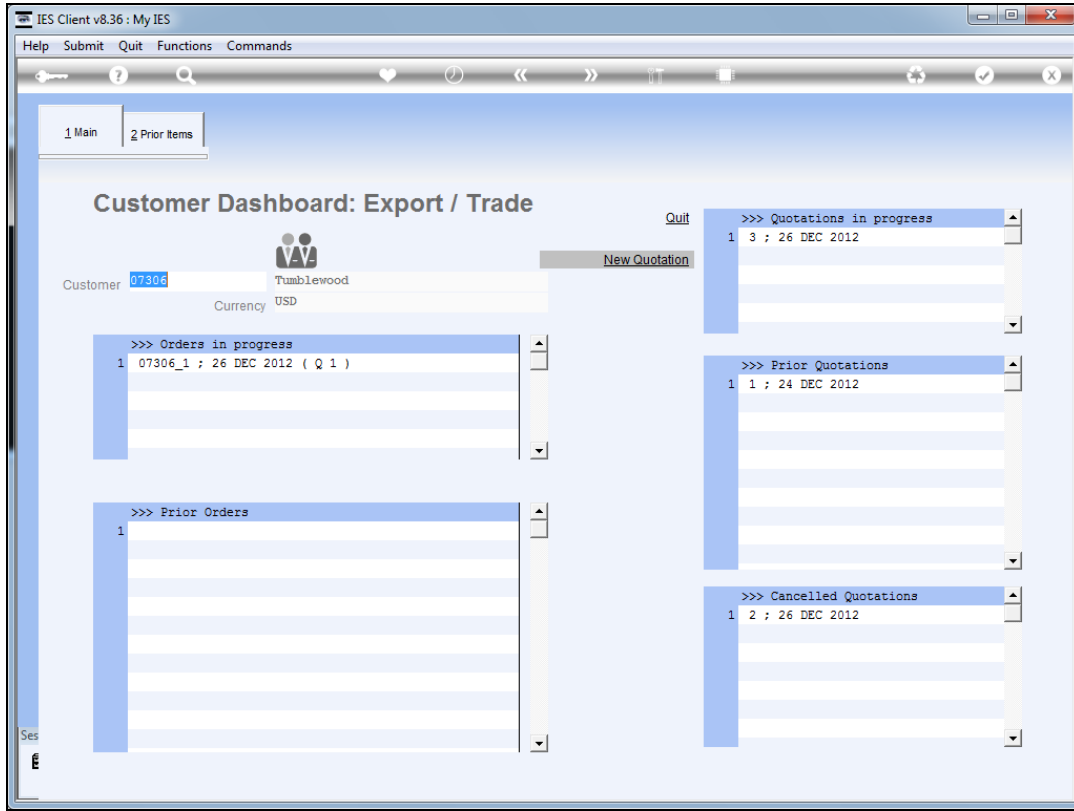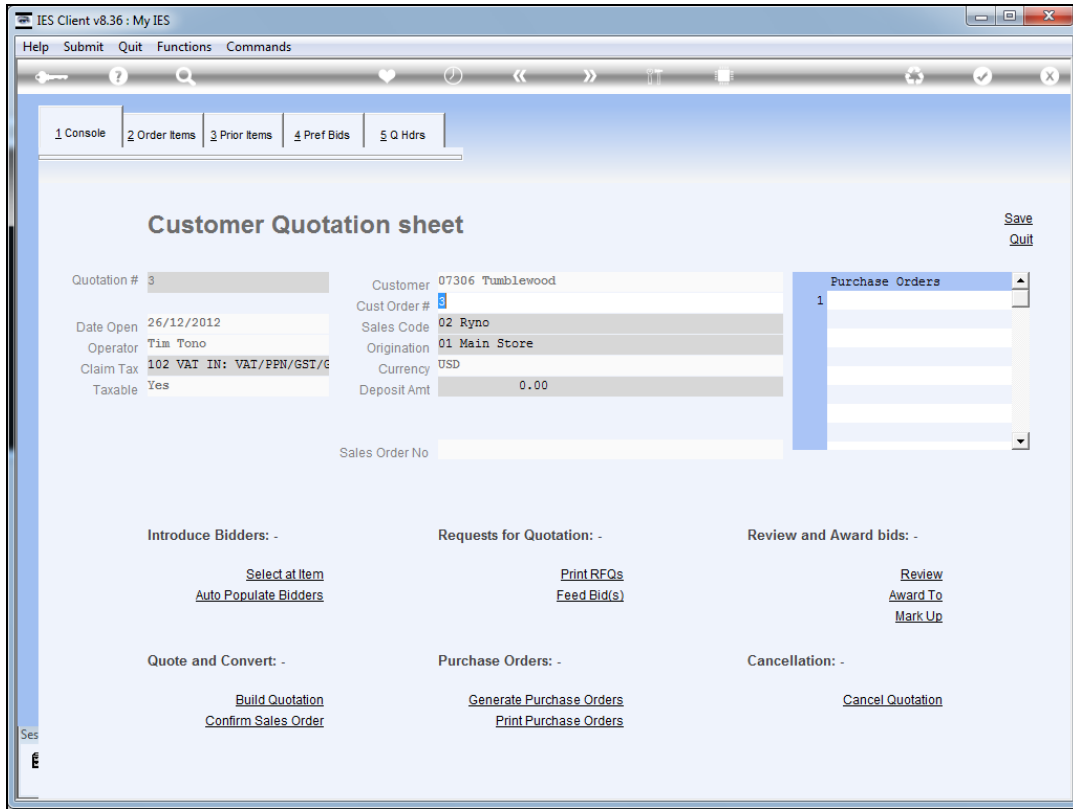Slide 1

Slide notes: At the Customer dashboard we have 3 Quotation sections. The 1st is for new and current Quotations. To open a new Quotation, we just choose 'New Quotation'.
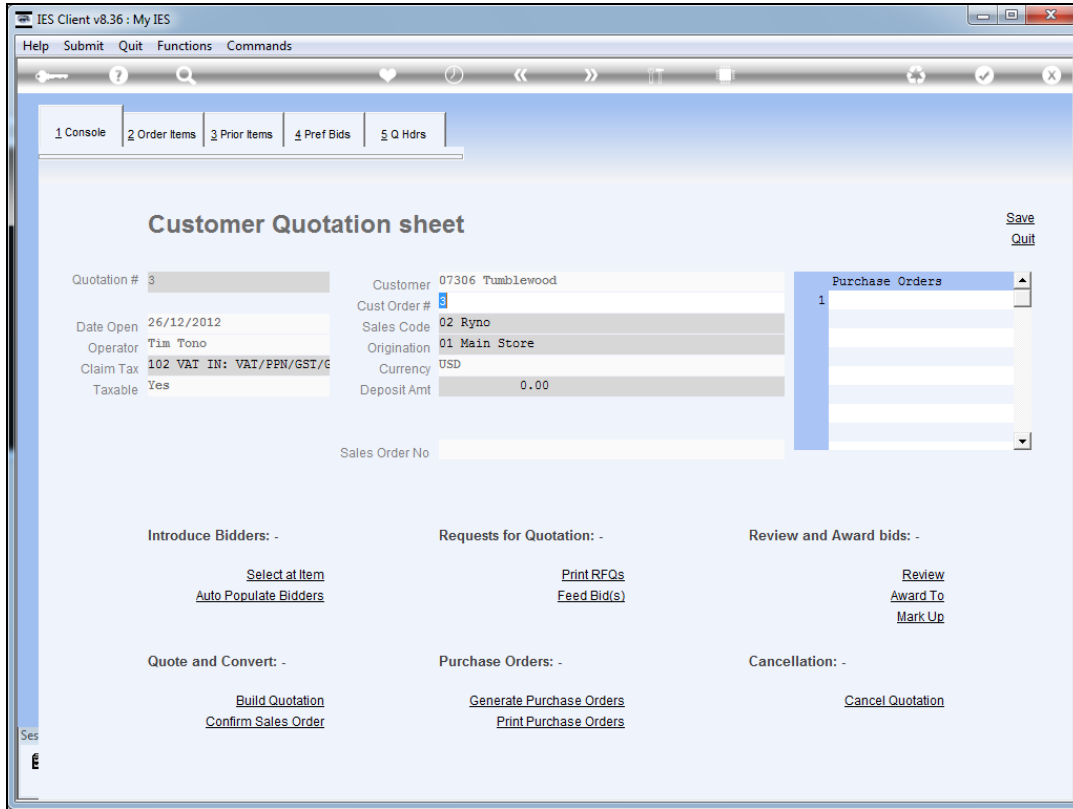
Slide 2

Slide notes: The system will automatically create a quotation workflow set with a number of defaults, and we can work with it by dbl-clicking on the Quotation.
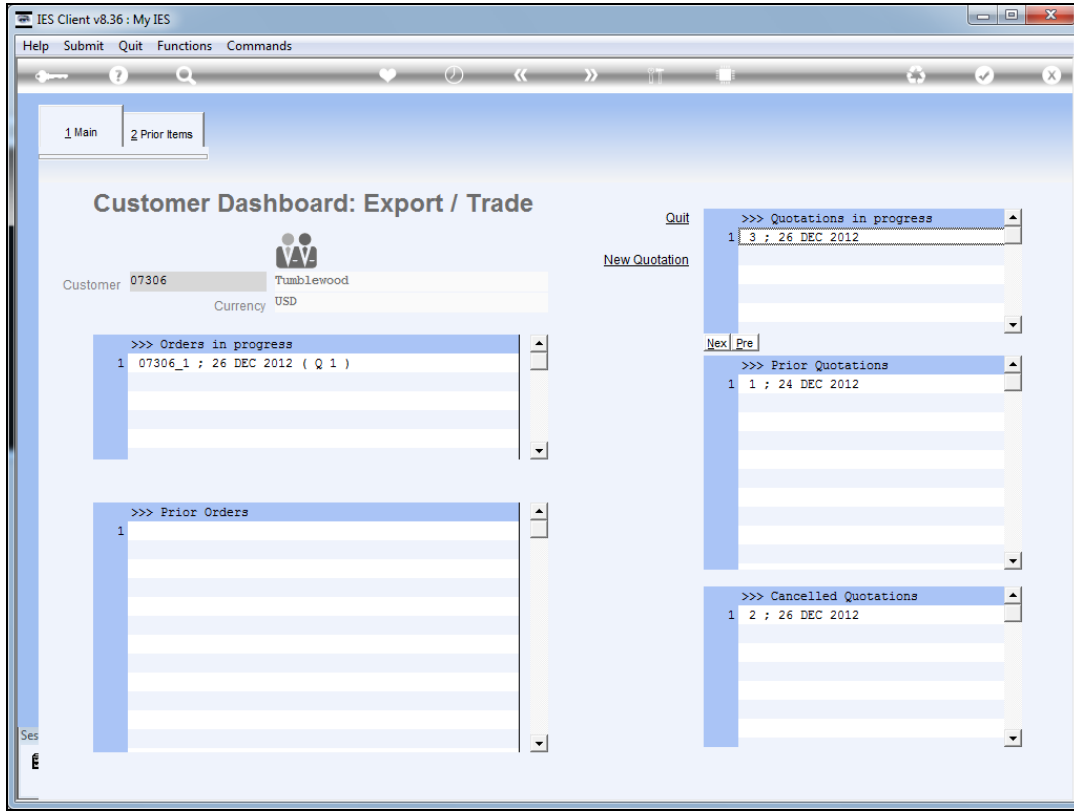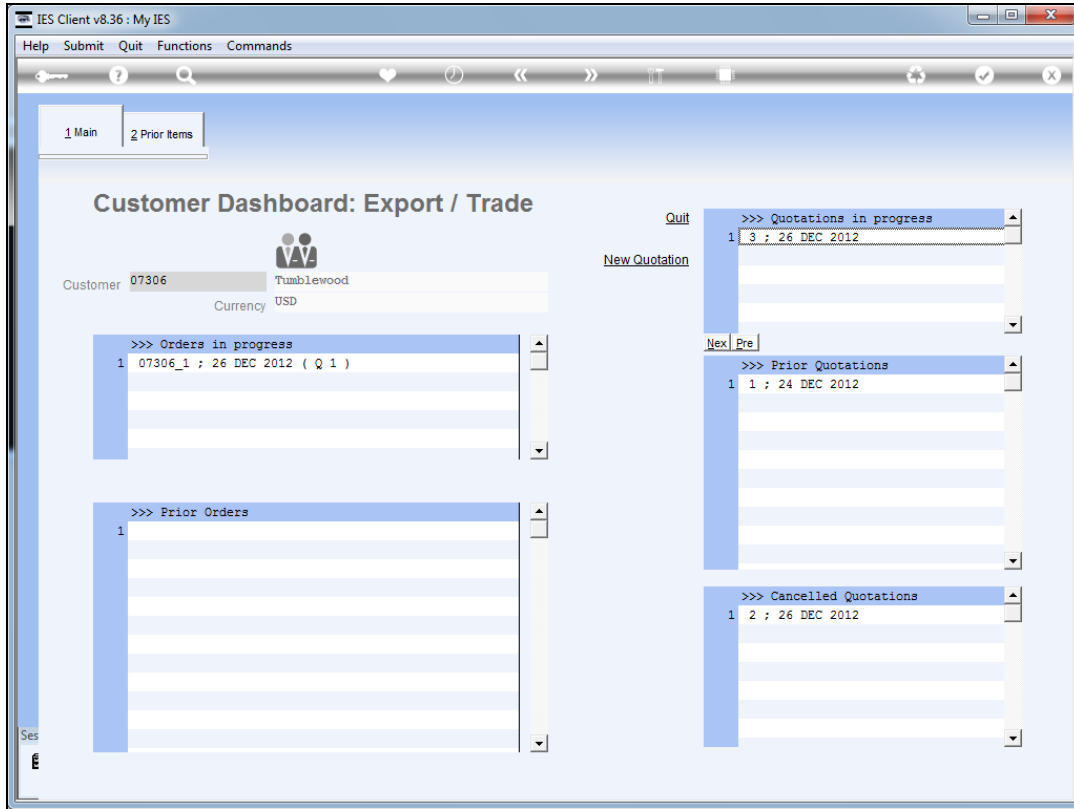
Slide 3

Slide notes: This new quotation workflow set is ready for use, and we can start performing steps on it. We can leave the workflow set and return any number of times to work with it.
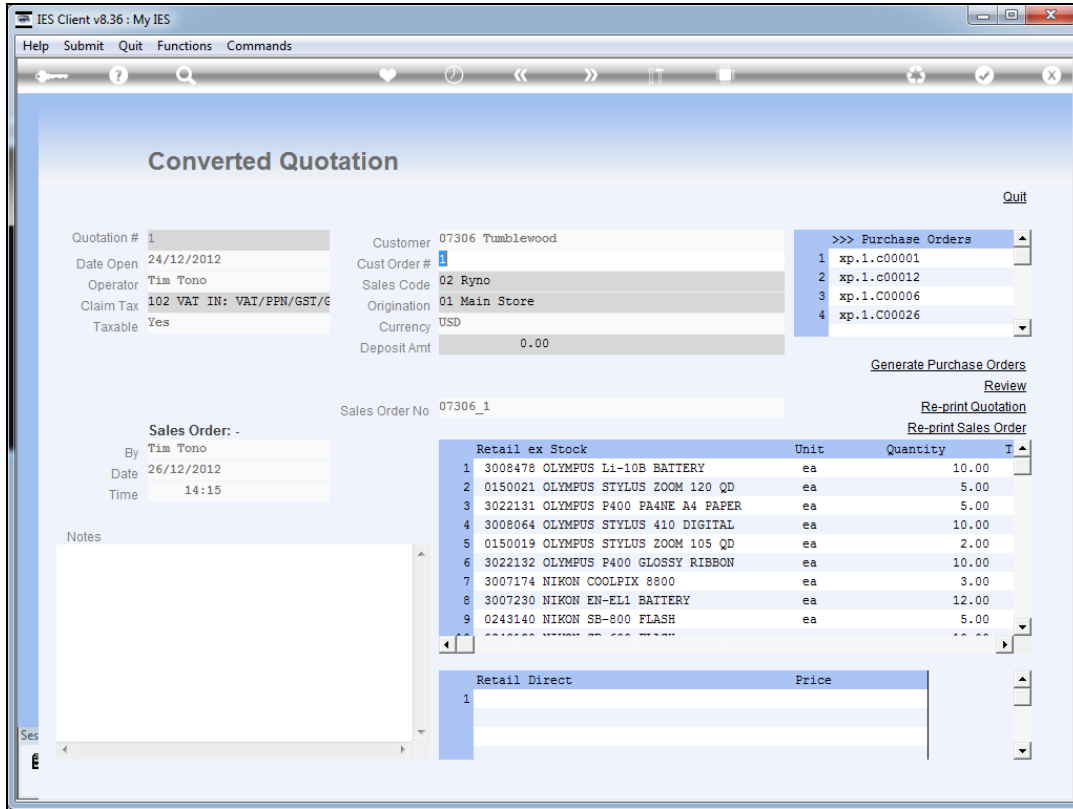
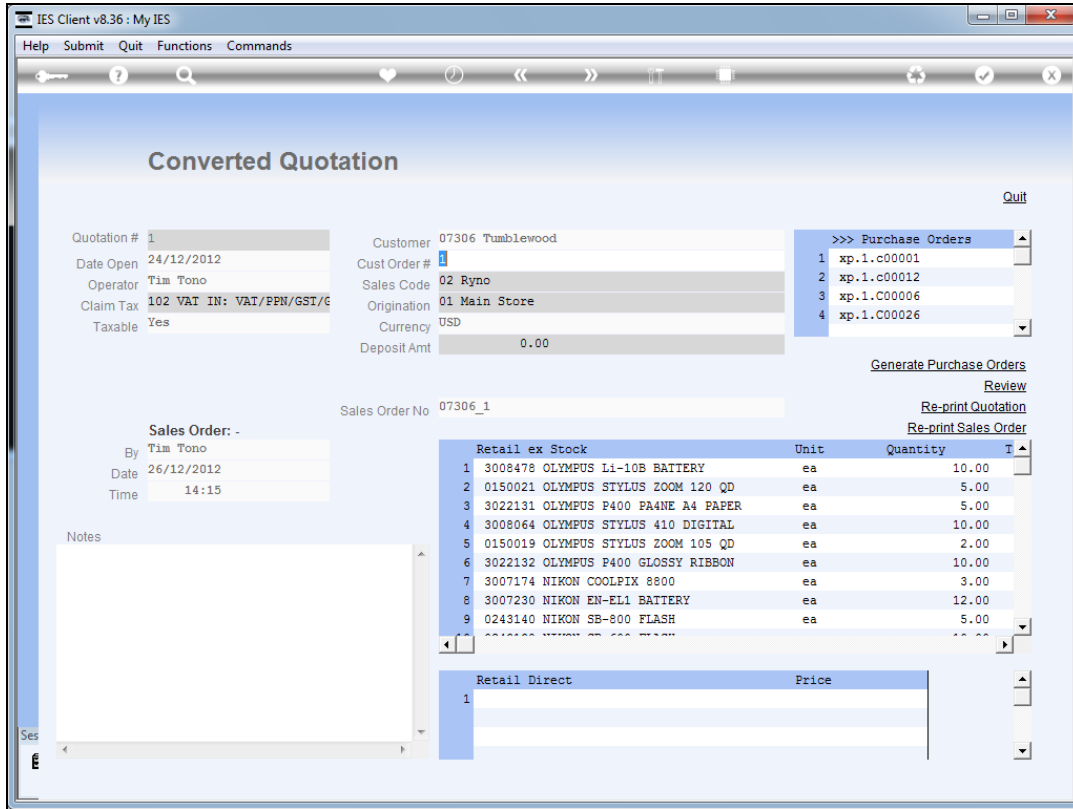Slide 4
Slide notes:

Slide 5
Slide notes:

Slide 6

Slide notes: Any prior Quotation for the Customer can be entered by a dbl-click.

Slide 7

Slide notes: A prior Quotation is always a Quotation that has been converted to a Sales Order, which may still be current or already a prior Customer Order.
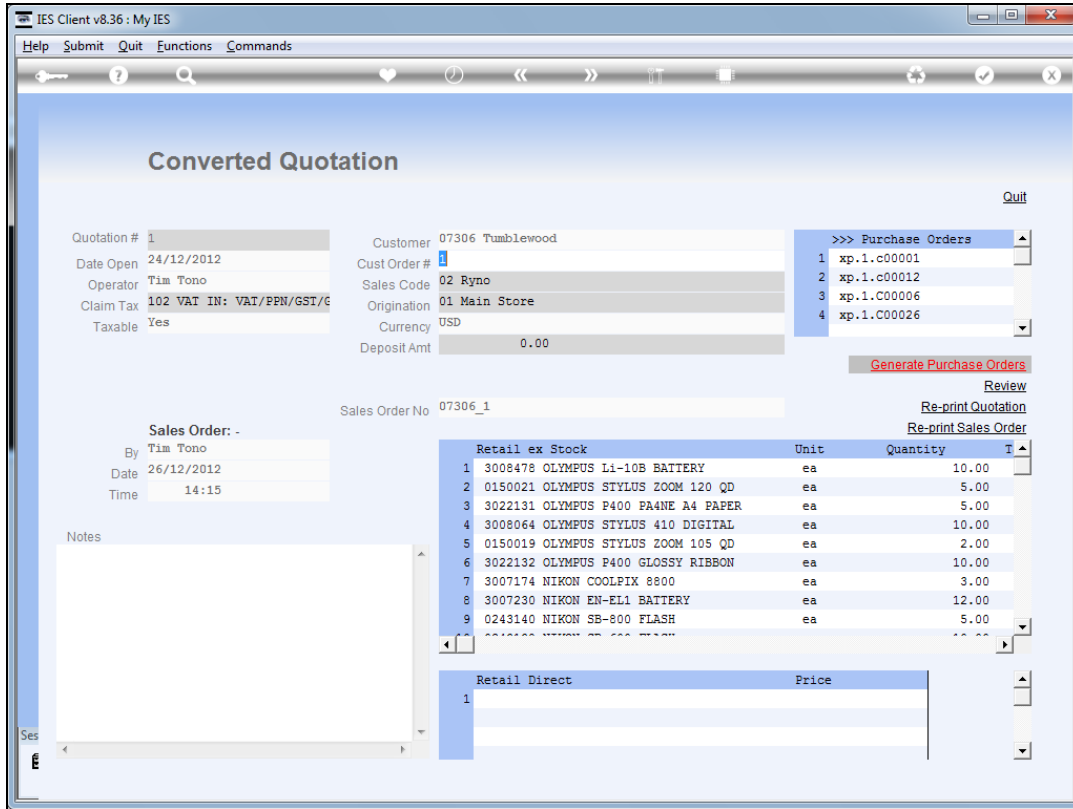
Slide 8
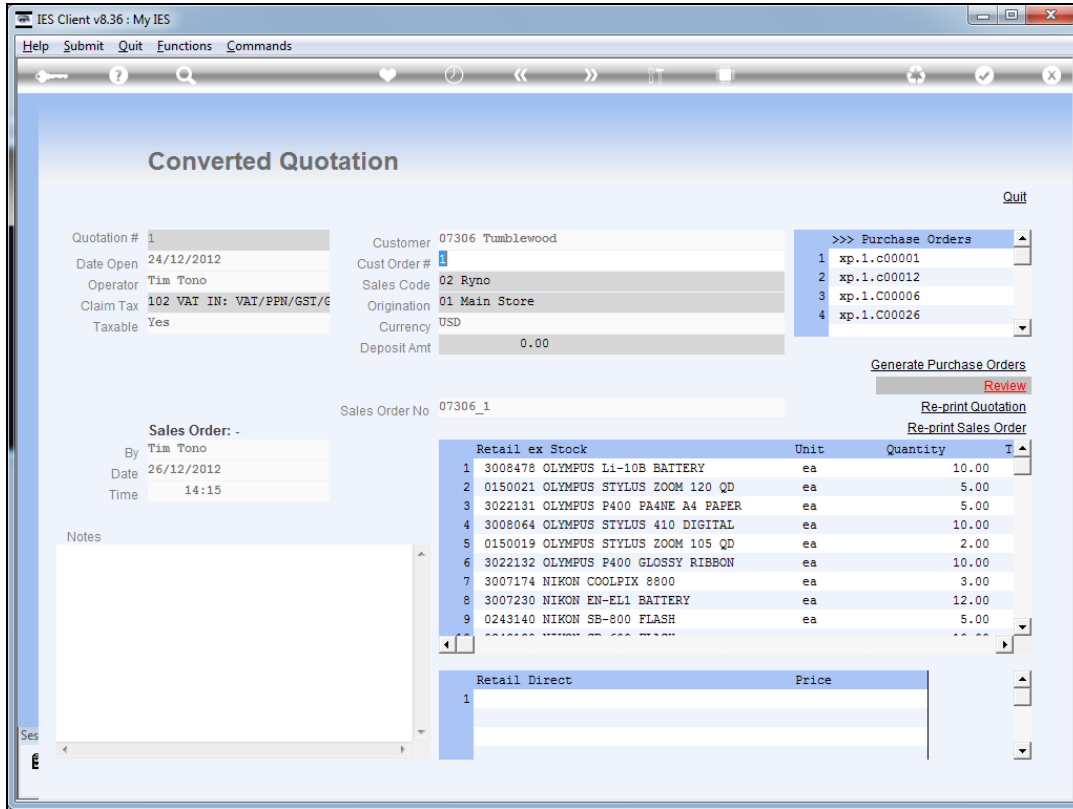
Slide notes:

Slide 9

Slide notes:

Slide 10

Slide notes: If we have not yet generated the Purchase Orders, we can do so here.
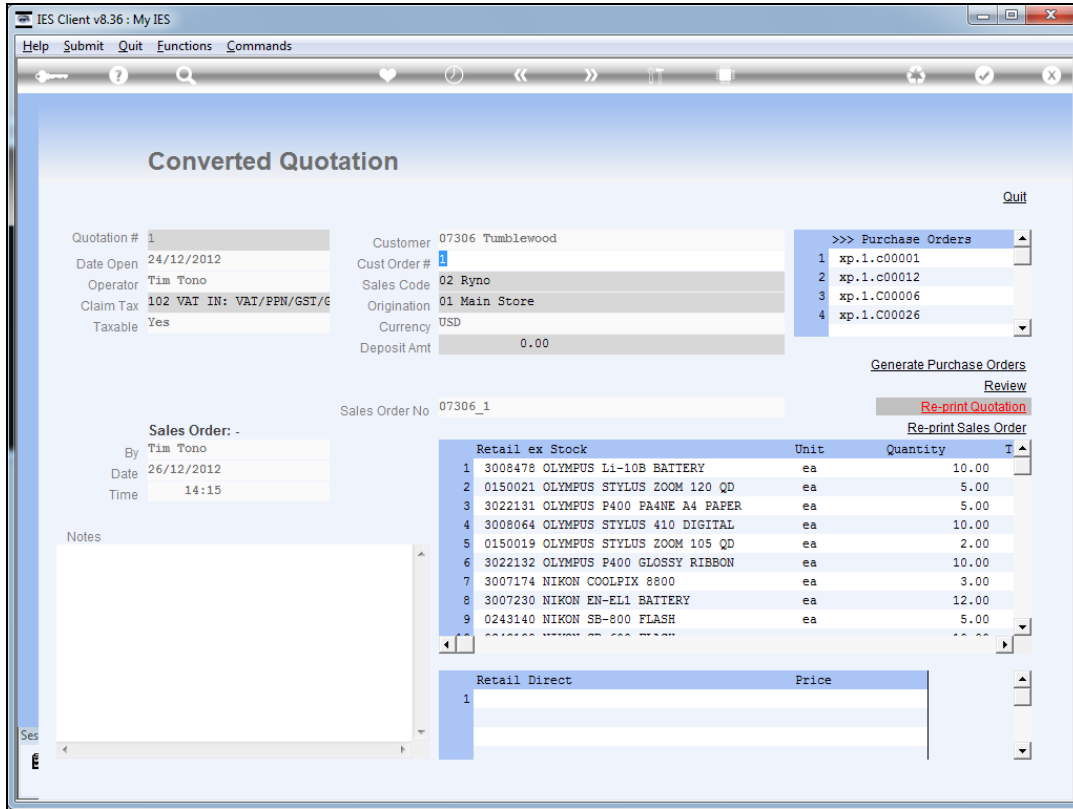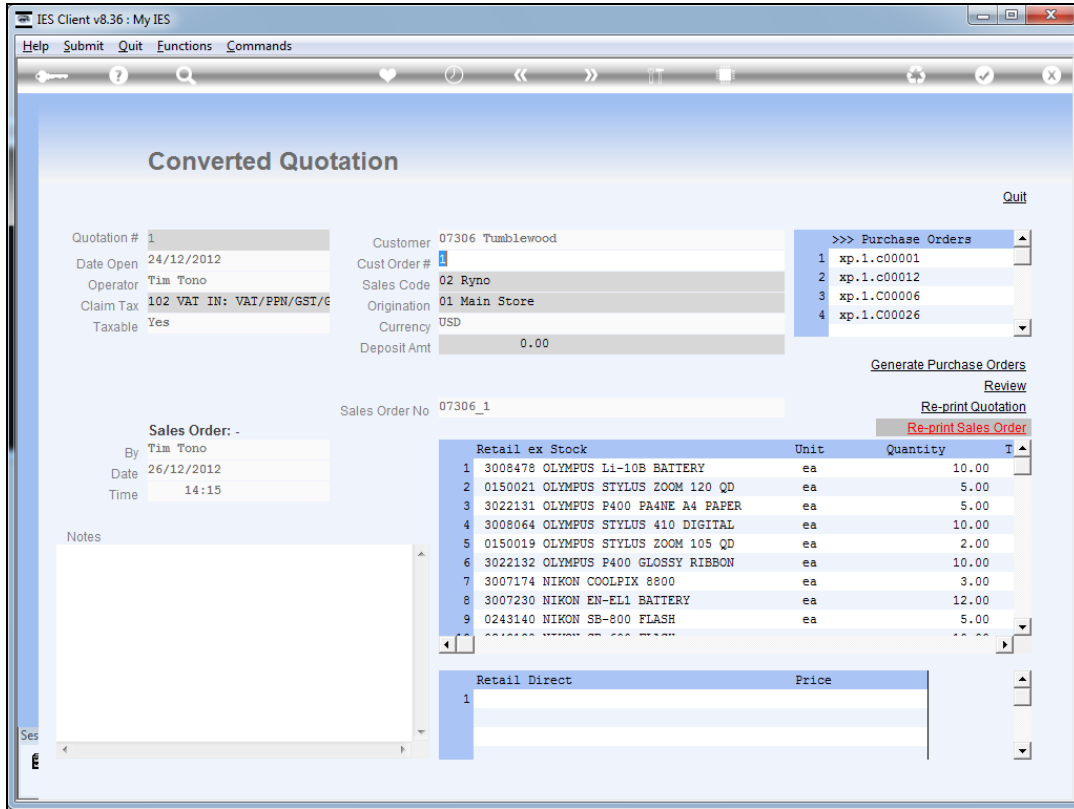
Slide 11
Slide notes:

Slide 12

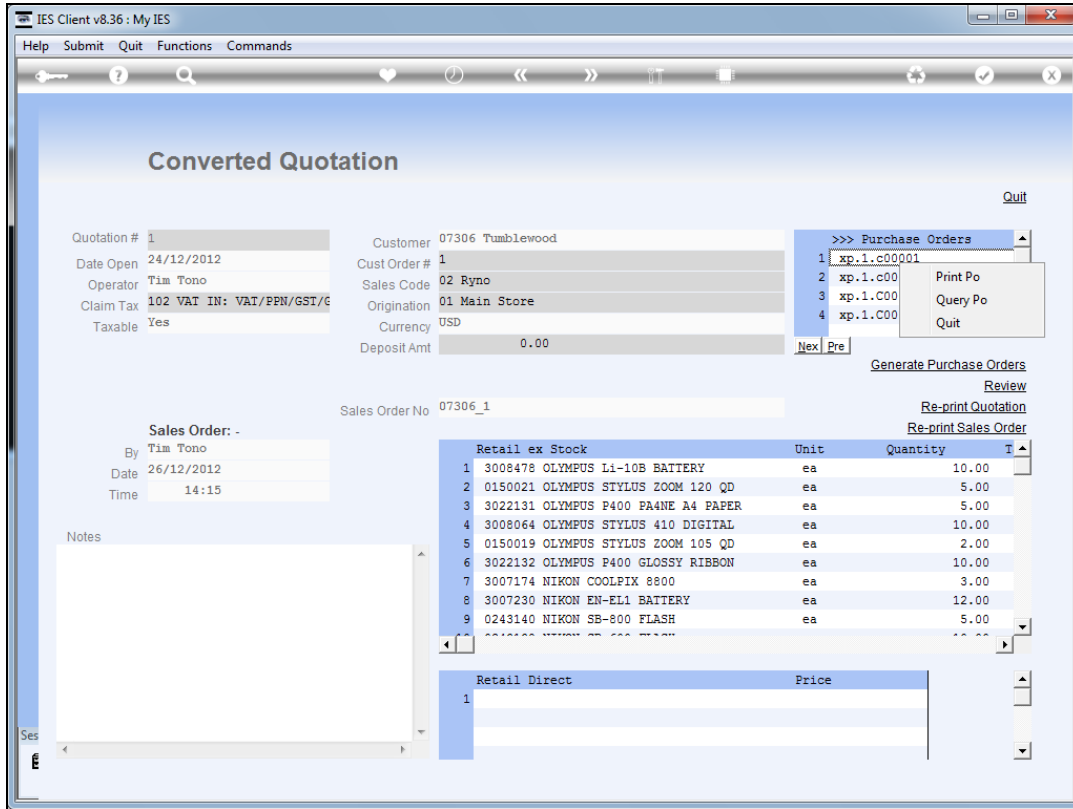Slide notes: We can re-print the final review of the workflow set.

Slide 13

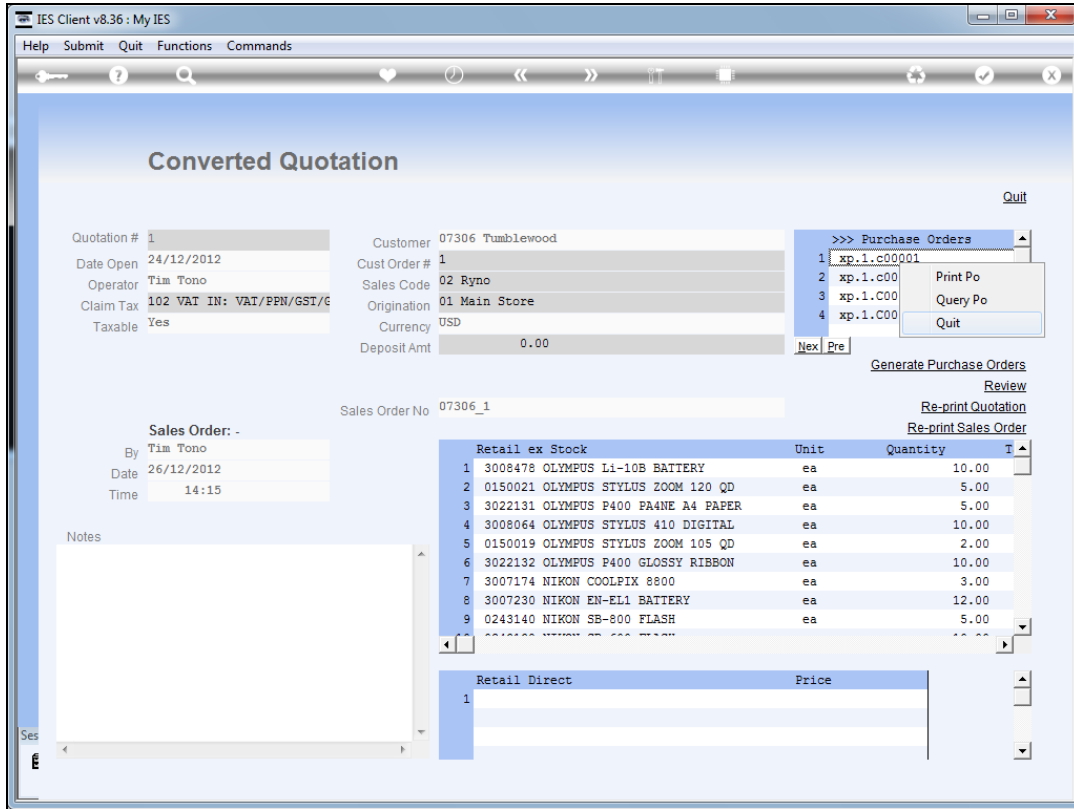Slide notes: We can also re-print the final Quotation or the Sales Order.
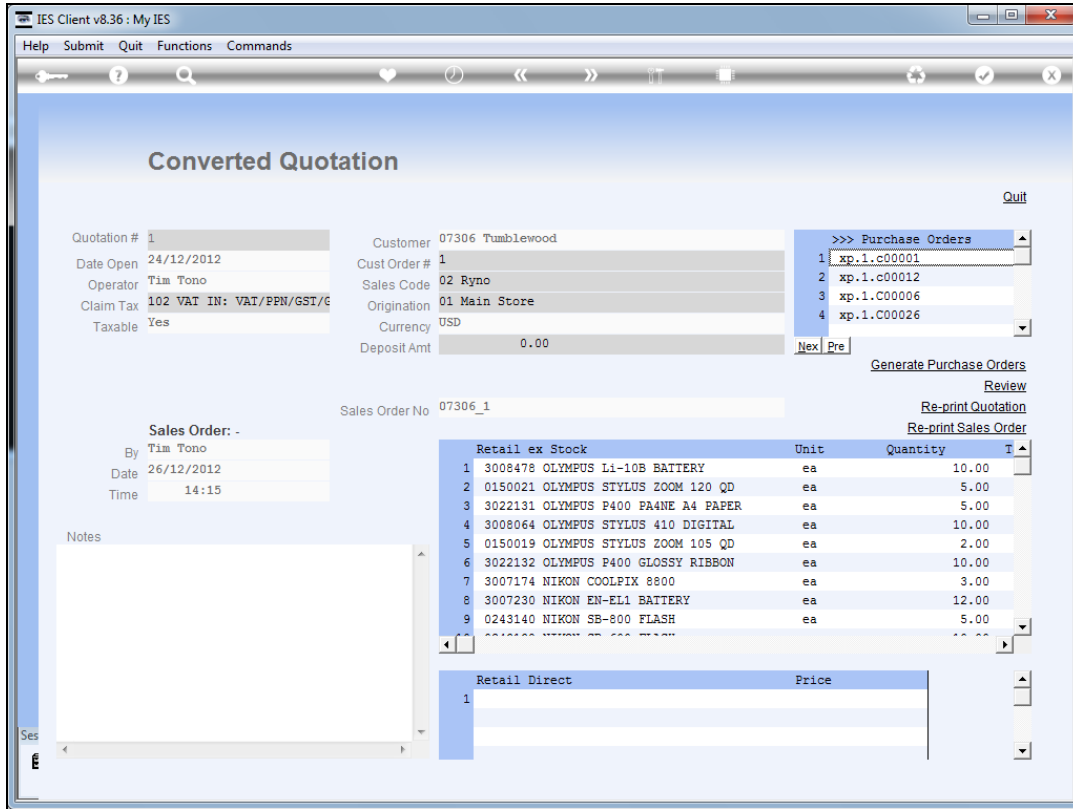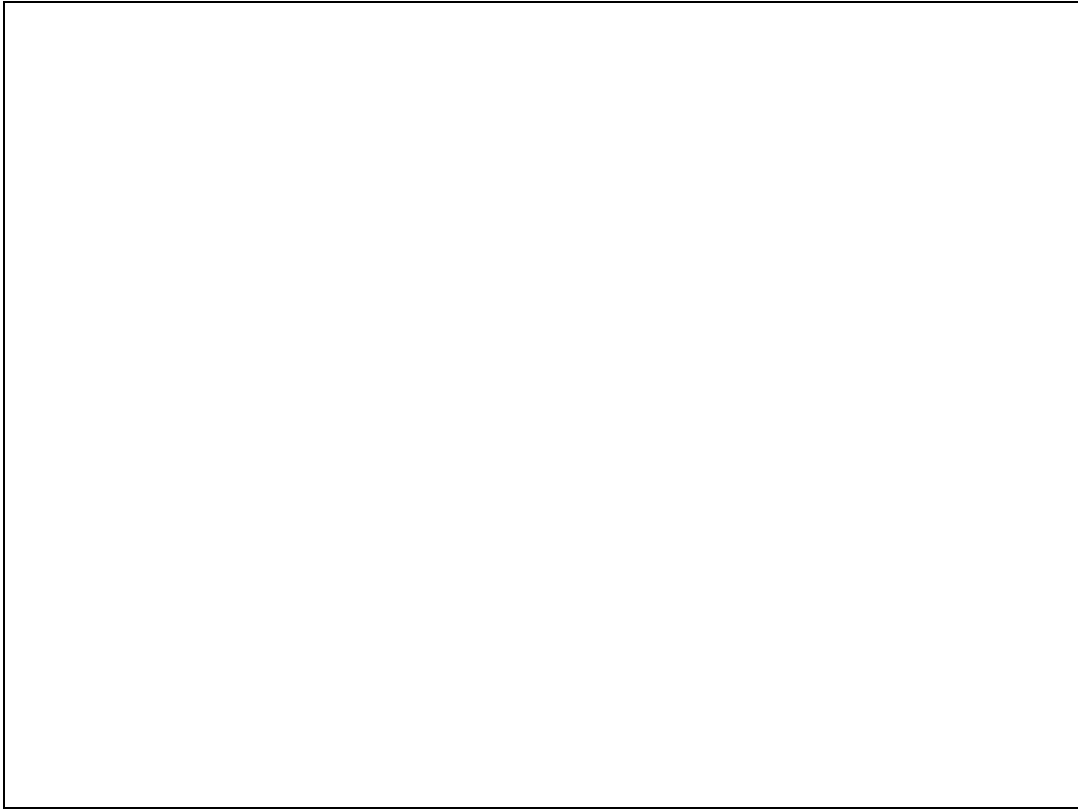
Slide 14
Slide notes:

Slide 15

Slide notes: And we can re-print or query any of the present Purchase Orders.
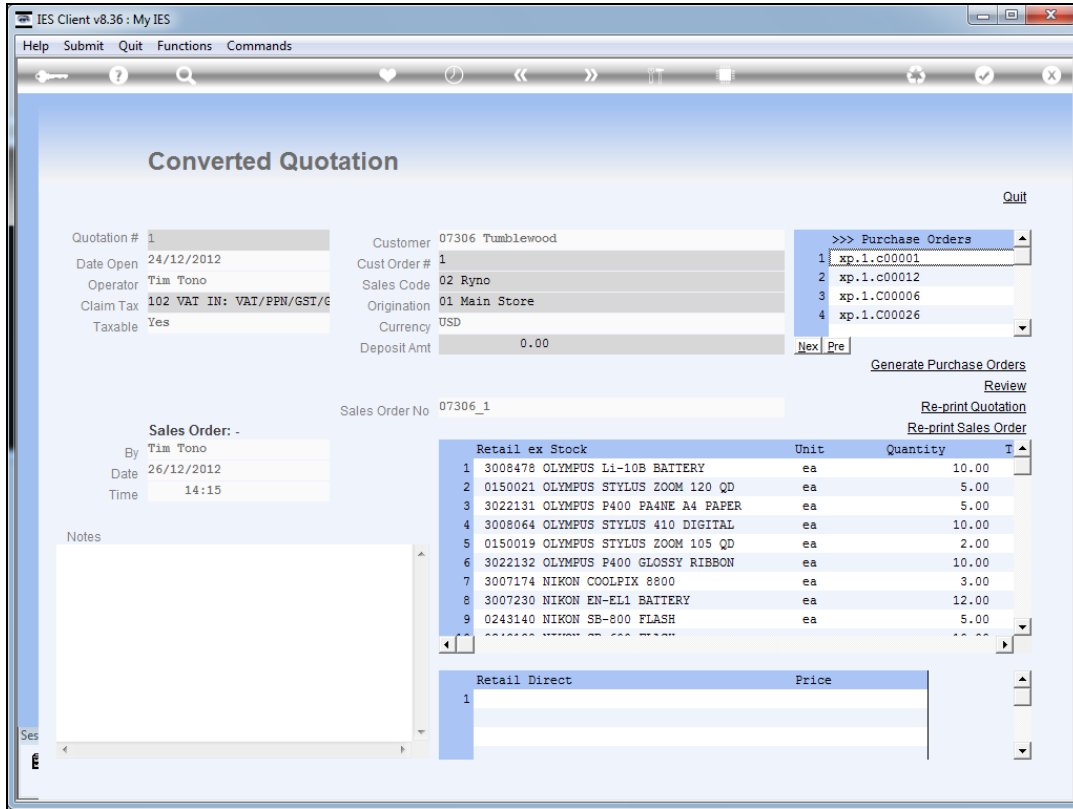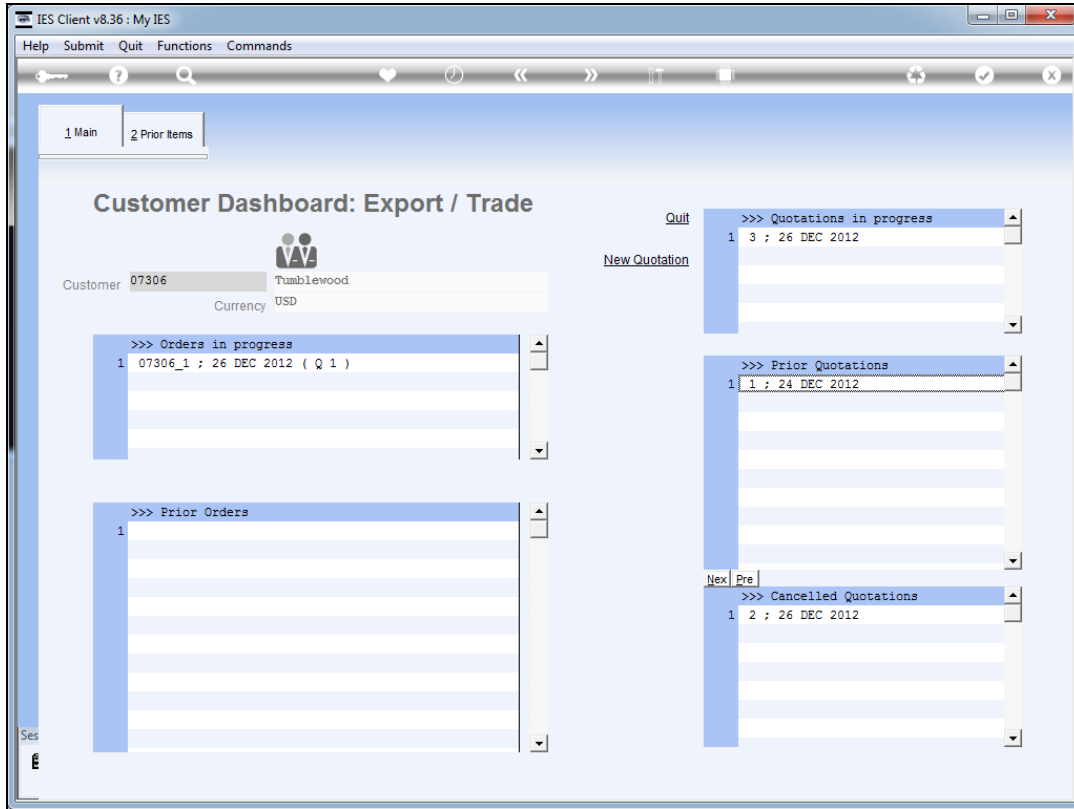
Slide 16
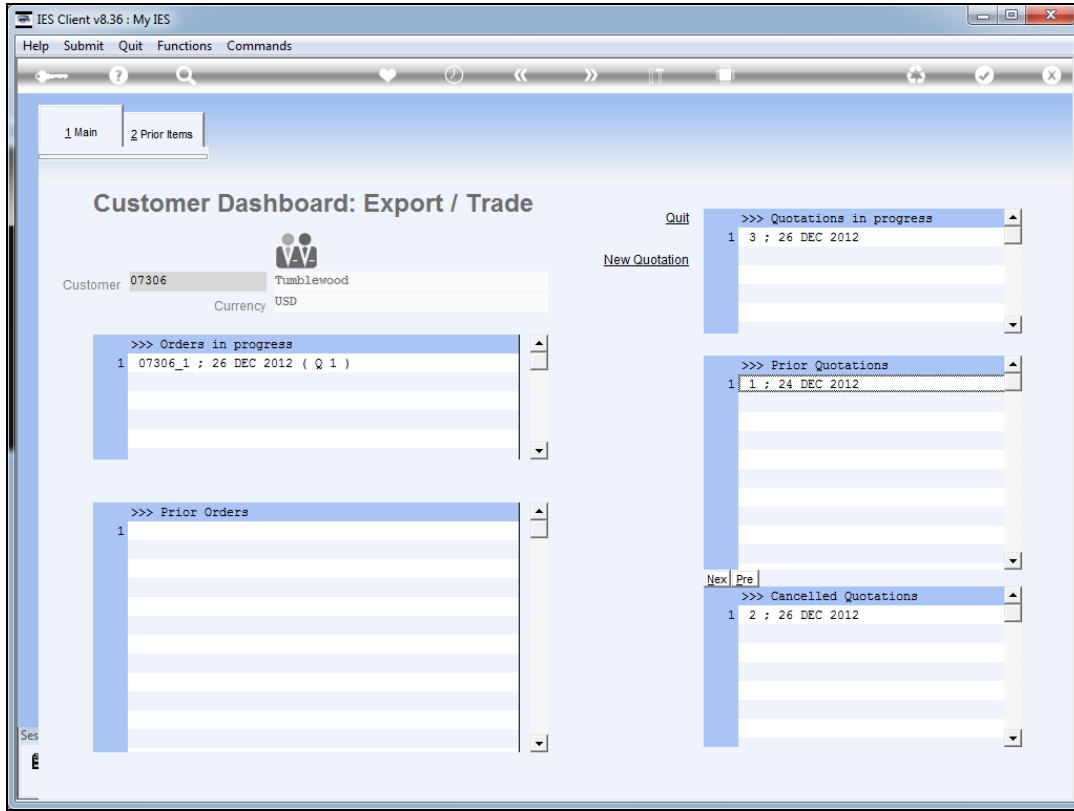Slide notes:

Slide 17

Slide notes:

Slide 18
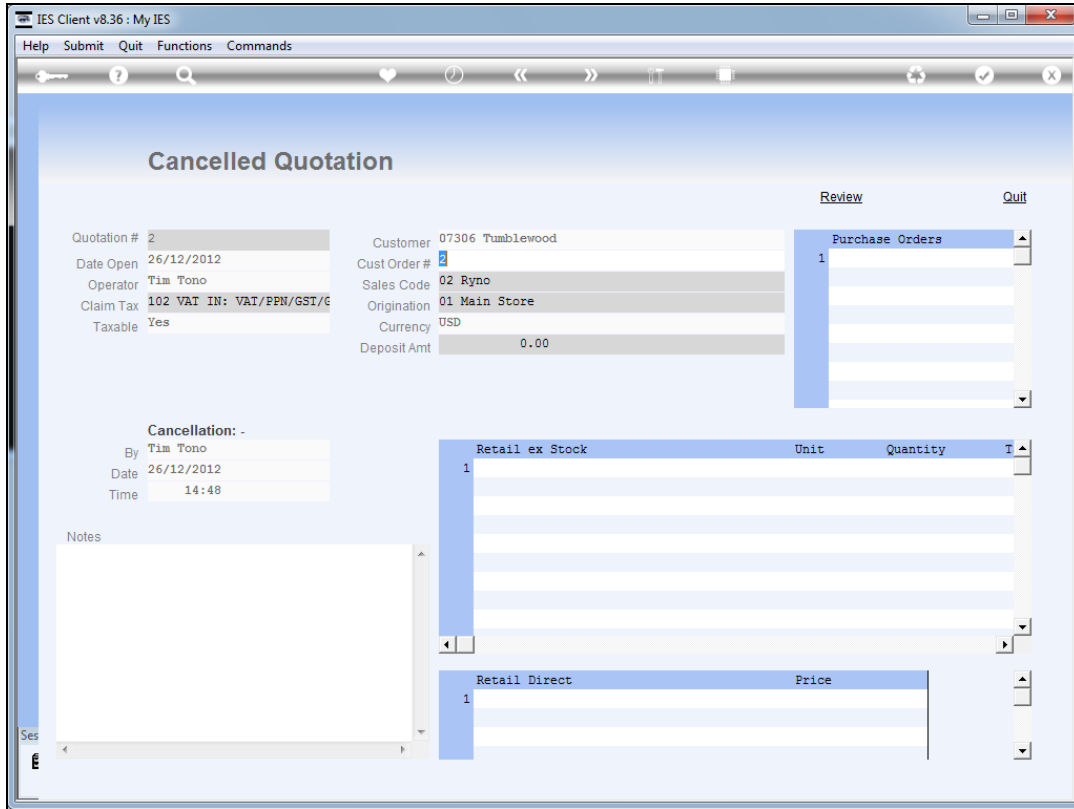Slide notes:

Slide 19
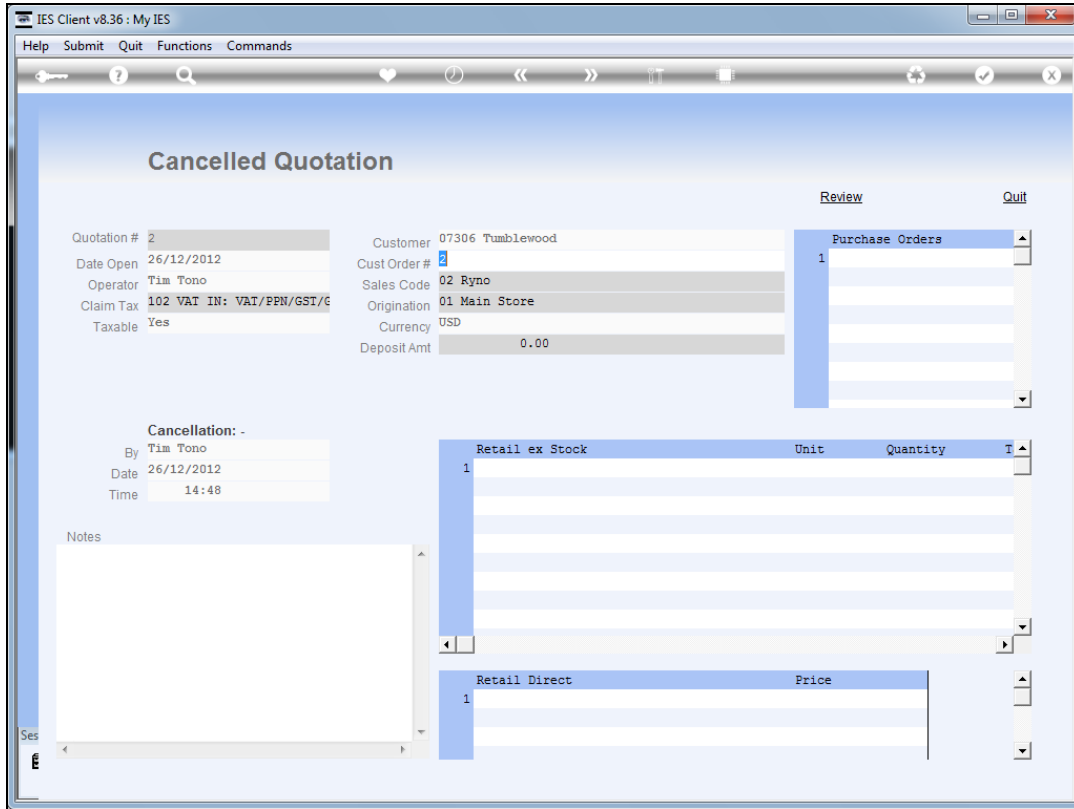Slide notes:

Slide 20
Slide notes:

Slide 21
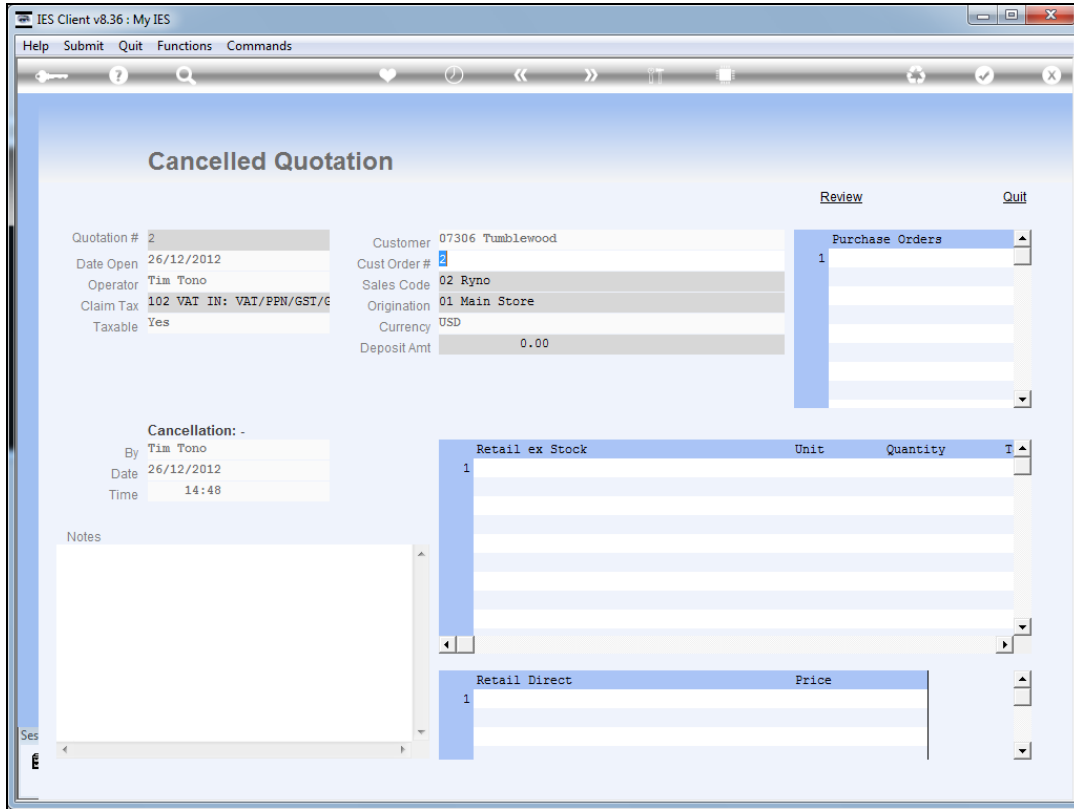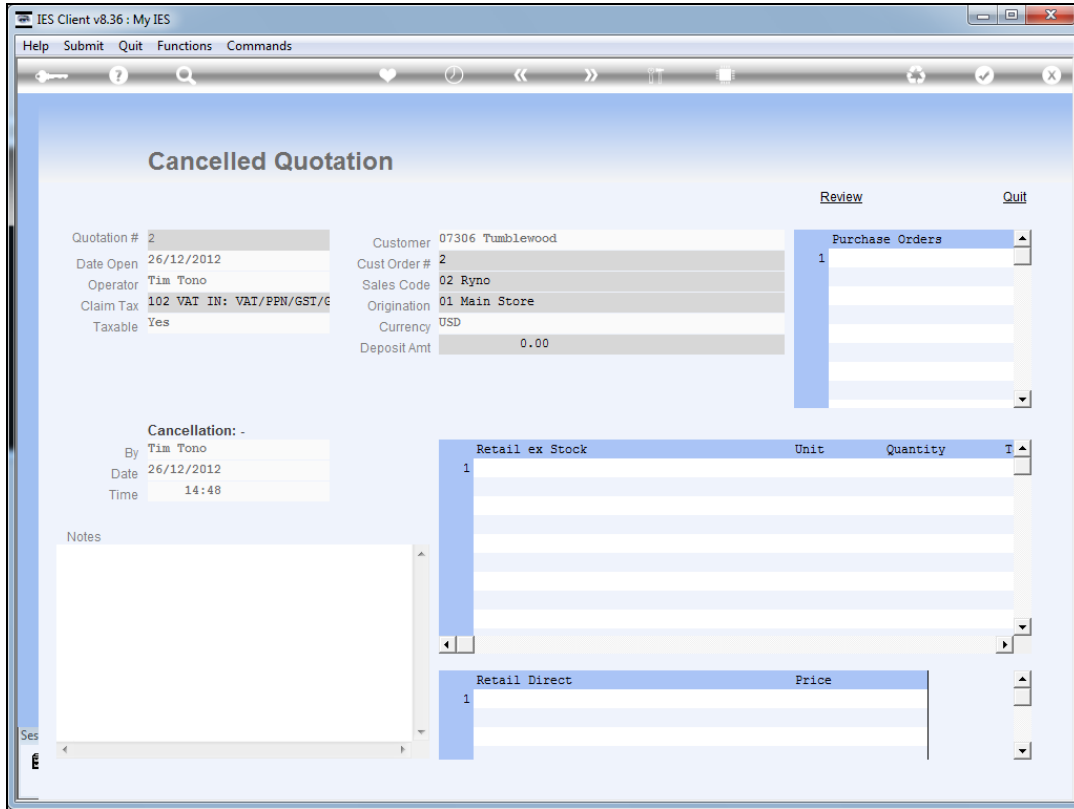Slide notes: Cancelled quotations can also be drilled.

Slide 22

Slide notes: And this will reveal the cancellation details, as well as the reason why, if it was recorded at the Notes.
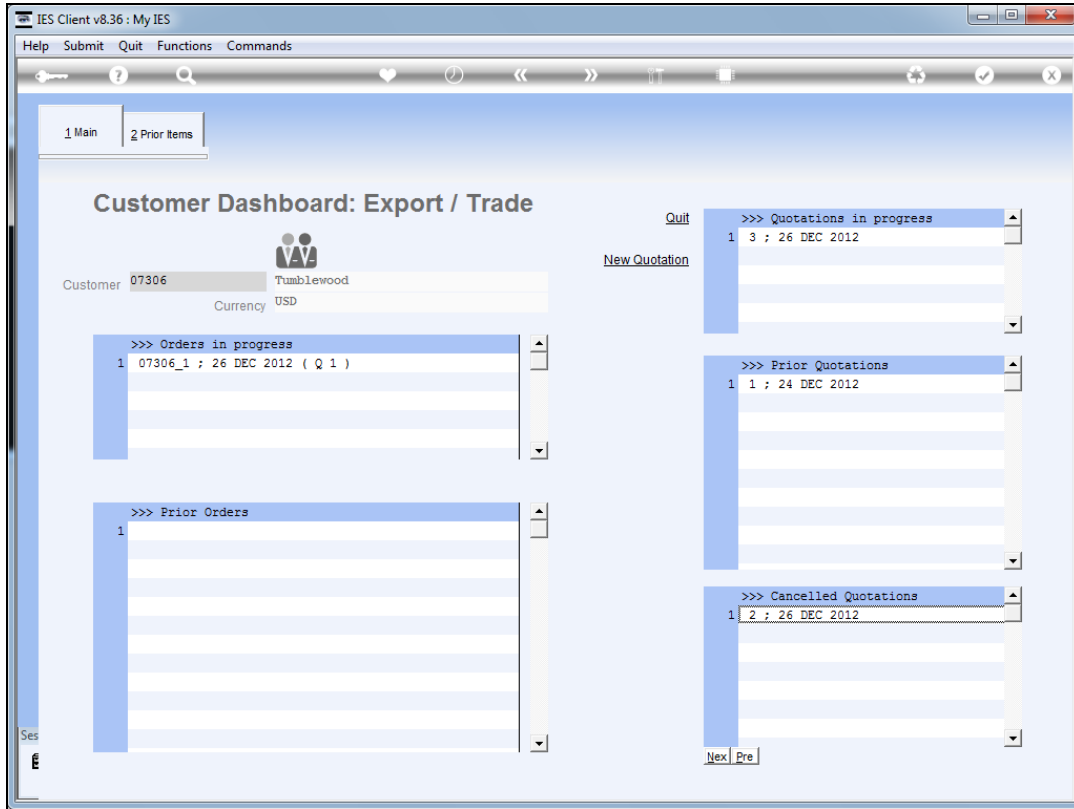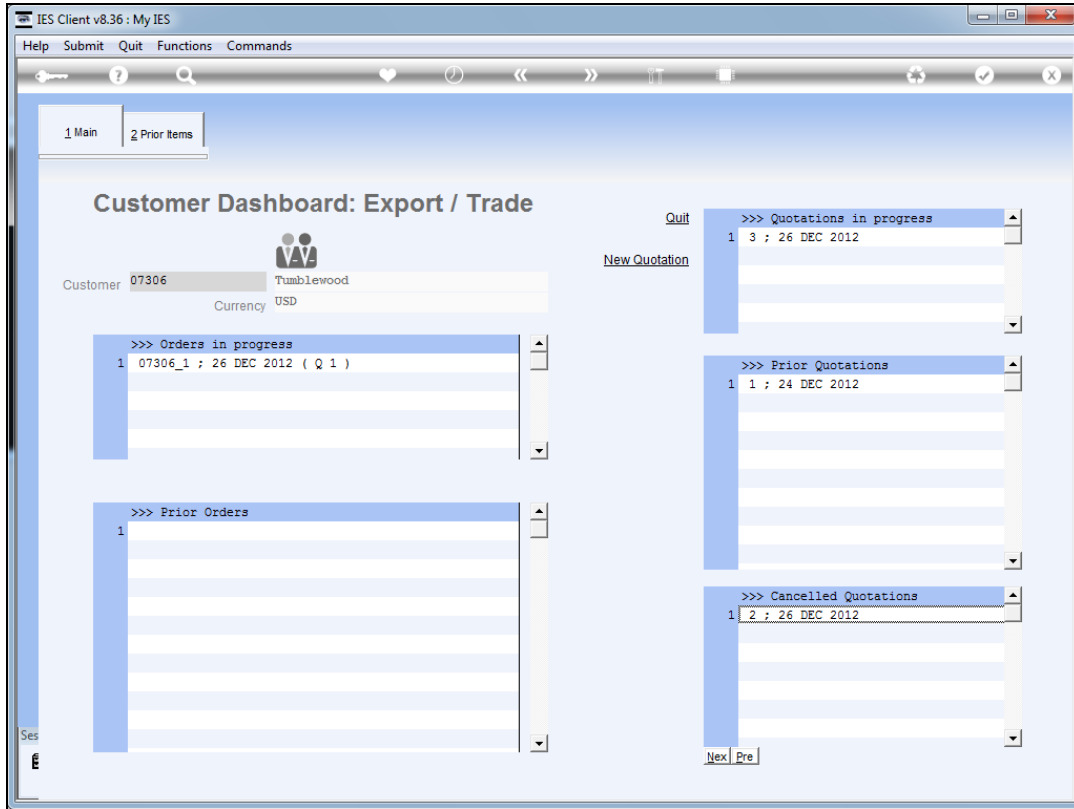
Slide 23
Slide notes:

Slide 24
Slide notes:

Slide 25
Slide notes:

Slide 26
Slide notes:

Slide 27
Slide notes: