

Quote – (Add)


This article describes how to add a new Quote to a Works. Once the Quote has been added, it can be built Manually, by Plan, by BOM OR combination of the 3. When saving the Quote, if the [Save as Estimate] button is selected, the Quote displays wording the refers to it as being an Estimate

To Add a new Quote;


Adding a new Quote is done from a WORKS: XXXX Window. To add a Works see KAT-2302

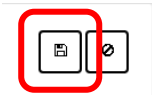
Quick Flow;

WORKS: XXXX > QUOTES Subnav > [Add Quotes] > Check/Edit > [Save]



- 1. From the **WORKS: XXXX** window scroll down and Press the **QUOTES** Subnav to expand, then Press the **[Add Quotes]** button  to display the QUOTES: NEW window.



- 2. From the QUOTE: NEW window **Check/Edit** editable fields; “Description”, “Default Brand” and/or “Quote Contact”, then Press the **[Save]** button  to add the Quote and display the QUOTE: XXXX VERSION X Window




To build a Quote Manually

From the QUOTE: XXXX VERSION X Window, to build a Quote Manually (not using a Plan), Press the **[Add Quote Section]** button  to display the Add Quote Section Window, then Enter a **Quote Section Name**, then Press the **[Add]** button  to display the Quote Section where you can Enter Kitsets / Product Codes to build your Quote. See KAT-1704




To build a Quote from a Plan

From the QUOTE: XXXX VERSION X Window, to build a Quote from a Plan, Press the **[Edit Plans]** button  to open a new tab where you can upload your plan and add Kitset Icons from the Kitset Library to build your Quote. See KAT-1706



To build a Quote from a BOM

From the QUOTE: XXXX VERSION X Window, to build a Quote from a BOM, Press the **[Import BOM]** button  to display the IMPORT BOM FOR Window where you can upload your KAT Report to build your Quote. See KAT-1708



At any time during the process of building the Quote, you can scroll down to the QUOTED HOURS Subnav and Expand to display a summary of the Quote's "Quoted Hours"

