


# Preparing an offer


To prepare a new offer in Eurad you need to click “New” button in the menu on the left in the section “Cust. offers”. You will see a window where you have to fill some basic data: Customer, NHM or Cargo description (depending on types of services you are allowed to register).

The screenshot shows a software window titled "Creating" with a close button (X) in the top right corner. Below the title bar, there is a message: "Change the data and press OK. Press Apply to save data without closing the window." The window is divided into several sections:

- Customer:** A text field containing "780001" with a green checkmark icon to its left and a dropdown menu showing "CKTZ" to its right.
- Contact person:** A text field with a dropdown menu icon to its right.
- Cargo:** A section with two tabs: "NHM/CN" and "Cargo description". The "Cargo description" tab is active, showing a text field with "5509" and a dropdown menu with "Yarn of synthetic staple fibres (excl. sewing thread and yarn put up". Below this, there are two sub-sections: "Including NHM" and "Excluding NHM". The "Including NHM" sub-section has a table with columns "From NHM" and "To NHM".
- Strategic cargo:** A checkbox labeled "Strategic cargo".
- Non-EU cargo:** A checkbox labeled "Non-EU cargo".
- RID/ADR:** A text field with a dropdown menu showing "[Class]" and a dropdown menu showing "[UN]".
- Country of origin:** A dropdown menu.
- Country of destin.:** A dropdown menu.
- INCOTERMS from:** A dropdown menu.
- INCOTERMS to:** A dropdown menu.
- Offered services:** A table with columns: "Service name", "Cost groups", and "Measure units conv...". The table is currently empty.

At the bottom of the window, there are three buttons: "OK", "Cancel", and "Apply".

Then you need to add at least one offered services by clicking “Add”  button in group “Offered services”. Choose what type of service you want to offer, for example: “Rail transport” or “Other service”. Then fill data regarding what type of service you chose, for example fill the transport’s relation for rail transport and click OK. You can add as many offered services as you want. You can

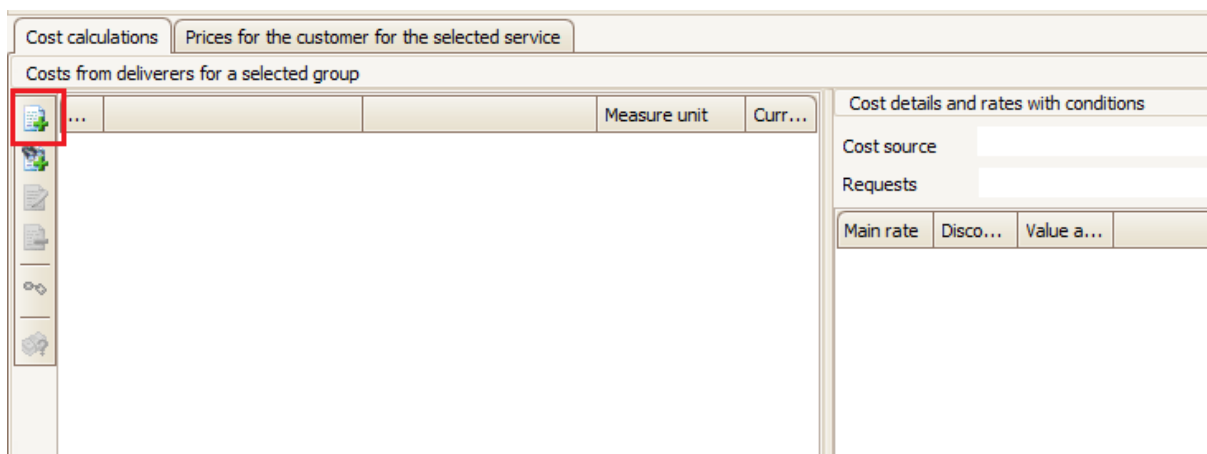
even copy offered service from created one by clicking “Copy” button . Click OK to create bases of a new offer.

You can also add new offered services in view window of offer in group “Services offered on suboffer”.

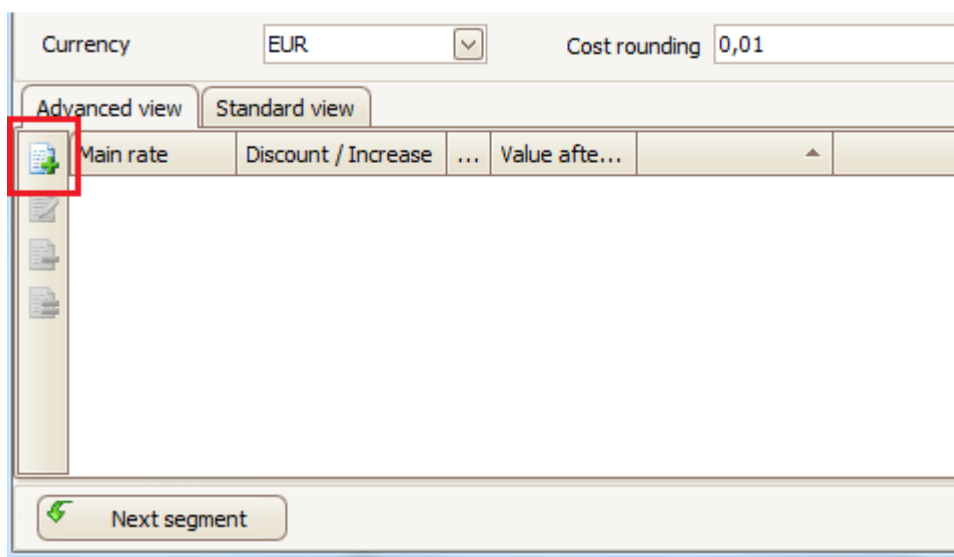
Then you need to set costs and prices for each offered service.

## Cost calculation

On customer offer view there is a “Cost calculations” tab. Go there and click “Add” button.



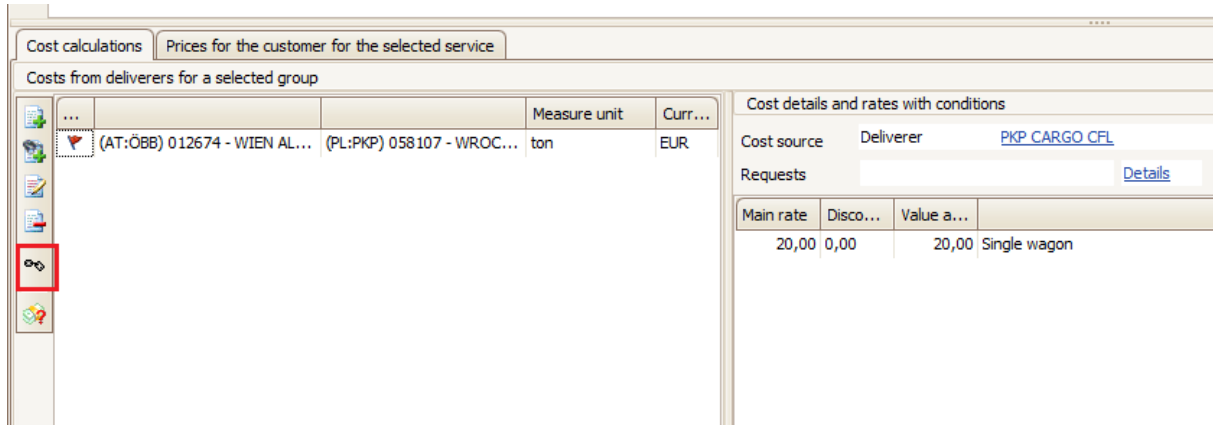
Choose what kind of cost you want to add (freight or additional cost). You will see a window for creating a new cost. Set basic data such as: cost type, cost source, measure unit and currency and then in a grid with cost values click “Add”.



Depending on for what kind of conditions you want to create a cost value you will have to set different data, for example for rail/wagon conditions: ownership, axle count, weight ranges or minimum weight. Then click OK. Finally you need to set cost value for cost condition you just created. Just enter cost value in “Main rate” column.

## Prices for customer

After making cost calculation you can prepare prices based on costs. To do that, in cost calculations grid, choose one or more costs which will be a part of created price and click “Create customer price” button.



Cost source	Deliverer	Measure unit	Curr...
(AT:ÖBB) 012674 - WIEN AL...	(PL:PKP) 058107 - WROC...	ton	EUR

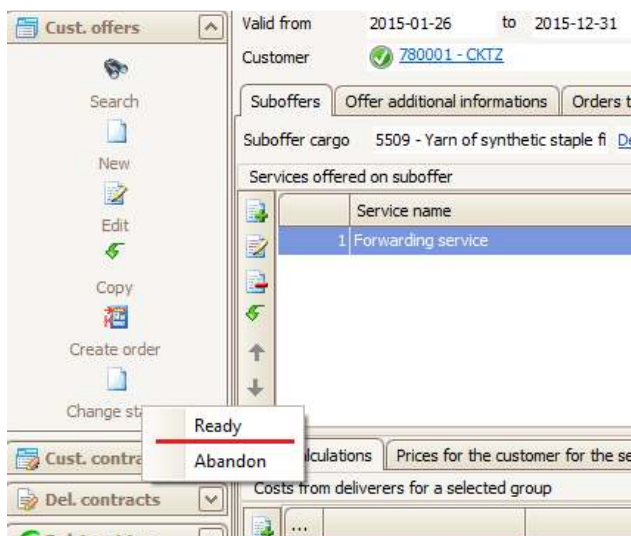
Main rate	Disco...	Value a...	Single wagon
20,00	0,00	20,00	Single wagon

You will see a window for creating a price. In a simply way just click “Calculate prices” and “Calculate prices with common conditions”. If it is possible to calculate a price automatically this sum of costs will be calculated. You need to add only a margin (setting % Margin or Margin column) and click OK. You can add prices manually of course by clicking “Add” button in “Prices for customer for the selected service” tab.

When you go back to “Cost calculations” tab, you will see that all costs have color flags. Green means that this cost is included in a price, red means that this cost is not included in a price.

You can add as many costs and prices to your offered service as you wish but remember not to mix cost/price conditions too much because all these conditions will be checked while registering a service, for example wagon (don’t mix conditions for empty and loaded wagons, because wagon cannot be empty and loaded at one time).

When you make cost and price calculation for all offered services you have to change an offer’s state to “Ready”. To do this click “Change state” on a left menu and choose “Ready”.



Service name
1 Forwarding service

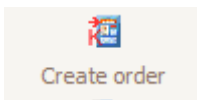
When you change offer's state to "Ready" you cannot change anything on this offer. To make it possible to change the offer you need to change offer's state back to "In work".

When offer is "Ready" and you are sure that everything with offer is OK you can change its state to "Sent". It means that you in reality sent this offer to your customer (by e-mail or printed version). Then enter expected date of response to the offer.

Last step is to change offer's state to:

- "Accepted" – when your customer accepted the offer or
- "Rejected" – when your customer rejected the offer. In this case write down the reason you rejected the offer.

From now on you can register customer orders based on accepted customer offers. To do this click

"Create order"  button in the menu on left in section "Cust. offers" while having open this offer.