

QUOTE NO:

⬆

Brick Vent Products

Entrance Flooring Systems

Expansion Joint Covers

Interior Wall Protection

Louver Products

Click on the “Quote No” label and a new window will pop up.

The screenshot shows a web application interface with two main sections: **NEW QUOTE** and **EDIT/SEARCH QUOTE**. In the **NEW QUOTE** section, there are dropdown menus for **QUOTE TYPE** (set to ALTERNATE), **PRODUCT** (set to Entrance Flooring Syster), and a text input field for **QUOTE NO:**. In the **EDIT/SEARCH QUOTE** section, there are dropdown menus for **PRODUCT** and **SEARCH METHOD**, and a text input field for **SEARCH FOR:**. A **CUSTOMER** section is partially visible on the left. Overlaid on this is a window titled **Quote Number search Helper - Microsoft Internet Explorer**. Inside this window, there is a section titled **QUOTE NUMBER SEARCHING** with the instruction **Enter the first few characters of the Quote number & Click Search:**. Below this is a text input field containing **001234\_00** and a **Search** button.

Enter the original quote number. As previously noted, the “%” works as a wildcard for searching.

Click on the “Search” button.

The screenshot shows the **Quote Number search Helper** window after a search. The window title is **QUOTE NUMBER'S LIKE "007" EFS**. Below this, there is a section titled **QUOTE NO SEARCH** with the instruction **Enter few characters of the number:** and a text input field. Below this is a section titled **Pick a Quote Number:** with a list of quote numbers and their corresponding descriptions:

- 007305\_00 , test ts, Artronics Corp.
- 007048\_00 , bv\_test\_002, Jim DeVore
- 007022\_00 , bv\_test\_002, Jim DeVore
- 007018\_01 , BV\_TEST\_001, Jim DeVore
- 007018\_00 , BV\_TEST\_001, Jim DeVore

At the bottom of the window is a **Select** button.

Highlight (select) the desired quote number by clicking on it.

Click the “Select” button and the selected quote number will populate the box on the screen.

Click the “START” button in the “New Quote” block to proceed.

**NEW QUOTE**

QUOTE TYPE:ALTERNATE

PRODUCT:Entrance Flooring Syster

QUOTE NO:007022\_00

START

Make any necessary changes to the header.

**EDITING THE QUOTE HEADER INFORMATION:**

Quote Status:	OPEN	Type:	Quote
Entry Date:	2006-07-27	Bid Date:	2006-07-27
Expire Date:	2006-10-25	Project Name:	bv_test_002
Project City:	Manville	Project State :	NJ
Architect Name:	ABB ENERGY VENTURE	Architect City:	Princeton , NJ
Exclusions:		Qualifying Notes:	
Free Exclusions:		Free Qualifying Notes:	
Division:	ABC	Section:	123
Free Text:		Customer Name:	Jim DeVore
Section Desc:	123 Desc.	Contact Name:	Bob Contact

Save

Click the “Save” button to go to the line item screen.

The program will now create a copy of the original quote. Alternate quote numbers will have the same first six digits as the original quote number, followed by an underscore “\_” and two digits for the number of the alternate. For example, quote number 001234\_00 would have 001234\_01 for the first alternate and 001234\_05 for the fifth alternate.

End Section