

## Quote from a BOM (KAT Report)

This article describes how to build a Quote from a Bill Of Materials (KAT Report). The KAT Report is generated from a SystemFox "Accepted" Quote. This does not create the Quote in Katipolt but provides a list of Labour and Product that allows the User to create Labour Bookings and/or Supplier Orders. With the BOM (KAT Report) imported you can also make Payment Claims from Katipolt.

### To add a Quote from a BOM (KAT Report);

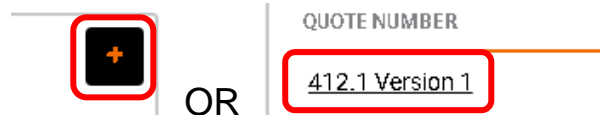
Adding a Quote from a BOM (KAT Report) is done from a Quote Window.


**NOTE:** The BOM (KAT Report) is exported from a SystemFox "Accepted" Quote. This is done from the SystemFox Quote's BOM Window

### Quick Flow;

**WORK: XXXX > QUOTES Subnav > Quote > [Import BOM] > Drag & Drop > Format Product Lines > [Save Imported BOM Data] > SECTION PRICE**

1. From the **WORK: XXXX** Window, Press the **QUOTES** Subnav to expand then either [Add] a Quote OR open an existing Quote



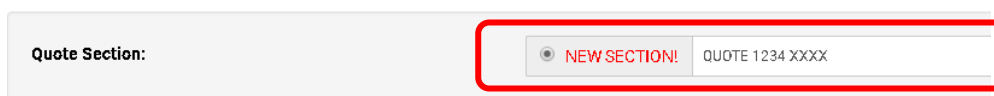
2. From the QUOTE: XXXX Window, Press the **[Import BOM]** button  to display the Import BOM window



3. From the Import BOM Window, select "Choose a file" to navigate to where you saved the file OR "drag" the file into the Import BOM Window

**NOTE:** The Supplier Names from the BOM Report must be the same spelling as that Supplier's Names in Katipolt. If the Supplier Name is not the same, or a Supplier not found "0" displays in the SUPPLIER column. If this happens correct the Supplier Name spelling in the BOM Report and re-import

4. From the IMPORT BOM FOR: XXXX VERSION X Window, enter a NEW SECTION! Name




5. From the IMPORT BOM FOR: XXXX VERSION X Window, scroll down and **Format Product Lines** as necessary;

- Inhouse Products > If any Select “[HR] as the “UOM” for any product that contains “LAB” in the “CODE”. I.E. “LAB1”, “LAB2”, “LAB3” “TRVLAB10”, “TRVLAB11”


Inhouse	2nd File	INSPT	Inspection Fee	150	1	150	214.94	--Select Category--	--Select U--
Inhouse	Lat Fix	LAB1	Labour Preside Fo	39	59.58	2329.75	329.72	--Select Category--	HR
Inhouse	2nd File	LAB2	Labour Preside Fo	39	59.58	2329.75	329.72	--Select Category--	HR
Inhouse	None	LAB3	Labour Adress Fo	39	4.95	193.05	276.62	--Select Category--	HR
Inhouse	2nd File	Misc	Take Material Con	1	1	1	1.43	--Select Category--	--Select U--



- Impromptu Products > If any Delete these, they can be added back in as Quick Products after the import
- ‘0’ Products > If any like Staff Labour, select from the SUPPLIER column dropdown the best Supplier for the product to associate with, IE “Staff Labour” > “Katipolt Quoting Labour”

6. From the IMPORT BOM FOR: XXXX VERSION X Window, Press the **[Save Imported BOM Data]** button  to return to the QUOTE: XXXX Window and display the imported Labour and Products




7. If needed, from the QUOTE: XXXX Window, Enter the SystemFox Quote value into the SECTION PRICE field, then Save the Quote

SECTION MARGIN (%)	SECTION MARGIN (\$)	SECTION PRICE	INCLUDED	OPTIONS
30.21 %	\$4,604.49	\$ 15239.92	<input checked="" type="checkbox"/>	

Once you have Imported a BOM, if the Quote or Variation has not been [Accepted], you can import another BOM. Press on the **[Import BOM]** button  to display the Import BOM window, then Tick the Section to overwrite the previous import, OR Press the [Add Quote Section] button  to add another Section to import the BOM into (Where the Quote has multiple Blocks and you want to see multiple Blocks).

QUOTE 1234 XXXX

Import Quantities (current totals file)
  Add/Minus to Existing (difference only file)
  Overwrite Section



**NOTE:** For the Labour and Products to Display in the LABOUR BOOKINGS and ORDERS Subnav's, the Quote must be [Accepted]


**To add a New Variation from a BOM (KAT Report);**

Adding a New Variation from a BOM (KAT Report) is done from an Accepted Quote or Variation Window.

**NOTE: TO ADD A NEW VARIATION, THE PREVIOUS QUOTE OR VARIATION MUST BE [ACCEPTED]. SELECT THE TICK BUTTON  TO ACCEPT.**

**Quick Flow;**

**[New Variation] > [Import BOM] > Drag & Drop > Format Product Lines > [Save Imported BOM Data] > Description > SECTION PRICE**

1. From the Accepted Quote or Variation Window, Press the **[New Variation]** button  to display the VARIATION: XXXX Window



2. From the VARIATION: XXXX VERSION X Window, Press the **[Import BOM]** button  to display the IMPORT BOM FOR: XXXX VERSION X Window



3. Repeat steps 3 to 8 as Above
4. Give the Variation a **Description** (This is what will display on the Payment Claim)


<b>Work</b>	918
<b>Description</b>	VARIATION 1
<b>Quote Contact</b>	LAUREN TEST

5. If needed, from the VARIATION: XXXX Window, Enter the SystemFox Variation value into the **SECTION PRICE** field, then Save the Variation

SECTION MARGIN (%)	SECTION MARGIN (\$)	SECTION PRICE	INCLUDED	OPTIONS
100.00%	\$0.00	\$ 0.00	<input checked="" type="checkbox"/>	⋮ ↑
45.51 %	\$5,498.82	\$ 12081.73	<input checked="" type="checkbox"/>	⋮ ↑

To add further Variations; [Accept] the last Variation, then repeat steps 1 to 5.


**To create a SystemFox KAT Report**


1. From the Quote Tab, OR the bottom of an open Quote, Press on the [BOM] button  to display the BOM Window.

2. Tick the Blocks/Variations to be included in the KAT Report.

Job Number: J7599      First Quotation Date: 10/07/2017      Customer Name: ...Ple:  
 State: Accepted      Supplier: -All-      Fix: - All -

Include	Date	Ref#	Description
<input checked="" type="checkbox"/>	10/07/2017	B7599.1	Block One
<input type="checkbox"/>	10/07/2017	V7599.1	Variation One
<input type="checkbox"/>	10/07/2017	V7599.2	Variation Two
<input type="checkbox"/>	10/07/2017	V7599.3	Variation Three

3. Press on the [KAT Report] button  to create the KAT Report

...Please Choose a Customer      Go      Process      CSV Report            Back

Show Item Pricing       Show Overall Pricing

Block Total	Discount	Qty.	Sub Total	State
\$3,758.10	0.00%	1.00	\$3,758.10	A
\$329.37	0.00%	1.00	\$329.37	A
\$1,669.91	0.00%	1.00	\$1,669.91	A
\$2,207.43	0.00%	1.00	\$2,207.43	A

4. Save the Report