

CHAPTER 11: QUOTATION TO CONTACTS

This chapter contains the following sections:

- Introduction
- Setting Up Customer Templates
- Making a Sales Quote from the Opportunity List Window
- Making a Sales Quote from the Sales Quote Window
- Creating a Sales Order from the Sales Quote Window
- Assigning a Sales Quote to an Opportunity
- Exercises

Introduction

In Microsoft® Business Solutions–Navision® 4.0 it is possible to create sales, purchase, and service documents on the basis of a contact instead of a customer. In this way the salesperson does not need to know the customer record to create, for example, a sales document. The knowledge of the contact record is sufficient. Also, a new customer template contains information that is necessary to create a customer from a contact record.

Information from the contact record and customer template is necessary to create quotes. If the quote is to become an order, the program will prompt you to create the customer because an order can still only be based on a customer record. The Quotation to Contact feature allows you to:

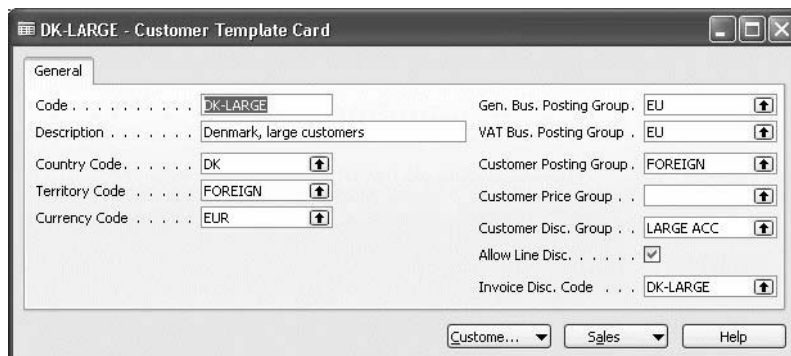
- Issue quotes to contacts from different countries.
- Use different language codes.
- Use different General, VAT, or Customers Bus. Posting Groups.
- Use different Price Group Codes.

Setting up Customer Templates

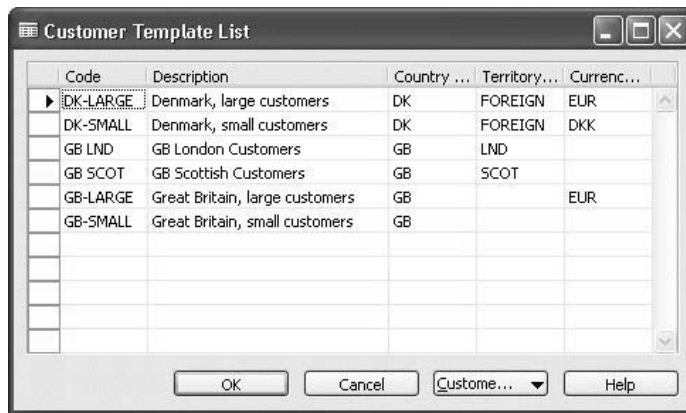
You may often have contacts or possible customers asking for quotes. These contacts or potential customers may not yet be registered as customers in the program. In order for you to make sales quotes for these requests, you should create and define one or more customer templates. You can then use the templates in the quotation phase, so that you do not have to create a customer. You use this template to pass on information that is necessary to create a customer from a contact card.

You can set up the customer templates in the following way:

1. Click SALES & MARKETING→SALES→SETUP→CUSTOMER TEMPLATES.
2. The Customer Template Card appears:



3. On the Customer Template Card found on the General tab, type a Code and a Description for the customer template.
4. The other fields, such as **Country Code**, **Territory Code**, and **Language Code** are used as search criteria and could be filled in.
5. The General Business Posting Group and the Customer Posting Group fields must be filled in.
6. The remaining fields do not have to be filled in and can be filled in only if you want to specify information for these fields.
7. You have now set up the customer template. Press F3 to create another one. Press F5 to see a list of your templates.



Making a Sales Quote from the Opportunity List Window

At a certain stage of a sales cycle or when the opportunity is close to becoming a customer, you may want to make a sales quote for the contact.

When setting up sales cycles, you can specify that a quote is required when the opportunity is at a given stage.

If the contact is a customer, the program uses the customer information to create the quote.

If the contact involved in this opportunity is not yet a customer, the user can still create the quote.

In this case, the program uses the most appropriate customer template, or you can choose one yourself. The program uses search criteria such as Country Code, Currency Code, or Territory Code to select the contacts on the basis of the customer template.

If there is more than one customer template that matches these fields, the program will prompt you to choose among them.

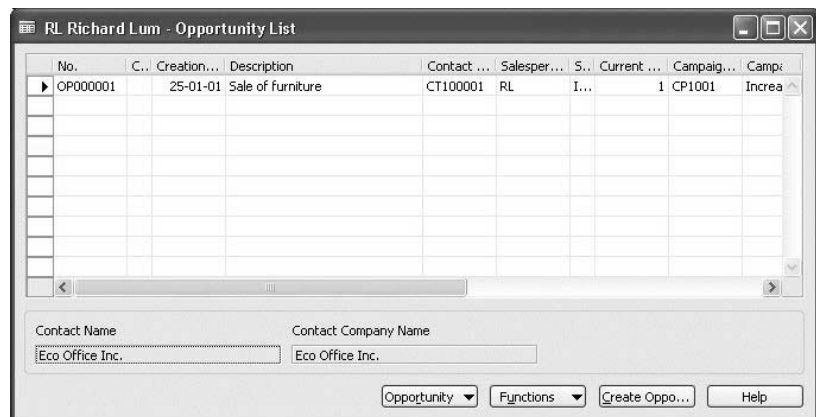
NOTE: Before you can create the sales quote, a contact must be defined, the customer template must be set up, and an opportunity for the company must exist.

You create the sales quote with information from the customer template and the contact in the following way:

1. Click SALES & MARKETING→SALES→SALESPeOPLE. The Salesperson/Purchaser Card appears. Select the Salesperson/Purchaser Card for the person for whom you have created the opportunity.



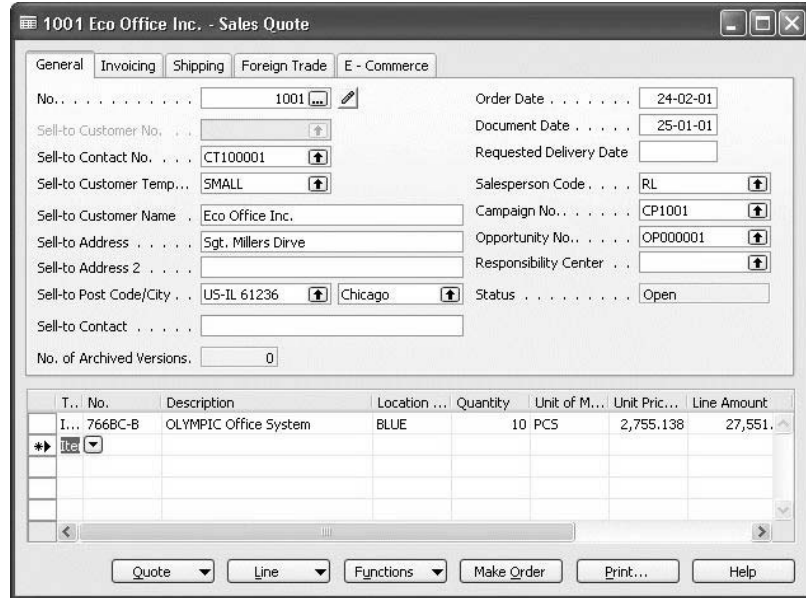
2. Click the **Salesperson** button, and select Opportunity. The Opportunity List window for the salesperson should appear.



3. Select the relevant opportunity, and click FUNCTIONS→ASSIGN SALES QUOTE. A Sales Quote window should appear.

If the company selected is registered as a customer, the program retrieves the customer information from the customer record linked to the company in question.

If the company is not a customer, and only one Customer template is in alignment with the customer, the program fills in the **Sell-to Customer** field. If more Customer templates fit the contact, you can select the relevant Customer template by clicking the **AssistButton** to the right of the **Sell-to Customer Template** field.



4. Fill in the details of the Sales Quote window, print it, and send it to the company.

Making a Sales Quote from the Sales Quote Window

It is possible to make a sales quote directly in the Sales Quote window for a contact that has not yet become a customer.

You should check that the information on the quote header is correct, and fill in the details of your quote. When you have done this, the quote is ready to be printed and sent to the contact.

It is not possible to release the quote before a customer is assigned to it, which means the quote is not ready to be made into an order.

NOTE: Before you can make the quote, your company and the person you want to sell to must be a registered contact in the program, and you should have set up a customer template.

You create the sales quote in the following way:

1. On the Contact Card, click CONTACT→SALES QUOTES. The Sales Quote window should appear.

2. In the **Sell-to Contact No.** field, select a company and a person you want to sell to. (These must be registered contacts in the program.)

T... No.	Description	Location ...	Quantity	Unit of M...	Unit Pric...	Line Amount
I... 766BC-B	OLYMPIC Office System	BLUE	10	PCS	2,755.138	27,551.

3. The program automatically selects a matching customer template. If more than one customer template fits this contact, click the **AssistButton** to the right of the **Sell-to Customer Template** field, and select the relevant customer template.
4. Fill in the details of the Sales Quote window, print it, and send it to the customer.

Creating a Sales Order from the Sales Quote Window

When the contact is satisfied with the proposal, an order can be made. If a sales quote has been created for this contact, you create an order directly from the quote.

If the contact is not linked to a customer record when you click **Make Order**, the program asks you if you want to transform the contact into a customer.

If you select Yes, a customer is created for the contact and the quote is transformed into an order.

NOTE: The company for which the order is to be made must be a registered contact in the program, and you must have made a sales quote for the new customer.

You create the sales order in the following way:

1. Click SALES & MARKETING→MARKETING→CONTACTS.

2. Click CONTACT→SALES QUOTES and find the relevant quote.
3. Click **Make Order** to transform the quote into an order. The program finds that no customer is linked to this contact, and you are prompted on whether you want to create a customer now.
4. Confirm, by clicking **Yes**, that you want to create a customer. A customer is created using the information from the Contact Card and information from the Customer Template Card. The quote is transformed into an order.
5. Print the order and send it to the customer.

NOTE: If you want to release a Quote, you use the sequence described previously.

Assigning a Sales Quote to an Opportunity

It is possible to assign an existing sales quote to an opportunity. There are two ways in which this can be performed:

A sales quote can be assigned from the Opportunity Card:

1. Click SALES & MARKETING→SALES→SALESPEOPLE. The Salesperson/Purchaser Card appears.
2. Click SALESPERSON→LIST, select the salesperson needed, and click **OK**.
3. On the Salesperson Card, click SALESPERSON→OPPORTUNITIES, and select the opportunity you want to assign a sales quote to.
4. Click OPPORTUNITY→CARD. The card for this opportunity should appear.
5. On the Opportunity Card, click the **AssistButton** in the **Sales Document Type** field, and select Quote.
6. Click the **AssistButton** in the **Sales Document No.** field, and select one of the existing sales quotes.

NOTE: A sales quote cannot be assigned to an opportunity which already has a sales quote assigned to it.

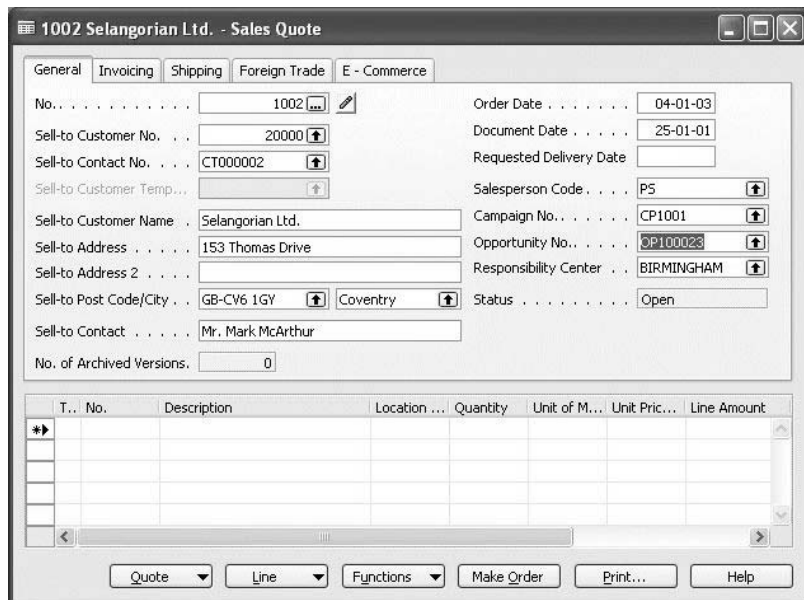
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If you try to assign a quote to an opportunity that already has a sales quote assigned to it, the following error message, specifying the number of the sales quote and the opportunity, will appear:

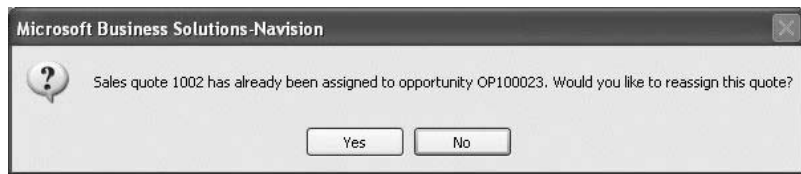


A sales quote can be assigned from the Sales Quote window:

1. Click PURCHASE→ORDER PROCESSING→QUOTES. The Sales Quote window should appear.
2. Click QUOTE→LIST, and select the Sales Quote you want to assign to an opportunity.
3. Click the **AssistButton** in the **Opportunity No.** field, and select the opportunity to which you want to assign this sales quote.



If the opportunity you selected already has a sales quote assigned to it, the following error message will appear:



NOTE: In order to view the sales quote assigned to an opportunity, go to the Opportunity Card and click **FUNCTIONS**→**SHOW SALES QUOTE**.

Test Your Skills – Setting Up Customer Templates

Scenario: You want to set up a number of customer templates to ease the work of the salespeople. You would like to set up templates called platinum (customers), gold (customers), and silver (customers), and you are going to fill in all the relevant fields for the customer templates.

Set up the platinum (Swedish customers), gold, and silver customer templates.

Test Your Skills – Creating a Sales Quote and a Sales Order

Scenario: Richard is a Salesperson working for Cronus. One of his contacts is Kinnareads Traeindustri AB. He receives a phone call from Kinnareads Traeindustri AB that is not a customer. They want a quote on office furniture.

Kinnareads Traeindustri is a registered contact in the program. A customer template for Swedish customers has been set up.

1. Make a sales quote for Kinnareads Traeindustri. Make sure that the correct customer template is used.
2. Fill in the sales quote, print it, and send it to Kinnareads Traeindustri.
3. Create a sales order on the basis of the previous sales quote.

Quick Interaction: Lessons Learned

Take a moment to write down three Key Points you have learned from this chapter:

1.

2.

3.
