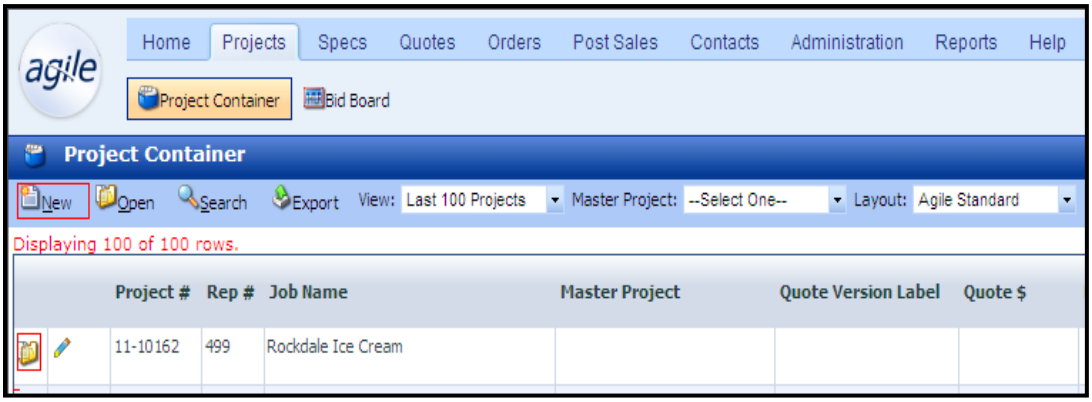
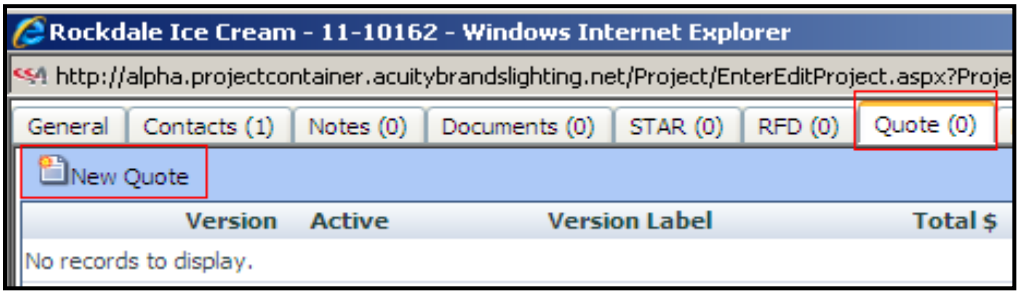
Agile Quotes – Quick Reference Guide

Creating a Quote from Project Container (PC)

- From the Project Container Dashboard
  - Select “New” or open existing PC



  - Enter the Job Name.
  - Associate Customers on Contacts Tab of PC
  - Save the Project
  - Click on Quotes tab and click “New Quote”



  - Populate Quote information (see additional details below)
  - Click “Print” to Preview and Send the Quote

Revised: 1.4.21

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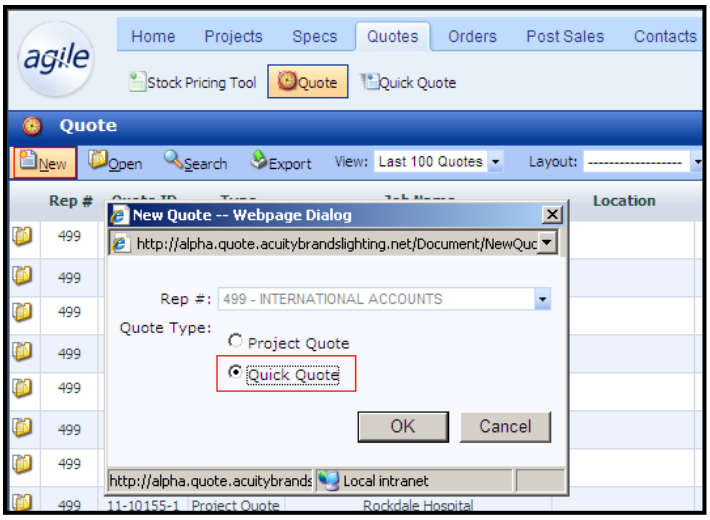
Creating a Quick Quote from the Quotes Dashboard

- Select “New” button and then select “Quick Quote” option



  - Update Job Name in Quote Header
  - Populate Customers on Customers tab
  - Populate Quote information (see additional details below)
  - Click “Print” to Preview and Send the Quote

Quick Reference Topics

- Entering Quote Lines
  - Select “New” to add lines
  - Lines can be validated one at a time or all at once
  - Main Line Categories
    - REG = Regular Product Line
    - GRP = Group Header used for formatting
    - BLNK = Blank Line used for formatting
    - SUB = Subtotal Line used to sum up product lines
    - ALT = Alternative Product lines not included in Subtotal and Totals
    - NOTE = Note line used to call out information directly on the quote
    - OVG = Overage line used to hold Lump Sum Overage; Does not print
    - ASMB= Assembly line used to add an assembly to be broken out
    - PART= Part line used to show individual parts associated with an assembly line
    - LMPS= Lamp line used as a standalone line or to break out lamps associated to a product

- Enter Quote Notes
  - From an open Quote, select the “Notes” Tab > Click “New” > Select “Print” (printing to the customer) or “General” (communicating information internally or with Acuity that will not print on the Quote). Then, populate your note information.

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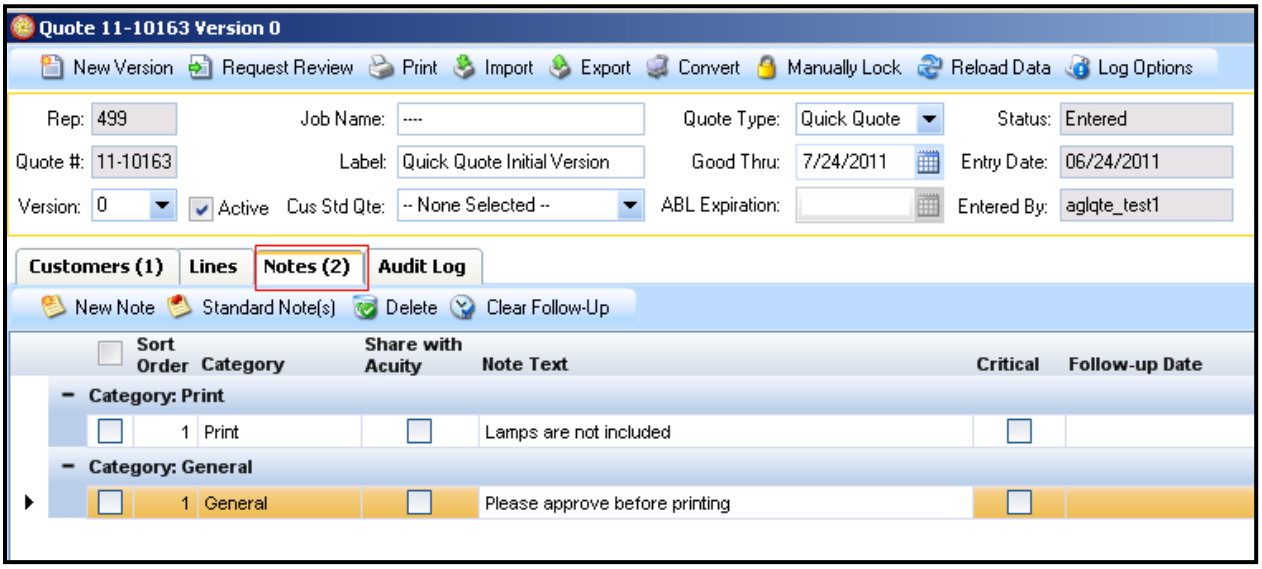
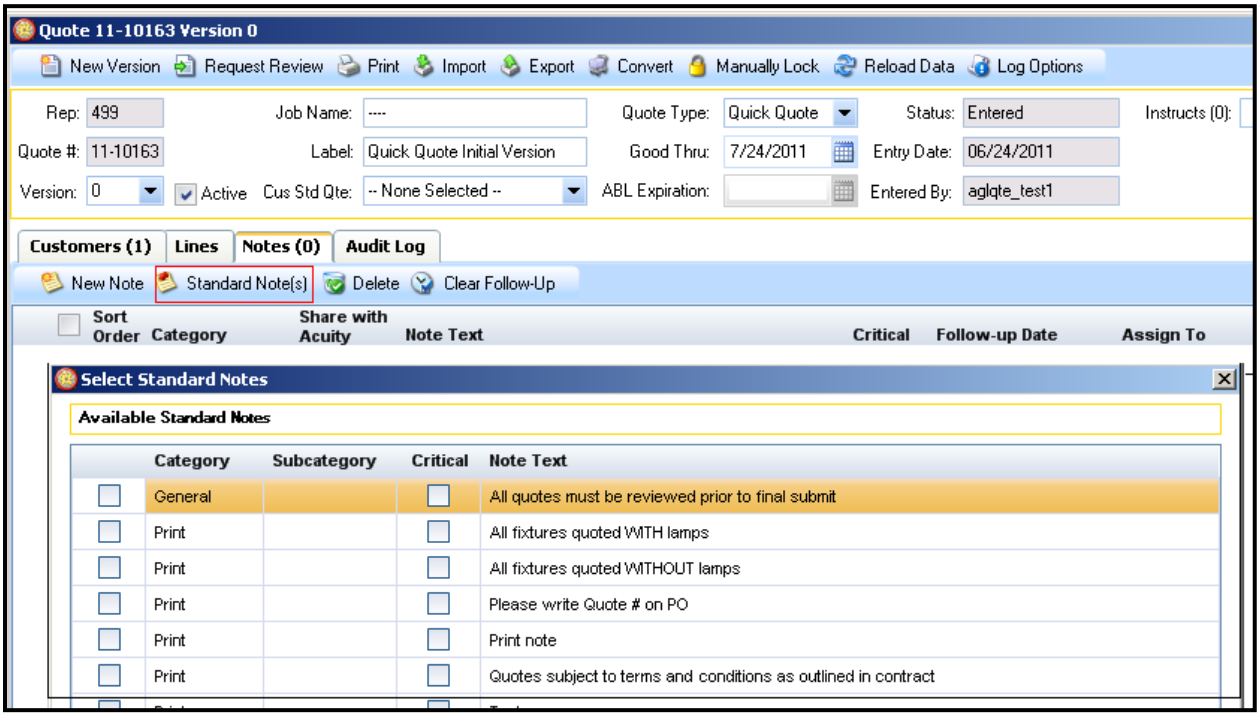


- Pull from Standard notes by clicking on "Notes" Tab > Click "Standard Notes" then select one or more notes from the standard note list. Your Agency Admin can create/update these Standard Notes.



- Printing a Quote
  - Click on the "Print" button

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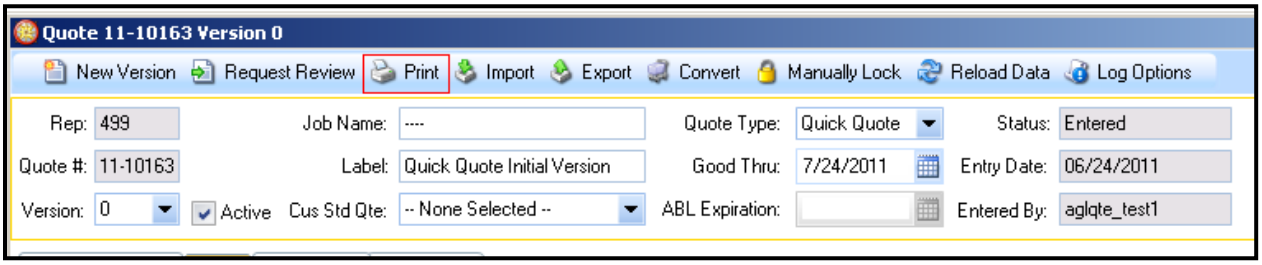
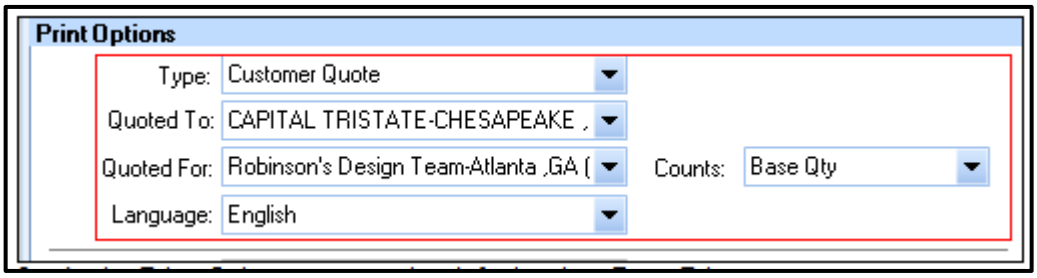
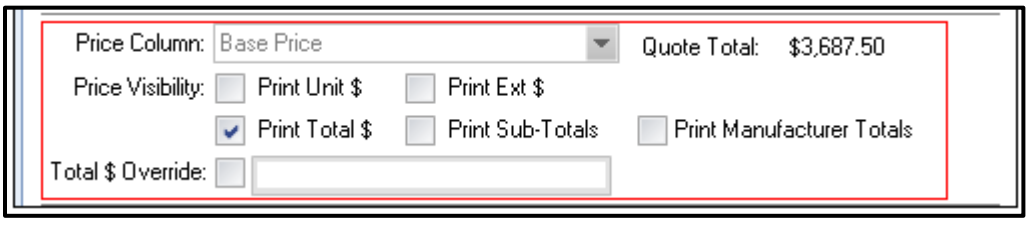


- Select Print Type
  - Customer Quote
  - Rep Copy
  - Manufacturer Breakout (Separate Page per MFG for getting PO's)
  - Manufacturer Quote Request (used to print/send to a Non ABL MFG for Pricing)
  - Customer Quote Multi-Send
- Select "Quoted To" (Who you are printing this quote for. This list of companies pulls from the Companies you have associated on the Contacts tab in Project Container. If you do not see a company in this list then you need to go back to the Project Container Contacts tab and associate them.)
- Select "Quoted For" *OPTIONAL* (This is an optional field where you can specify an additional Company on the printout. i.e. Quoted To: Graybar Elec. Quote For: ABC Contractor)
- Select "Counts" *OPTIONAL (Default Counts are the "Base Qty" however if you use the Counts functionality you can select which Contractor Counts to use when printing.)*



- Select Pricing Options: Decide how you want to expose pricing (ie-Unit vs. Lump)



- Select Product Options: Decide what information you want to print in terms of the Products

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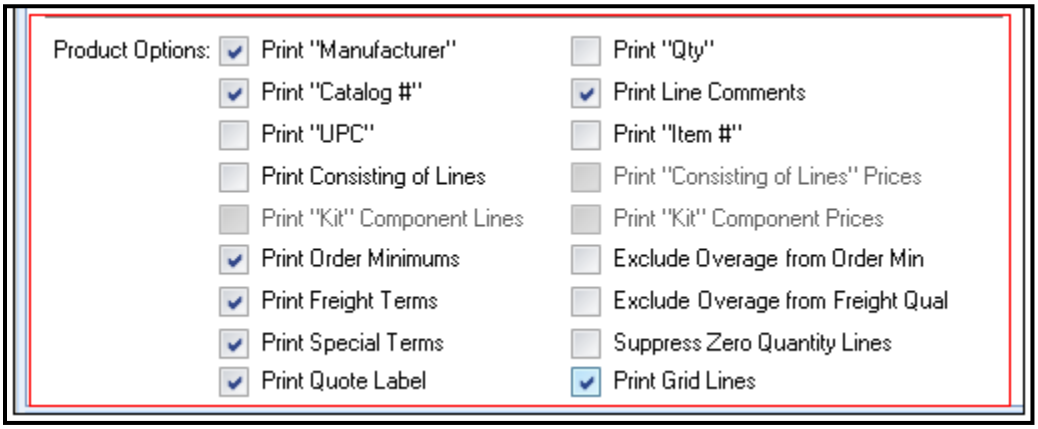
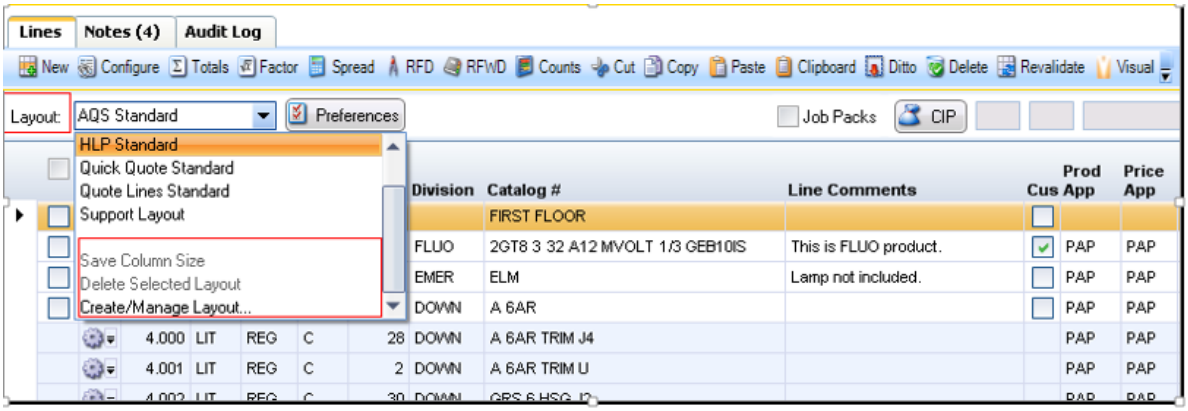


- Add/Remove Print Notes
- Click "Preview" to review your quote. If changes are necessary Close, adjust the print options and click "Preview" again. If you are happy with the preview, then click either:
  - "Print" to send the quote to your local Printer
  - "Send" which will open a blank email and attach the quote as a PDF

- Managing Quote "Layouts"
  - Click in the "Layout" drop down and select a predefined Layout such as:

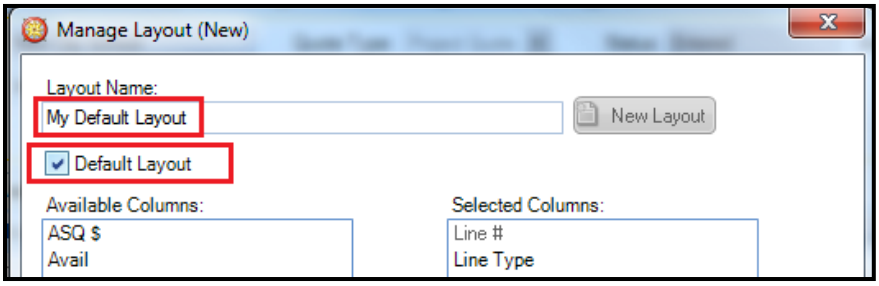


    - AQS Standard
    - Quick Quote Standard
    - Overage Standard
  - Click in the "Layout" drop down and select "Create/Manage Layout…"
  - You can make a copy by clicking "New Layout"



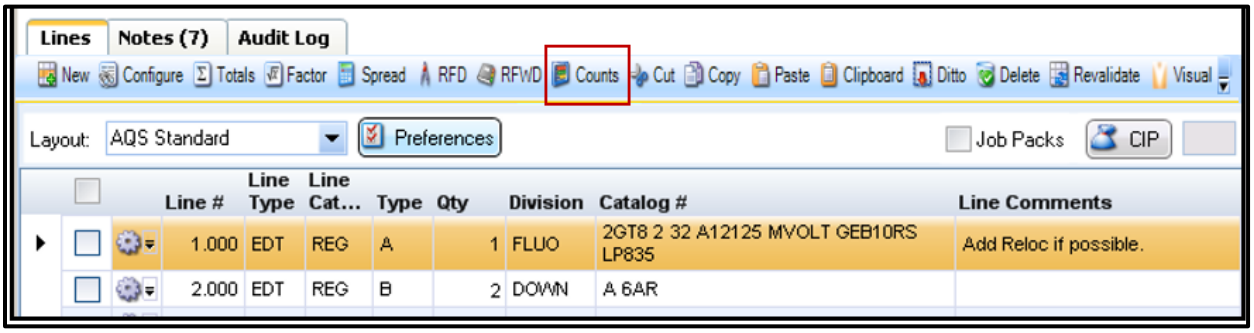
  - Enter a "Layout Name" and use the arrows to add/remove columns as well as move them up and down in order.

- If you would like to make this new layout your default select the "Default Layout" option
- Adding RFD#, RFD Status, RFD Good Thru and Warranty Deviation Request ID will show the status of these transactions without having to go to another view.



- Click "Save"

- Add a different set of Counts
  - Click on the "Counts" button



  - Adjust Quantities for different Contractors and Distributors associated to the Project. If you do not see any other companies, go back to the Contacts tab in Project Container.
  - Differences in Qty from the Base Count will be highlighted in Red.

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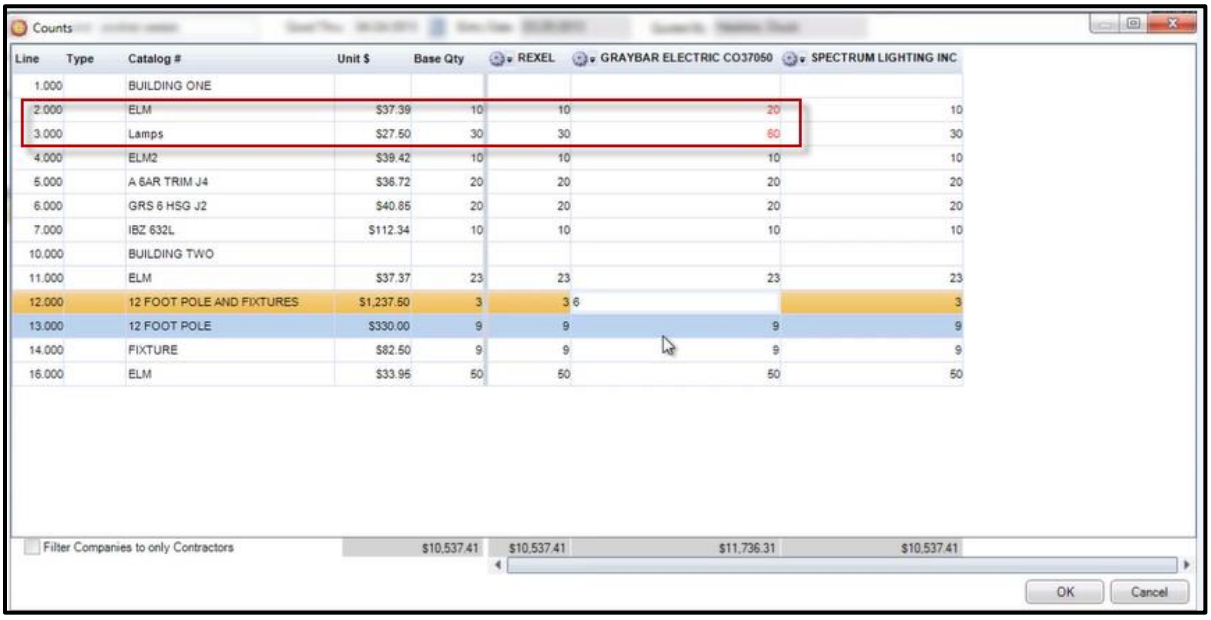
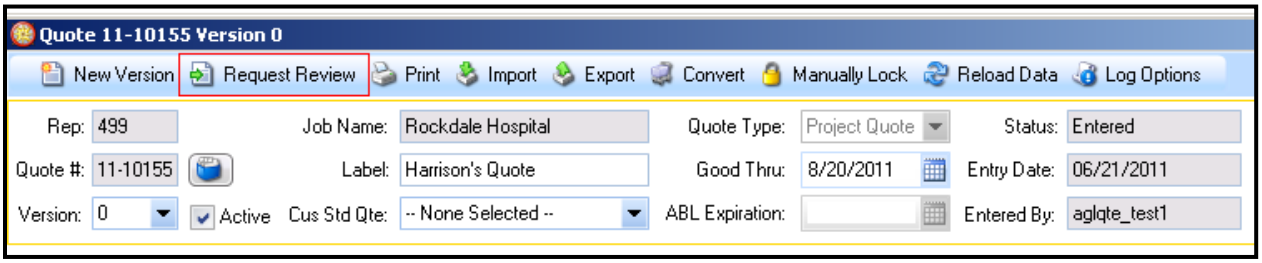
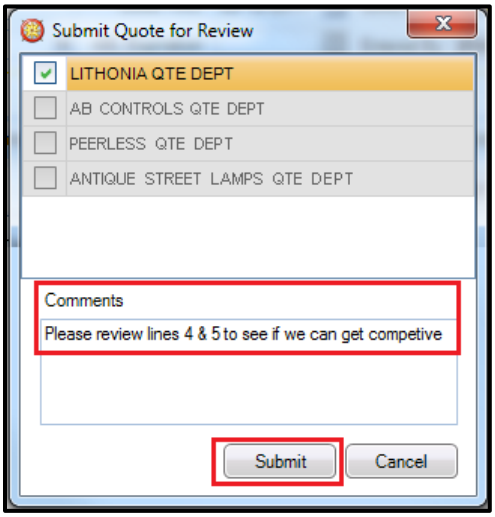


- Submitting a Quote to Acuity for Review
  - Click on the "Request Review" button



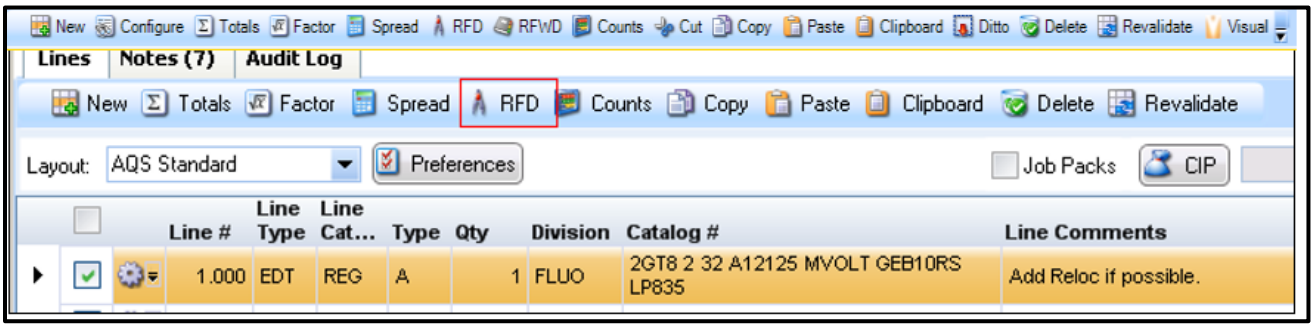
  - Enter Note for your Quotation Manager in the "Comments" section
  - Click "Submit"



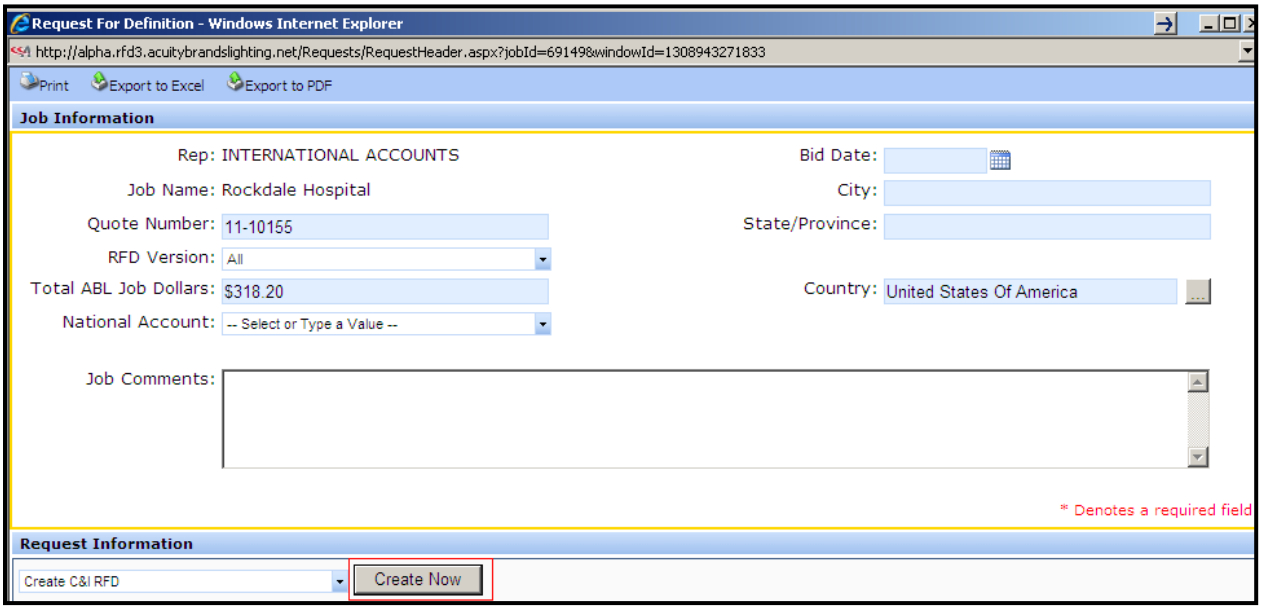
  - *agile* quotes will create new version and submit that to your Quotation Manager(s)

- You will receive an email back once they have returned the quote to your Agency

- Adding an RFD
  - Select a line and click on the "RFD" button



  - Select "Create Now" and enter the relevant information
  - Click "Submit"



  - An RFD # is associated to the quote line
  - RFD information can be added to your Layout

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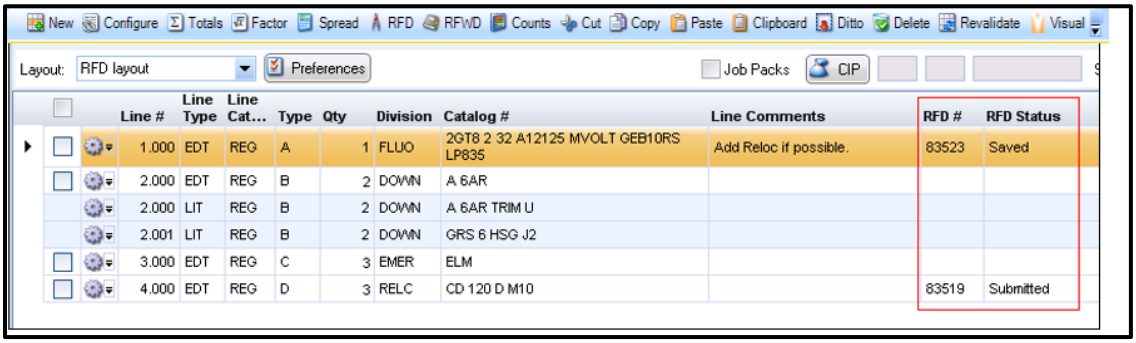
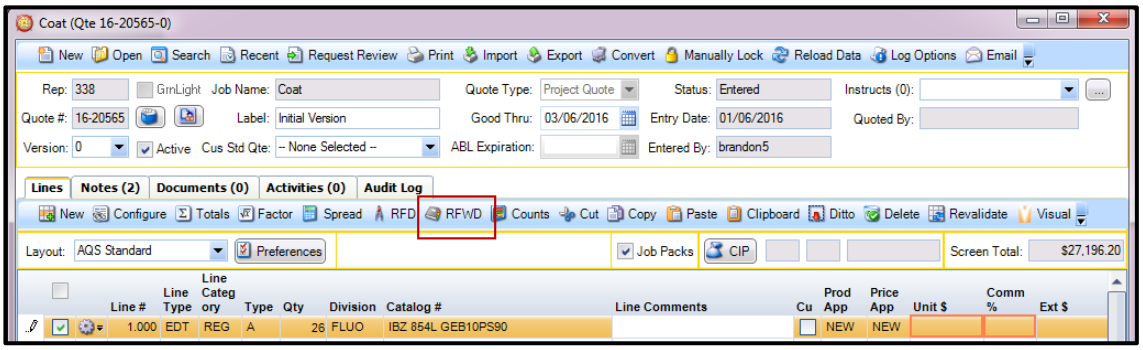
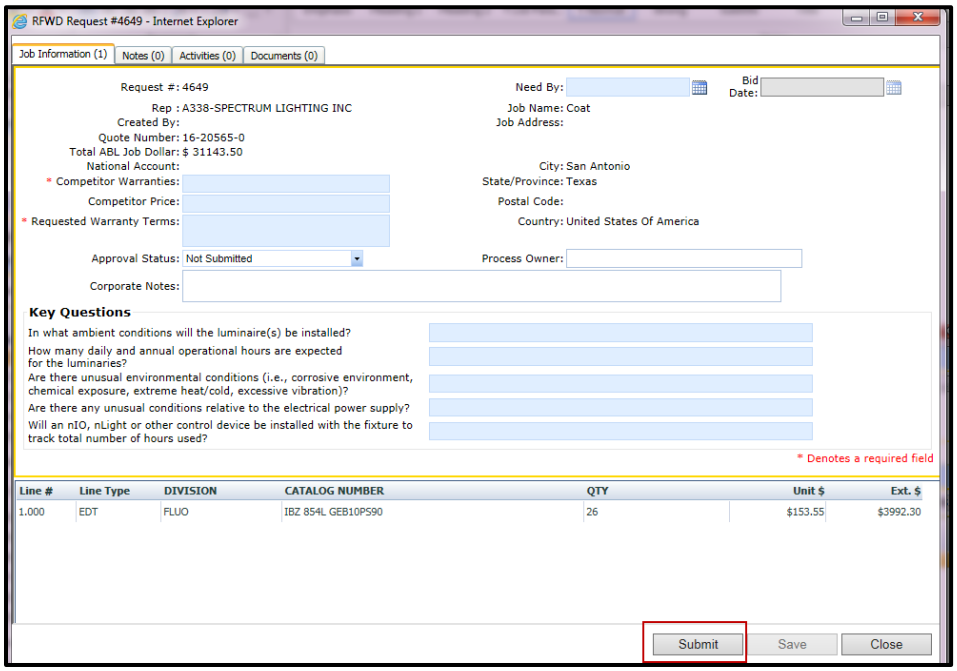


- Requesting an RFWD
  - Select a line and click on the “RFWD” button

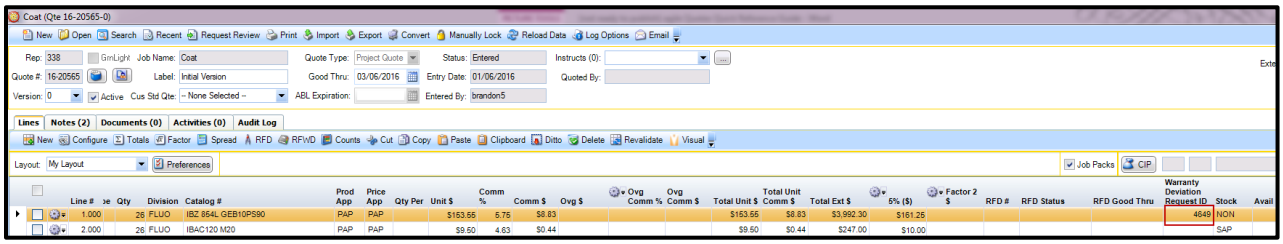


  - Complete the form with the relevant information
  - Click “Submit”



Agile Quotes – Quick Reference Guide

- An RFWD # is associated to the quote line
- RFWD information can be added to your Layout



- Hot Keys

From the agile quotes dashboard:

Alt + N creates new quote	Alt + O Launches open dialog
Alt + S Launches search dialog	

Lines tab:

Alt + N adds a new line to the lines grid	Alt + O will open
Alt + T Show quote totals	Alt + E will launch the recent window
Alt + X Cut	Alt + P Print
Alt + C Copy	Alt + S save
Alt + V Paste	Alt + Z Show Product Catalog for Non ABL
Alt + K will ditto	Alt + W shows MFG website
Alt + D will delete	Alt + R will revalidate
Alt + R will revalidate	

Notes tab:

Alt + N new note	Alt + D will delete a note
Alt + A will launch standard notes	Alt + L clear follow up from selected line

Tab to move between cells left to right
Shift tab to move between the cells going right to left
Enter to validate a line
Arrow keys up/down