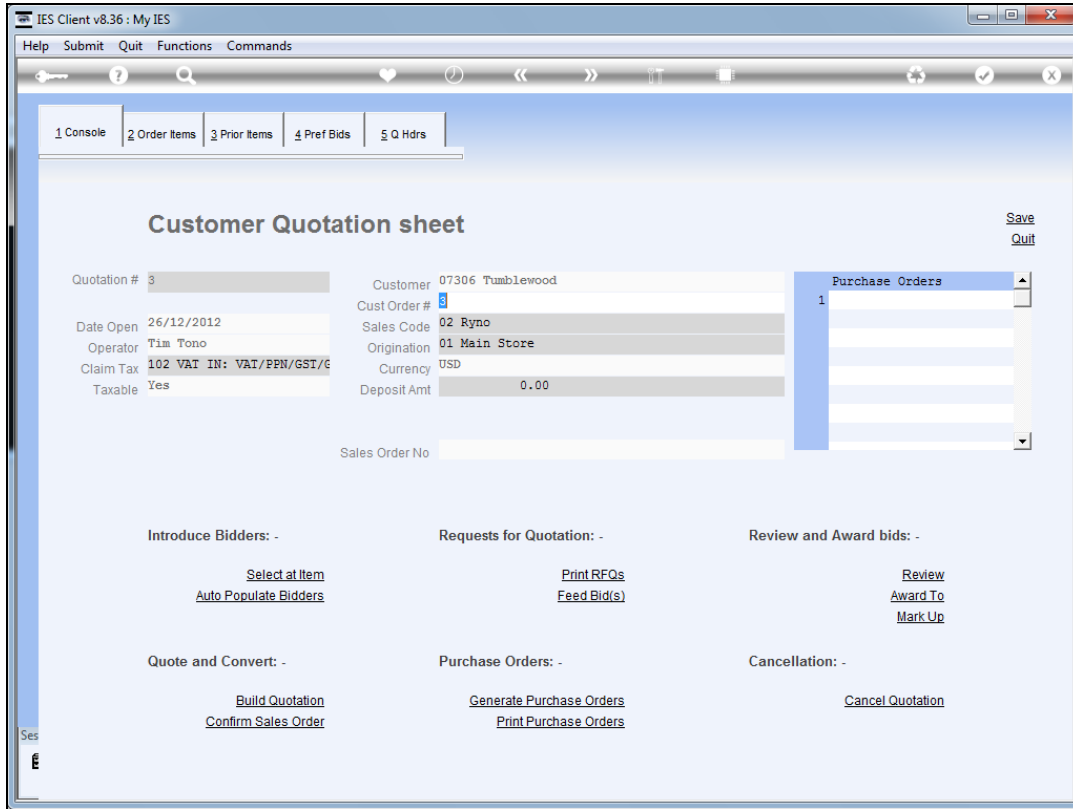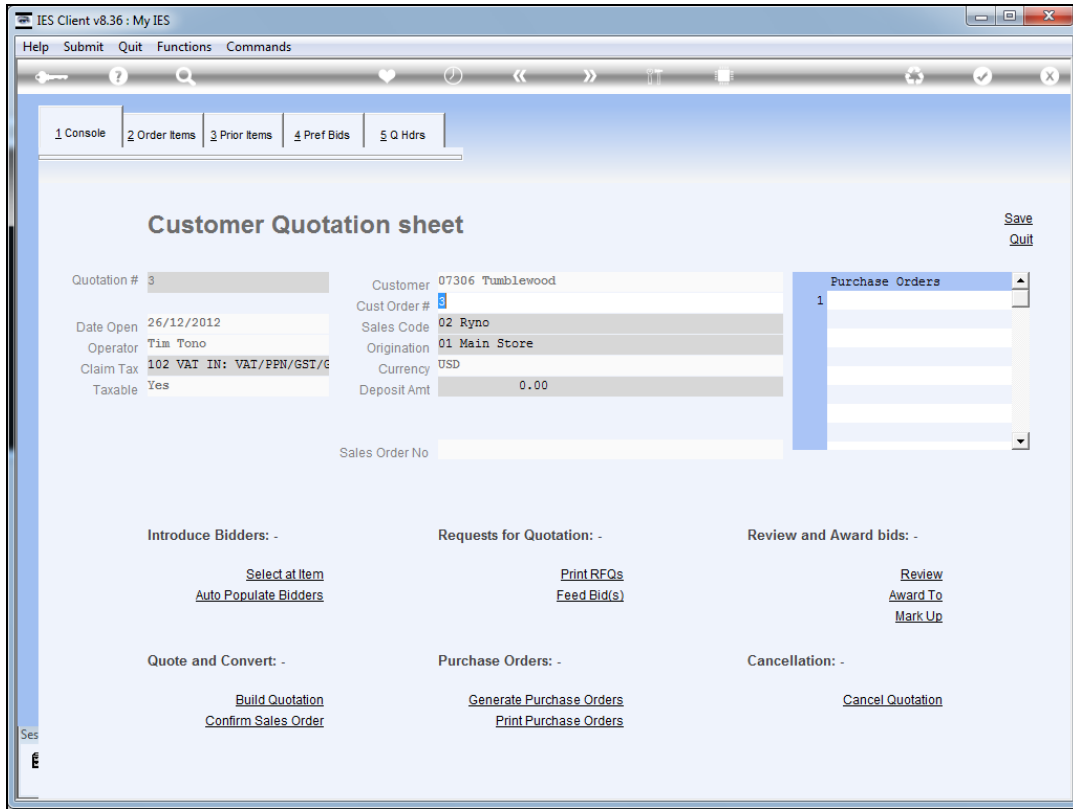Slide 1

Slide notes: We work with the quotations by entering a current Quotation, either from the Customer dashboard or from the direct Quotation entry option.
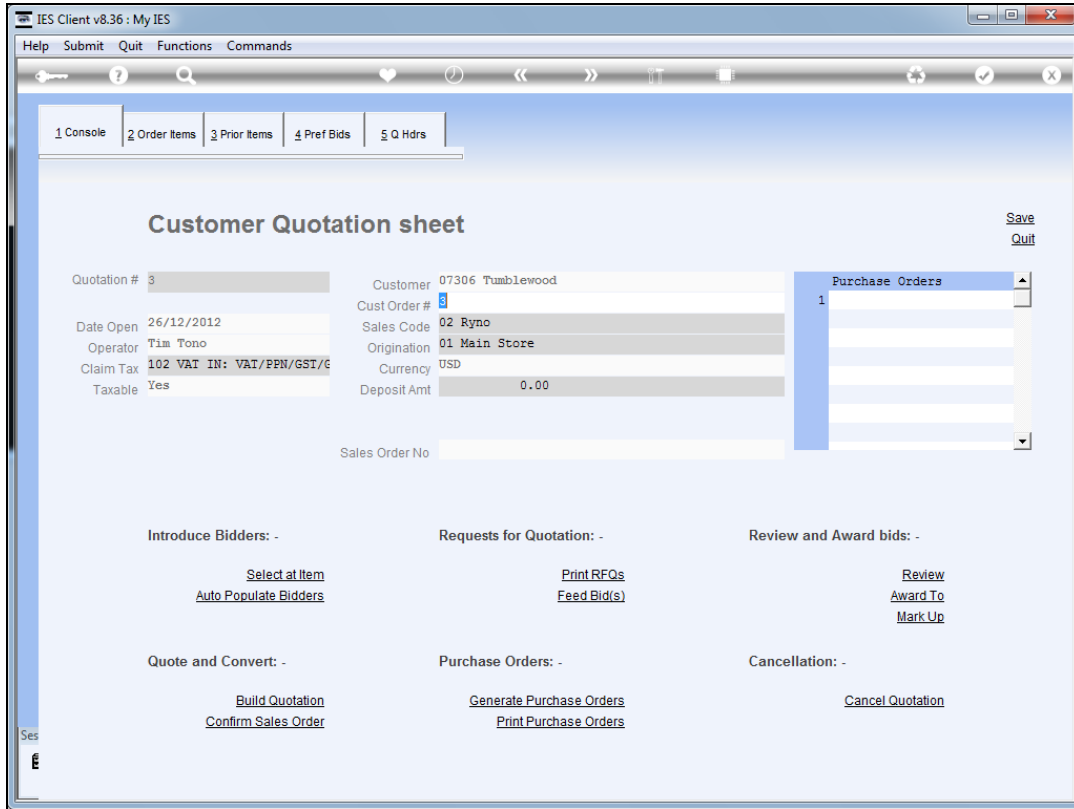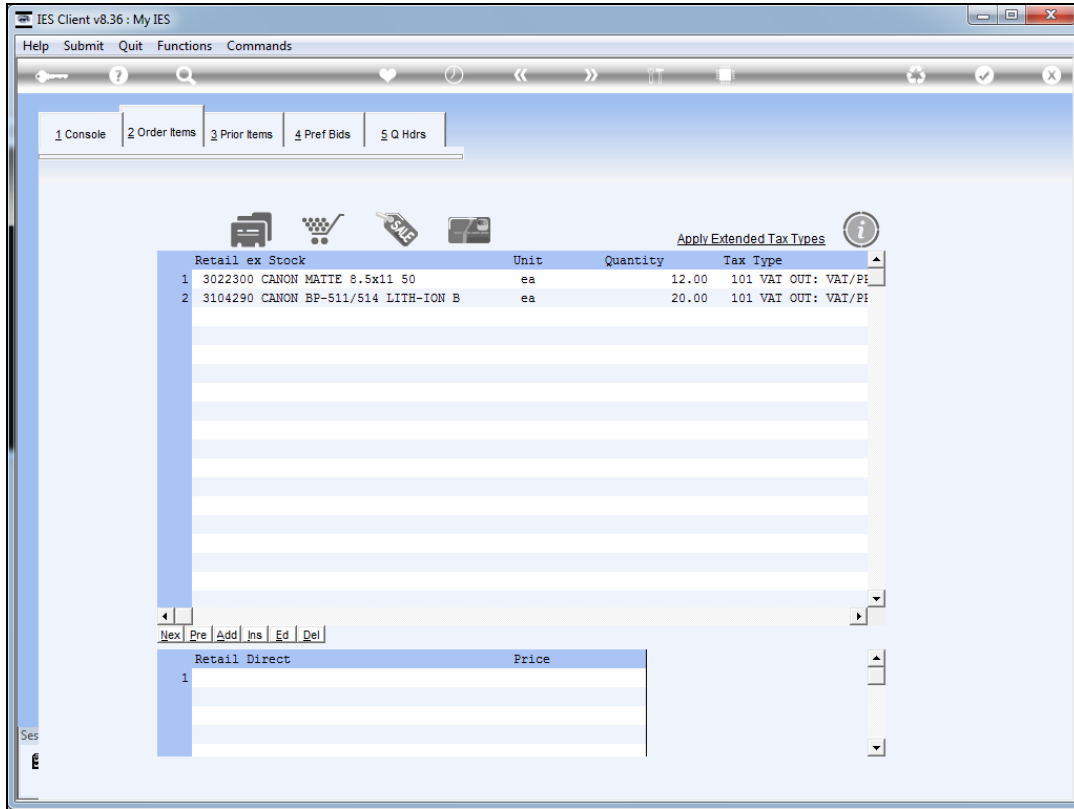
Slide 2

Slide notes: The Console area includes a number of parameters for this quotation, and also a series of command options to perform various steps in the workflow.
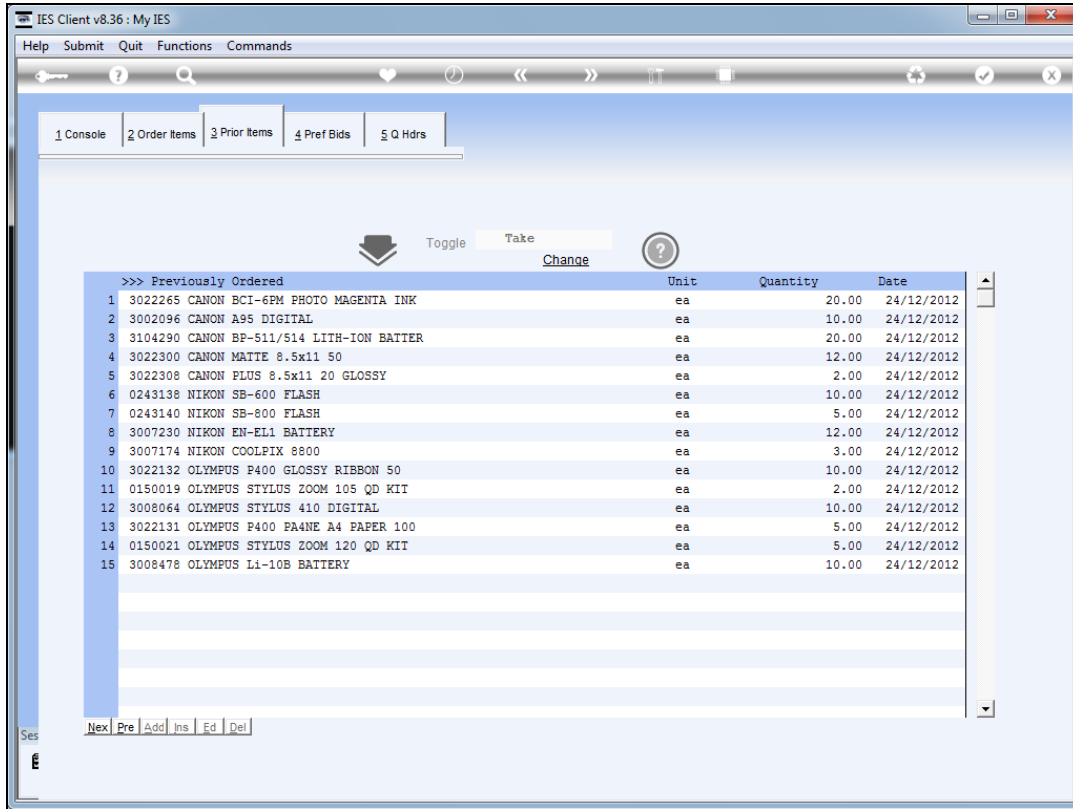
Slide 3
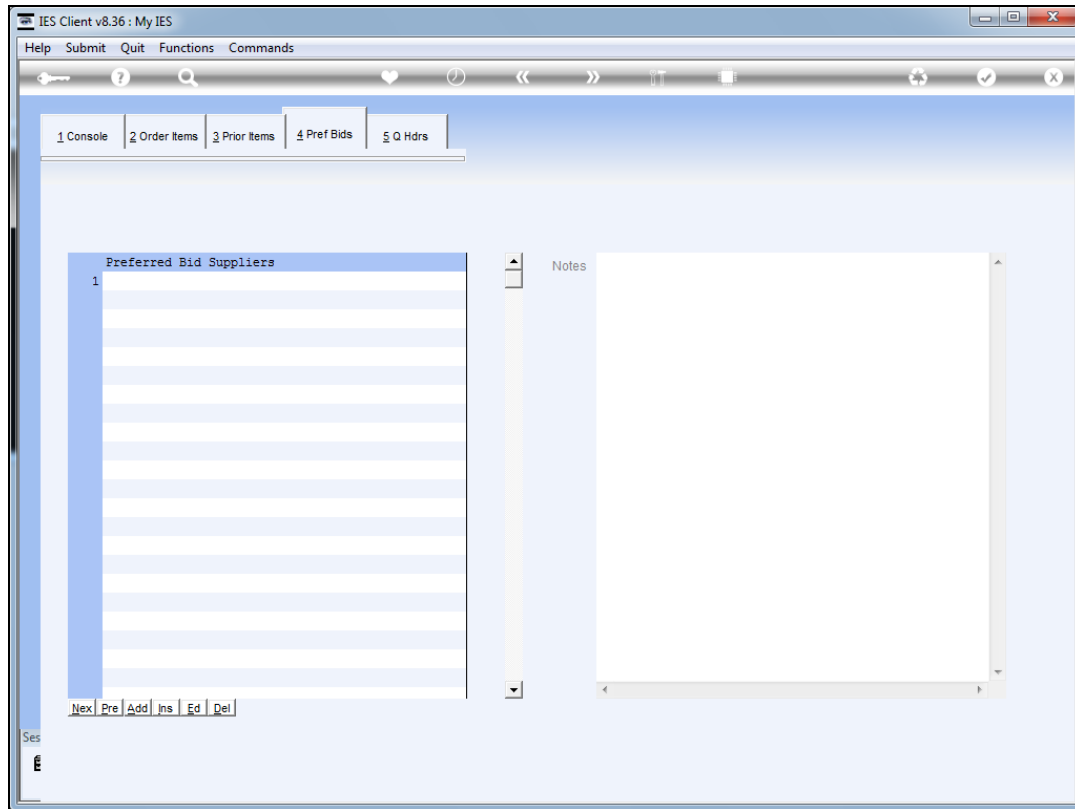Slide notes:

Slide 4
Slide notes:

Slide 5

Slide notes: The Order Items section is the primary area where we enter Order Items.
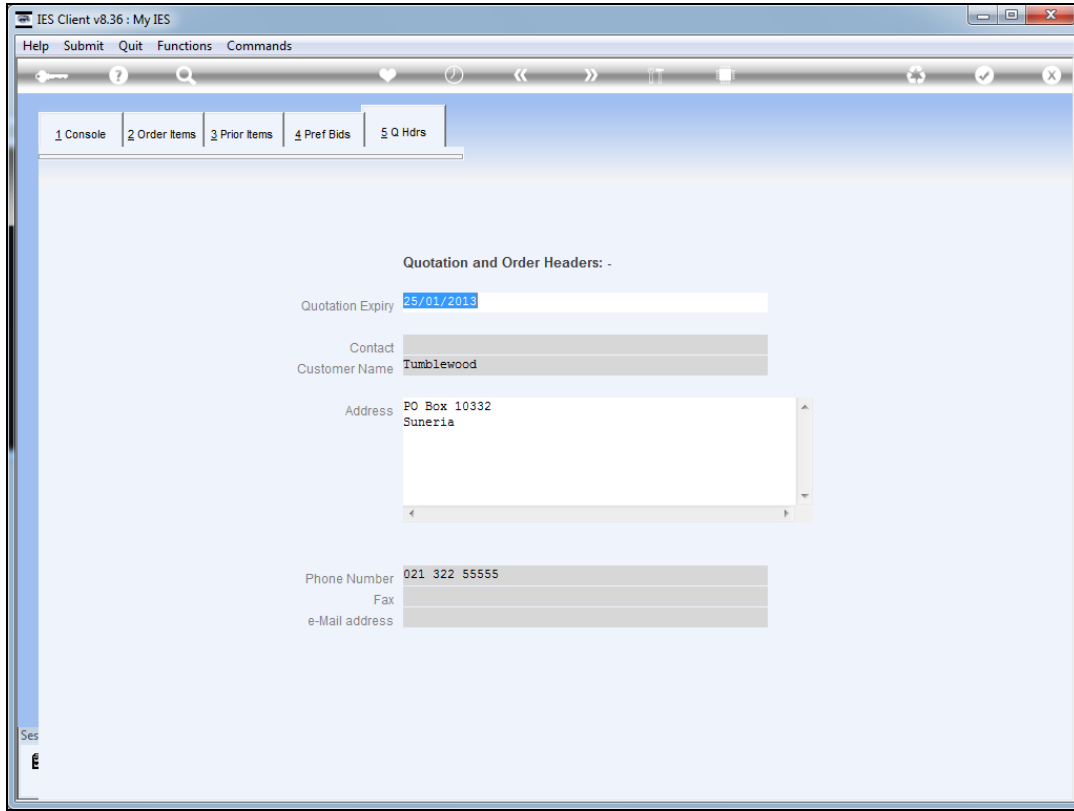
Slide 6

Slide notes: Prior Items are Items previously ordered by this Customer, and we can select Items here for inclusion as new Order Items as well as drill into the history for any of the listed items.
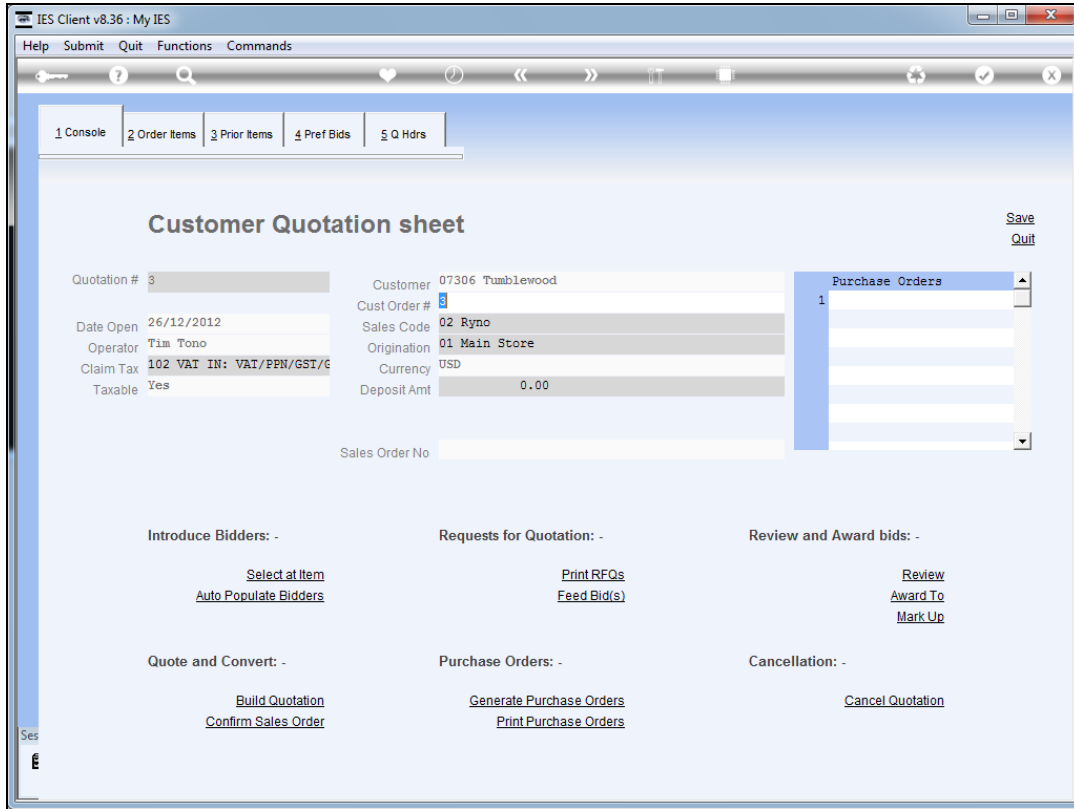
Slide 7

Slide notes: At preferred Bid Suppliers we may enter any number of Suppliers to be automatically available for bid selection when we work with the various Items at bid level. We also have a Notes area where we may record any relevant notes on this quotation.

Slide 8

Slide notes: The headers section includes information used on the quotation print, and are defaulted from the Customer Account when we open a new quotation. We may make changes here, if necessary.

Slide 9
Slide notes: