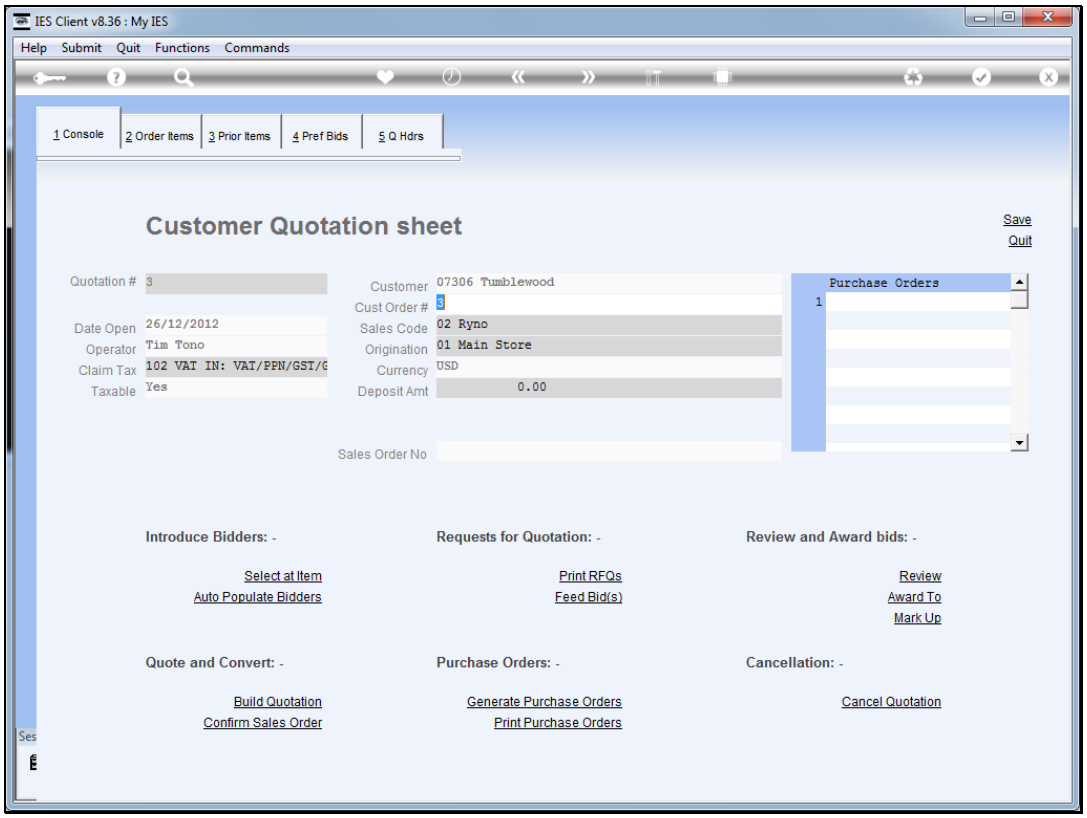
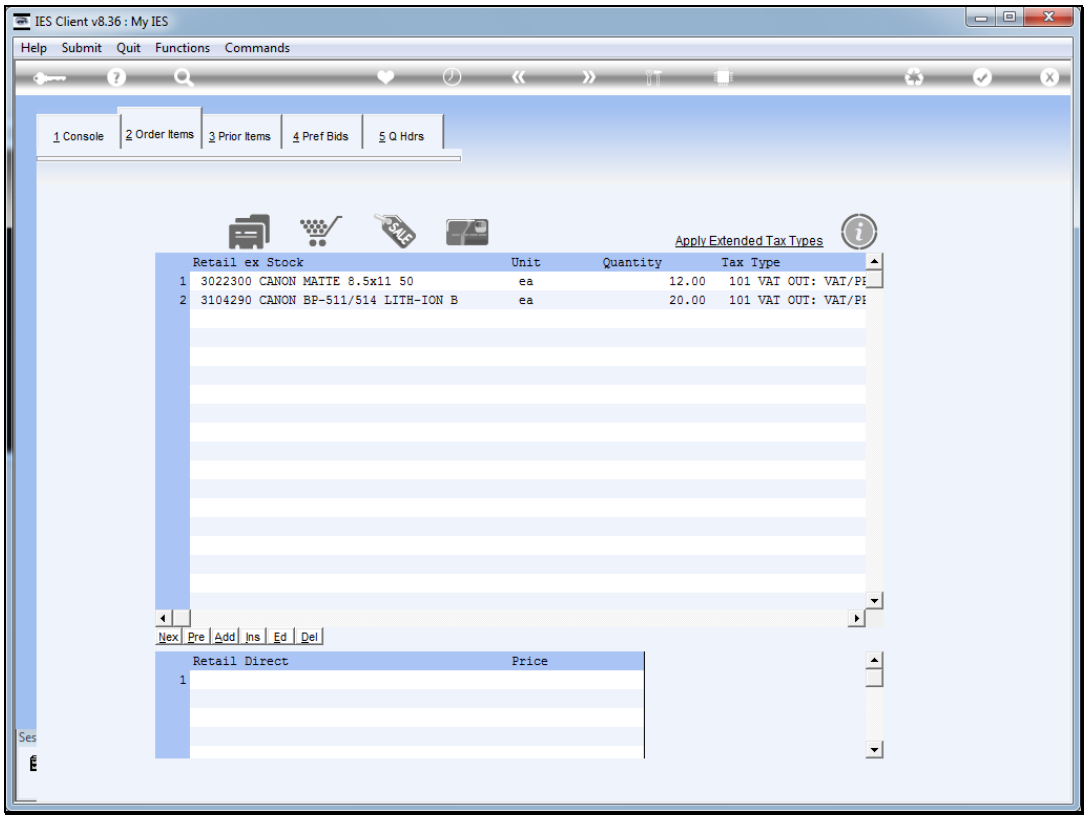


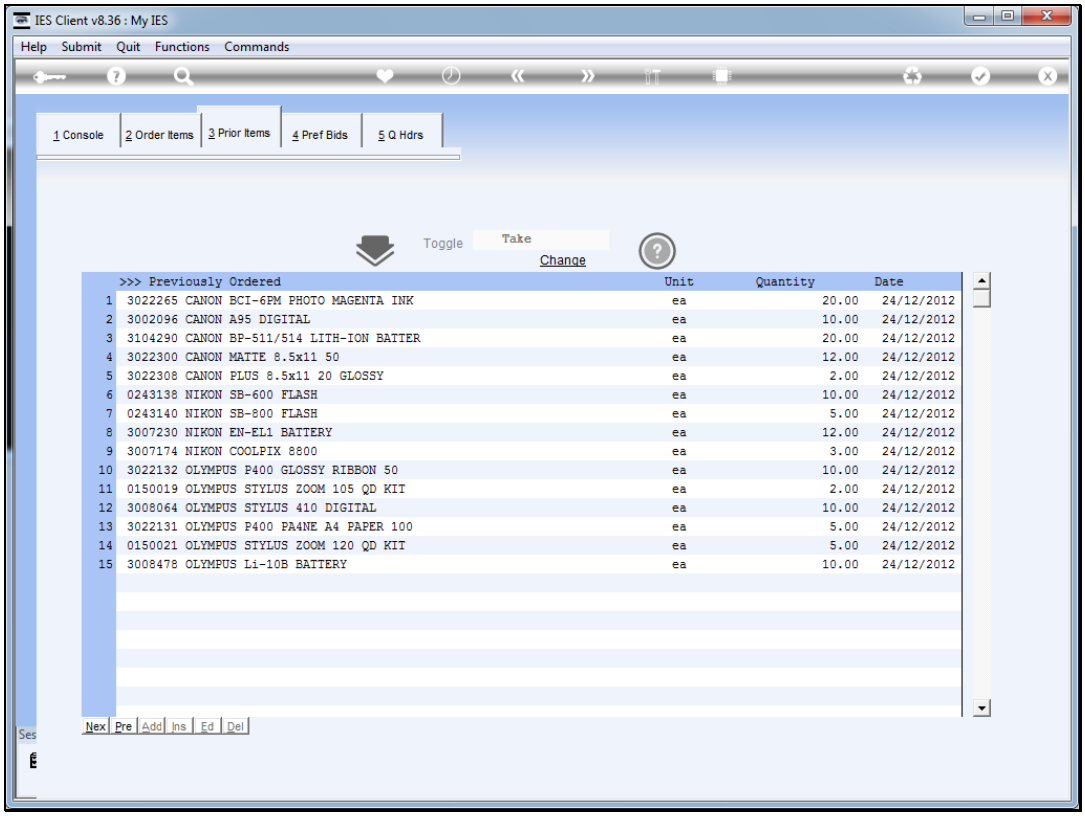
Slide 1

Slide notes: The quotation needs Order Items, and the logical place to enter those is at the "Order Items" section.



Slide 2

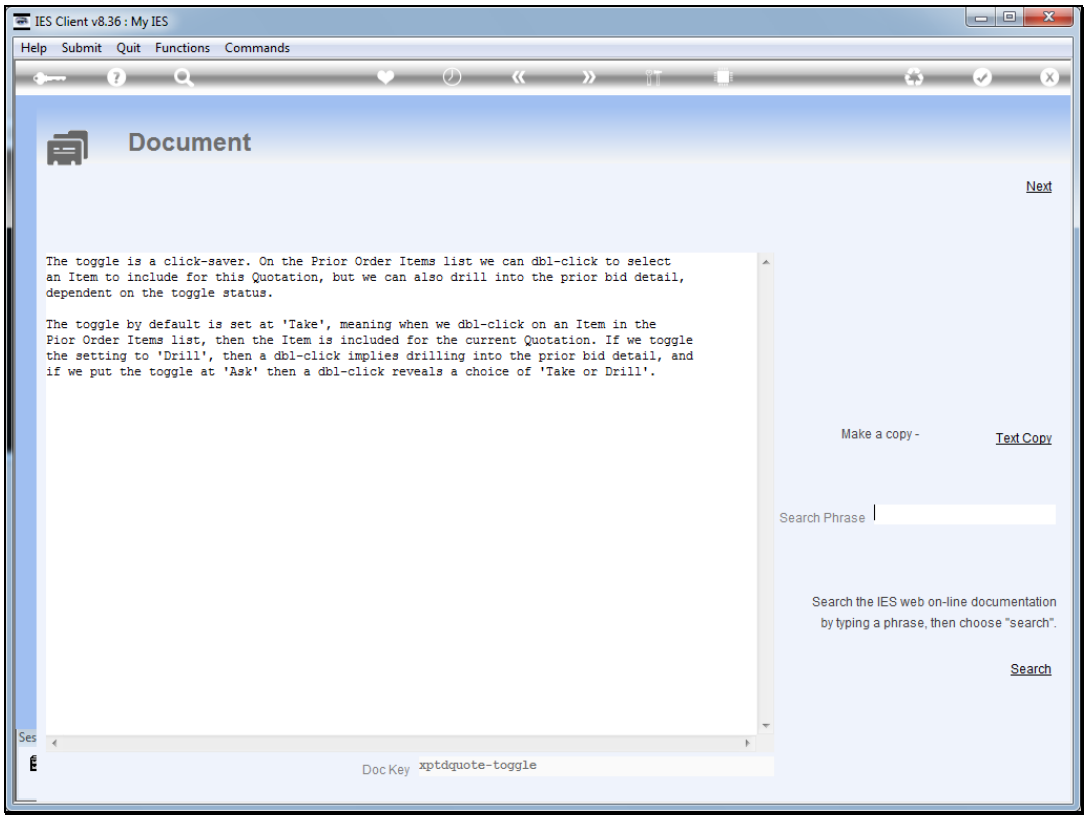
Slide notes: In this example, we already have 2 Items listed. Before we come back here for direct entering of more Order Items, we'll have a look at how we can select repeat Items from prior Orders for the same Customer.



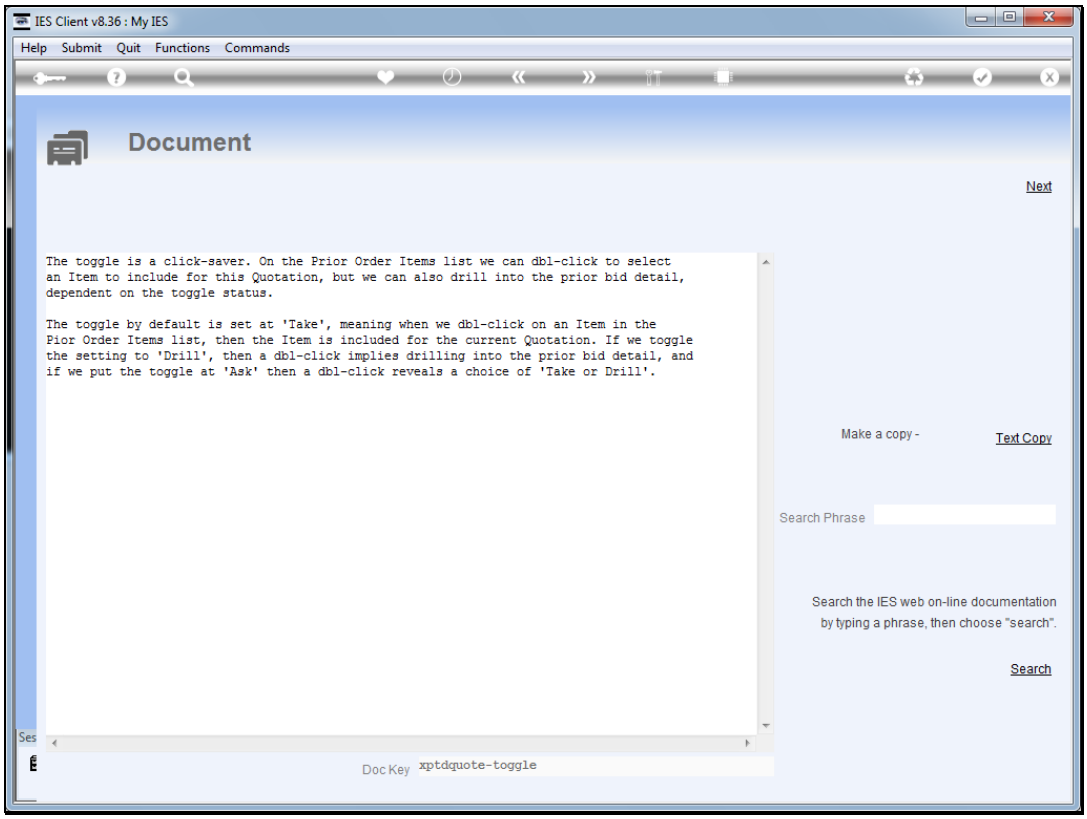
	>>> Previously Ordered	Unit	Quantity	Date
1	3022265 CANON BCI-6PM PHOTO MAGENTA INK	ea	20.00	24/12/2012
2	3002096 CANON A95 DIGITAL	ea	10.00	24/12/2012
3	3104290 CANON BP-511/514 LITH-ION BATTER	ea	20.00	24/12/2012
4	3022300 CANON MATTE 8.5x11 50	ea	12.00	24/12/2012
5	3022308 CANON PLUS 8.5x11 20 GLOSSY	ea	2.00	24/12/2012
6	0243138 NIKON SB-600 FLASH	ea	10.00	24/12/2012
7	0243140 NIKON SB-800 FLASH	ea	5.00	24/12/2012
8	3007230 NIKON EN-EL1 BATTERY	ea	12.00	24/12/2012
9	3007174 NIKON COOLPIX 8800	ea	3.00	24/12/2012
10	3022132 OLYMPUS P400 GLOSSY RIBBON 50	ea	10.00	24/12/2012
11	0150019 OLYMPUS STYLUS ZOOM 105 QD KIT	ea	2.00	24/12/2012
12	3008064 OLYMPUS STYLUS 410 DIGITAL	ea	10.00	24/12/2012
13	3022131 OLYMPUS P400 PA4NE A4 PAPER 100	ea	5.00	24/12/2012
14	0150021 OLYMPUS STYLUS ZOOM 120 QD KIT	ea	5.00	24/12/2012
15	3008478 OLYMPUS Li-10B BATTERY	ea	10.00	24/12/2012

Slide 3

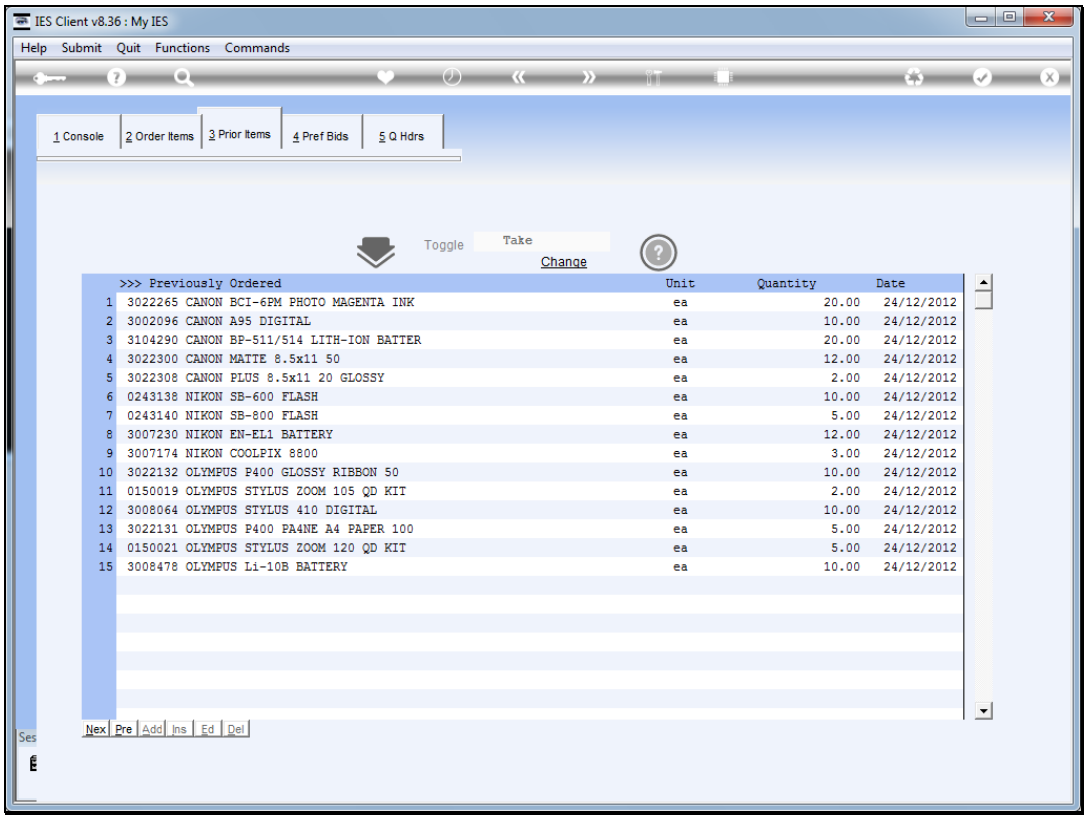
Slide notes: At prior Items, we have the toggle currently set at "take" which means any Items we dbl-click will automatically be included at Order Items.



Slide 4
Slide notes: The toggle can also be set at 'drill' or 'ask'.

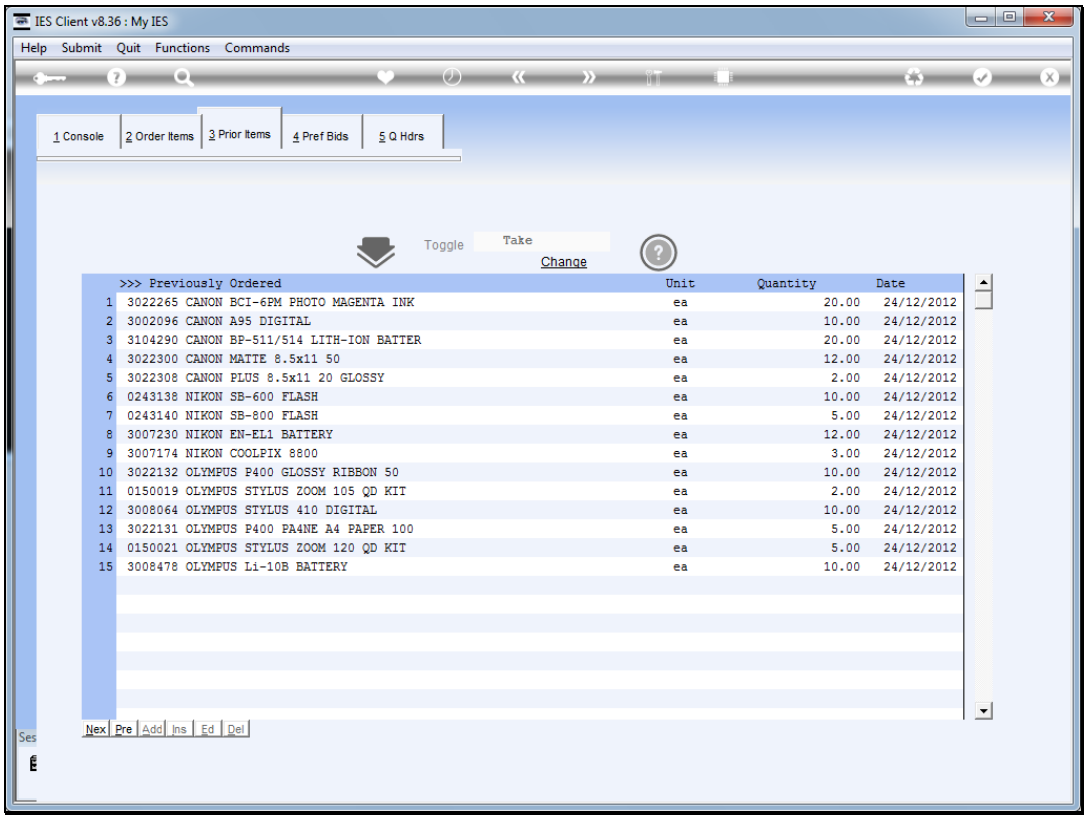


Slide 5
Slide notes:



	>>> Previously Ordered	Unit	Quantity	Date
1	3022265 CANON BCI-6PM PHOTO MAGENTA INK	ea	20.00	24/12/2012
2	3002096 CANON A95 DIGITAL	ea	10.00	24/12/2012
3	3104290 CANON BP-511/514 LITH-ION BATTER	ea	20.00	24/12/2012
4	3022300 CANON MATTE 8.5x11 50	ea	12.00	24/12/2012
5	3022308 CANON PLUS 8.5x11 20 GLOSSY	ea	2.00	24/12/2012
6	0243138 NIKON SB-600 FLASH	ea	10.00	24/12/2012
7	0243140 NIKON SB-800 FLASH	ea	5.00	24/12/2012
8	3007230 NIKON EN-EL1 BATTERY	ea	12.00	24/12/2012
9	3007174 NIKON COOLPIX 8800	ea	3.00	24/12/2012
10	3022132 OLYMPUS P400 GLOSSY RIBBON 50	ea	10.00	24/12/2012
11	0150019 OLYMPUS STYLUS ZOOM 105 QD KIT	ea	2.00	24/12/2012
12	3008064 OLYMPUS STYLUS 410 DIGITAL	ea	10.00	24/12/2012
13	3022131 OLYMPUS P400 PA4NE A4 PAPER 100	ea	5.00	24/12/2012
14	0150021 OLYMPUS STYLUS ZOOM 120 QD KIT	ea	5.00	24/12/2012
15	3008478 OLYMPUS Li-10B BATTERY	ea	10.00	24/12/2012

Slide 6
Slide notes:



	>>> Previously Ordered	Unit	Quantity	Date
1	3022265 CANON BCI-6PM PHOTO MAGENTA INK	ea	20.00	24/12/2012
2	3002096 CANON A95 DIGITAL	ea	10.00	24/12/2012
3	3104290 CANON BP-511/514 LITH-ION BATTER	ea	20.00	24/12/2012
4	3022300 CANON MATTE 8.5x11 50	ea	12.00	24/12/2012
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6	0243138 NIKON SB-600 FLASH	ea	10.00	24/12/2012
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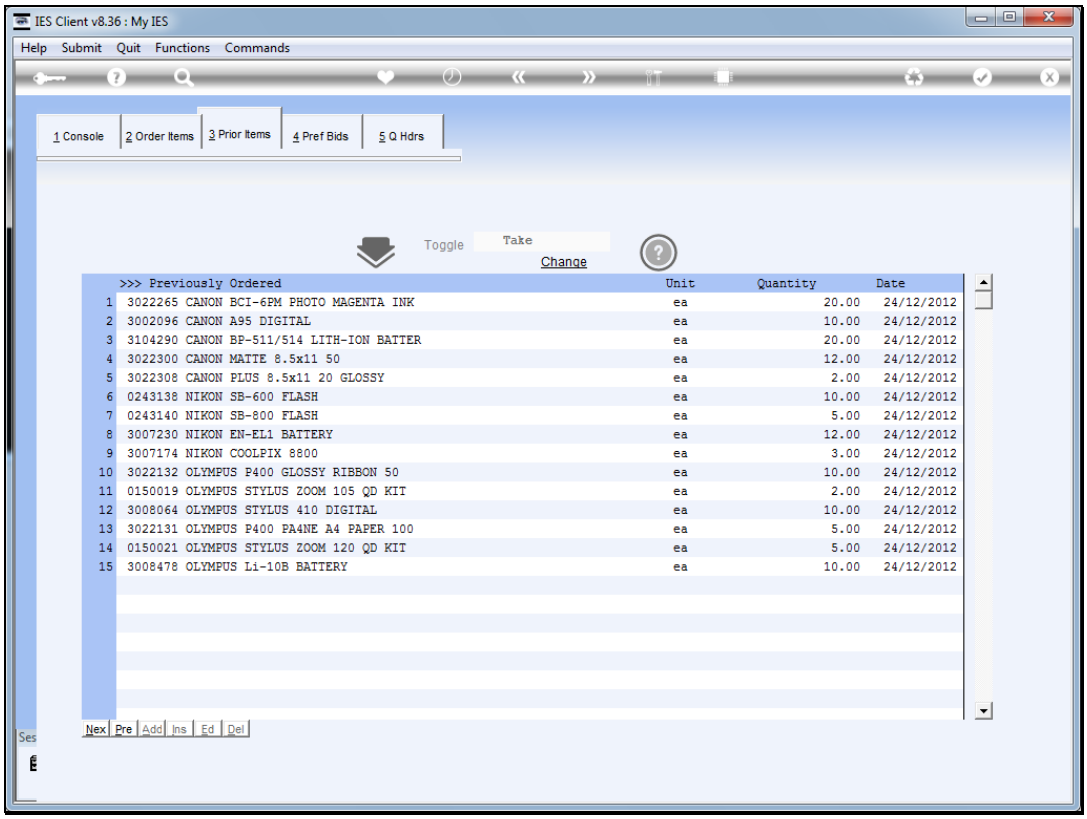
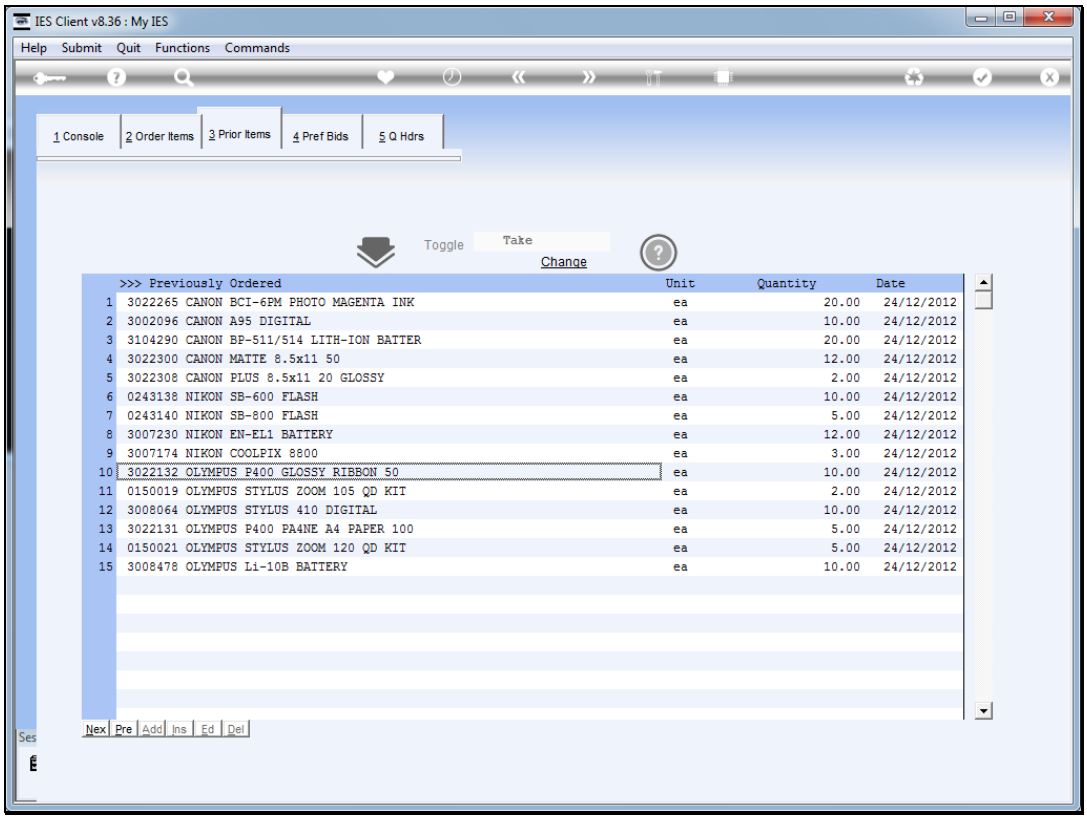
8	3007230 NIKON EN-EL1 BATTERY	ea	12.00	24/12/2012
9	3007174 NIKON COOLPIX 8800	ea	3.00	24/12/2012
10	3022132 OLYMPUS P400 GLOSSY RIBBON 50	ea	10.00	24/12/2012
11	0150019 OLYMPUS STYLUS ZOOM 105 QD KIT	ea	2.00	24/12/2012
12	3008064 OLYMPUS STYLUS 410 DIGITAL	ea	10.00	24/12/2012
13	3022131 OLYMPUS P400 PA4NE A4 PAPER 100	ea	5.00	24/12/2012
14	0150021 OLYMPUS STYLUS ZOOM 120 QD KIT	ea	5.00	24/12/2012
15	3008478 OLYMPUS Li-10B BATTERY	ea	10.00	24/12/2012

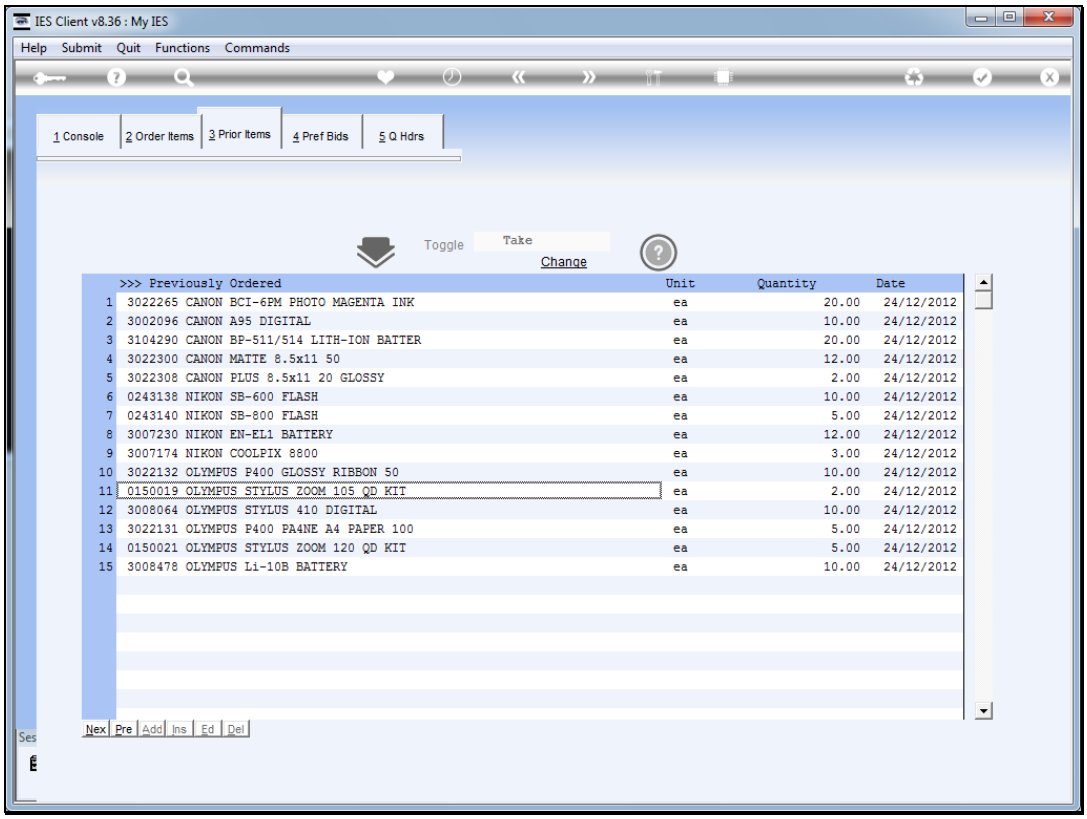
Slide 7
Slide notes:



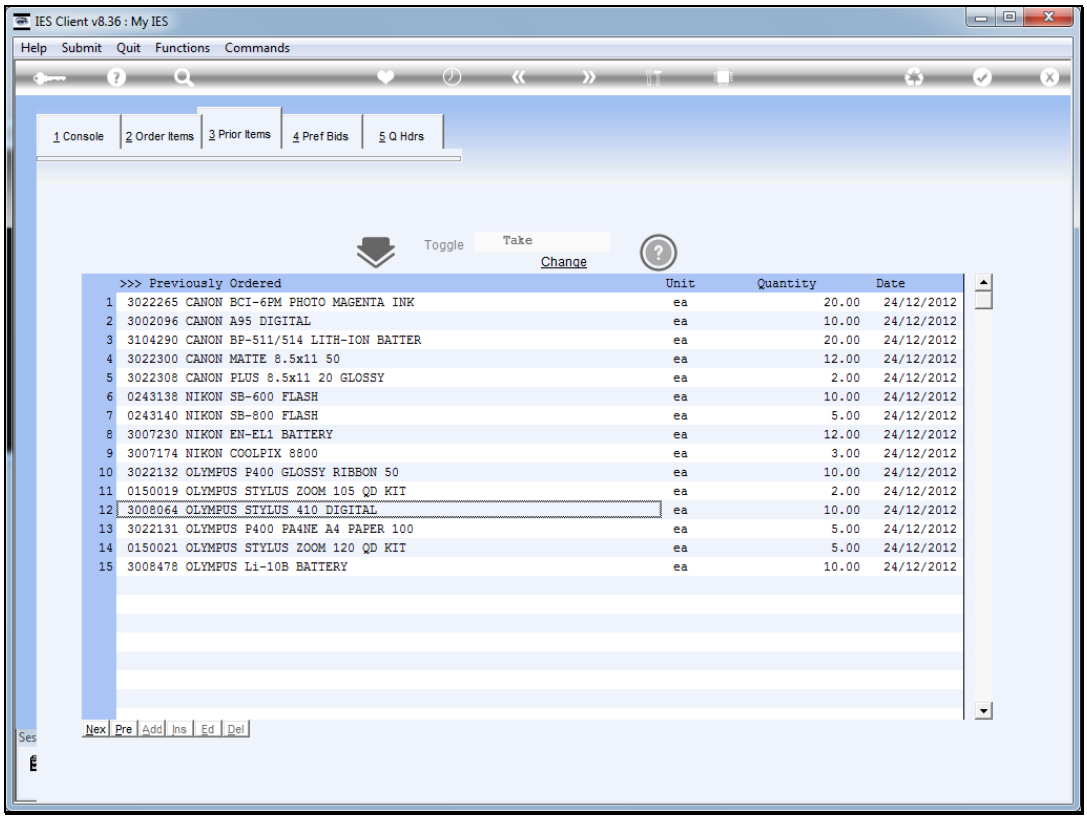
Slide 8
Slide notes:



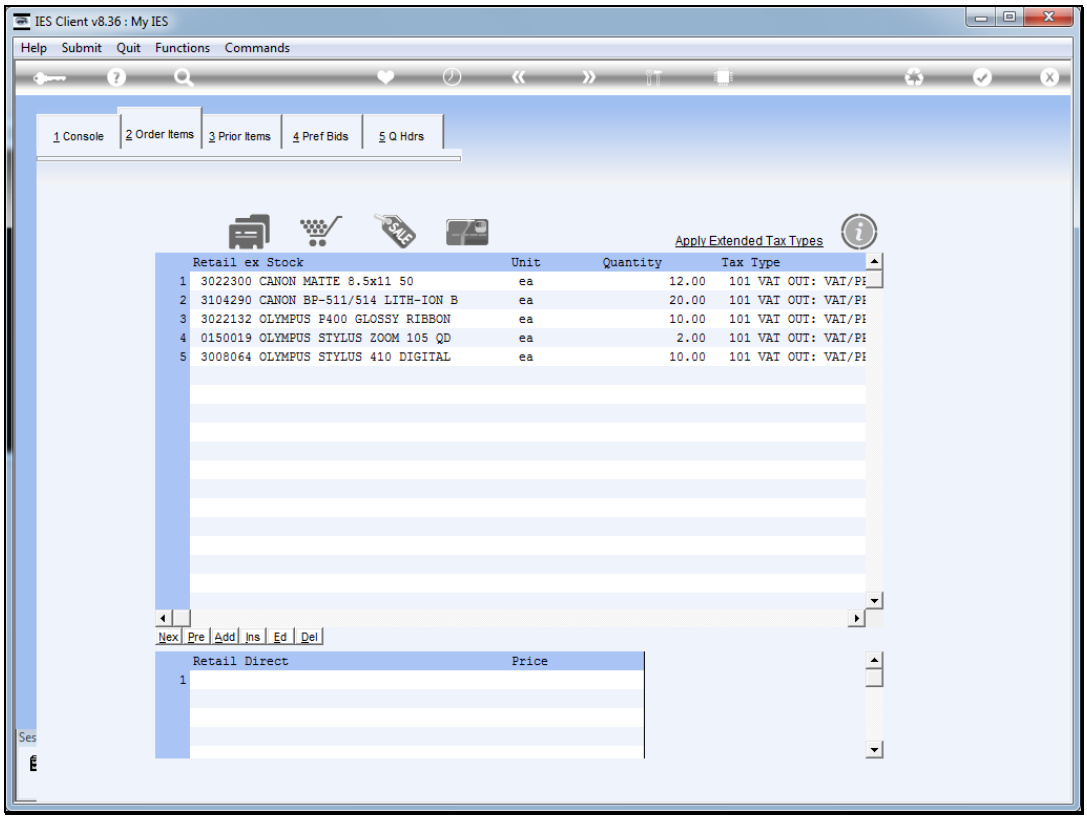
Slide 9
Slide notes:



Slide 10
Slide notes:

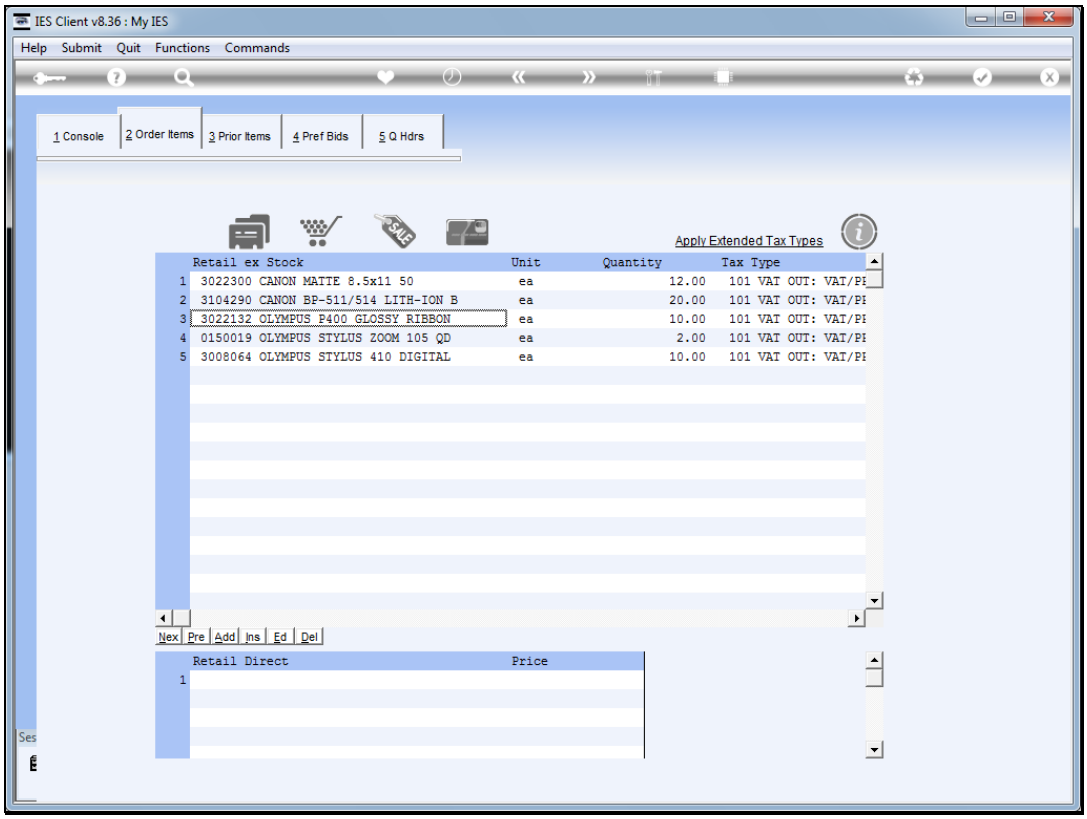


Slide 11
Slide notes:



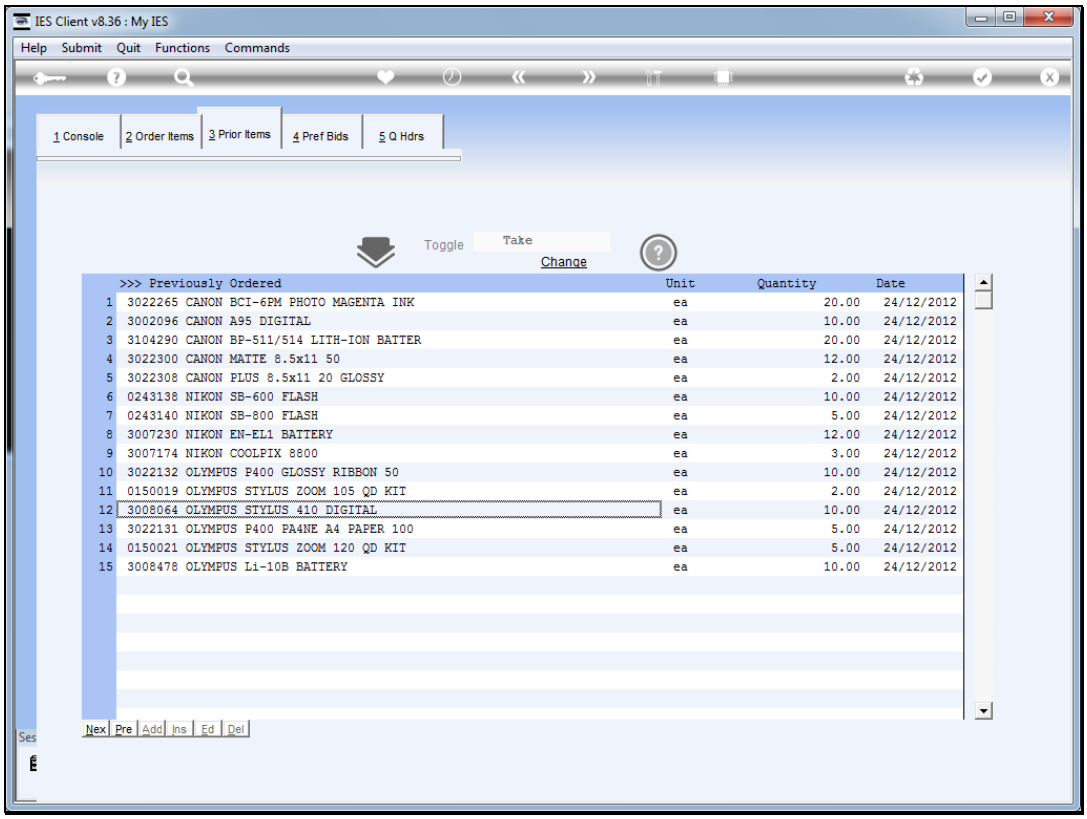
Slide 12

Slide notes: If we return to Order Items, we can see that the Prior Items that we dbl-clicked are also included. Of course, on this list we can change the quantities if different from what we auto selected. We can also easily delete Items here or make other changes.

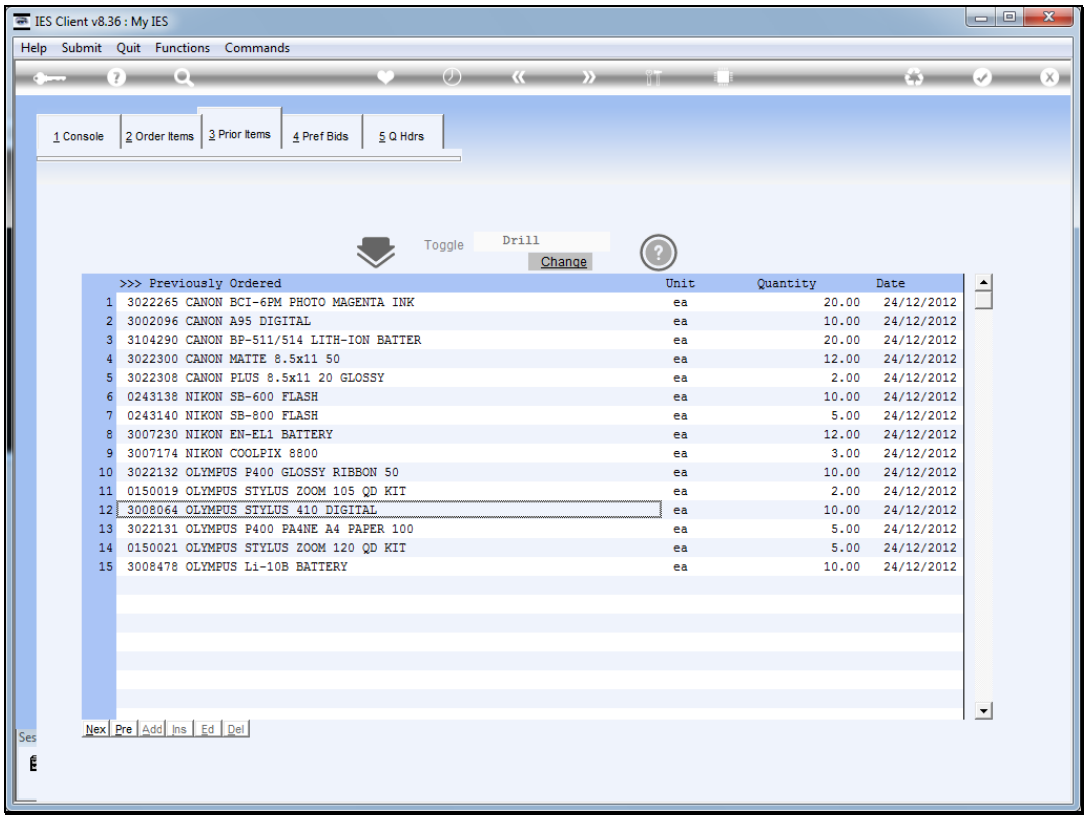


Slide 13

Slide notes: But first let's go back to Prior Items.

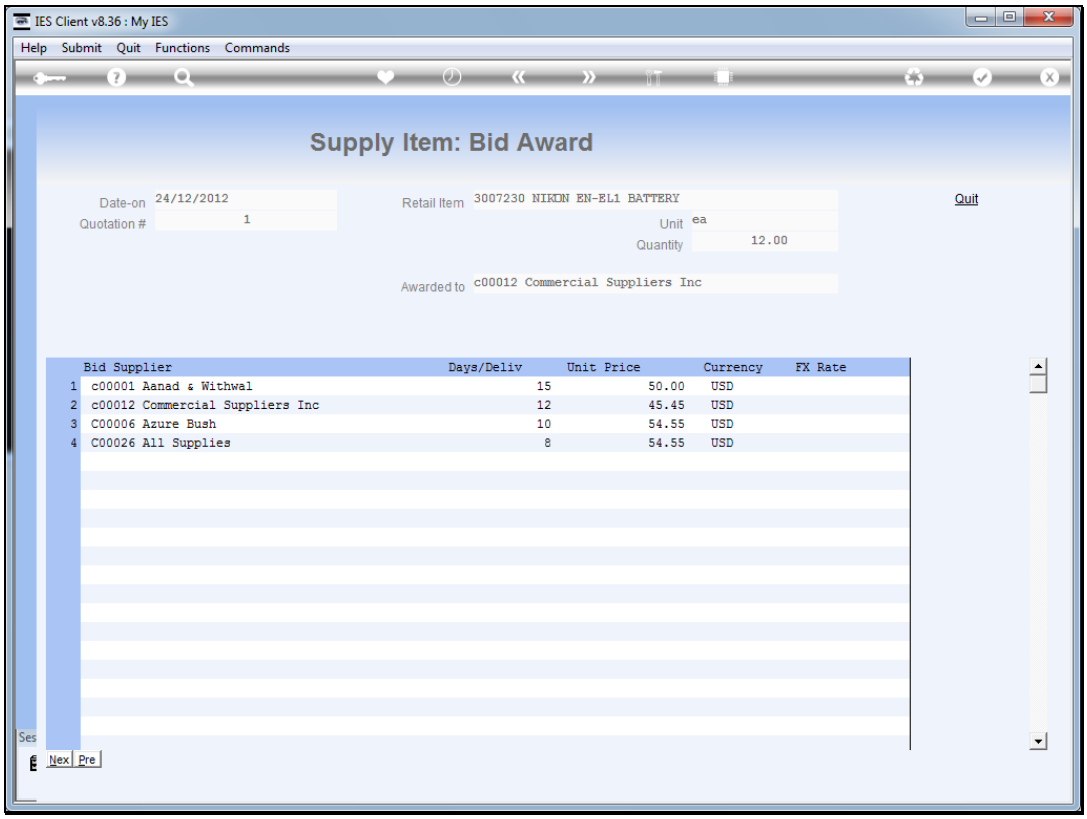


Slide 14
Slide notes:

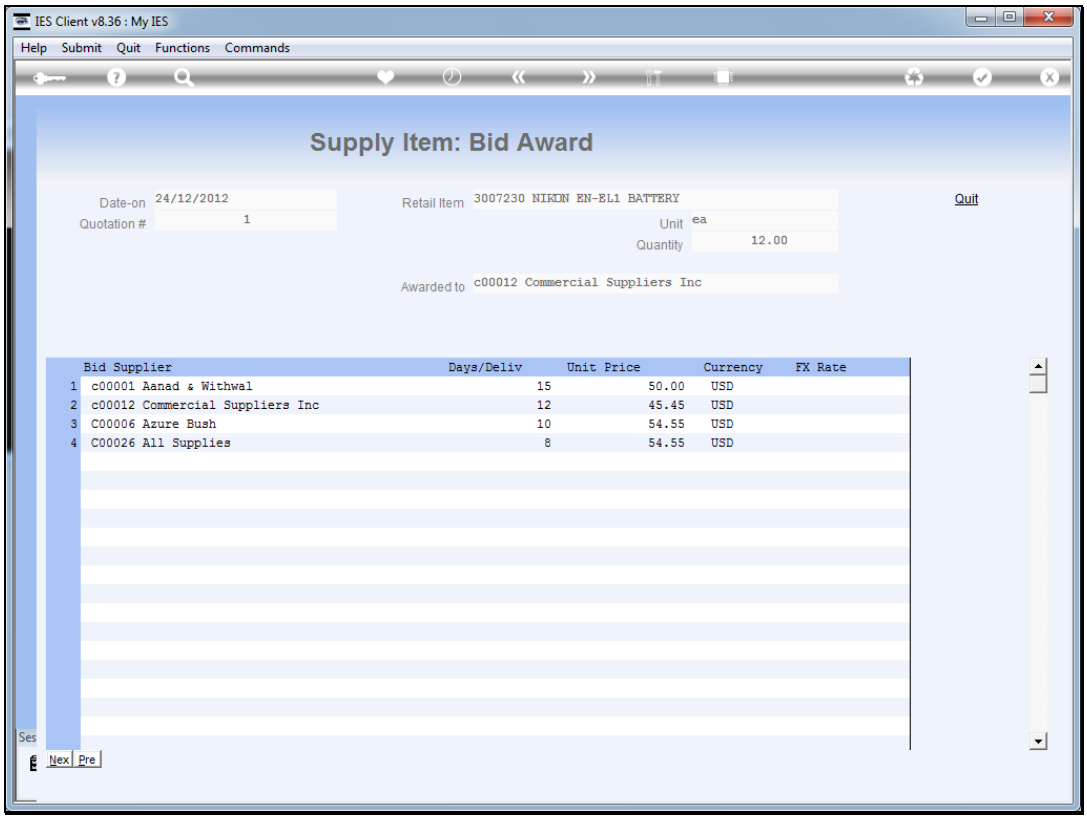


Slide 15

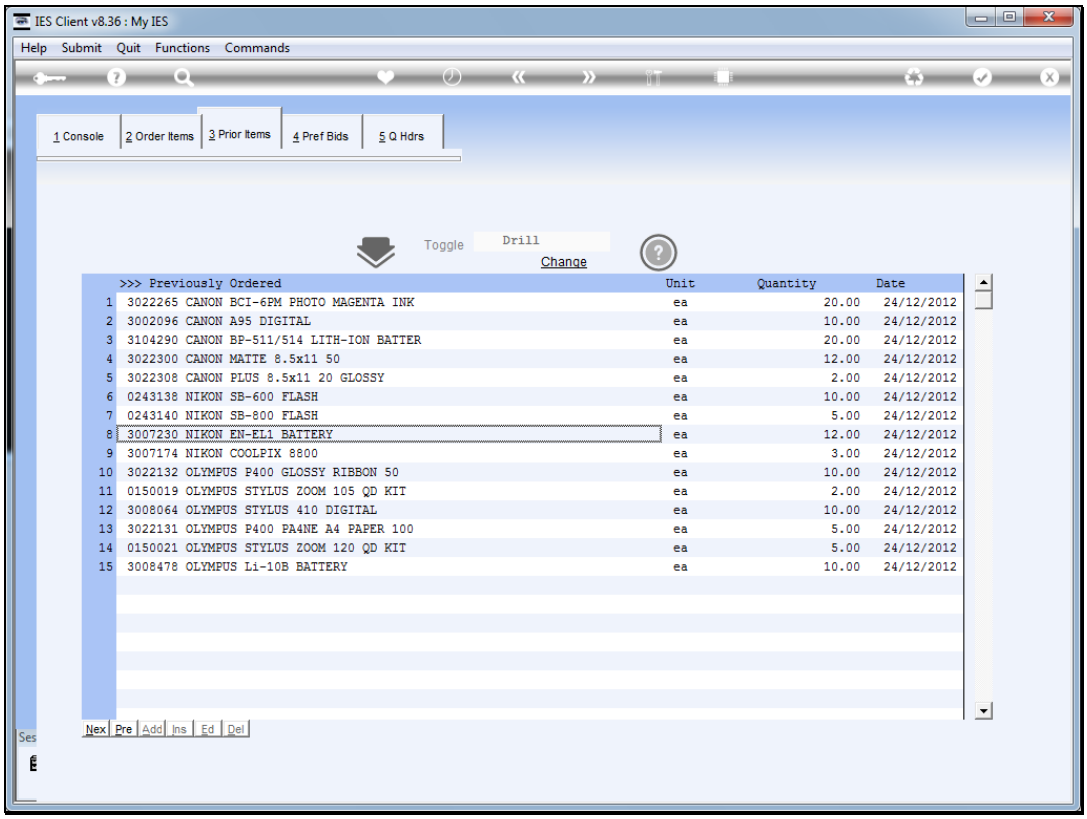
Slide notes: If we change the toggle to 'drill' then when we dbl-click a prior Item we are drilling into the history, rather than selecting it for ordering now.



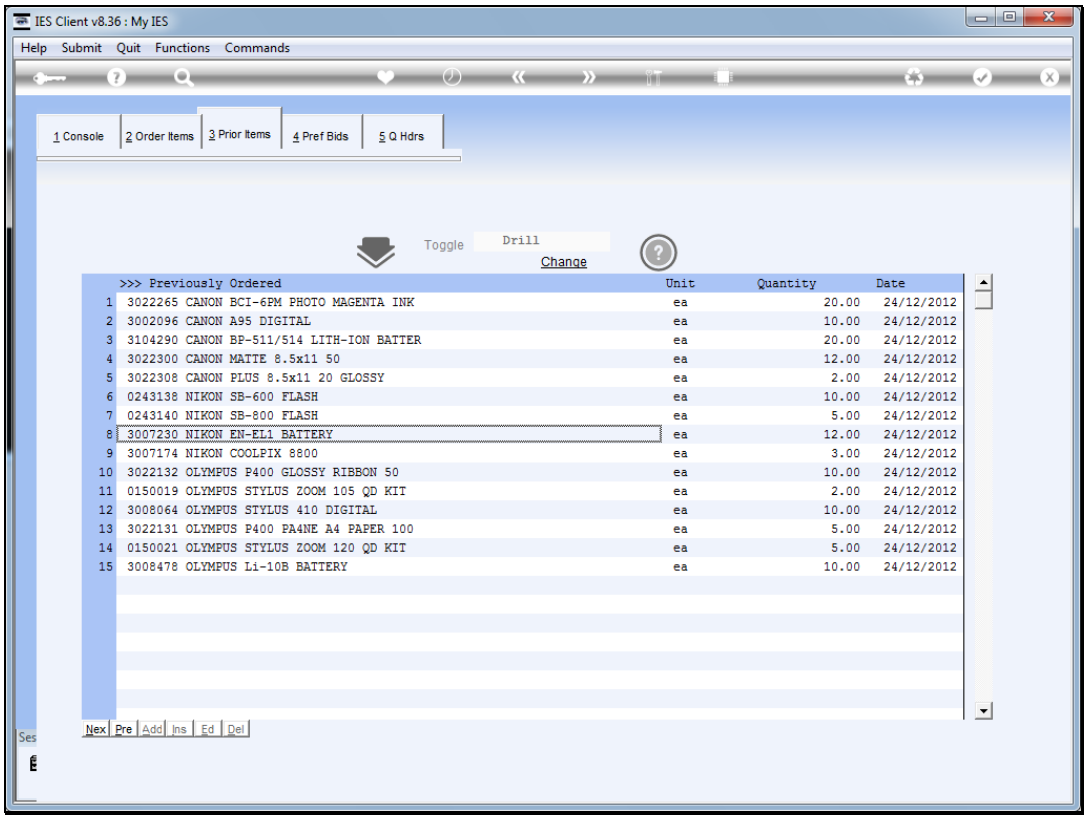
Slide 16
Slide notes:



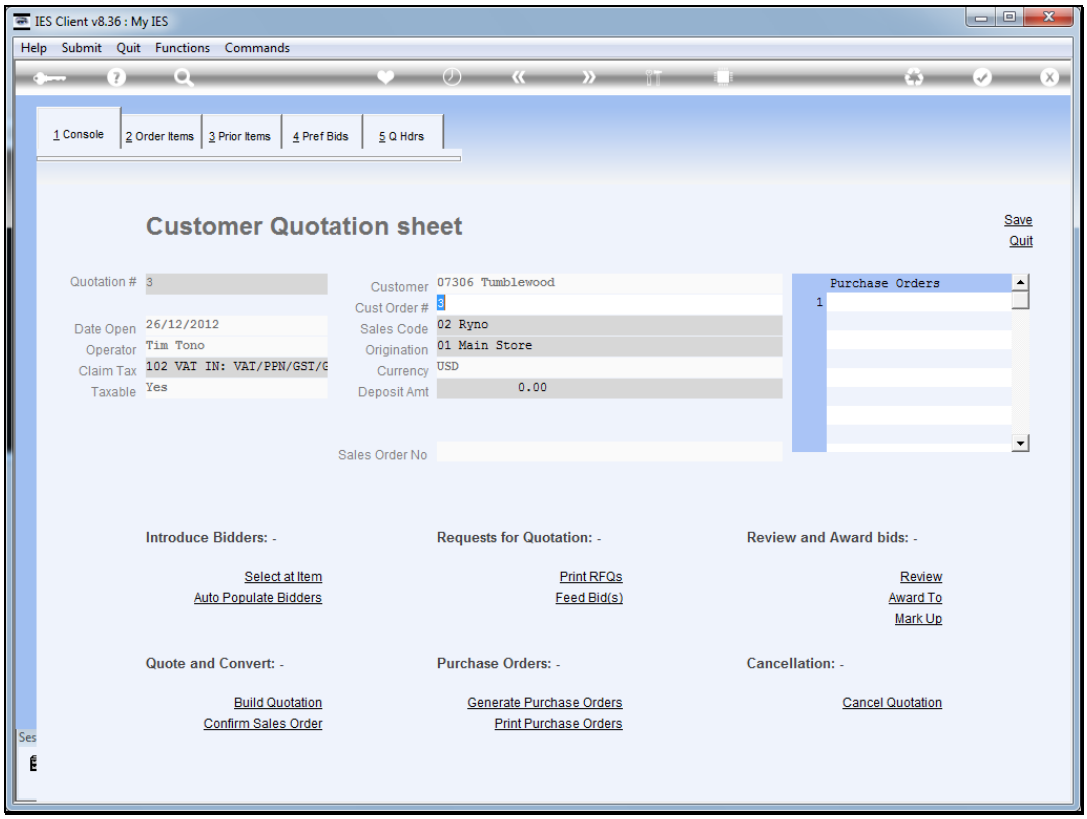
Slide 17
Slide notes:



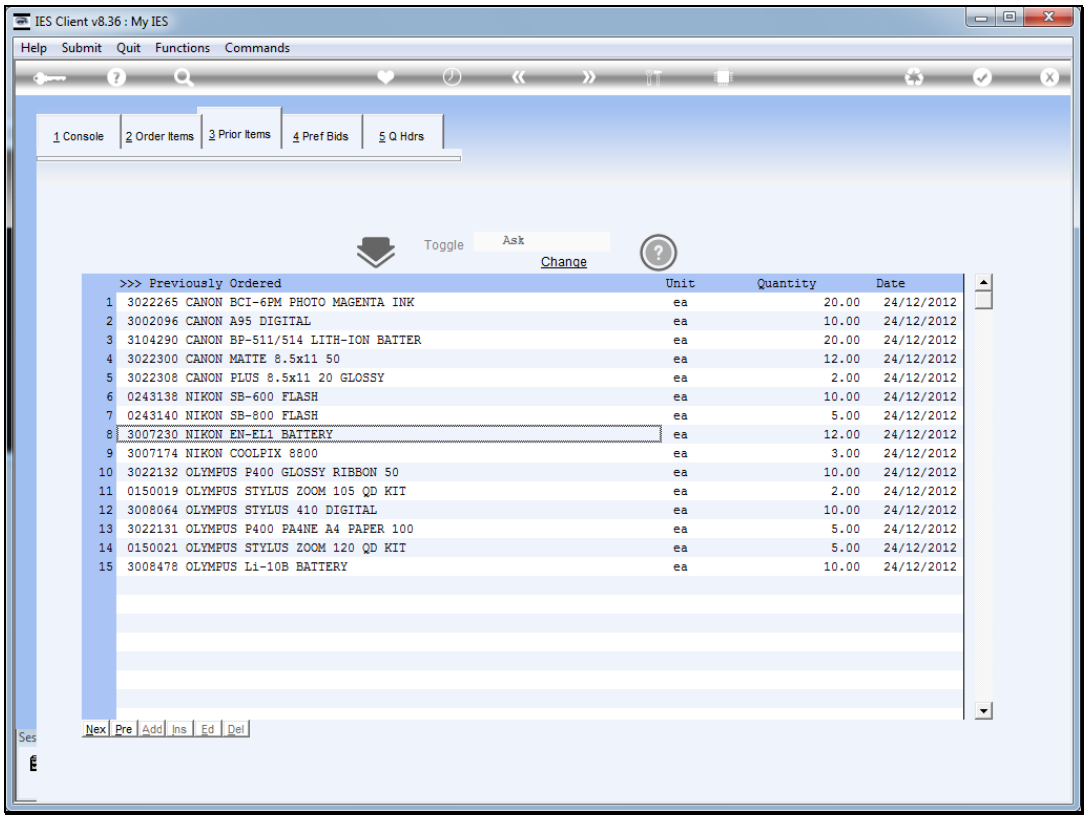
Slide 18
Slide notes:



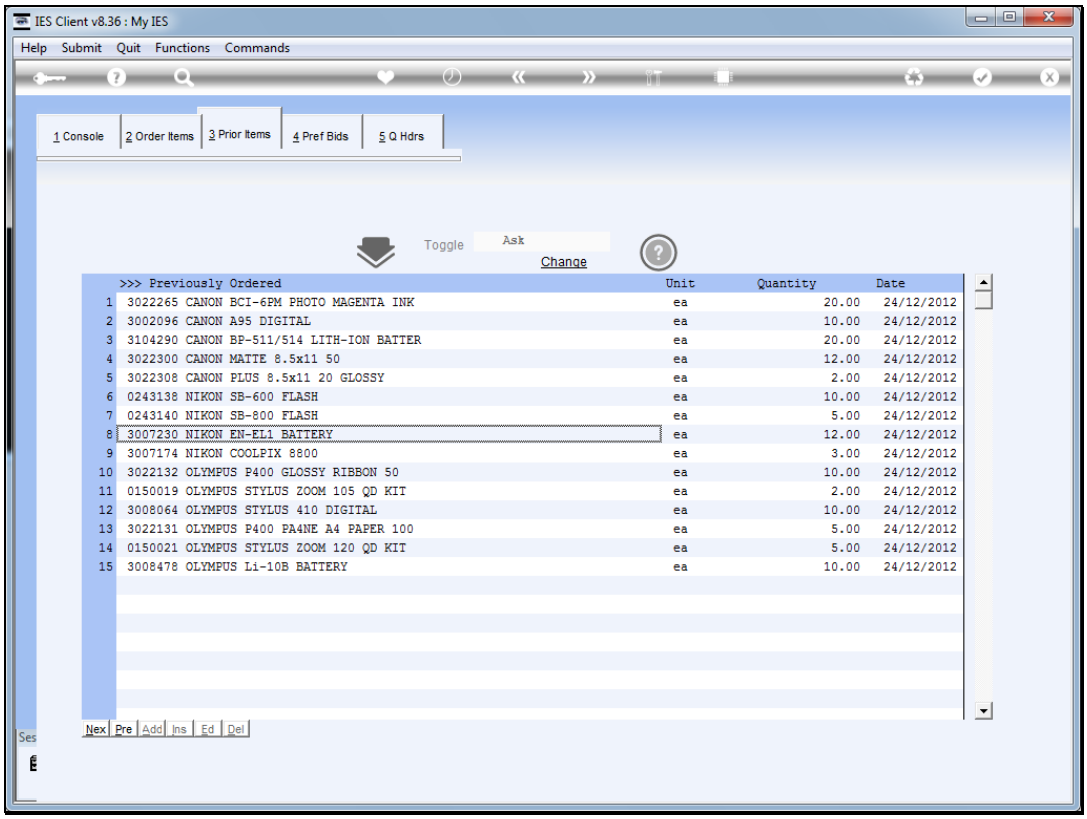
Slide 19
Slide notes:



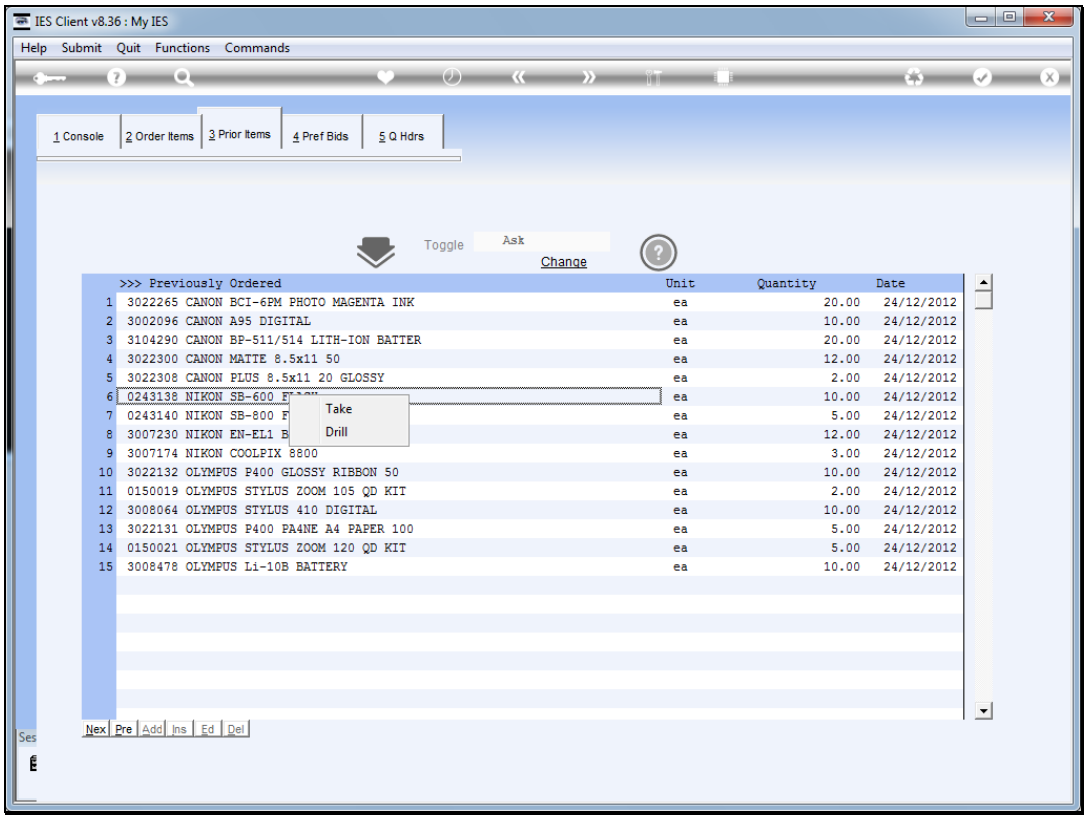
Slide 20
Slide notes:



Slide 21
Slide notes:

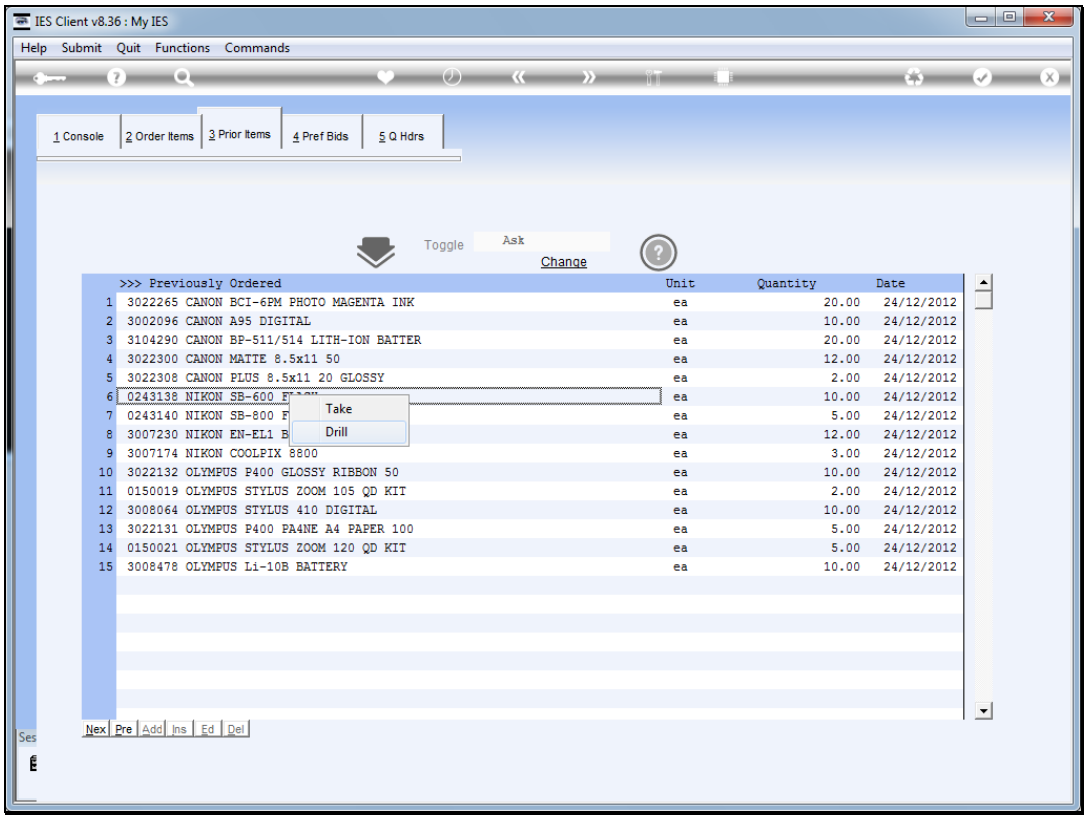


Slide 22
Slide notes:

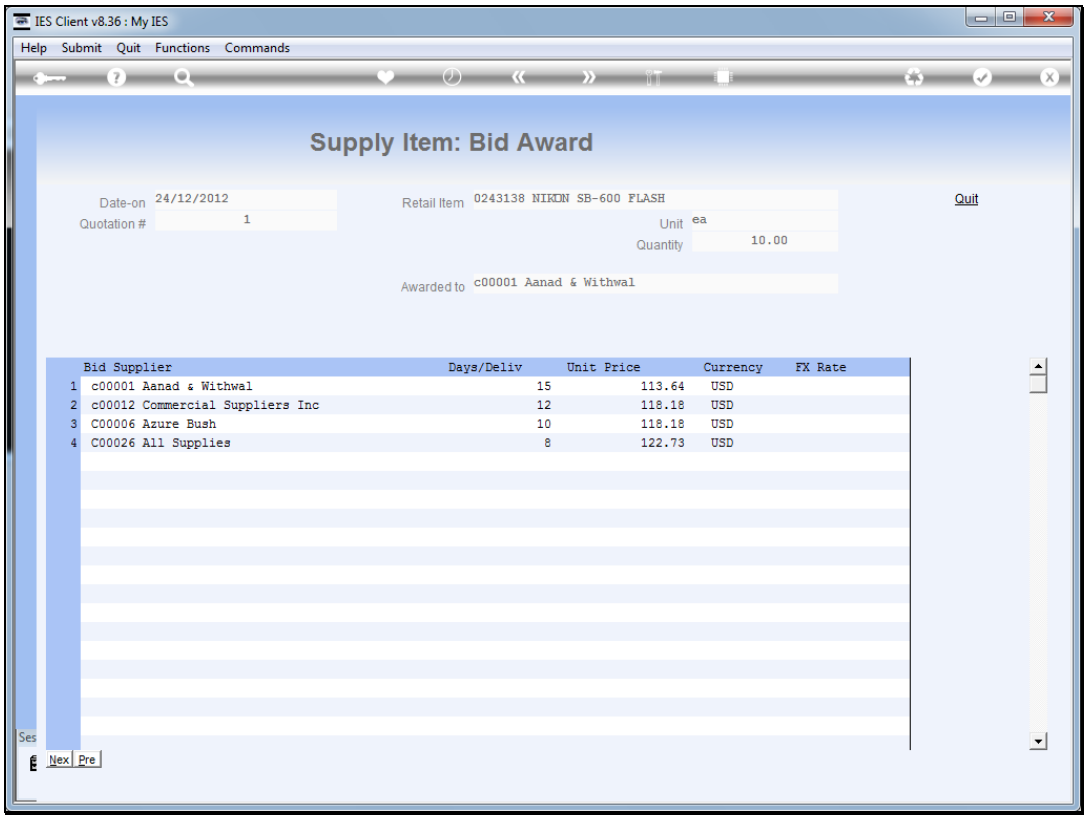


Slide 23

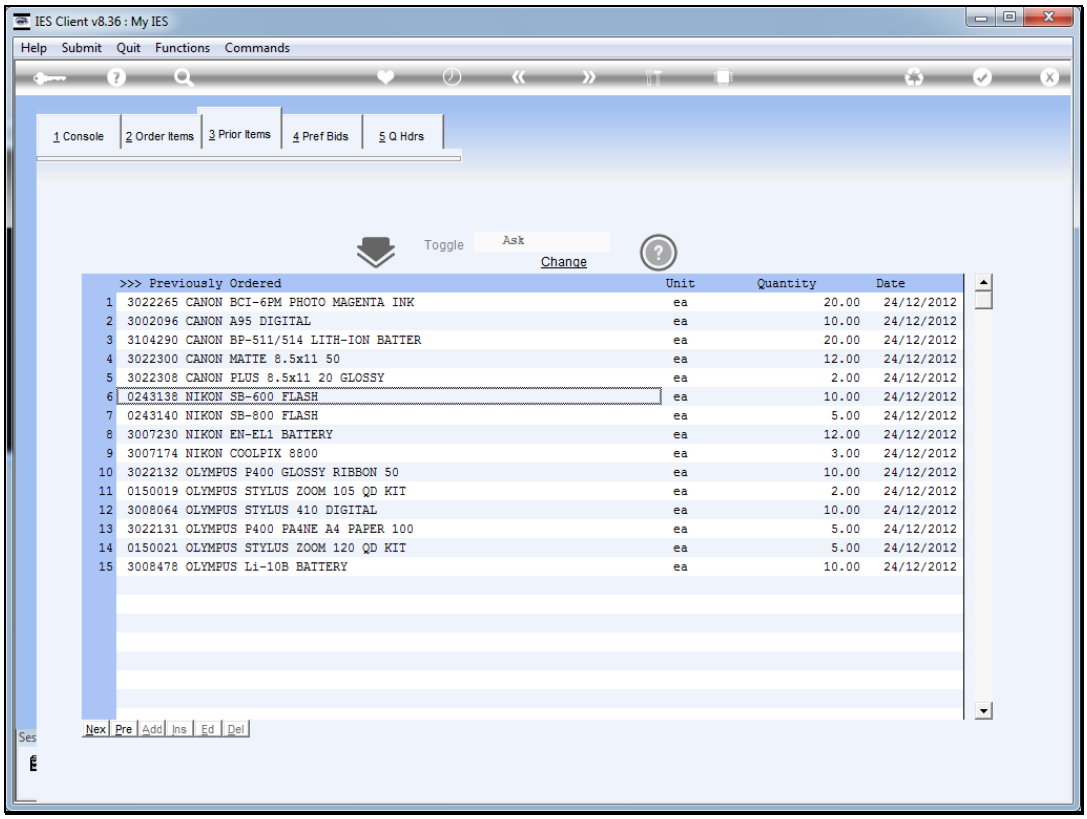
Slide notes: And if we change the toggle to 'ask', then we have a choice each time we click a Prior Item. So the toggle can be set to behave as may suit us at the time.



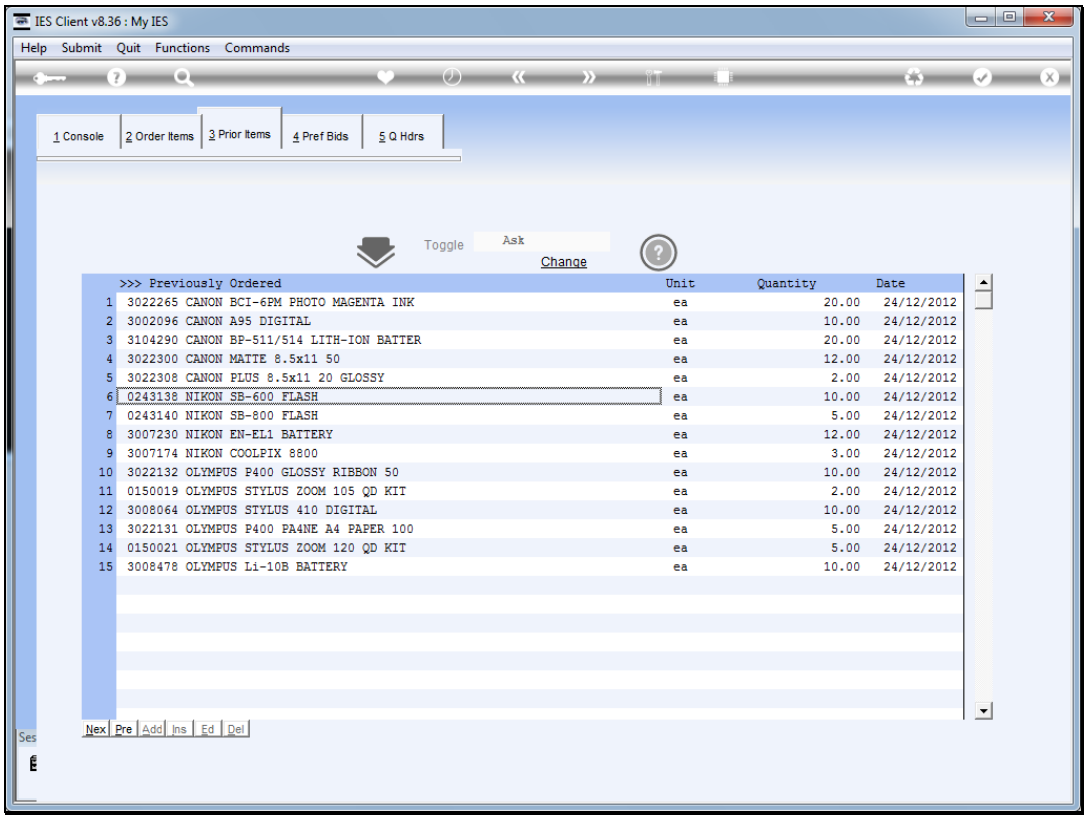
Slide 24
Slide notes:



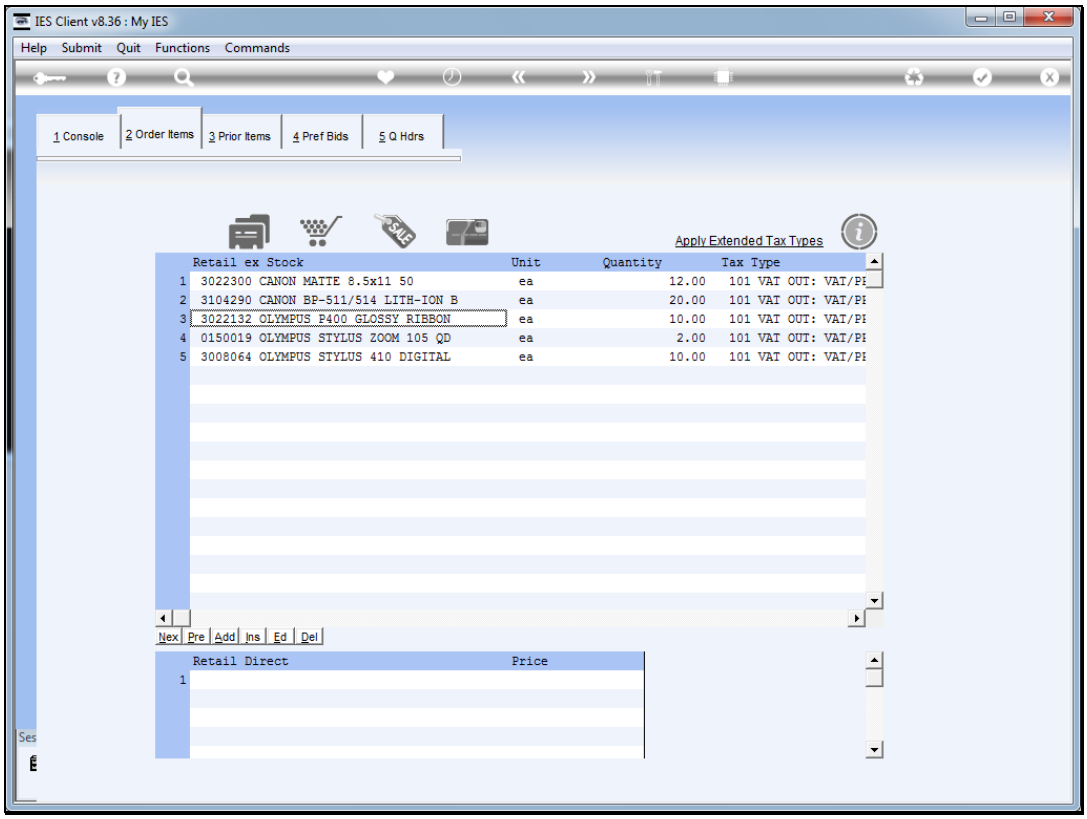
Slide 25
Slide notes:



Slide 26
Slide notes:

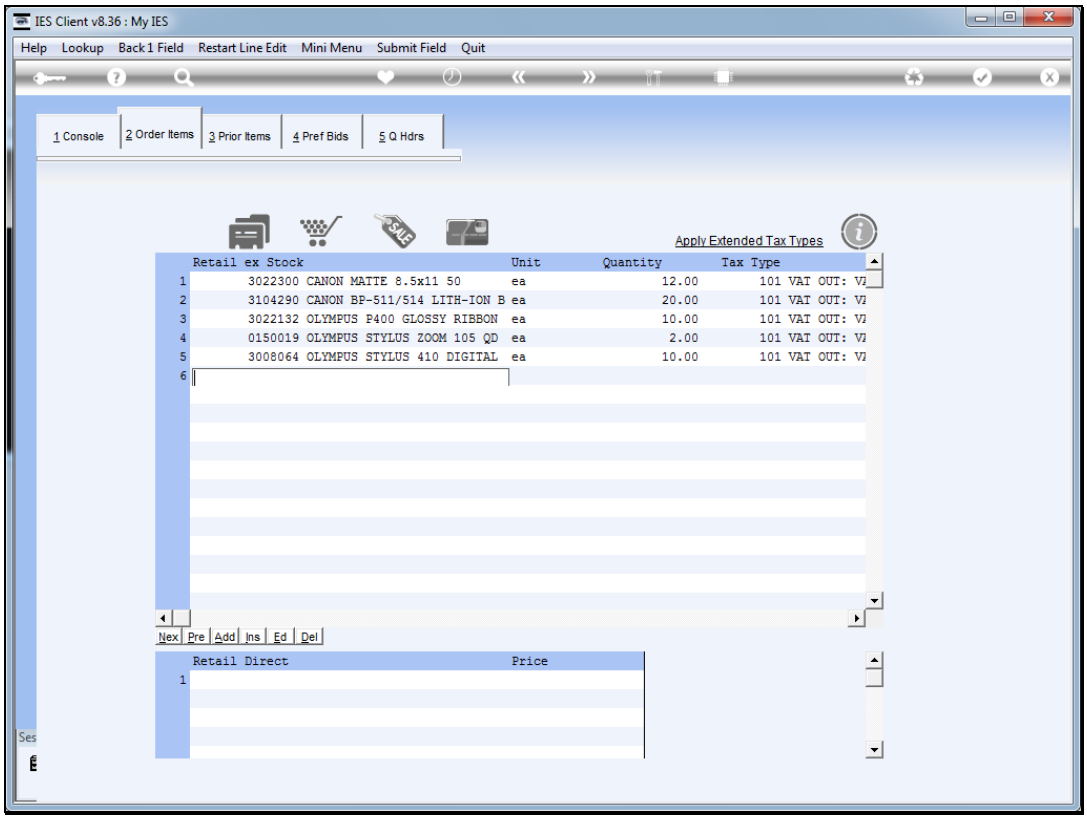


Slide 27
Slide notes:

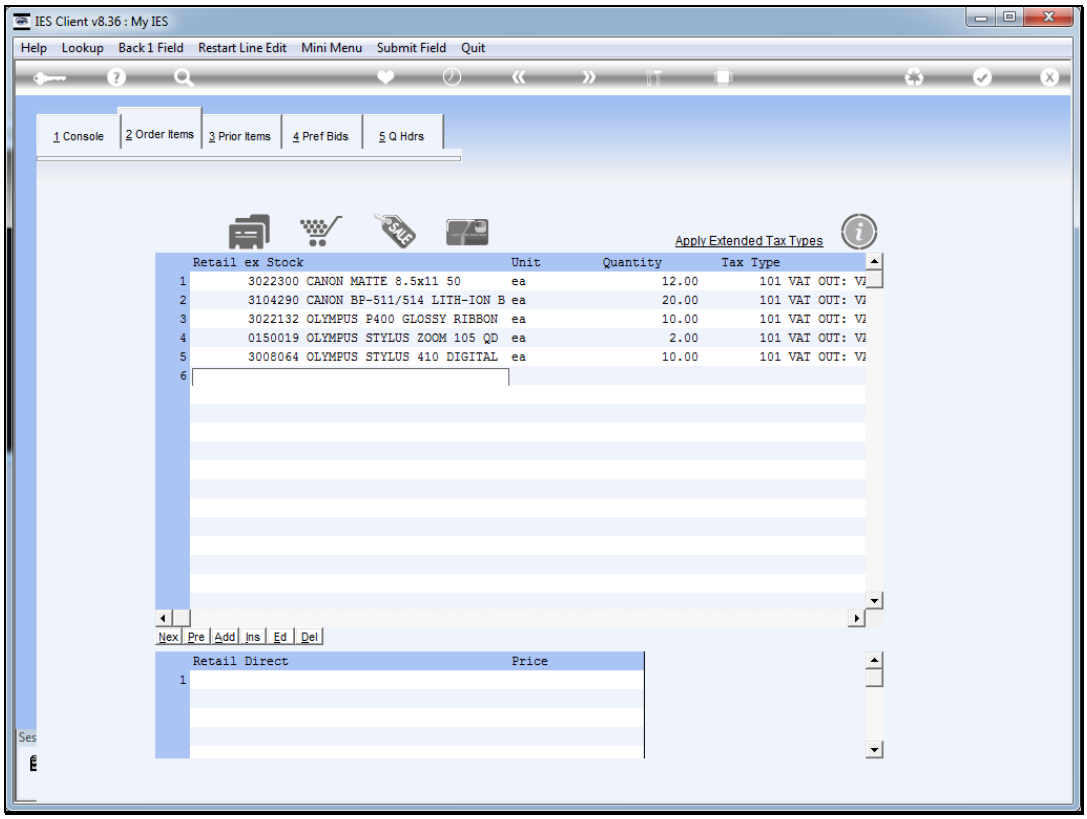


Slide 28

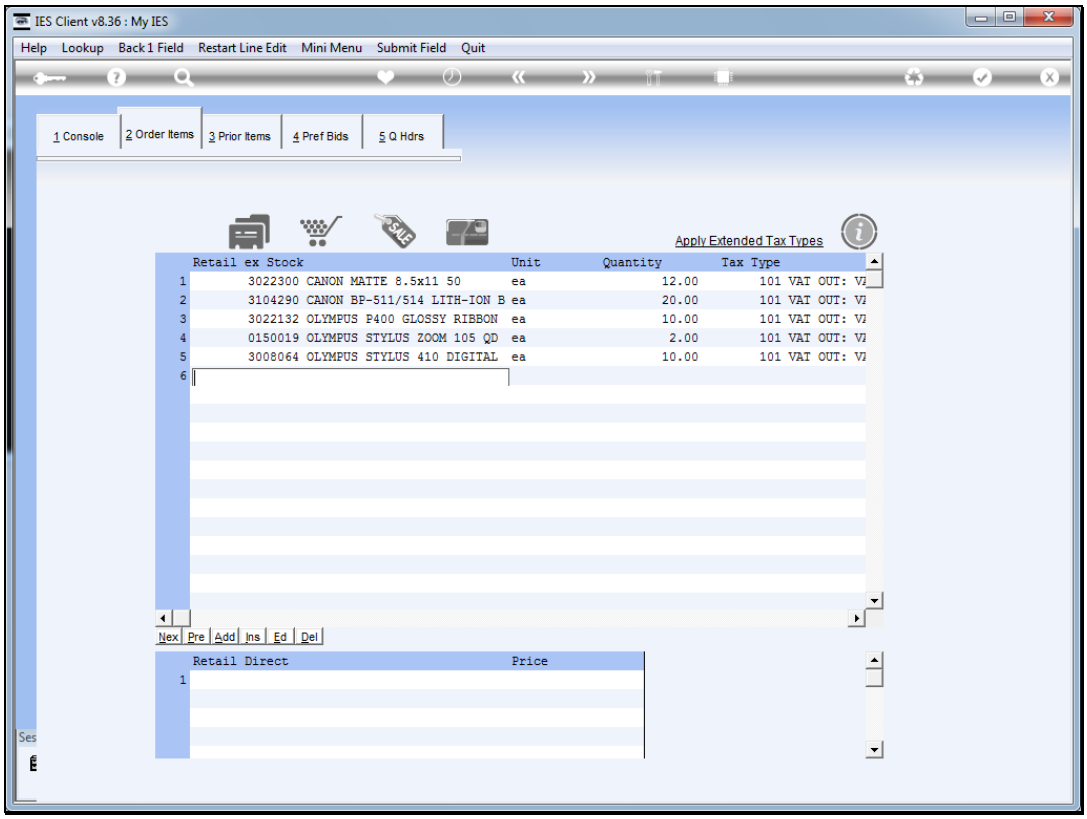
Slide notes: Back at our new Order Items, we can also select from the Retail Catalog any Item we wish to include.



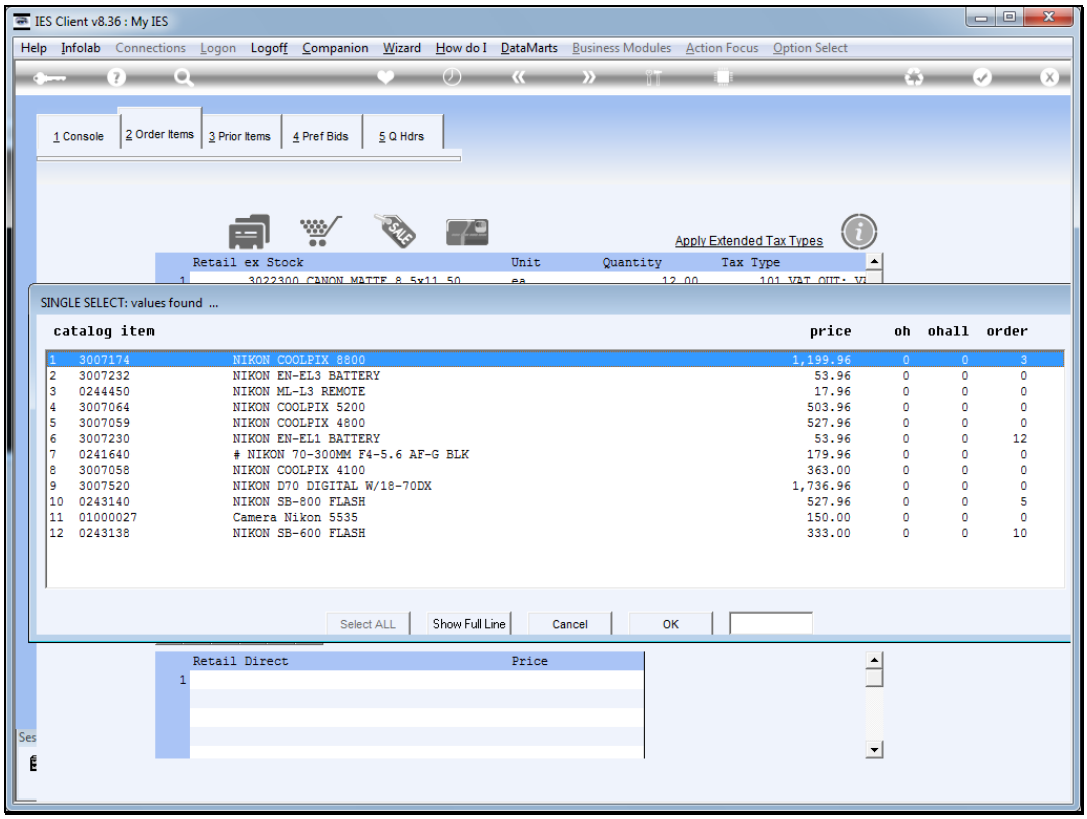
Slide 29
Slide notes:



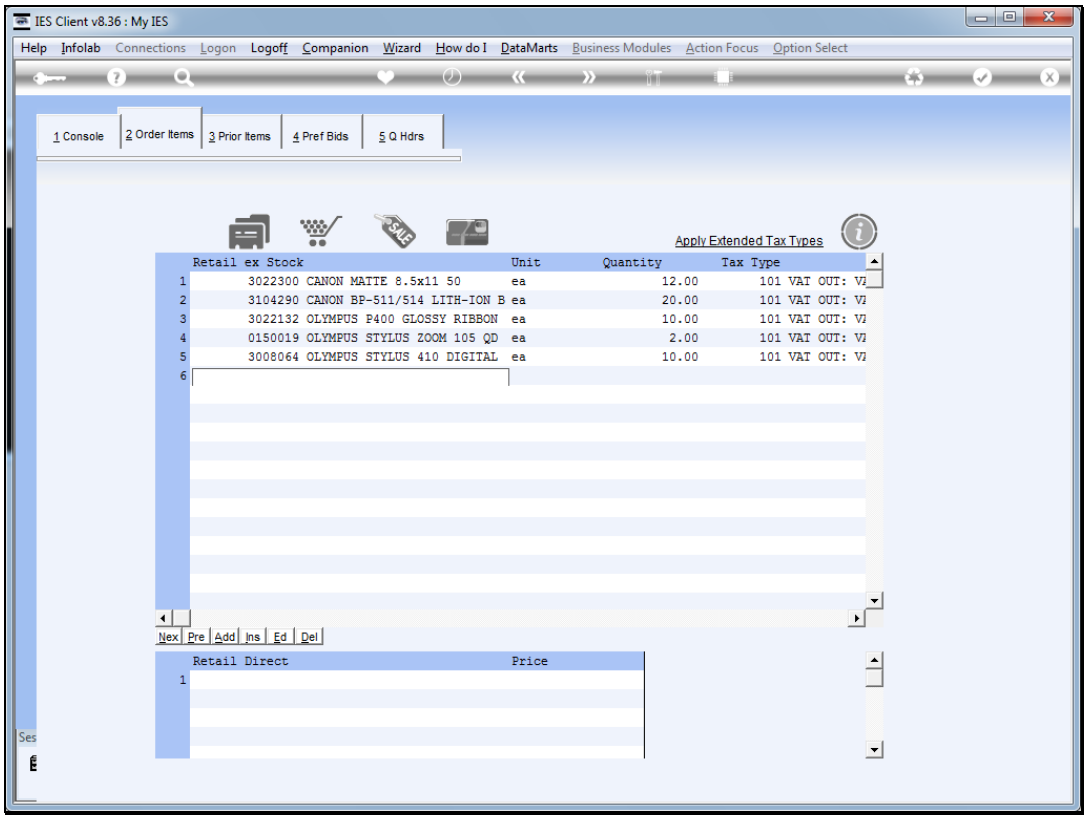
Slide 30
Slide notes:



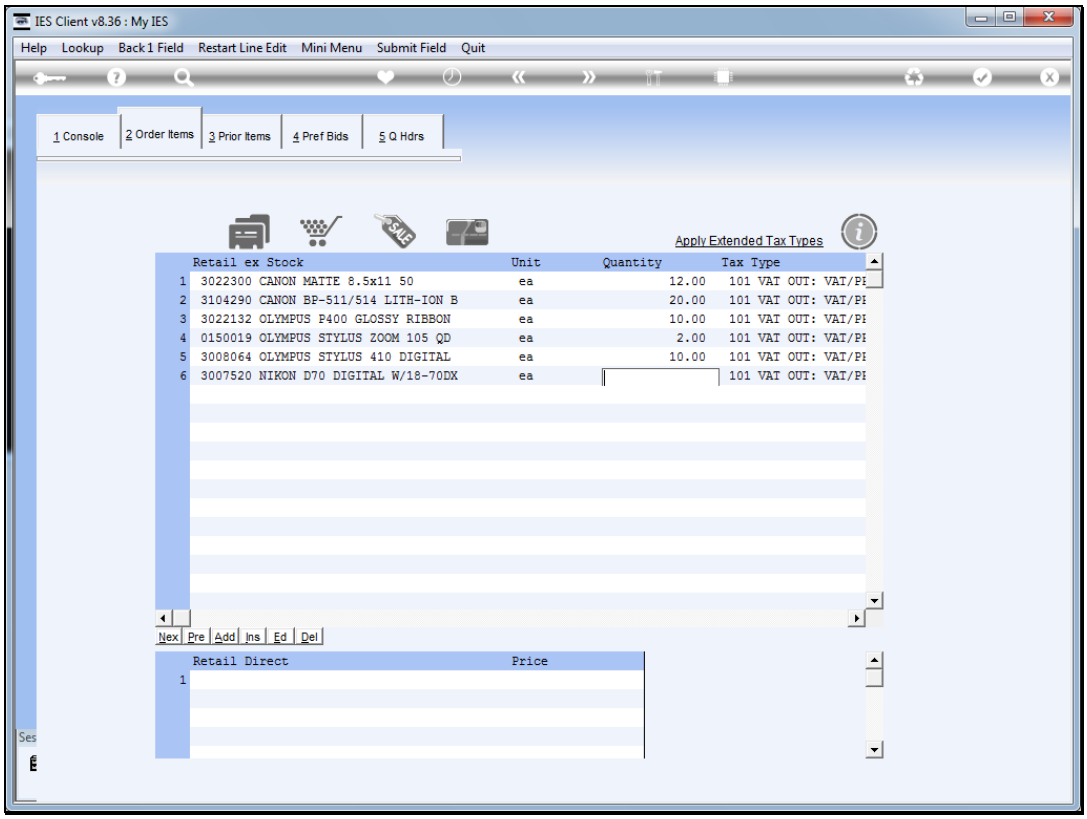
Slide 31
Slide notes:



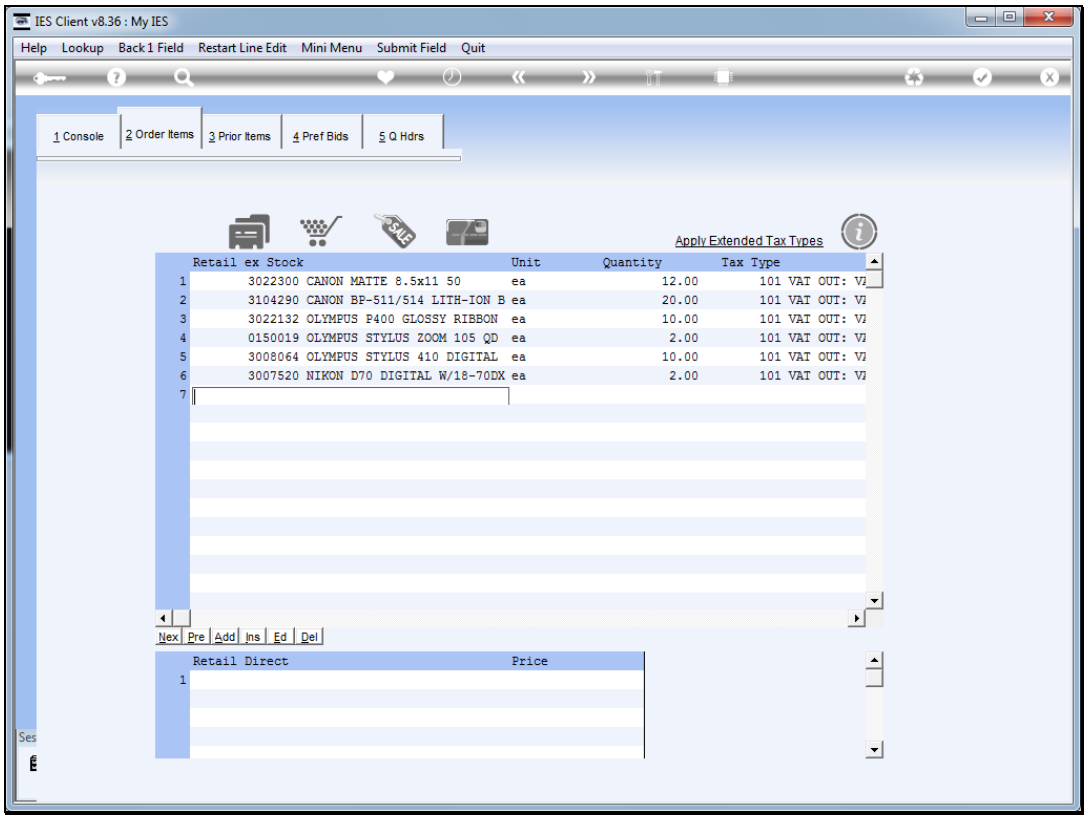
Slide 32
Slide notes:



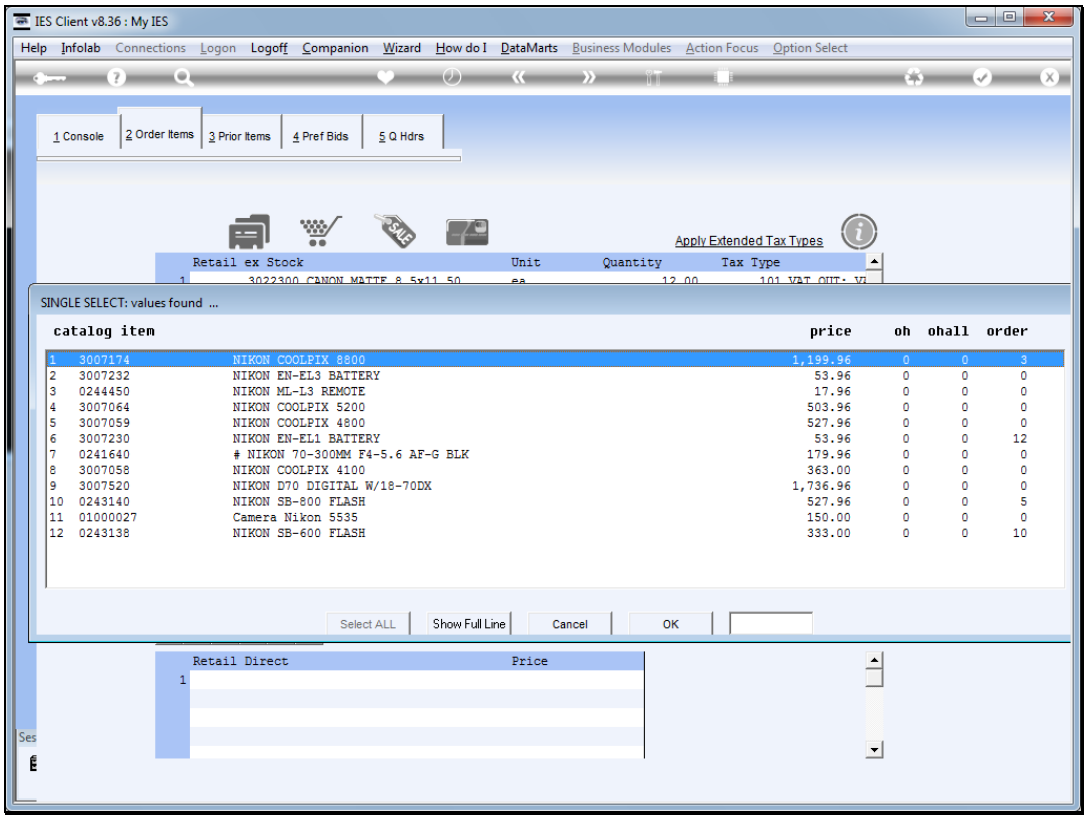
Slide 33
Slide notes:



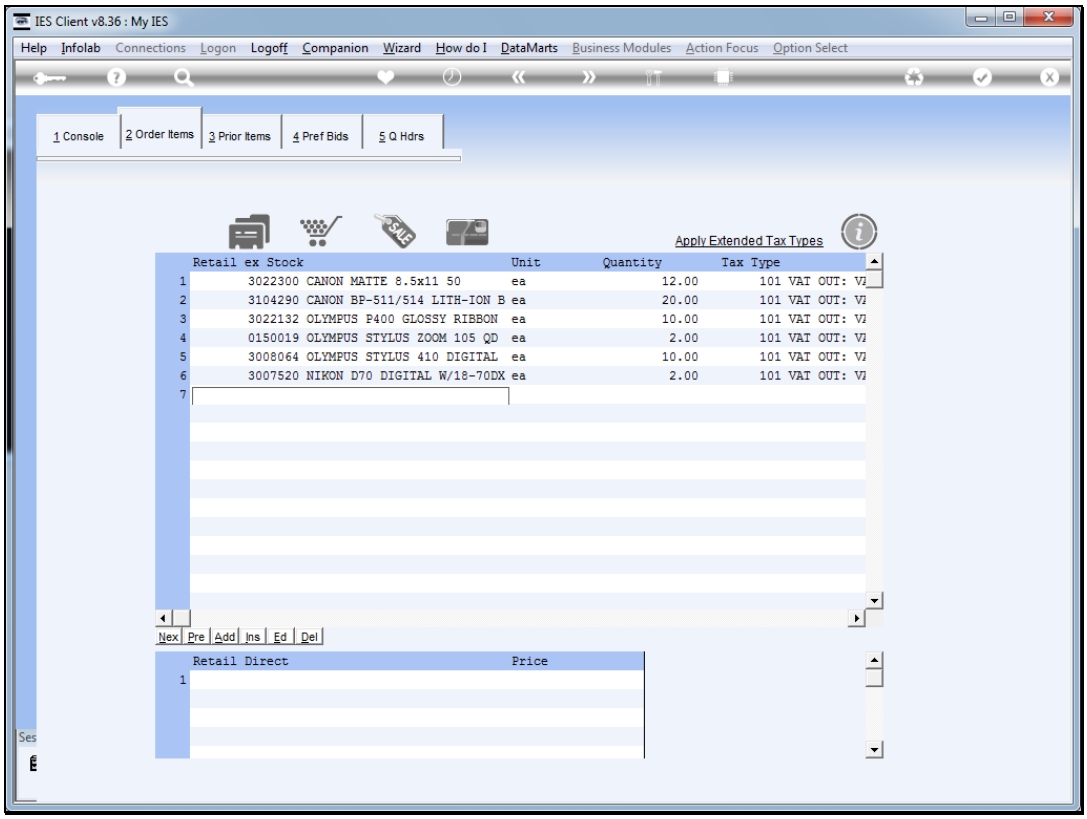
Slide 34
Slide notes:



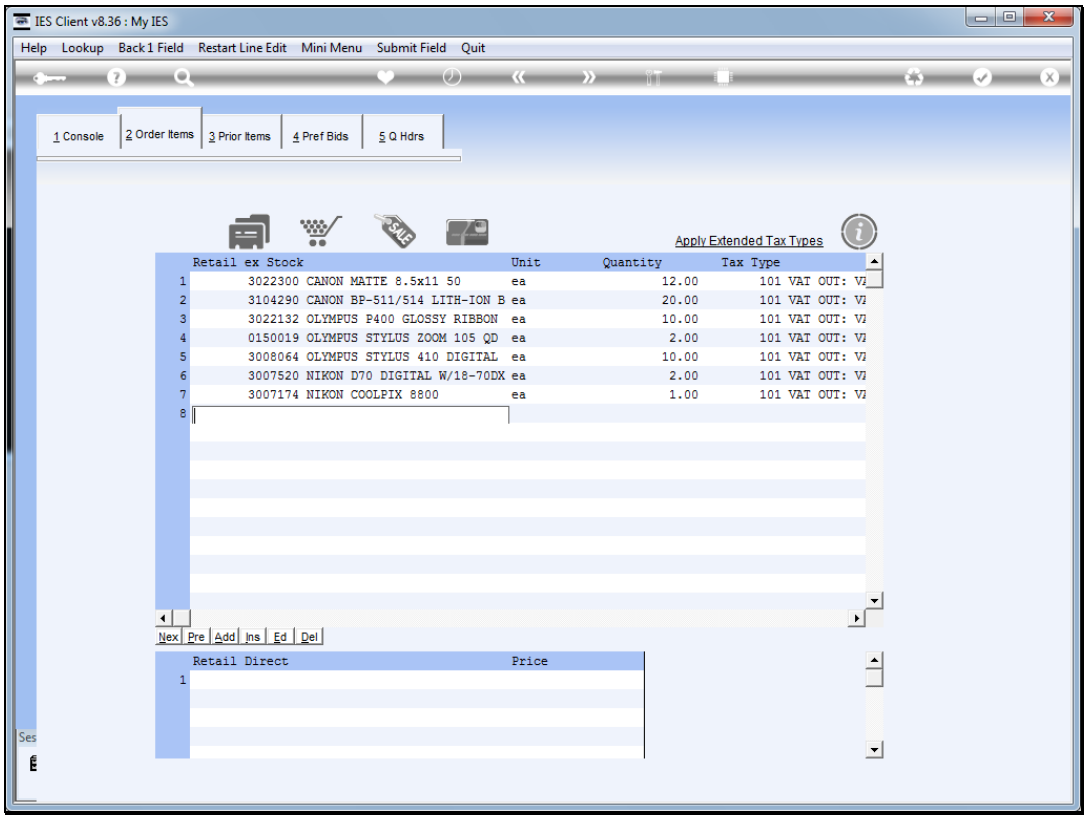
Slide 35
Slide notes:



Slide 36
Slide notes:

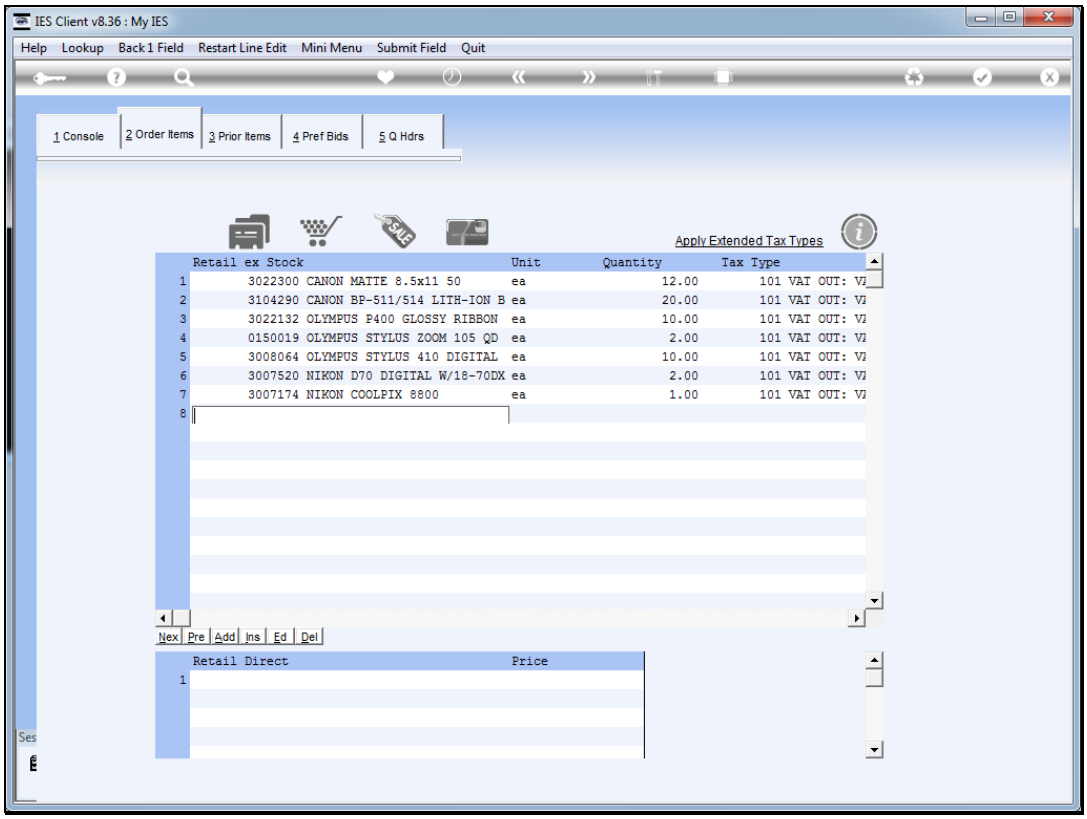


Slide 37
Slide notes:

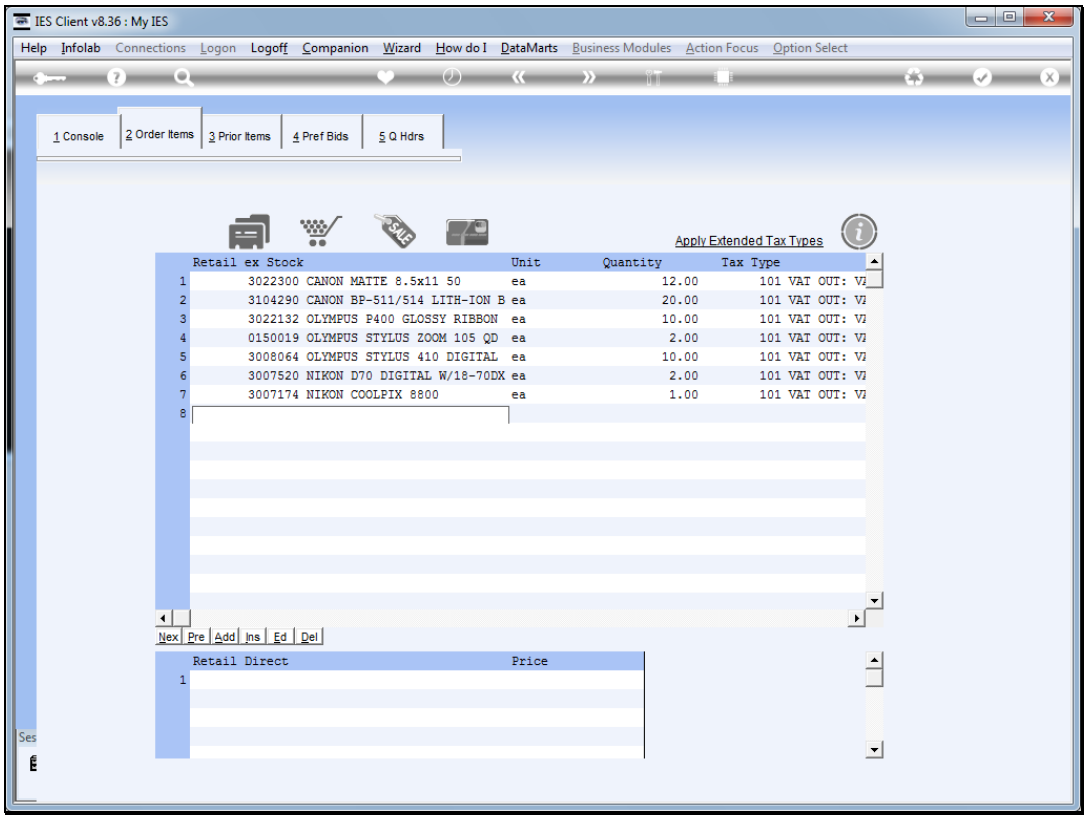


Slide 38

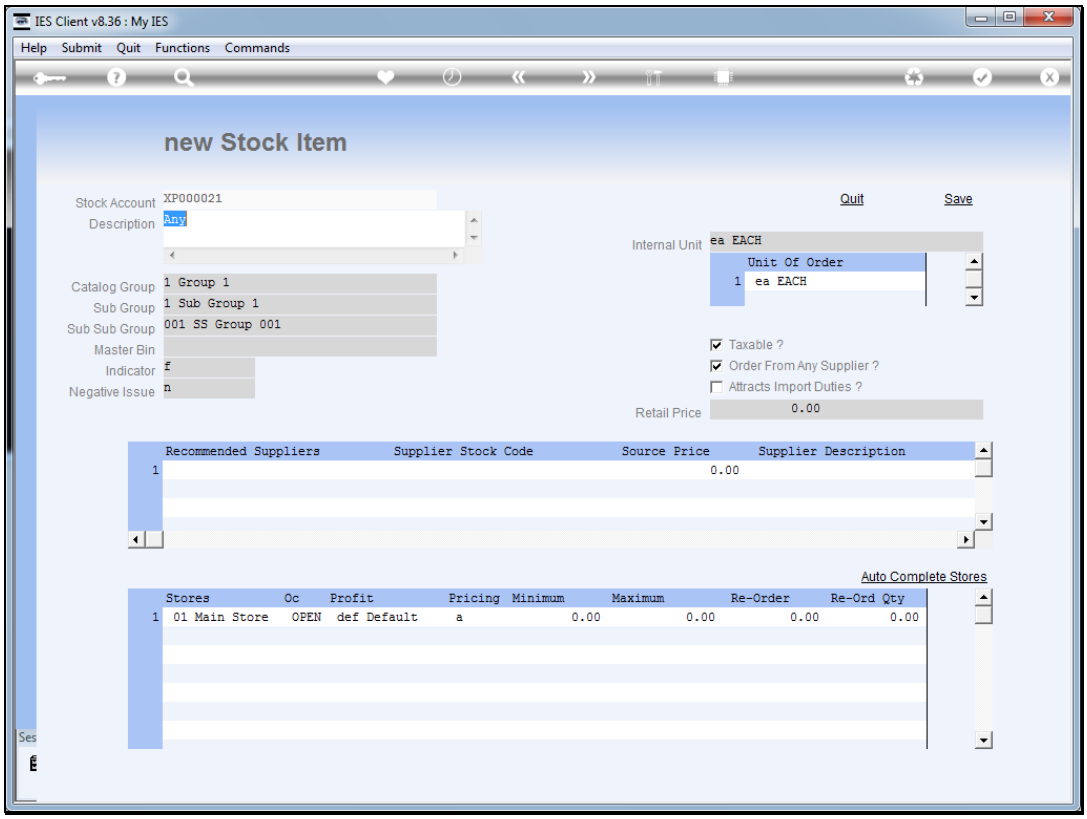
Slide notes: And if it is an entirely new Item, which we have never ordered or supplied before, then we can create it from here by typing "new".



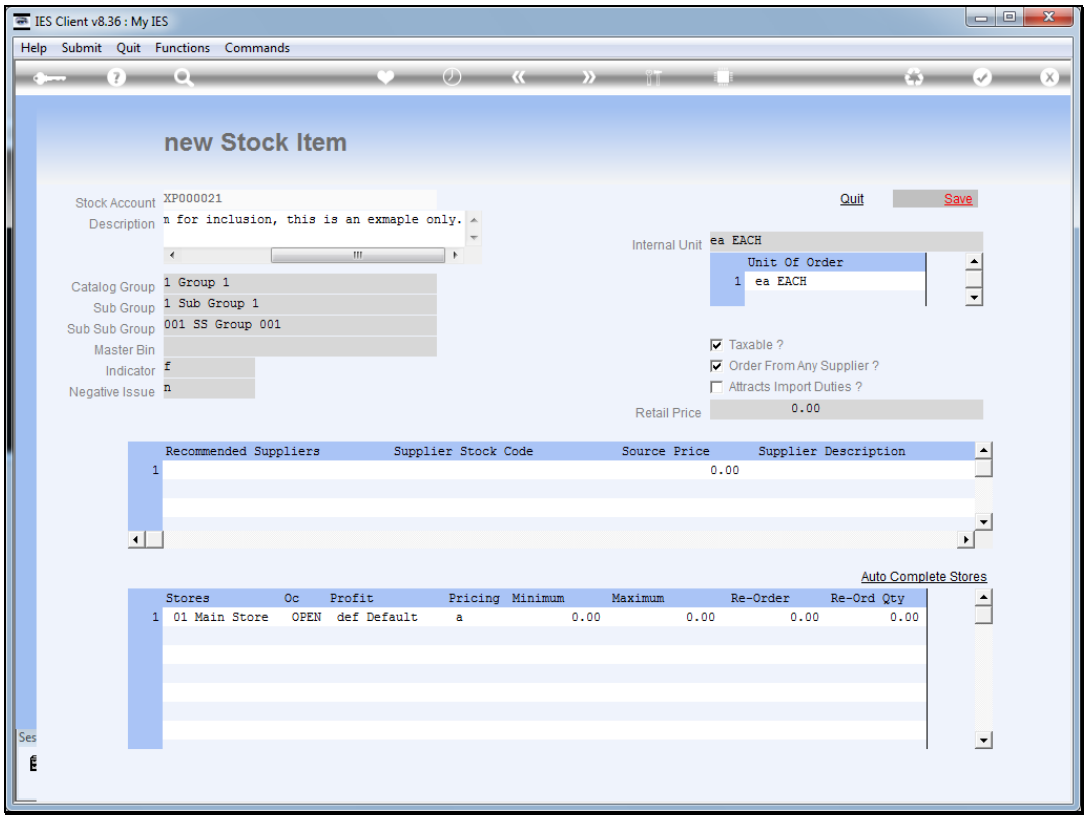
Slide 39
Slide notes:



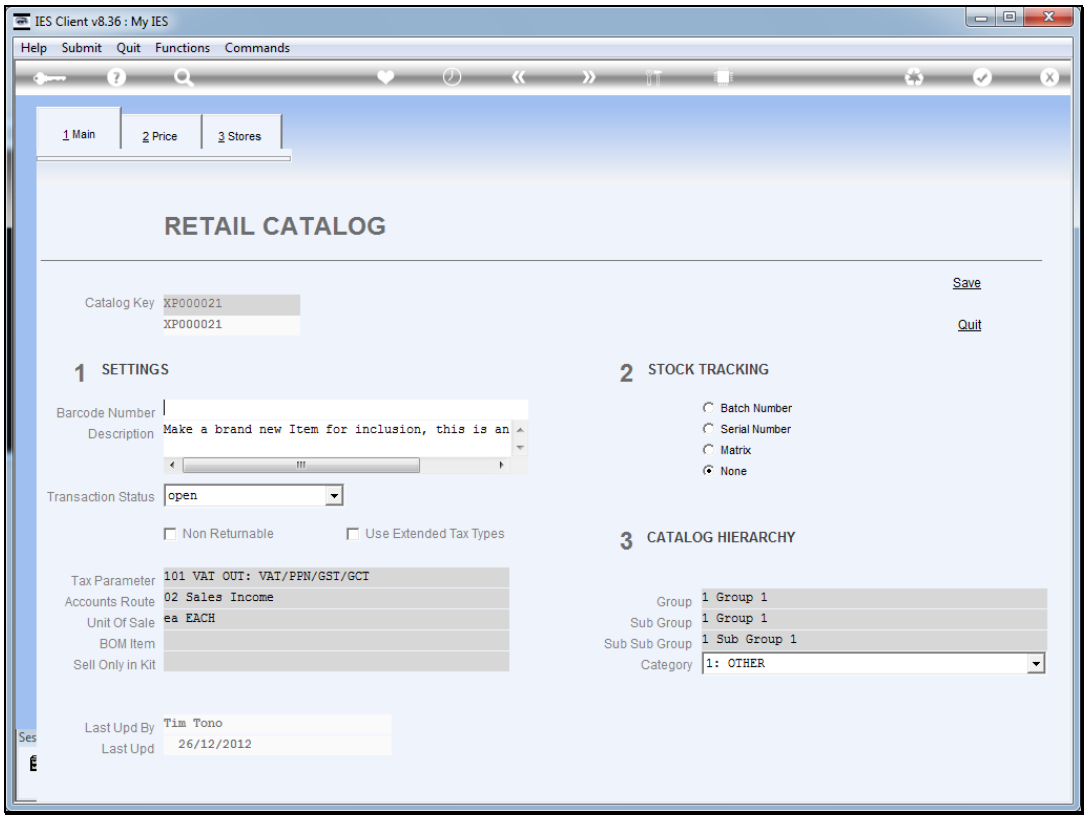
Slide 40
Slide notes:



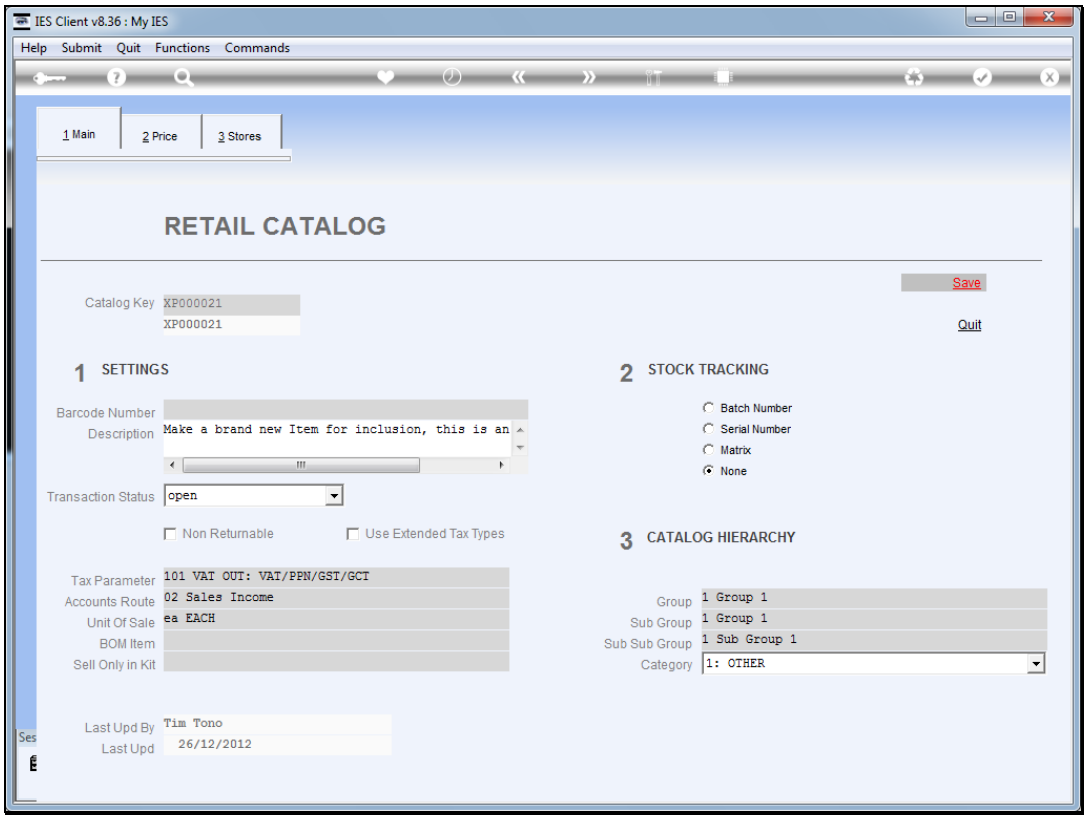
Slide 41
Slide notes:



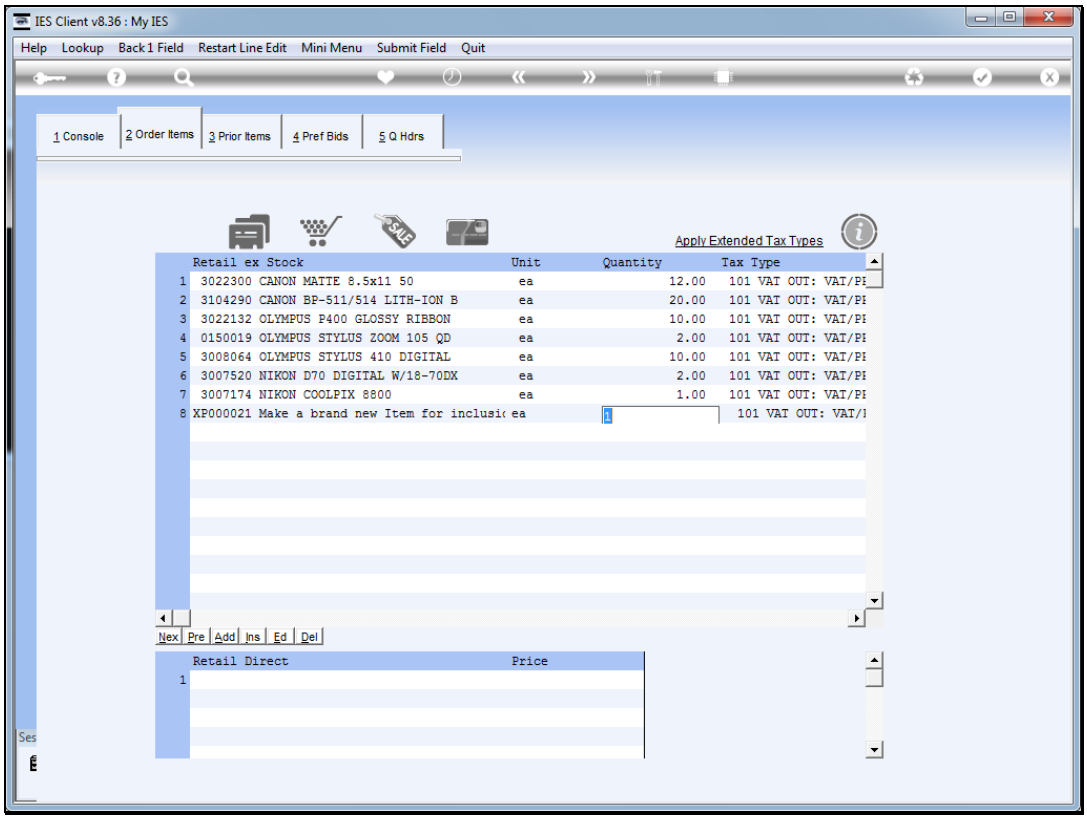
Slide 42
Slide notes:



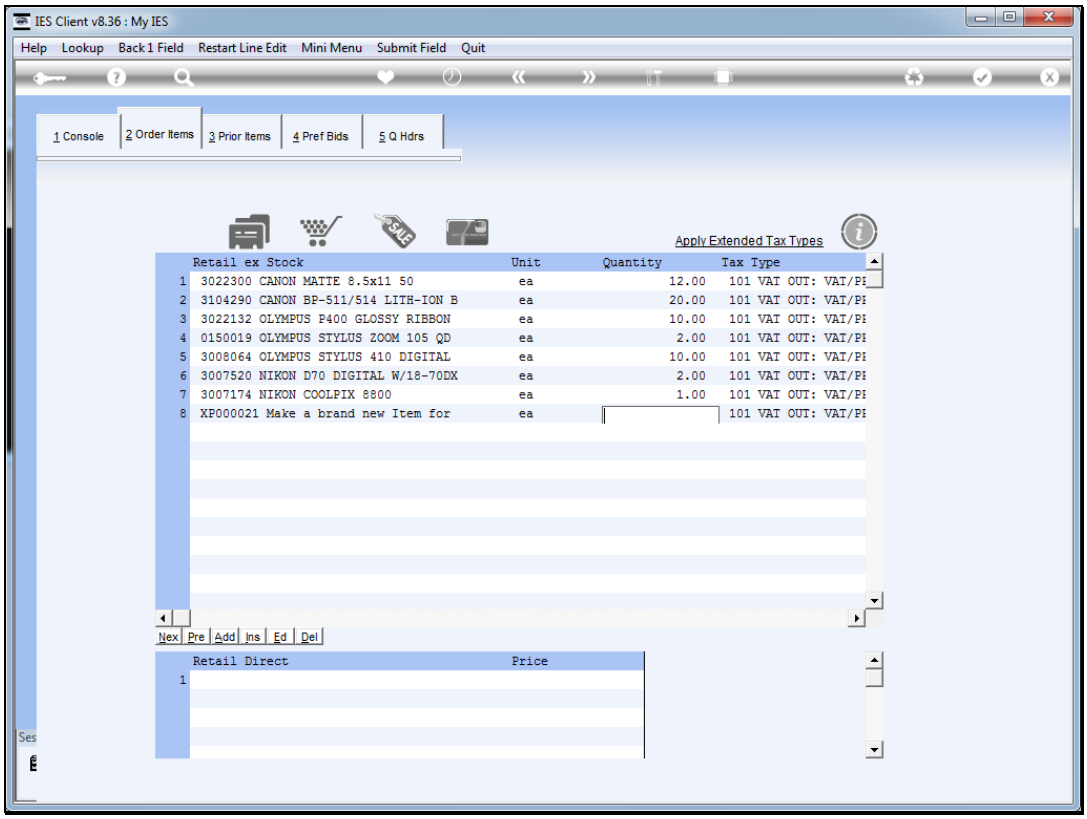
Slide 43
Slide notes:



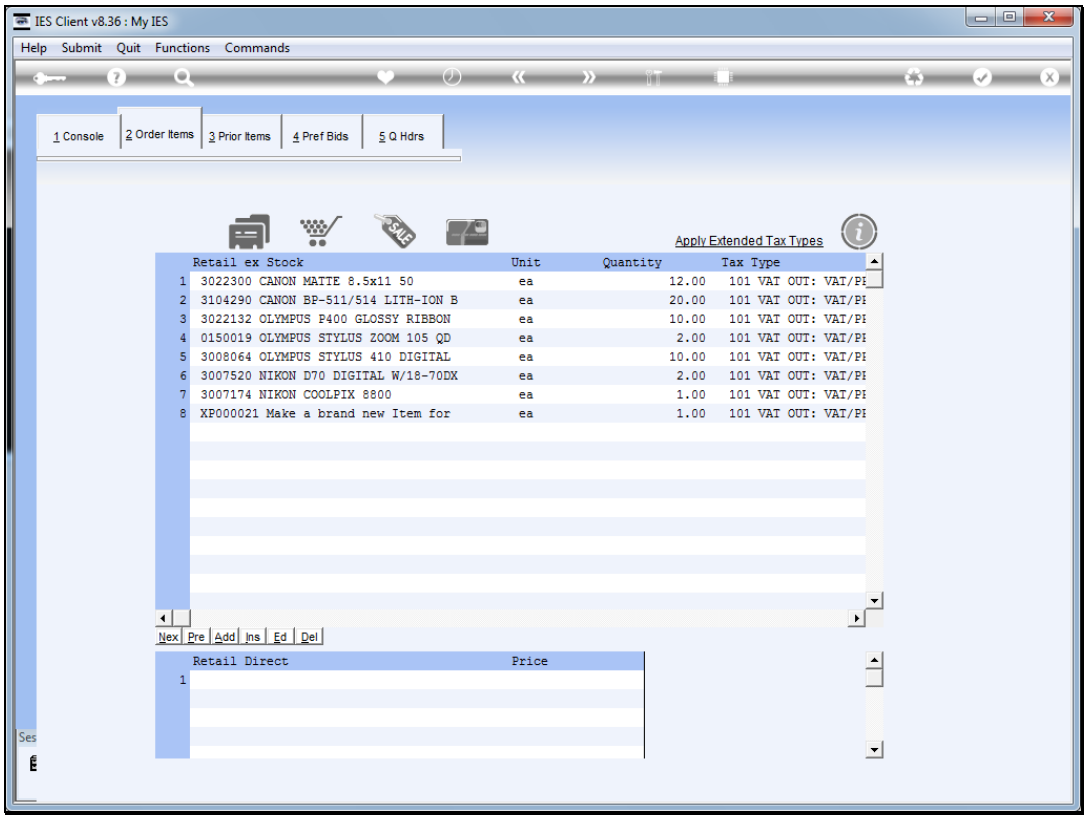
Slide 44
Slide notes:



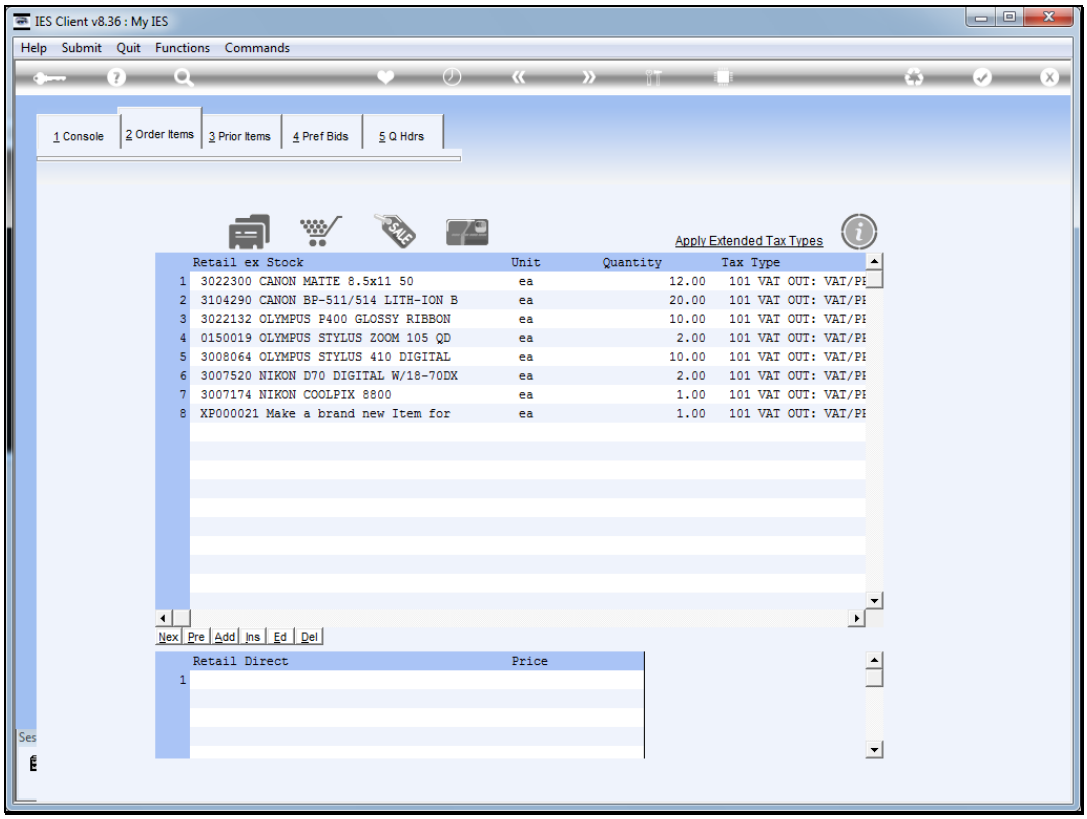
Slide 45
Slide notes:



Slide 46
Slide notes:

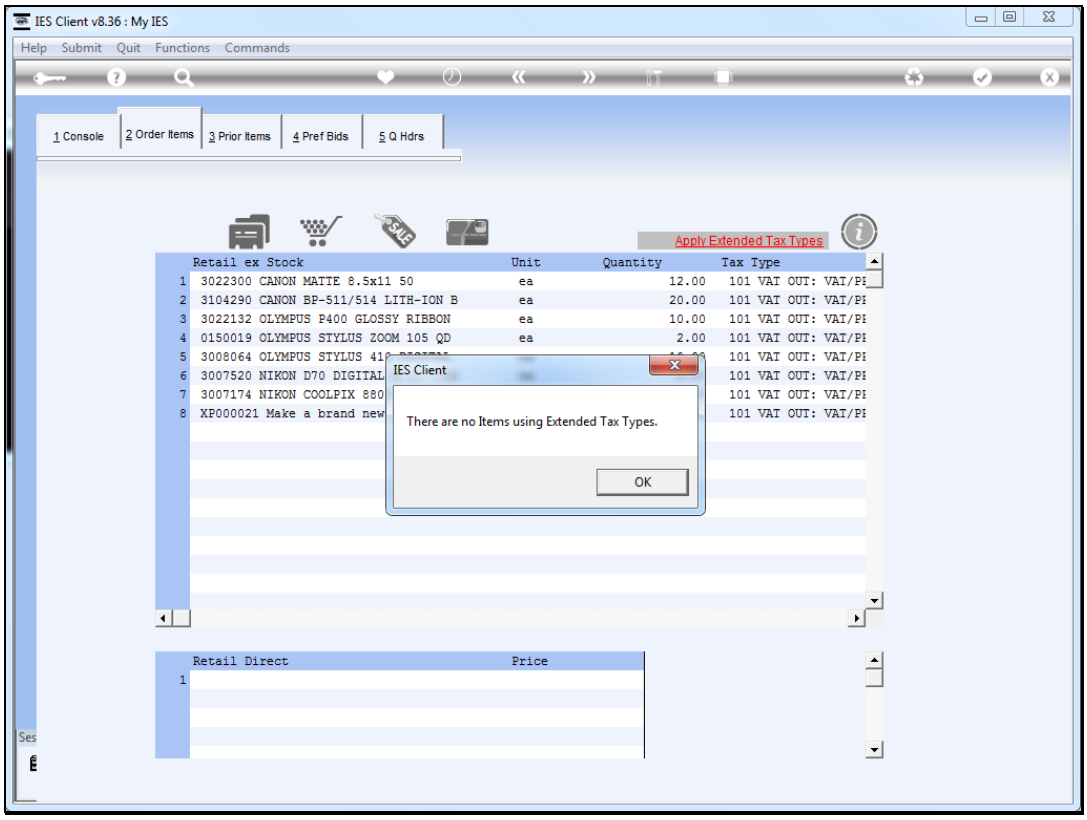


Slide 47
Slide notes:



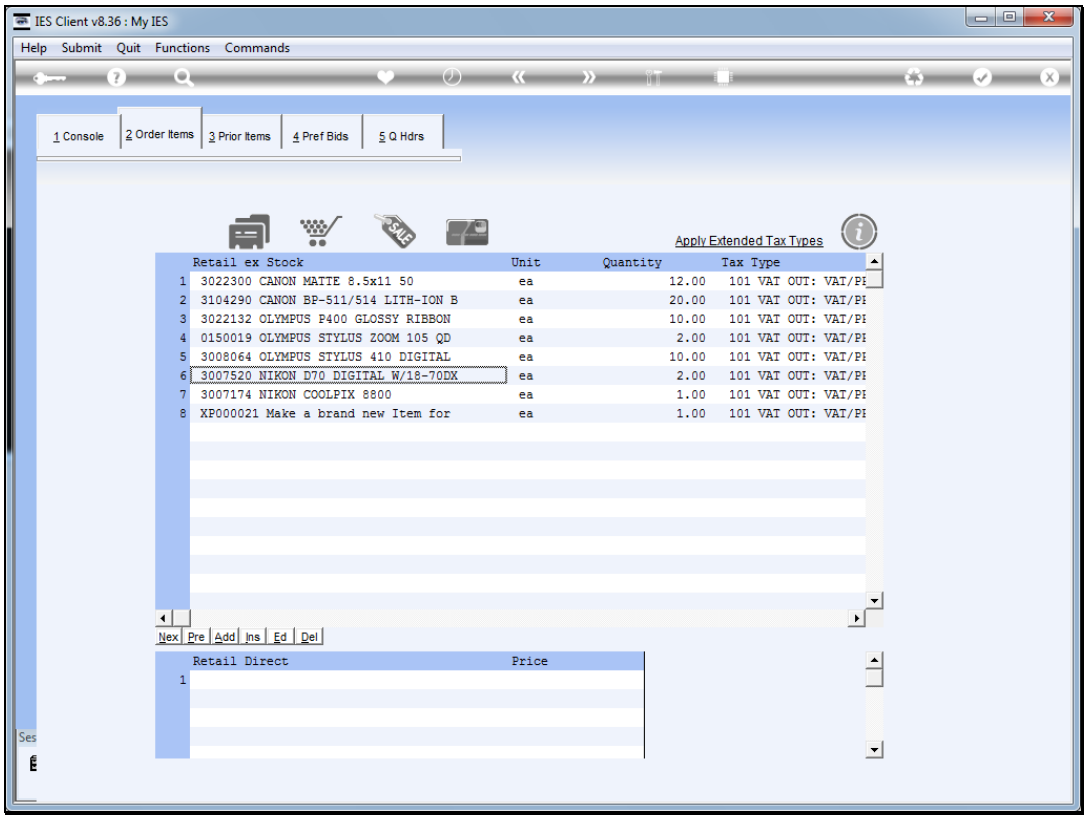
Slide 48

Slide notes: In the event that we have Items that we sell with multiple Tax Types, we may use 'Apply Extended Tax Types' to select the appropriate Tax Types for this quotation.

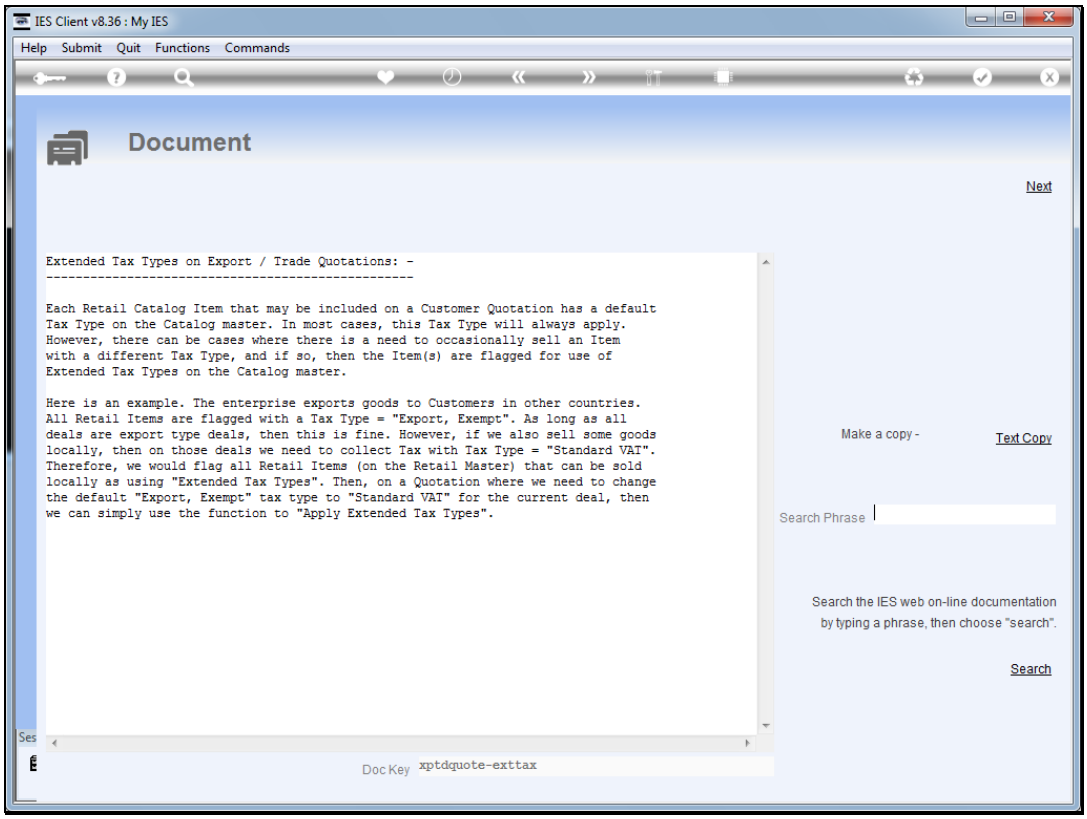


Slide 49

Slide notes: There are no such Items in our example, but let's check the Help for this anyway.

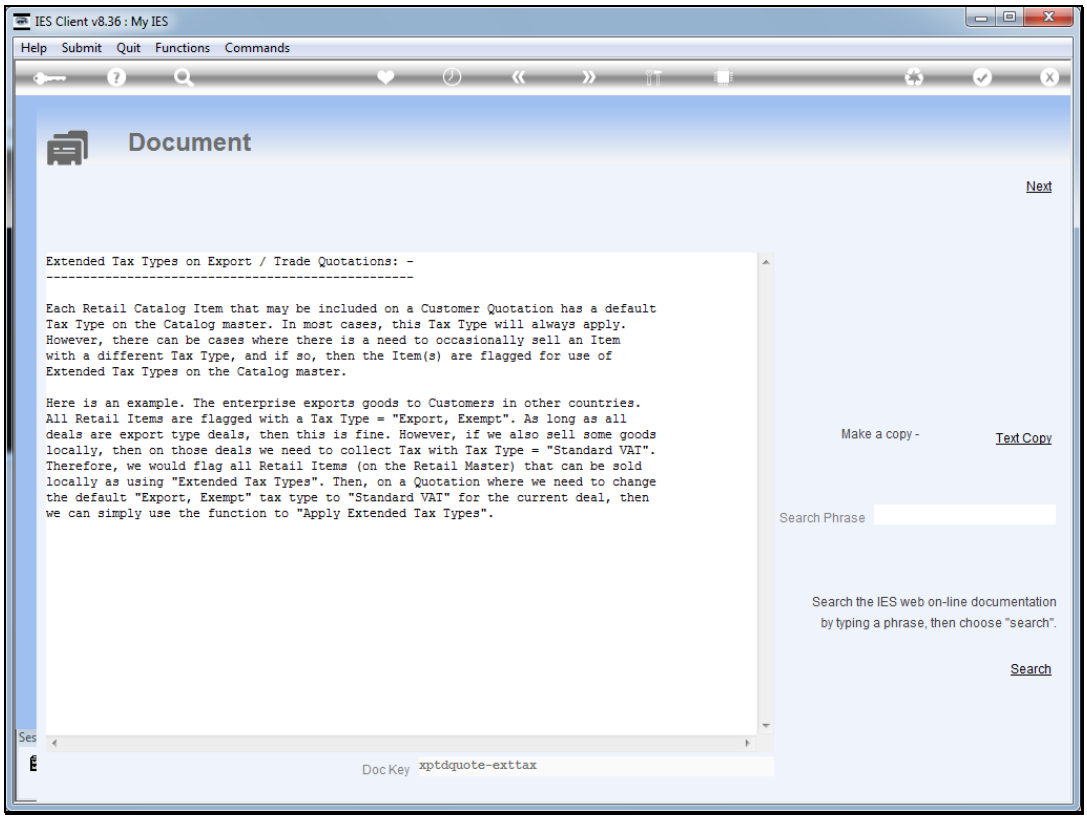


Slide 50
Slide notes:

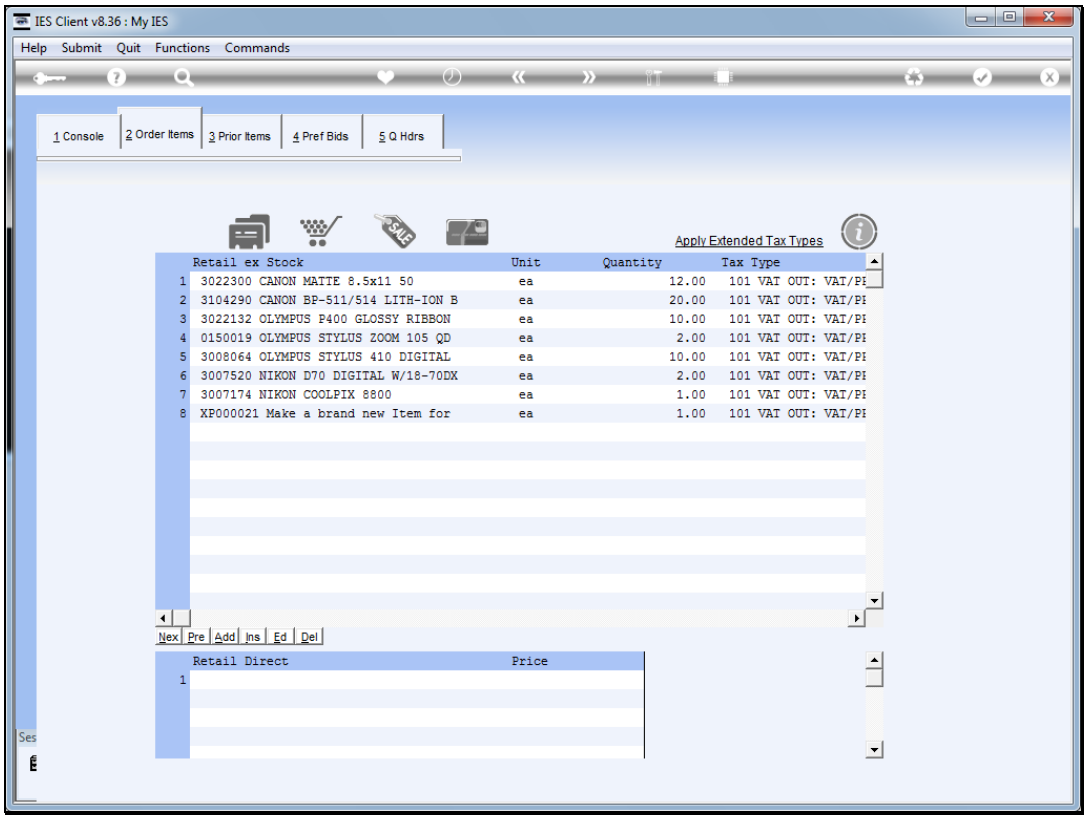


Slide 51

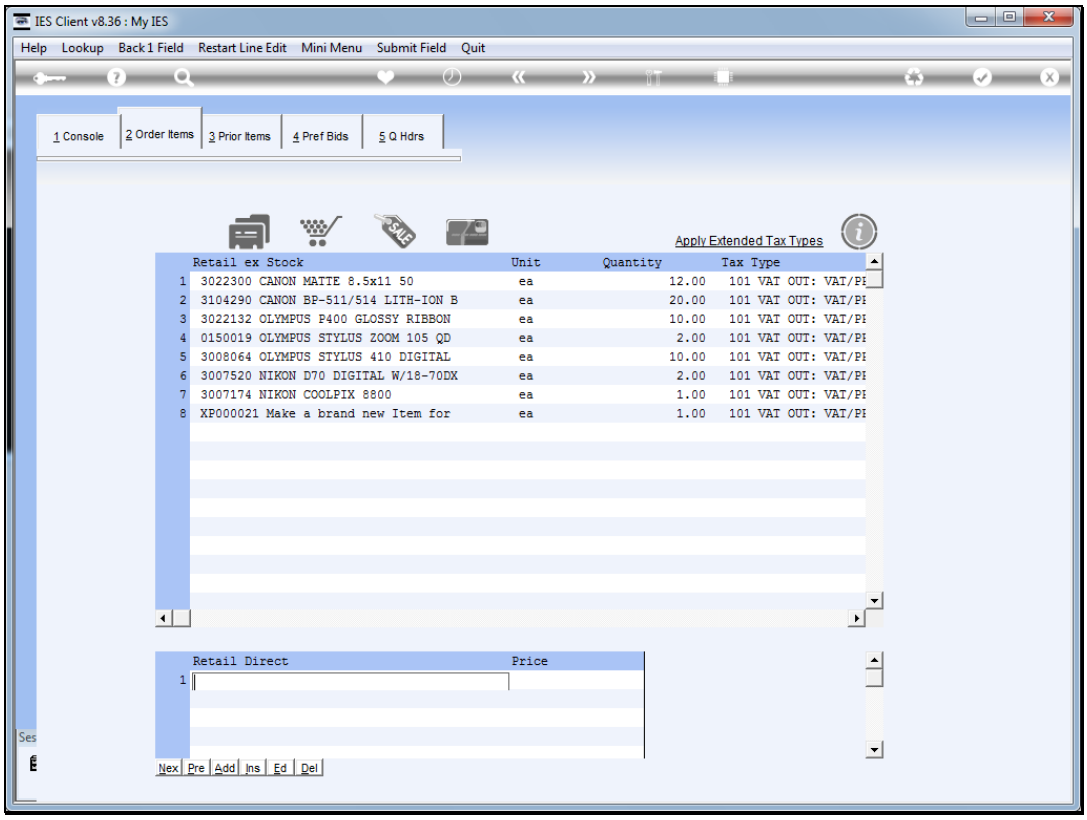
Slide notes: Here we have the explanation.



Slide 52
Slide notes:

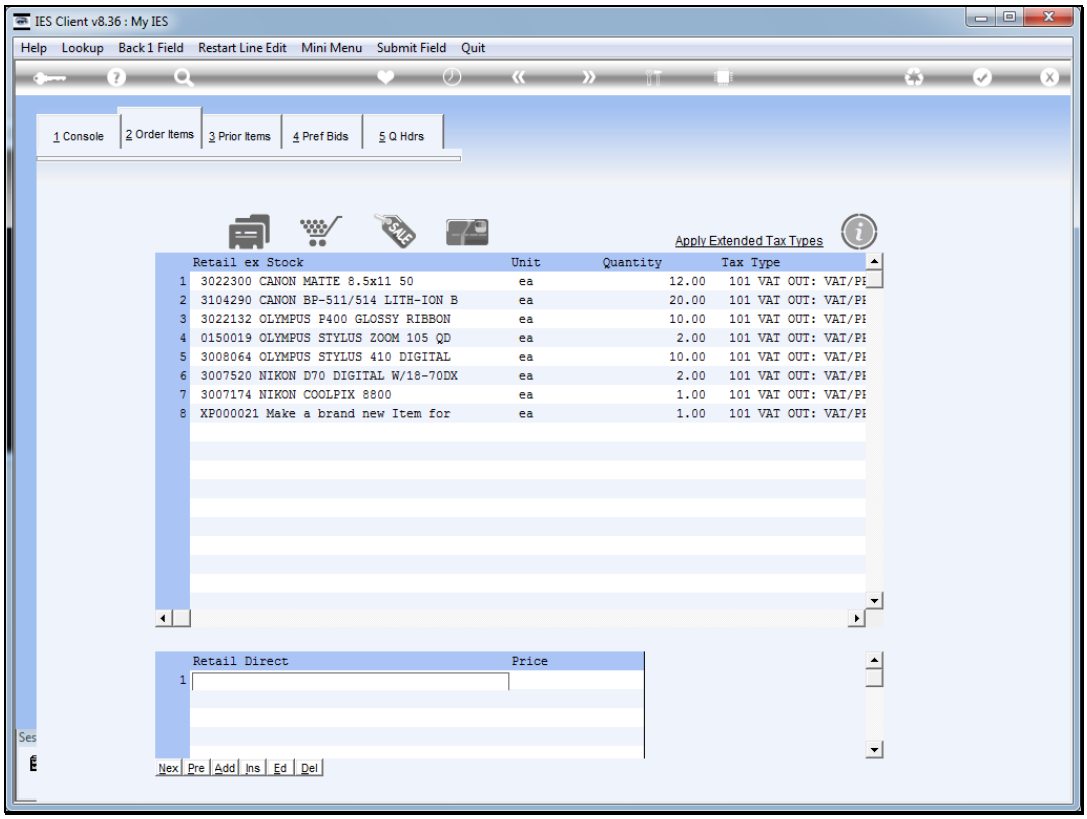


Slide 53
Slide notes:

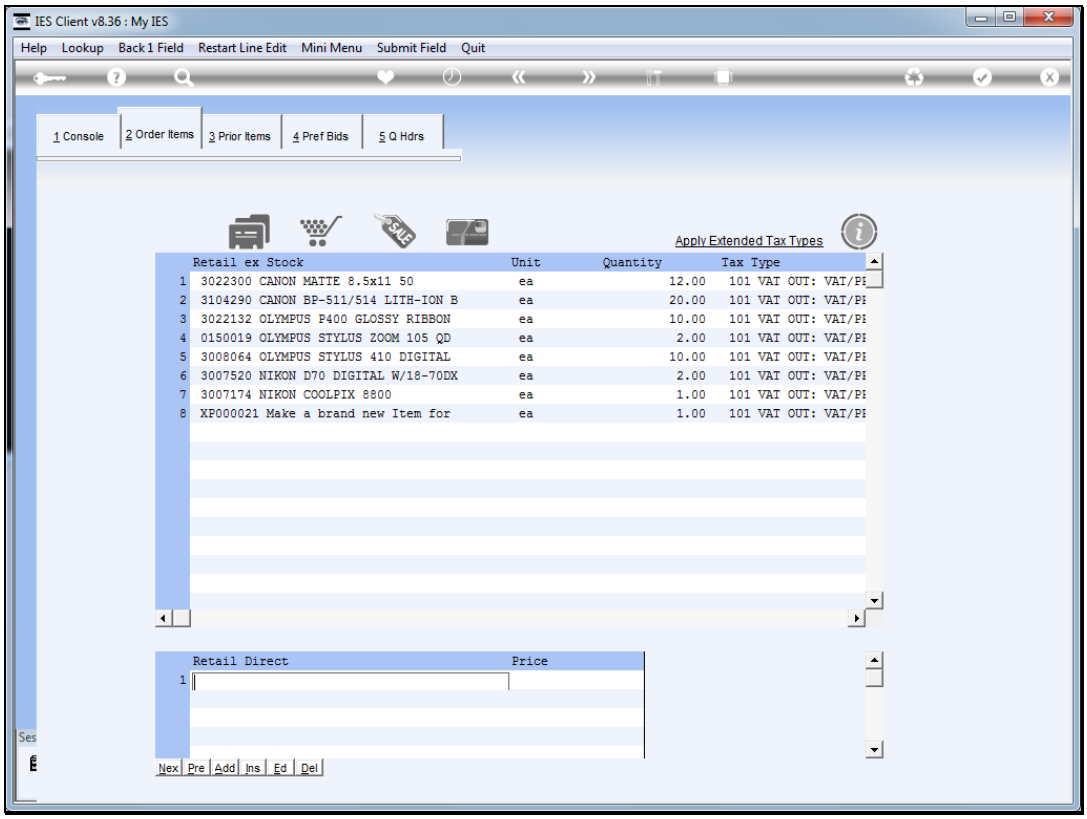


Slide 54

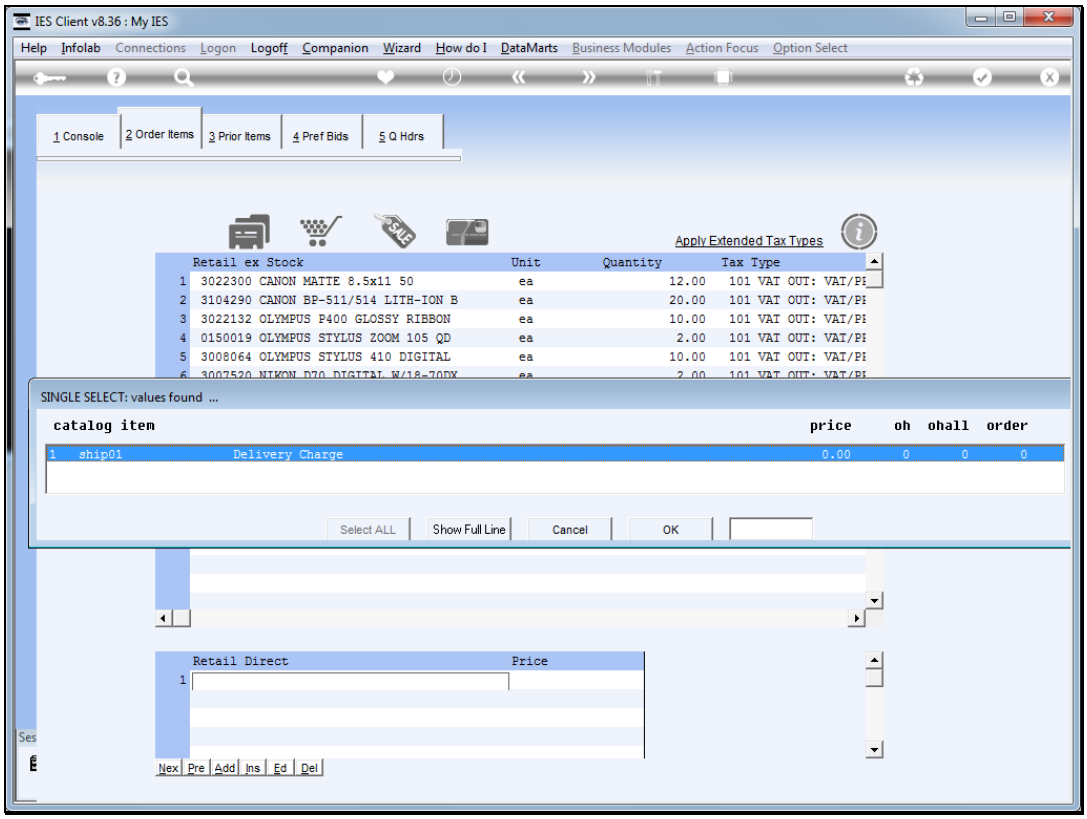
Slide notes: The Order Items are all Items that we need to procure before we can supply it ex Stock. However, we may also have 1 or more non-Stock Items which are not ordered by the Customer but which we include to cover some costs or charges, for example a Delivery Charge. This type of Item is recorded at 'Retail Direct' and will not attract bids or be included in Purchase Orders.



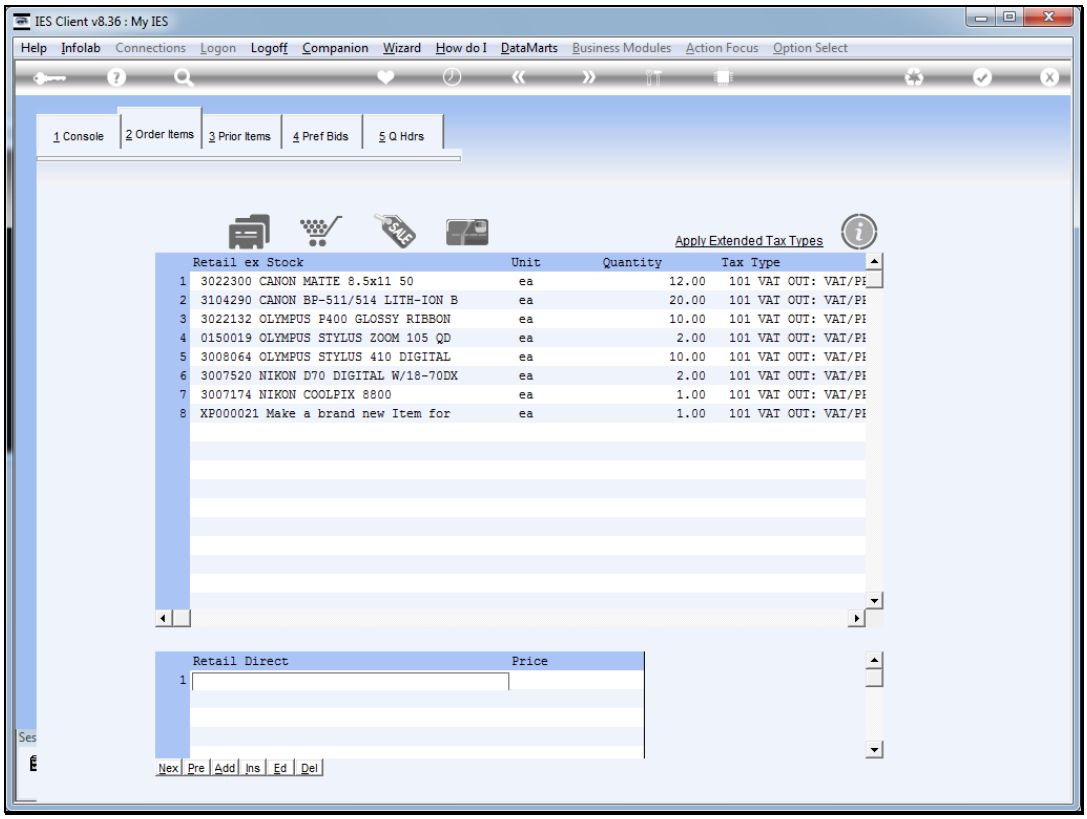
Slide 55
Slide notes:



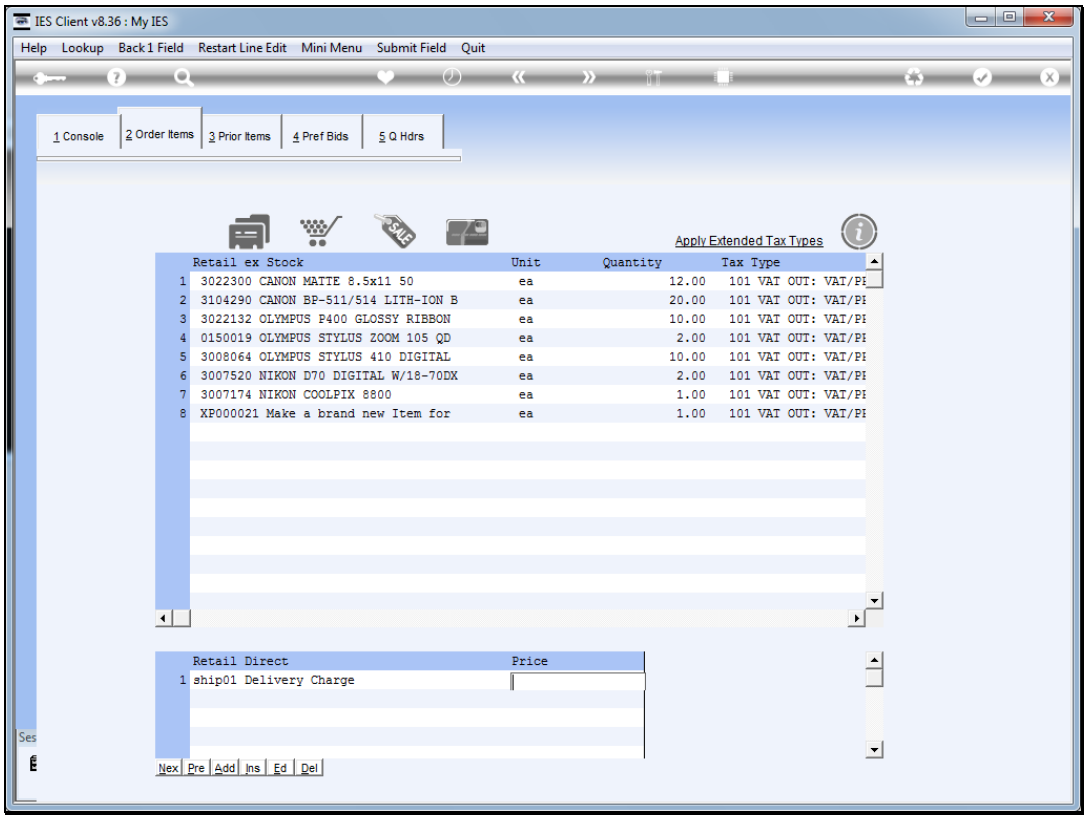
Slide 56
Slide notes:



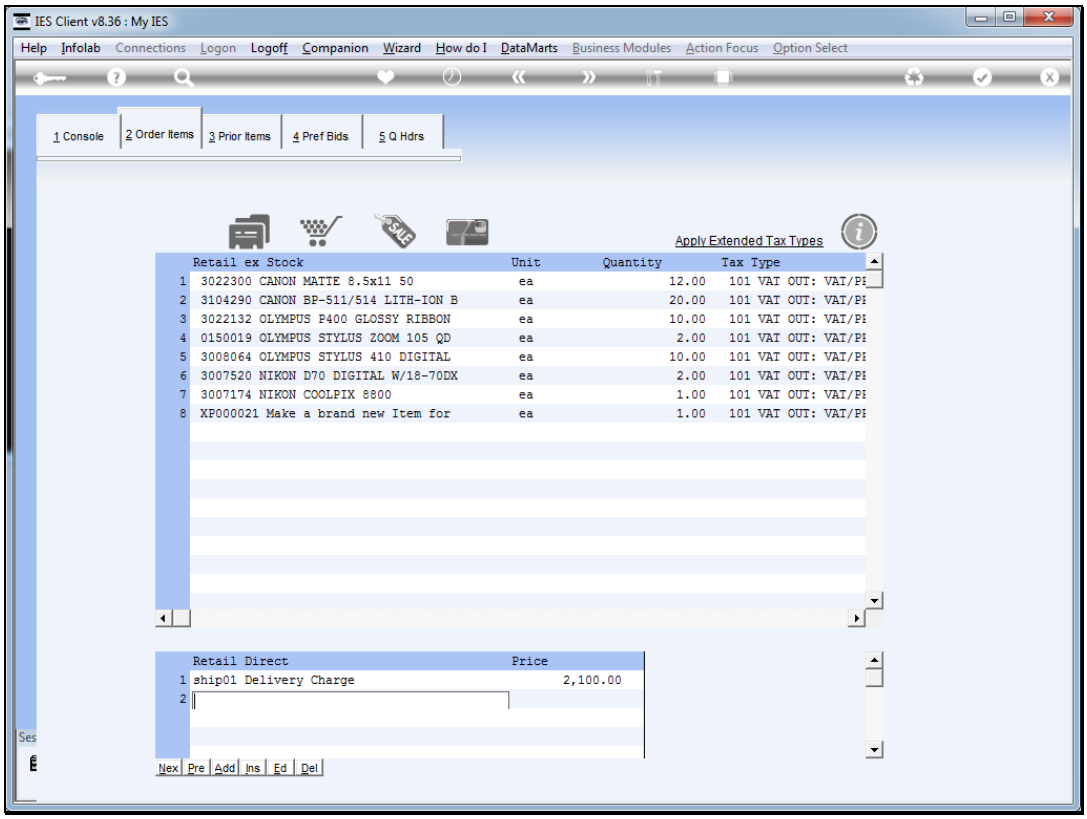
Slide 57
Slide notes:



Slide 58
Slide notes:



Slide 59
Slide notes:



Slide 60

Slide notes: The quotation must include a minimum of 1 Item at 'Retail ex Stock', while any Items at 'Retail Direct' are optional.