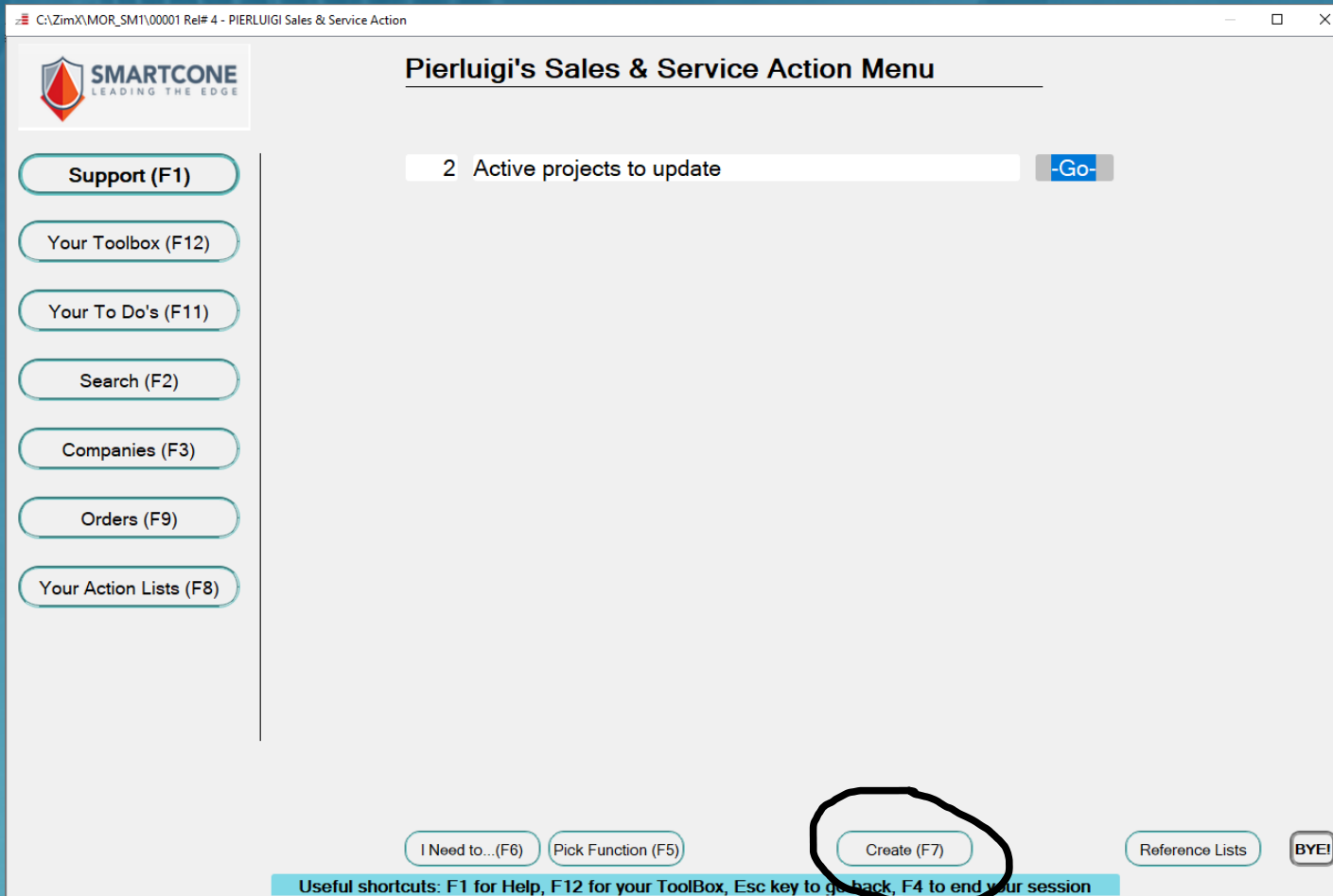


Customer Quoting and Order Types...

1. **ADI**...Action Driven Interface notifies users of all steps related to building and supporting quotes and orders
2. **Integration**...Seamlessly converts Quotes to Orders
3. **Processes**...Streamlines all processes involved once quotes are accepted
4. **Collaboration**...sends all related information throughout entire cycle from quote to invoice
5. **Support**...anytime you need it


This presentation will show you how to add a quotation for a customer and the various item types the system supports.

1. From the main interface select the 'Create (F7)' button on the bottom row





Select 'Quote for a Customer'



Options

ORDER for a Customer
QUOTE for a Customer
Timecard Report
Message or Reminder

Order Reports

Close

Enter Starting letter(s) hit enter
and select


[illegible]

Select how long the quote will remain valid for and enter other quote heading information such 'Bill and Ship to addresses' and a Contact for this quotation.

****Note**** the yellow highlighted buttons to the right of the various fields allow you to add details relevant to the field they are beside.

Select the Add Item button to select item type...

M.O.R. Control - Quote #: 23-1001 for UNITED AIRLINES



Support (F1)
Your Toolbox (F12)
Your To Do's (F11)
Add Item

Customer: UNITED AIRLINES
Bill To Add:
Chicago ILLINOIS U.S.A.
tel: fax:
Acct Contact: NON ENTERED Note:
Ship To: UNITED AIRLINES
Chicago ILLINOIS U.S.A.
Ship to Contact: NON ENTERED Note:
Contact: NON ENTERED **Add**
Heading comment: Thank you for letting SmartCone Technologies provide you with this quotation.
Complete quote heading information. Click the 'Add item' or use 'F2' to add a new item.

Quote #: 23-1001
Quoted date:
Quote is Good For: 30 Days
Bill terms: 30 **Terms**
Ship: FOB (FREE CARRIER), SELLER HANDED OVER GOODS, CLEARED FOR EXPORT, INTO THE CHARGE OF THE
Ship comment: Your Plant

Quote footing Comments:
Regards: **-List-**
for internal comment use only

0.00 US\$
Save, Print and Exit
Delete

'Add a Charge type item' is used to simply add a line item with a Bill Code description, an amount and a more detailed description if required.

Options

Add Work Order type item

Add item we stock or buy and sell

Add a charge type item

Close

The Bill Code descr: drop down allows you to select from bill codes that you define. Whatever is relevant to your business will determine what appears in this list.

Quote item on Quote #: 23-1001 for UNITED AIRLINES

Billable Item

Select a Bill Code description, enter an Amount and an Additional description and press 'Add'. 'Esc' to Cancel.

Bill Code Descr: TECHNICAL SUPPORT

Qty: CUSTOMER SHIPPING CHARGE

Amount: LABOUR CHARGES

Add'l Descr: MATERIALS WE SELL

TECHNICAL SUPPORT

Clear Add

****Note**** The blue field in most forms provide some basic instructions...

Quote item on Quote #: 23-1001 for UNITED AIRLINES

Billable Item

Select a Bill Code description, enter an Amount and an Additional description and press 'Add'. 'Esc' to Cancel.

Bill Code Descr: TECHNICAL SUPPORT

Qty: 1

Amount: 375.00

Add'l Descr: THIS IS A SAMPLE OF ADDING A DESCRIPTION.

Clear Add

Simple ways to search the database allows for users to easily find and quickly add items. Here we **Search with Type...**

'Add item we stock or buy and sell' is used to select Parts you have in inventory or items you need to purchase to fulfill the order.

Options

Add Work Order type item

Add item we stock or buy and sell

Add a charge type item

Close

Quote Item on Quote #: 23-1001 for UNITED AIRLINES

Enter 1-5 characters of part number and hit 'Enter' or use 'Add Item' button.

Stock Item

Part #:

Part Type:

Descr:

Date reqd: Get Date

Reqd: Avail: 0.00

Price: Discount: 0.0 %

Bill Type: MATERIALS WE SELL

Add (F2)

Search with Type

Cancel

Quote Item on Quote #: 23-1001 for UNITED AIRLINES

Enter 1-5 characters of part number and hit 'Enter' or use 'Add Item' button.

Stock Item

Part #:

Part Type: EVALUATION BOARD

Descr: BARRIER BLOCK CONNECTOR

Date reqd: CABLE

Reqd: CERAMIC CAPACITOR

Price: CLINCHING NUT

Bill Type: CONNECTOR

CONNECTION HEADER THROUGH HOLE

CRIMP CONNECTOR

CRIMP PIN

DIODE

ESD SURGE BOARD

EVALUATION BOARD

EXPANSION BOARD THROUGH HOLE

FUSE

HOOK UP WIRE

IMU RTC SHIELD (IRS) BOARD

Add (F2)

Search with Type

Cancel

zimgc

Click to choose a part

Part #	In Stock	Description
CMP-20086 EVAL BOARD ADS1015 12-BIT ADC		ADS1015 - 12 BIT 3.3K SAMPLES PER SECOND ANALOG
CMP-20097 ARDUINO PRO MINI 328 3.3V/8MHZ		ATMEGA328 ARDUINO PRO MINI 328 3.3V/8MHZ AVR

Exit

Quote Item on Quote #: 23-1001 for UNITED AIRLINES

CMP-20086 EVAL BOARD ADS1015 12-BIT ADC-EVALUATION BOARD

Stock Item

Part #: CMP-20086 EVAL BOARD ADS1015 12-BIT ADC

Descr: ADS1015 - 12 BIT 3.3K SAMPLES PER SECOND ANALOG TO DIGITAL CONVERTER (ADC) EVALUATION BOARD

Date reqd: Get Date

Reqd: 35.00 EACH Avail: 0.00

Price: 22.50 Discount: 0.0 %

Bill Type: MATERIALS WE SELL

Maintain

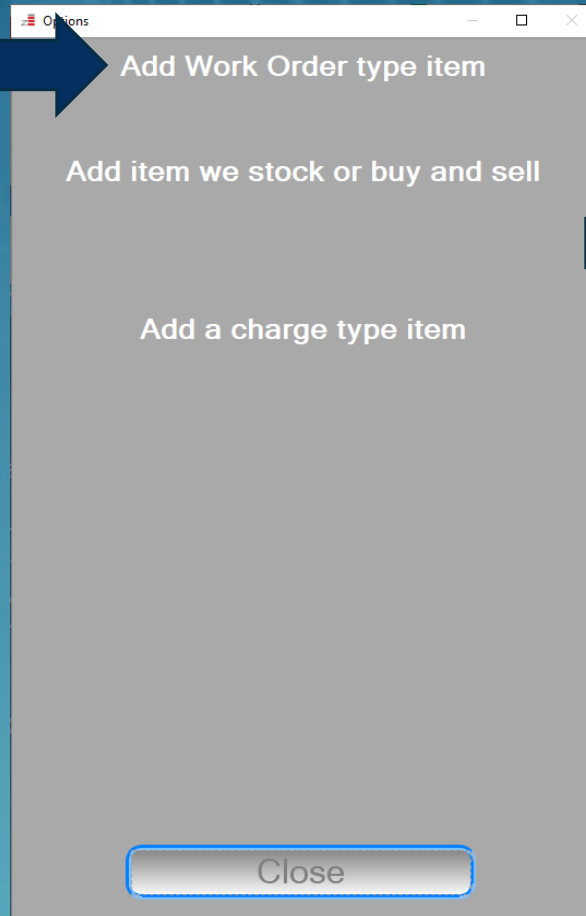
OK

Cancel

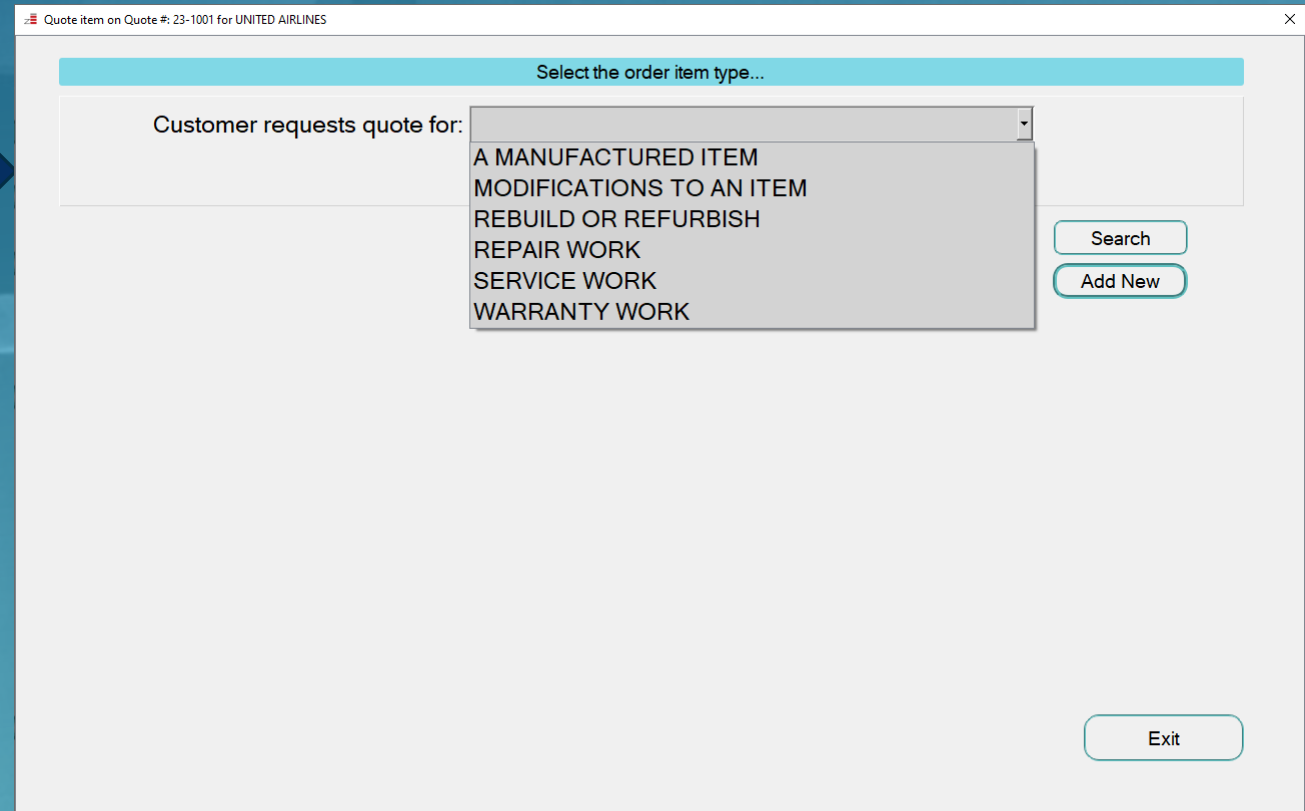
Work Order type items are driven by user defined work order types and can involve multiple levels of details. The system provides way to Manufacture new items or Repair or Modify items.

When quoting work order type items, engineers can be assigned to build BOM's and provide detailed estimates for purchased parts, Operations required and Outsourcing expenses. You can also submit BOM's into current planning requirements to determine feasibility and timing.

'Add Work Order type item' is selected when an item will require a Work Order to fulfill requirements.



The 'Options' dialog box is shown with the title bar 'Options'. It contains two main options: 'Add item we stock or buy and sell' and 'Add a charge type item'. The option 'Add Work Order type item' is highlighted in blue, and a blue arrow points to it from the text on the left. A 'Close' button is at the bottom.



The 'Quote item on Quote #: 23-1001 for UNITED AIRLINES' dialog box is shown. It has a title bar with the same text. Below the title bar is a section titled 'Select the order item type...'. This section contains a dropdown menu labeled 'Customer requests quote for:' which is open, showing a list of options: 'A MANUFACTURED ITEM', 'MODIFICATIONS TO AN ITEM', 'REBUILD OR REFURBISH', 'REPAIR WORK', 'SERVICE WORK', and 'WARRANTY WORK'. To the right of the dropdown are 'Search' and 'Add New' buttons. At the bottom right is an 'Exit' button.

****Note**** More on this on next pages...

MQR

Control Software

Once Work Order type items are defined a user will be notified there is a Quote item requiring their attention.

Quote item on Quote #: 23-1001 for UNITED AIRLINES

Make your changes to this Quoted Item and click the 'Change' button.

Customer requests quote for: A MANUFACTURED ITEM

Quoting Item: PCB-50101R1-IMU RTC SHIELD (IRS) BOARD

Description (of what quote is for): MANUFACTURE AS PER YOUR SUPPLIED SPECIFICATIONS.

Quoting Quantity: 12

Unit Price: \$0.00 US\$

Discount: 0.00 %

Discount Amt.: 0.00

Delivery comment: (e.g. '2-3 Weeks' or 'In Stock')

Date will supply: Get Date

Jim Parisien

Change attention to

Delete Change Item Exit

SMARTCONE LEADING THE EDGE

Jim's Engineering Action Menu

4 Active projects to update -Go-

1 Quote ITEMS requiring your ATTENTION -Go-

Support (F1)

Your Toolbox (F12)

Your To Do's (F11)

Search (F2)

Companies (F3)

Orders (F9)

Your Action Lists (F8)

I Need to... (F6) Pick Planning Create (F7) Reference Lists BYE!

Useful shortcuts: F1 for Help, F12 for your Toolbox, Esc key to go back, F4 to end your session

Jim is notified and defines a BOM to estimate costs.

BOM for PCB-50101R1-IMU RTC SHIELD (IRS) BOARD

B.O.M. for: PCB-50101R1-IMU RTC SHIELD (IRS) BOARD

Qty Required: 12

ENGINEERING REV. #: 0 Effective Date: 2023/02/09

Go Back 1 (F6)

Type	Parts/Materials	Qty	Est Cost	In Stock	Unit Cost	Costs
Purchased	CMP-20070 CAP CER 10UF 25V X7R RADIAL-CERAMIC CAPACITOR	1.00	1.12	0.00	0.00	EACH
Purchased	CMP-20071 CAP CER 22UF 16V X7R RADIAL-CERAMIC CAPACITOR	1.00	1.20	0.00	0.00	EACH
Purchased	CMP-20072 CONN HDR 40POS 0.1 TIN PCB-CONNECTOR HEADER THROUGH HOLE	1.00	3.30	0.00	0.00	EACH
Purchased	CMP-20073 CONN HEADER R/A 2POS 2.54MM-CONNECTOR HEADER THROUGH HOLE	1.00	0.59	0.00	0.00	EACH
Purchased	CMP-20074 CONN HEADER R/A 3POS 2.54MM-CONNECTOR HEADER THROUGH HOLE	1.00	0.71	0.00	0.00	EACH
Purchased	CMP-20075 CONN HEADER R/A 4POS 2.54MM-CONNECTOR HEADER THROUGH HOLE	1.00	0.99	0.00	0.00	EACH
Purchased	CMP-20076 DC DC CONVERTER 5V 10W-REGULATOR THROUGH HOLE	1.00	14.05	0.00	0.00	EACH
Purchased	CMP-20077 13DOF CLICK-EXPANSION BOARD THROUGH HOLE	1.00	69.16	0.00	0.00	EACH
Purchased	CMP-20078 RES 2K OHM 5% 1/4W AXIAL-RESISTOR	3.00	0.45	0.00	0.00	EACH
Purchased	CMP-20079 N-CH 20V 530MA TO92-3-MOSFET	1.00	2.07	0.00	0.00	EACH
Purchased	CMP-20080 PC GRAY-TEST POINT	3.00	1.83	0.00	0.00	EACH
Purchased	CMP-50101R1.2-IMU RTC SHIELD (IRS) BOARD	1.00	0.00	0.00	0.00	EACH
		0.00	0.00	0.00	0.00	
		0.00	0.00	0.00	0.00	
		0.00	0.00	0.00	0.00	

Engineering: 0.00

Parts: 95.47

Labour: 260.00

Machines: 0.00

O/S: 0.00

TOTAL: 355.47

Operations

Seq #	Operation Name	Est Time	Est Cost per Unit	Freq	Work Description
1	ASSEMBLY	4.00000 Hr	260.00000	Per Unit	AS REQUIRED

Add Item (F2)

Add Operation (F3)

OK

Planned Loading

When required MOR will give every detail required in the process of manufacturing or repairing etc...

For quicker quote responses you can simply add a price and build the required BOM or turn the item into a Time and Materials job if the quote is accepted.

Quote

MANUFACTURE AS PER YOUR SUPPLIED SPECIFICATIONS. on a PCB-50101R1-IMU RTC SHIELD (IRS) BOARD

Quoting Qty: **12**

Quote Type: **B.O.M.**
ITEM DESCR
PRICE ONLY

Use a Bill Of Materials to calculate the cost

Earliest Start: Earliest Finish:

Run for dates

Mat'l's/Parts Req'd **\$95.47** per/pc. **View** Operations Cost: **\$260.00** per/pc. **View**

Markup Materials: **20 %** Markup Labour: **20 %**

Materials After **\$114.56** per/pc. Operations After Markup: **\$312.00** per/pc.

There are missing material costs. Click view

per/pc.

Total Cost before Markup: **\$355.47**

Total Cost After Markup: **\$426.56**

Suggested unit price: **\$0.00** <<< Suggest this Unit Price and Exit

Actual unit price: **\$450.00** <<< Approve this Price as the Unit Price

OPTIONS **Exit**

C:\Zim\MOR_SM1\00001 Rel# 4 - PIERLUIGI Sales & Service Action

SMARTCONE
LEADING THE EDGE

Pierluigi's Sales & Service Action Menu

Support (F1)

Your Toolbox (F12)

Your To Do's (F11)

Search (F2)

Companies (F3)

Orders (F9)

Your Action Lists (F8)

2 Active projects to update -Go-

2 Quoted ITEMS to be SENT to Customer -Go-

Once all items have required pricing you will be informed of Quoted items to be sent to customer...

I Need to...(F6) Pick Function (F5) Create (F7) Reference Lists **BYE!**

Useful shortcuts: F1 for Help, F12 for your ToolBox, Esc key to go back, F4 to end your session

Once all the information required for the quotation is completed select the 'Save, Print' button

M.O.R. Control - Quote #: 23-1001 for UNITED AIRLINES

SMARTCONE
LEADING THE EDGE

Support (F1)

Your Toolbox (F12)

Your To Do's (F11)

Add Item

Clear all items

Customer: UNITED AIRLINES

Bill To Add: Chicago, ILLINOIS, U.S.A.

Ship To: UNITED AIRLINES, Chicago, ILLINOIS, U.S.A.

Quote #: 23-1001

Quoted date: Waiting

Quote is Good For: 30 Days

Bill terms: 30

Ship: FOB (FREE CARRIER) SELLER HANDED OVER GOODS, CLEARED FOR EXPORT, INTO THE CHARGE OF THE

Contact: NON ENTERED

Heading comment: Thank you for letting SmartCone Technologies provide you with this quotation.

Click on an item to make changes. Click the 'Add item' or use 'F2' to add a new item.

No.	Quantity	Item Information	Unit Price	Dis%	Discount Amt.	Extended	On Order#	Description
1	1.00	TECHNICAL SUPPORT	\$375.00	.00	\$ 0.00	\$375.00	n/a	THIS IS A
2	35.00	CMP-20086 EVAL BOARD ADS1015 12-BIT ADC-EVALUA	\$22.50	.00	\$ 0.00	\$787.50	n/a	ADS1015
3	12.00	PCB-50101R1-IMU RTC SHIELD (IRS) BOARD	\$450.00	.00	\$ 0.00	\$5,400.00	n/a	MANUFAC

Quote footing Comments: Please note prices may change after quote expiration. Please feel free to Contact us regarding any concerns you may have.

Regards: Pierluigi

for internal comment use only This is place to save internal comments regarding this quotation...

6,562.50 US\$

Save, Print and Exit

Delete

3/4/23, 1:11 PM

prt_file.html

SMARTCONE TECHNOLOGIES INC.

10 Didak Dr,
Amprior, ONTARIO, CANADA
K7S 0C3
Tel #: 343-804-0727

QUOTATION #: 23-1001

Quoted on: March 4, 2023
Valid until: April 3, 2023
Terms net: 30
Ship: FOB Your Plant

email:

Sold to: UNITED AIRLINES

Bill to: UNITED AIRLINES

Chicago, ILLINOIS, U.S.A.

Tel #:

Fax #:

Ship to: UNITED AIRLINES

Chicago, ILLINOIS, U.S.A.

Attention to: UNITED AIRLINES

Thank you for letting SmartCone Technologies provide you with this quotation.

No.	Part Number	Description	Quantity	Unit Price	Extension
1	TECHNICAL SUPPORT	THIS IS A SAMPLE OF ADDING A DESCRIPTION.	1.00	375.00	375.00
2	CMP-20086 EVAL BOARD ADS1015 12-BIT ADC-EVALUATION BOARD	ADS1015 - 12 BIT 3.3K SAMPLES PER SECOND ANALOG TO DIGITAL CONVERTER (ADC) EVALUATION BOARD	35.00	22.50	787.50
3	PCB-50101R1-IMU RTC SHIELD (IRS) BOARD	MANUFACTURE AS PER YOUR SUPPLIED SPECIFICATIONS.	12.00	450.00	5,400.00

TOTAL: \$6,562.50 US\$

Please note prices may change after quote expiration. Please feel free to Contact us regarding any concerns you may have.

Regards

Pierluigi


An html doc will open and can emailed through the system or printed. Once the document is approved a copy is saved on the server.

MOR Control Software

To convert a Quote into a Customer Order you can use the 'Search (F2)' function from the Main page.

If a quote was never required for the Customer order the process is the same as creating a Quote... (you would just select 'Order for a Customer' from the Create option.)

C:\Zim\MOR_SM1\00001 Rel# 4 - PIERLUIGI Sales & Service Action



Pierluigi's Sales & Service Action Menu

Support (F1)

Your Toolbox (F12)

Your To Do's (F11)

Search (F2)

Companies (F3)

Orders (F9)

Your Action Lists (F8)

2 Active projects to update -Go-

I Need to...(F6)

Pick Function (F5)

Create (F7)

Reference Lists

BYE!

Useful shortcuts: F1 for Help, F12 for your ToolBox, Esc key to go back, F4 to end your session

Search

Search for Information using a PART

Search using a COMPANY NAME


23-1001 Enter a known number and click type from list below.

- ☐ Customer orders
- ☐ Invoices
- ☐ Packing slips sent to customers
- ☐ Purchase orders
- ☒ Quotes provided to customers
- ☐ Received items
- ☐ Request for quotes from vendors
- ☐ Work Orders

Exit

Enter quote number and select 'Quotes...

M.O.R. Control - Quote #: 23-1001 for UNITED AIRLINES



Support (F1)

Your Toolbox (F12)

Your To Do's (F11)

Add Item

Convert to Order

Clear all items

Customer: UNITED AIRLINES

Ship To: UNITED AIRLINES

Chicago ILLINOIS

Chicago ILLINOIS

U.S.A. U.S.A.

tel: fax:

Acct Contact: NON ENTERED Note:

Ship to Contact: NON ENTERED Note:

Contact: NON ENTERED Add

Heading comment: Thank you for letting SmartCone Technologies provide you with this quotation.

Click on an item to make changes. Click the 'Add item' or use 'F2' to add a new item.

No.	Quantity	Item Information	Unit Price	Dis%	Discount Amt.	Extended	On Order#	Description
1	1.00	TECHNICAL SUPPORT	\$375.00	.00	\$ 0.00	\$375.00	n/a	THIS IS A
2	35.00	CMP-20086 EVAL BOARD ADS1015 12-BIT ADC-EVALUA	\$22.50	.00	\$ 0.00	\$787.50	n/a	ADS1015
3	12.00	PCB-50101R1-IMU RTC SHIELD (IRS) BOARD	\$450.00	.00	\$ 0.00	\$5,400.00	n/a	MANUFAC

Quote # 23-1001

Quoted date: March 4, 2023

Quote is Good For: 30 Days

Bill terms: 30 Terms

Ship: FOB

Ship comment: Your Plant

Quote footing Comments: Please note prices may change after quote expiration. Please feel free to Contact us regarding any concerns you may have.

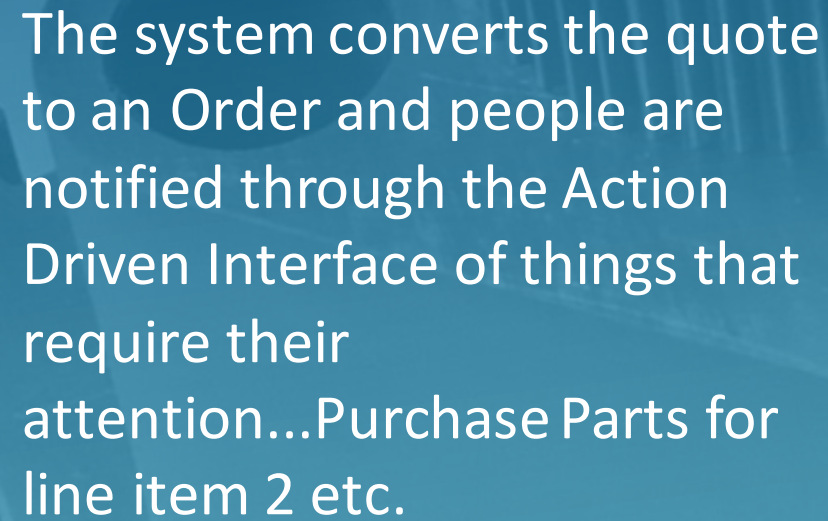
Regards: Pierluigi

6,562.50 US\$

Save, Print and Exit

Delete

Convert to Order.



Save Order and Exit