

Slide 1

Slide notes: In this tutorial we look at how we convert a Quotation into an Indent Order. First we retrieve the Customer profile.

IES Client(Q) v8.24 : My IES

Help Submit Quit Functions Commands

Customer Sale, Order or Quotation

Find Cust?

Sales Code

Cust Ord#

Origination

Name: GRABOYSKI, THERESA

Account: 07306

Account Balance: 6,639.27

Credit Limit: 1,000,000.00

Available Credit: 993,360.73

CRM: 00492

Club:

Expiry:

Directive:

Do Sale: - [Cashier](#) [Sale](#) [Order](#) [Quotation](#) [Warehouse Pre-Paid](#)

Deal Functions: [Functions](#)

ex Catalog: -

Stock Code	Store Description	Price	Cust Price	Qty	Serial/Batch	Total	Tax	Incl Value
1		0.00					0.00	0.00

Direct (non Catalog) : -

[Direct](#) [Trade In](#) [Return](#)

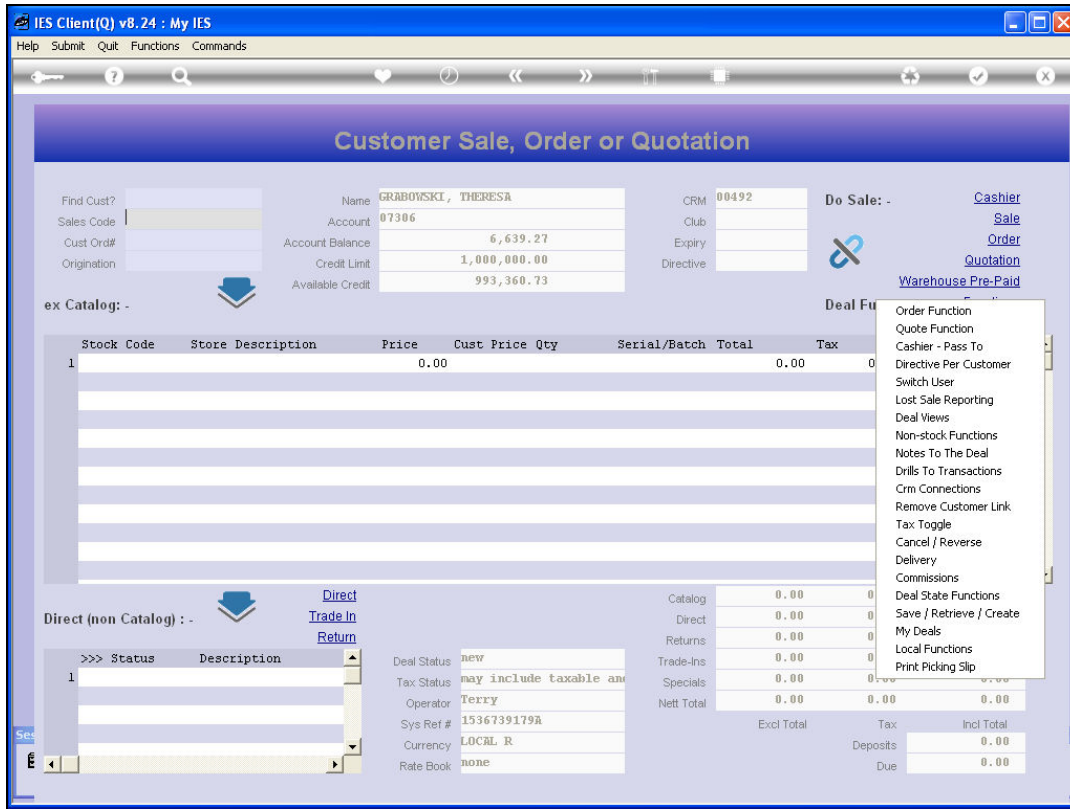
>>> Status	Description
1	

Deal Status	new
Tax Status	may include taxable and
Operator	Terry
Sys Ref #	1536739179A
Currency	LOCAL R
Rate Book	none

Catalog	0.00	0.00	0.00
Direct	0.00	0.00	0.00
Returns	0.00	0.00	0.00
Trade-Ins	0.00	0.00	0.00
Specials	0.00	0.00	0.00
Nett Total	0.00	0.00	0.00
Excl Total			
Tax			
Deposits			0.00
Due			0.00

Slide 2

Slide notes: Then we choose FUNCTIONS.



Slide 3

Slide notes: Then we choose 'Save / Retrieve / Create'.

IES Client(Q) v8.24 : My IES

Help Submit Quit Functions Commands

Customer Sale, Order or Quotation

Find Cust? Name GRABOYSKI, THERESA CRM 00492 Do Sale: - [Cashier](#)

Sales Code Account 07306 Club [Sale](#)

Cust Ord# Account Balance 6,639.27 Expiry [Order](#)

Origination Credit Limit 1,000,000.00 Directive [Quotation](#)

[Warehouse Pre-Paid](#)

ex Catalog: -

Stock Code	Store Description	Price	Cust Price	Qty	Serial/Batch	Total	Tax
1		0.00				0.00	0

Deal Fu

- Order Function
- Quote Function
- Cashier - Pass To
- Directive Per Customer
- Switch User
- Lost Sale Reporting
- Deal Views
- Non-stock Functions
- Notes To The Deal
- Drills To Transactions
- Crm Connections
- Remove Customer Link
- Tax Toggle
- Cancel / Reverse
- Delivery
- Commissions
- Deal State Functions
- Save / Retrieve / Create**
- My Deals
- Local Functions
- Print Picking Slip

Direct (non Catalog) : - [Direct](#)

>>> Status	Description	Deal Status	Tax Status	Operator	Sys Ref #	Currency	Rate Book
1		new	may include taxable an	Terry	1536739179A	LOCAL R	none

Catalog	0.00	0
Direct	0.00	0
Returns	0.00	0
Trade-Ins	0.00	0
Specials	0.00	0
Nett Total	0.00	0.00

Excl Total	Tax	Incl Total
	Deposits	0.00
	Due	0.00

Slide 4
Slide notes:

IES Client(Q) v8.24 : My IES

Help Submit Quit Functions Commands

Customer Sale, Order or Quotation

Find Cust?

Sales Code

Cust Ord#

Origination

Name: GRABOYSKI, THERESA

Account: 07306

Account Balance: 6,639.27

Credit Limit: 1,000,000.00

Available Credit: 993,360.73

CRM: 00492

Club:

Expiry:

Directive:

Do Sale: - [Cashier](#) [Sale](#) [Order](#) [Quotation](#) [Warehouse Pre-Paid](#)

Deal Functions: [Functions](#)

ex Catalog: -

Stock Code	Store Description	Price	Cust Price	Qty	Serial/Batch	Total	Tax	Incl Value
1		0.00					0.00	0.00

Direct (non Catalog) : -

[Direct](#)

[Trade In](#)

[Return](#)

>>> Status	Description
1	

Deal Status: new

Tax Status: may include taxable and

Operator: Terry

Sys Ref #: 1536739179A

Currency: LOCAL R

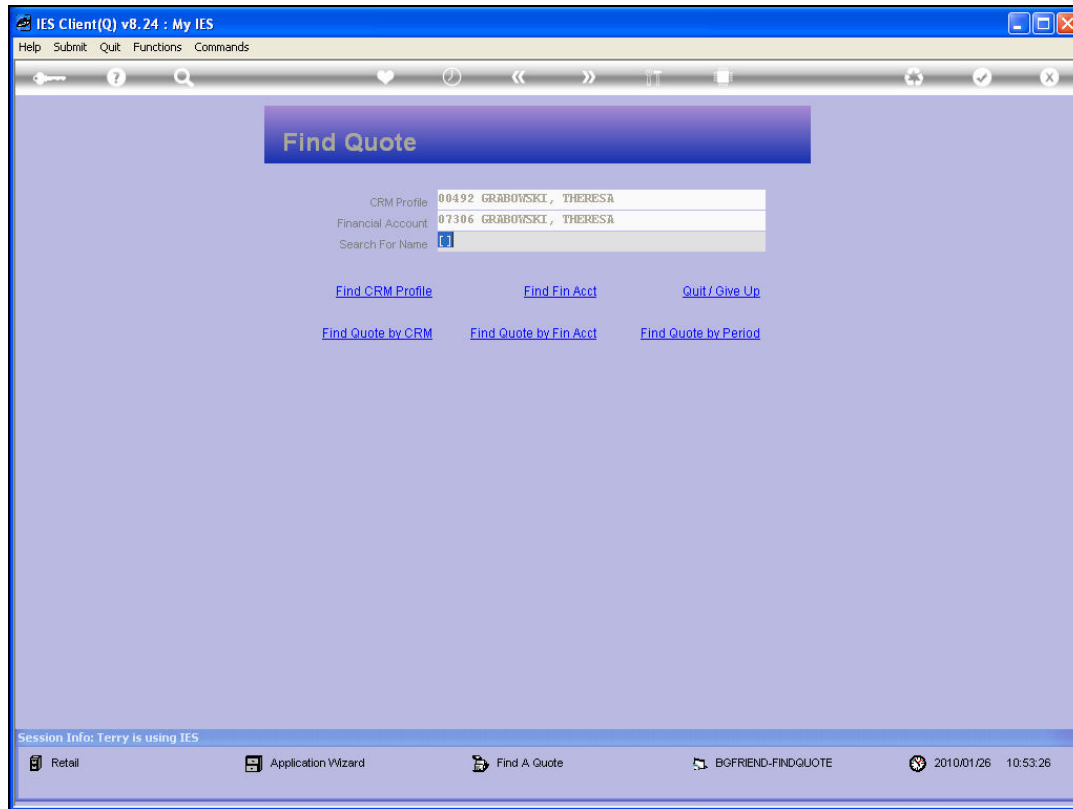
Rate Book: none

Catalog	0.00	0.00	0.00
Direct	0.00	0.00	0.00
Returns	0.00	0.00	0.00
Trade-Ins	0.00	0.00	0.00
Specials	0.00	0.00	0.00
Nett Total	0.00	0.00	0.00
Excl Total			
Depos			
Due			0.00

- Retrieve From Saved List
- Retrieve Quote
- Retrieve Invoiced Sale
- Retrieve Invoiced Order
- Retrieve Pre-approval Order
- Retrieve Reversed Deal
- Retrieve Cancelled Order
- None Of These

Slide 5

Slide notes: And then 'Retrieve Quote'.



Slide 6

Slide notes: We can now find any Quotation for this Customer from the CRM or Customer Account.

The screenshot shows the IES Client v8.24 interface. At the top, there is a menu bar with options like Help, Infobab, Connections, Logon, Logoff, Companion, Wizard, How do I, DataMarts, Business Modules, Action Focus, and Option Select. Below the menu is a toolbar with various icons. The main area is titled "Find Quote" and contains the following search criteria:

- CRM Profile: 00492 GRABOWSKI, THERESA
- Financial Account: 07306 GRABOWSKI, THERESA
- Search For Name: []

Below the search criteria are several buttons: "Find CRM Profile", "Find Fin Acct", "Quit/Give Up", "Find Quote by CRM", "Find Quote by Fin Acct" (highlighted), and "Find Quote by Period".

A dialog box titled "SINGLE SELECT: SELECT QUOTE" is open, displaying a table of quotes:

QUOTE #	OPERATOR	DATE	CUSTOMER NAME	DIRECTIVE #	AMOUNT	CURRENCY
1	0000082	Terry	30/11/2009	Grabowski, Theresa	1,539.00	R
2	0000083	Terry	30/11/2009	Grabowski, Theresa	2,906.95	R
3	0000084	Terry	26/01/2010	Grabowski, Theresa	1,952.82	R

Below the table are buttons for "Select ALL", "Show Full Line", "Cancel", and "OK".

At the bottom of the window, there is a "Session Info" bar showing "Terry is using IES" and a taskbar with icons for Retail, Application Wizard, Find A Quote, and BGFRIEND-FINDQUOTE. The system clock shows 2010/01/26 10:53:29.

Slide 7
Slide notes:

The screenshot shows the IES Client v8.24 interface. At the top, there is a menu bar with options like Help, Infobab, Connections, Logon, Logoff, Companion, Wizard, How do I, DataMarts, Business Modules, Action Focus, and Option Select. Below the menu is a toolbar with various icons. The main area is titled "Find Quote" and contains the following search criteria:

- CRM Profile: 00492 GRABOWSKI, THERESA
- Financial Account: 07306 GRABOWSKI, THERESA
- Search For Name: []

Below the search criteria are several buttons: "Find CRM Profile", "Find Fin Acct", "Quit / Give Up", "Find Quote by CRM", "Find Quote by Fin Acct" (highlighted), and "Find Quote by Period".

A dialog box titled "SINGLE SELECT: SELECT QUOTE" is open, displaying a table of quotes:

QUOTE #	OPERATOR	DATE	CUSTOMER NAME	DIRECTIVE #	AMOUNT	CURRENCY
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2	0000083	Terry	30/11/2009	Grabowski, Theresa	2,906.95	R
3	0000084	Terry	26/01/2010	Grabowski, Theresa	1,952.82	R

Below the table are buttons for "Select ALL", "Show Full Line", "Cancel", and "OK".

At the bottom of the window, there is a "Session Info" bar showing "Terry is using IES" and a taskbar with icons for "Retail", "Application Wizard", "Find A Quote", and "BGFRIEND-FINDQUOTE". The system clock shows "2010/01/26 10:53:29".

Slide 8
Slide notes:

IES Client(Q) v8.24 : My IES

Help Submit Quit Functions Commands

Customer Sale, Order or Quotation

Find Cust? **d1 Indra**

Sales Code **07306/22**

Cust Ord# **01 Main Store**

Origination **01 Main Store**

Name **GRABOYSKI, THERESA**

Account **07306**

Account Balance **6,639.27**

Credit Limit **1,000,000.00**

Available Credit **993,360.73**

CRM **00492**

Club

Expiry

Directive

Do Sale: -

[Cashier](#)

[Sale](#)

[Order](#)

[Quotation](#)

[Warehouse Pre-Paid](#)

Deal Functions: [Functions](#)

ex Catalog: -

Stock Code	Store	Description	Price	Cust Price	Qty	Serial/Batch	Total	Tax	Incl Value
1 3008412	01	OLYMPUS CAMEDIA	1,350.00	1,350.00	1.00		1,350.00	189.00	1,539.00
2 3007058	01	NIKON COOLPIX 41	363.00	363.00	1.00		363.00	50.82	413.82

Direct (non Catalog): -

[Direct](#)

[Trade In](#)

[Return](#)

>>> Status	Description
1	

Catalog	1,713.00	239.82	1,952.82
Direct	0.00	0.00	0.00
Returns	0.00	0.00	0.00
Trade-Ins	0.00	0.00	0.00
Specials	0.00	0.00	0.00
Nett Total	1,713.00	239.82	1,952.82

Excl Total	Tax	Incl Total
	Deposits	0.00
	Due	1,952.82

Deal Status **quote # 0000084**

Tax Status **may include taxable am**

Operator **Terry**

Sys Ref # **1536738671R**

Currency **LOCAL R**

Rate Book **none**

Slide 9
Slide notes:

IES Client(Q) v8.24 : My IES

Help Submit Quit Functions Commands

Customer Sale, Order or Quotation

Find Cust?

Sales Code

Cust Ord#

Origination

Name GRABOYSKI, THERESA

Account 07306

Account Balance 6,639.27

Credit Limit 1,000,000.00

Available Credit 993,360.73

CRM 00492

Club

Expiry

Directive

Do Sale: - [Cashier](#) [Sale](#) [Order](#) [Quotation](#) [Warehouse Pre-Paid](#)

Deal Functions: [Functions](#)

ex Catalog: -

Stock Code	Store	Description	Price	Cust Price	Qty	Serial/Batch	Total	Tax	Incl Value
1 3008412	01	OLYMPUS CAMEDIA	1,350.00	1,350.00	1.00		1,350.00	189.00	1,539.00
2 3007058	01	NIKON COOLPIX 41	363.00	363.00	1.00		363.00	50.82	413.82

Direct (non Catalog) : -

[Direct](#)

[Trade In](#)

[Return](#)

>>> Status	Description
1	

Catalog	1,713.00	239.82	1,952.82
Direct	0.00	0.00	0.00
Returns	0.00	0.00	0.00
Trade-Ins	0.00	0.00	0.00
Specials	0.00	0.00	0.00
Nett Total	1,713.00	239.82	1,952.82

Excl Total	Tax	Incl Total
	Deposits	0.00
	Due	1,952.82

Deal Status quote # 0000084

Tax Status may include taxable am

Operator Terry

Sys Ref # 1536738671R

Currency LOCAL R

Rate Book none

Slide 10

Slide notes: Once we have retrieved the Quotation, we choose FUNCTIONS again.

IES Client(Q) v8.24 : My IES

Help Submit Quit Functions Commands

Customer Sale, Order or Quotation

Find Cust?

Sales Code

Cust Ord#

Origination

Name

Account

Account Balance

Credit Limit

Available Credit

CRM

Club

Expiry

Directive

Do Sale: -

[Cashier](#)

[Sale](#)

[Order](#)

[Quotation](#)

[Warehouse Pre-Paid](#)

Deal Functions: [Functions](#)

Stock Code	Store	Description	Price	Cust Price	Qty	Serial/Batch	Total	Tax
1 3008412	01	OLYMPUS CAMEDIA	1,350.00	1,350.00	1.00		1,350.00	
2 3007058	01	NIKON COOLPIX 41	363.00	363.00	1.00		363.00	

Direct (non Catalog) : -

[Direct](#)

[Trade In](#)

[Return](#)

>>> Status	Description
1	

Deal Status

Tax Status

Operator

Sys Ref #

Currency

Rate Book

Catalog	1,713.00
Direct	0.00
Returns	0.00
Trade-Ins	0.00
Specials	0.00
Nett Total	1,713.00

Excl Total	Tax	Incl Total
	0.00	
Deposits		1,952.82
Due		1,952.82

- Order Function
- Quote Function
- Cashier - Pass To
- Directive Per Customer
- Switch User
- Lost Sale Reporting
- Deal Views
- Non-stock Functions
- Notes To The Deal
- Drills To Transactions
- Crm Connections
- Remove Customer Link
- Tax Toggle
- Cancel / Reverse
- Delivery
- Commissions
- Deal State Functions
- Save / Retrieve / Create
- My Deals
- Local Functions
- Print Picking Slip

Slide 11

Slide notes: And 'Save / Retrieve / Create' again.

IES Client(Q) v8.24 : My IES

Help Submit Quit Functions Commands

Customer Sale, Order or Quotation

Find Cust?

Sales Code

Cust Ord#

Origination

Name

Account

Account Balance

Credit Limit

Available Credit

CRM

Club

Expiry

Directive

Do Sale: -

[Cashier](#)

[Sale](#)

[Order](#)

[Quotation](#)

[Warehouse Pre-Paid](#)

Deal Functions: [Functions](#)

Stock Code	Store	Description	Price	Cust Price	Qty	Serial/Batch	Total	Tax
1 3008412	01	OLYMPUS CAMEDIA	1,350.00	1,350.00	1.00		1,350.00	
2 3007058	01	NIKON COOLPIX 41	363.00	363.00	1.00		363.00	

Direct (non Catalog) : -

>>> Status	Description
1	

Deal Status

Tax Status

Operator

Sys Ref #

Currency

Rate Book

Catalog	1,713.00
Direct	0.00
Returns	0.00
Trade-Ins	0.00
Specials	0.00
Nett Total	1,713.00

Excl Total		Tax	Incl Total
		Deposits	0.00
		Due	1,952.82

- Order Function
- Quote Function
- Cashier - Pass To
- Directive Per Customer
- Switch User
- Lost Sale Reporting
- Deal Views
- Non-stock Functions
- Notes To The Deal
- Drills To Transactions
- Crm Connections
- Remove Customer Link
- Tax Toggle
- Cancel / Reverse
- Delivery
- Commissions
- Deal State Functions
- Save / Retrieve / Create**
- My Deals
- Local Functions
- Print Picking Slip

Slide 12
Slide notes:

IES Client(Q) v8.24 : My IES

Help Submit Quit Functions Commands

Customer Sale, Order or Quotation

Find Cust?

Sales Code

Cust Ord#

Origination

Name

Account

Account Balance

Credit Limit

Available Credit

CRM

Club

Expiry

Directive

Do Sale: - [Cashier](#) [Sale](#) [Order](#) [Quotation](#) [Warehouse Pre-Paid](#)

Deal Functions: [Functions](#)

ex Catalog: -

Stock Code	Store	Description	Price	Cust Price	Qty	Serial/Batch	Total	Tax	Incl Value
1 3008412	01	OLYMPUS CAMEDIA	1,350.00	1,350.00	1.00		1,350.00	189.00	1,539.00
2 3007058	01	NIKON COOLPIX 41	363.00	363.00	1.00		363.00	50.82	413.82

Direct (non Catalog) : -

[Direct](#)

[Trade In](#)

[Return](#)

>>> Status Description

1

Deal Status

Tax Status

Operator

Sys Ref #

Currency

Rate Book

Catalog	1,713.00	239.82	1,952.82
Direct	0.00	0.00	0.00
Returns	0.00	0.00	0.00
Trade-Ins	0.00		
Specials	0.00		
Nett Total	1,713.00	239.82	1,952.82

Excl Total Tax Incl Total

Deposits 0.00

Due 1,952.82

Save And Clear Screen

Convert To New Deal

None Of These

Slide 13

Slide notes: This time, the system senses that we have a Quotation on screen, and it offers a conversion option.

IES Client(Q) v8.24 : My IES

Help Submit Quit Functions Commands

Customer Sale, Order or Quotation

Find Cust? **D1 Indra**

Sales Code **07306/22**

Cust Ord# **07306/22**

Origination **01 Main Store**

Name **GRABOYSKI, THERESA**

Account **07306**

Account Balance **6,639.27**

Credit Limit **1,000,000.00**

Available Credit **993,360.73**

CRM **00492**

Club

Expiry

Directive

Do Sale: -

[Cashier](#)

[Sale](#)

[Order](#)

[Quotation](#)

[Warehouse Pre-Paid](#)

Deal Functions: [Functions](#)

ex Catalog: -

Stock Code	Store	Description	Price	Cust Price	Qty	Serial/Batch	Total	Tax	Incl Value
1 3008412	01	OLYMPUS CAMEDIA	1,350.00	1,350.00	1.00		1,350.00	189.00	1,539.00
2 3007058	01	NIKON COOLPIX 41	363.00	363.00	1.00		363.00	50.82	413.82

Direct (non Catalog): -

[Direct](#)

[Trade In](#)

[Return](#)

>>> Status	Description
1	

Deal Status **new**

Tax Status **may include taxable and**

Operator **Terry**

Sys Ref # **1536738671R**

Currency **LOCAL R**

Rate Book **none**

Catalog	1,713.00	239.82	1,952.82
Direct	0.00	0.00	0.00
Returns	0.00	0.00	0.00
Trade-Ins	0.00	0.00	0.00
Specials	0.00	0.00	0.00
Nett Total	1,713.00	239.82	1,952.82

Excl Total	Tax	Incl Total
		0.00
	Deposits	
	Due	1,952.82

Slide 14

Slide notes: The Quotation is then automatically converted into a New Order without any re-capturing being required.

IES Client(Q) v8.24 : My IES

Help Submit Quit Functions Commands

Customer Sale, Order or Quotation

Find Cust?

Sales Code **01 Indra**

Cust Ord# **07306/22**

Origination **01 Main Store**

Name **GRABOYSKI, THERESA**

Account **07306**

Account Balance **6,639.27**

Credit Limit **1,000,000.00**

Available Credit **993,360.73**

CRM **00492**

Club

Expiry

Directive

Do Sale: - [Cashier](#) [Sale](#) [Order](#) [Quotation](#) [Warehouse Pre-Paid](#)

Deal Functions: [Functions](#)

ex Catalog: -

Stock Code	Store	Description	Price	Cust Price	Qty	Serial/Batch	Total	Tax	Incl Value
1 3008412	01	OLYMPUS CAMEDIA	1,350.00	1,350.00	1.00		1,350.00	189.00	1,539.00
2 3007058	01	NIKON COOLPIX 41	363.00	363.00	1.00		363.00	50.82	413.82

Direct (non Catalog) : -

[Direct](#)

[Trade In](#)

[Return](#)

>>> Status	Description
1	

Deal Status **new**

Tax Status **may include taxable and**

Operator **Terry**

Sys Ref # **1536738671R**

Currency **LOCAL R**

Rate Book **none**

Catalog	1,713.00	239.82	1,952.82
Direct	0.00	0.00	0.00
Returns	0.00	0.00	0.00
Trade-Ins	0.00	0.00	0.00
Specials	0.00	0.00	0.00
Nett Total	1,713.00	239.82	1,952.82

Excl Total	Tax	Incl Total
		0.00
	Deposits	0.00
	Due	1,952.82

Slide 15

Slide notes: And, in the case of an Indent Order, we can simply choose 'Warehouse Pre-Paid' to process it.

IES Client(Q) v8.24 : My IES

Help Submit Quit Functions Commands

Customer Sale, Order or Quotation

Find Cust?

Sales Code **01 Indra**

Cust Ord# **07306/22**

Origination **01 Main Store**

Name **GRABOYSKI, THERESA**

Account **07306**

Account Balance **6,639.27**

Credit Limit **1,000,000.00**

Available Credit **993,360.73**

CRM **00492**

Club

Expiry

Directive

Do Sale: -

[Cashier](#)

[Sale](#)

[Order](#)

[Quotation](#)

[Warehouse Pre-Paid](#)

Deal Functions: [Functions](#)

ex Catalog: -

Stock Code	Store	Description	Price	Cust Price	Qty	Serial/Batch	Total	Tax	Incl Value																																								
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<table border="0" style="width: 100%;"> <tr> <td>Catalog</td> <td>1,713.00</td> <td>239.82</td> <td>1,952.82</td> </tr> <tr> <td>Direct</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> </tr> <tr> <td>Returns</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> </tr> <tr> <td>Trade-Ins</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> </tr> <tr> <td>Specials</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> </tr> <tr> <td>Nett Total</td> <td>1,713.00</td> <td>239.82</td> <td>1,952.82</td> </tr> <tr> <td>Excl Total</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Tax</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Deposits</td> <td></td> <td></td> <td>0.00</td> </tr> <tr> <td>Due</td> <td></td> <td></td> <td>1,952.82</td> </tr> </table>										Catalog	1,713.00	239.82	1,952.82	Direct	0.00	0.00	0.00	Returns	0.00	0.00	0.00	Trade-Ins	0.00	0.00	0.00	Specials	0.00	0.00	0.00	Nett Total	1,713.00	239.82	1,952.82	Excl Total				Tax				Deposits			0.00	Due			1,952.82
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Trade-Ins	0.00	0.00	0.00																																														
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Deposits			0.00																																														
Due			1,952.82																																														

Direct (non Catalog): -

[Direct](#)

[Trade In](#)

[Return](#)

>>> Status	Description
1	

Deal Status **new**

Tax Status **may include taxable an**

Operator **Terry**

Sys Ref # **1536738671R**

Currency **LOCAL R**

Rate Book **none**

Category	Excl Total	Tax	Incl Total
Catalog	1,713.00	239.82	1,952.82
Direct	0.00	0.00	0.00
Returns	0.00	0.00	0.00
Trade-Ins	0.00	0.00	0.00
Specials	0.00	0.00	0.00
Nett Total	1,713.00	239.82	1,952.82
Excl Total			
Tax			
Deposits			0.00
Due			1,952.82

Slide 16
Slide notes: