Agile Quotes:

General

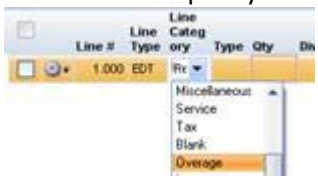
The following field changes have been made with version 1.5.13.0 of Agile Quotes to accommodate the updated Non-ABL Overage functionality

- Changed the "CIP $" and "CIP Comm $" fields to "Ovg $" *and* "Ovg Comm $" since these fields will now be used for CIP and Non-ABL Overage
- Added two new fields:
  - "Ovg Comm %": This field will allow you to specify the split % for any Overage on that particular Line
  - "Total Ext $": This field will allow you to see the combined "Ext $" and "Ext Ovg $" value. This column will allow you to always be able to add up the values to verify the amount in the Screen Total (prior to this you would have to add up the values in "Ext $" and then add in any Overage)
- Added a new quote layout "Overage Standard" has been added for quick editing and visibility of Overage $ on the quote. Please note you can add the fields in this view to your own custom layout if needed.

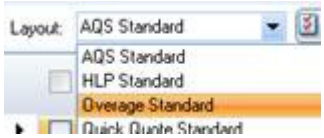
Using the Overage Line

To utilize the Overage line:

- Add a new line to the quote and change the Line Category to "OVG". At this point you can choose to specify a Mfg/Div if you want or you can leave it blank



- Switch to the "Overage Standard" layout if your current layout does not have the Overage fields



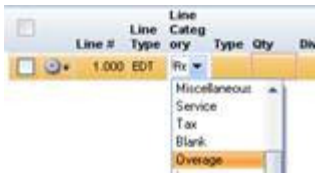
- Enter in the Overage amount into the "Ovg $" field and the Split % into the "Ovg Comm %" field.



Manually adding Overage to an existing Product Line

To add Overage to an existing Non-ABL Product Line:

- Once the line is entered switch to the "Overage Standard" layout if your current layout does not have the Overage fields



- Enter in the Overage amount into the "Ovg $" field and the Split % into the "Ovg Comm %" field



- Please note that you can see what values will be shown on the Printout using the "Total $" and "Total Ext $" columns



Viewing Overage:

There are a few options for viewing Overage in a Quote

- Totals Dialog
  - For each Non-ABL Manufacturer that has Overage associated to it a new line in totals (called "Overage") will show the entered amount.

Totals - Quote 462 11-10622 Version 0

Manufacturer	Ext $	Comm %	Comm $	Approval
Acuity Brands Lighting	$4,339.42	14.68	$637.14	PAP
Downlighting	$2,101.75	7.18	$150.85	PAP
Emergency	$302.52	11.25	$34.04	PAP
Fluorescent	$1,935.15	23.37	$452.25	PAP
Leviton	$1,000.00	24.00	$240.00	PAP
Leviton	$800.00	10.00	$80.00	PAP
Overage	$200.00	80.00	$160.00	PAP
TOTAL	$5,339.42	16.43	$877.14	

  - If an Overage Line has been added without a specified Manufacturer/Division

Totals - Quote 462 11-10622 Version 0

Manufacturer	Ext $	Comm %	Comm $	Approval
Acuity Brands Lighting	$4,339.42	14.68	$637.14	PAP
Downlighting	$2,101.75	7.18	$150.85	PAP
Emergency	$302.52	11.25	$34.04	PAP
Fluorescent	$1,935.15	23.37	$452.25	PAP
Leviton	$800.00	10.00	$80.00	PAP
Leviton	$800.00	10.00	$80.00	PAP
Not Specified	$200.00	80.00	$160.00	
Not Specified	$0.00			
Overage	$200.00	80.00	$160.00	PAP
TOTAL	$5,339.42	16.43	$877.14	

- Rep Copy: The Rep Copy Printout will include any Overage in the Additional Commission section. Just like Totals it will put any Overage that has not been applied directly to a Mfg/Div in the "Not Specified" category

Additional Commissions			
	Additional $	Comm %	Comm $
Acuity Brands Lighting	$799.99	90.00%	$719.99
Leviton	$400.00	90.0%	$360.00
Not Specified	$200.00	90.0%	$180.00

Agile Order Management:

Quote Conversion

Quotes containing overage will now convert into the Agile Order Management hold order. The process of converting the quote is the same as converting a quote that does not contain overage. During the quote conversion process you may be prevented from converting a quote containing an OVG line in the following circumstances:

- Manufacturer is missing on line
- Division is missing on line
- Overage Unit $ is blank
- Overage Commission % is blank
- Overage Division does not match any regular line divisions

If you are prevented from converting the quote you will need to return to the quote to correct the line.

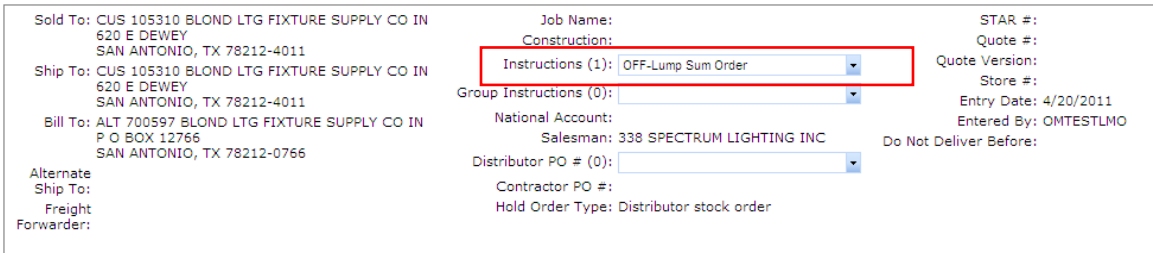
Once the quote is converted you will receive notification that the hold order was created and the hold order will be available for editing.

Hold Order

The process for hold order creation has not changed but the below will highlight the updates that have been made to support the entry and maintenance of non-ABL overage. For detailed information on hold order creation please refer to the Agency User Guide located under Order Management on the Help tab.

Header Tab-

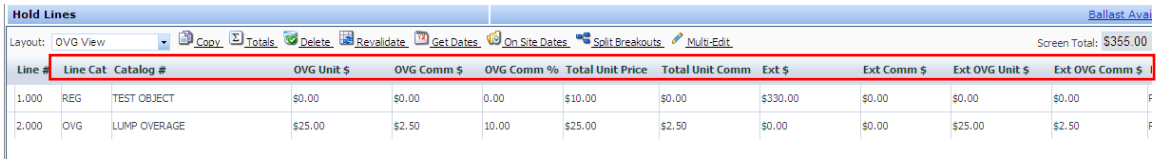
- Converted quotes that contain an OVG line will automatically apply the Lump Sum Order instruction on the hold header
- The Lump Sum instruction will also be applied after saving the addition of any new OVG lines to the hold order.



Lines Tab-

The Lines Tab supports the ability to modify and add new lines containing overage.
On the Lines Tab the following fields will be visible if any non-ABL lines exist:

- Line Category-
  - REG=Regular line; REG lines can be used when spreading overage by line. This line category allows for product and overage fields to be populated.
  - OVG=Overage line; OVG lines can be used when applying a lump amount of overage. This line category allows for only the overage fields to be populated.
- OVG Unit $=Amount of overage $ for line
- OVG Comm %=Commission percent for overage $ on line
- OVG Comm $=Calculated as OVG Unit $ * (OVG Comm %/100)
- Total Unit Price=Calculated as Unit $ + OVG Unit $
- Total Unit Comm=Calculated as Comm $ + OVG Comm $
- Ext OVG Unit $ =Calculated as Qty * OVG Unit $
- Ext OVG Comm $=Calculated as Qty * OVG Comm $



Adding new lines with overage:

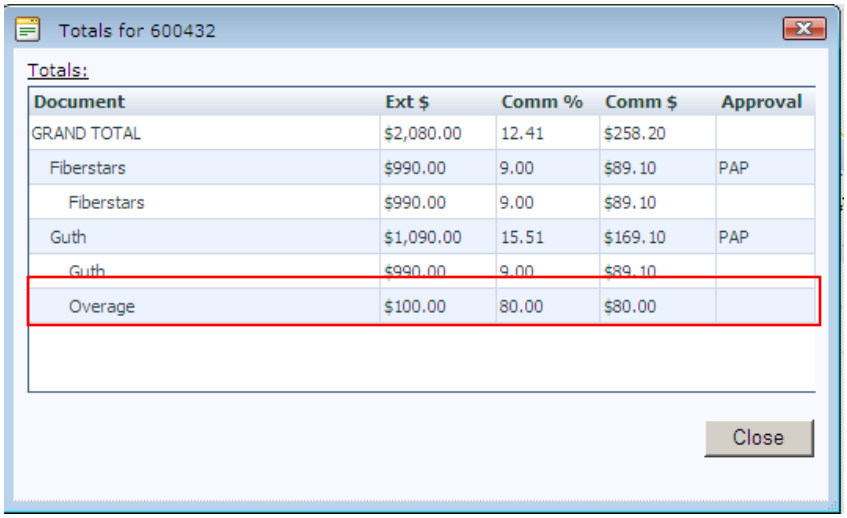
- Enter basic line information in the Add New Line section
- Add line to Hold Lines grid by clicking on the ✔
  - All lines will default to the line category of REG. You will need to edit the line to add the overage amounts to the line or to change the line from REG to OVG
- Click ✎ to put line in edit mode
- Modify the following fields as needed:
  - Line Category(REG,OVG)
    - REG- allows for product and overage fields to be populated
    - OVG-reserved for Lump Overage and only allows the OVG $ and OVG Comm % fields to be populated. Qty and Catalog # will be automatically populated and cannot be edited
  - OVG Unit $
  - OVG Comm %
- Once complete click on ✔ to accept changes

Editing overage:

- Click to put line in edit mode
- For non-ABL lines you will have the ability to modify the following overage fields:
  - Line Category(REG,OVG)
    - REG- allows for product and overage fields to be populated
    - OVG-reserved for Lump Overage and only allows the OVG $ and OVG Comm % fields to be populated. Qty and Catalog # will be automatically populated and cannot be edited.
  - OVG Unit $
  - OVG Comm %
- Once complete click on to accept changes

Totals-

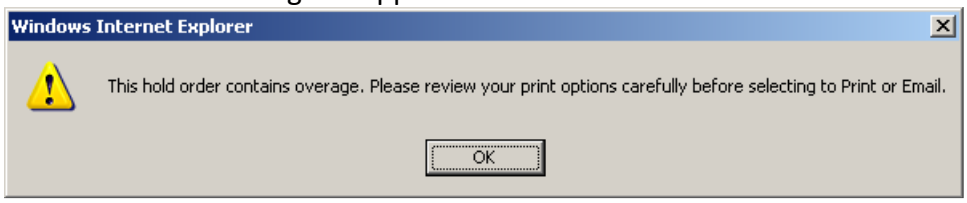
The totals screen will display the overage amounts per non-ABL manufacturer.



Document	Ext $	Comm %	Comm $	Approval
GRAND TOTAL	$2,080.00	12.41	$258.20	
Fiberstars	$990.00	9.00	$89.10	PAP
Fiberstars	$990.00	9.00	$89.10	
Guth	$1,090.00	15.51	$169.10	PAP
Guth	$990.00	9.00	$89.10	
Overage	$100.00	80.00	$80.00	

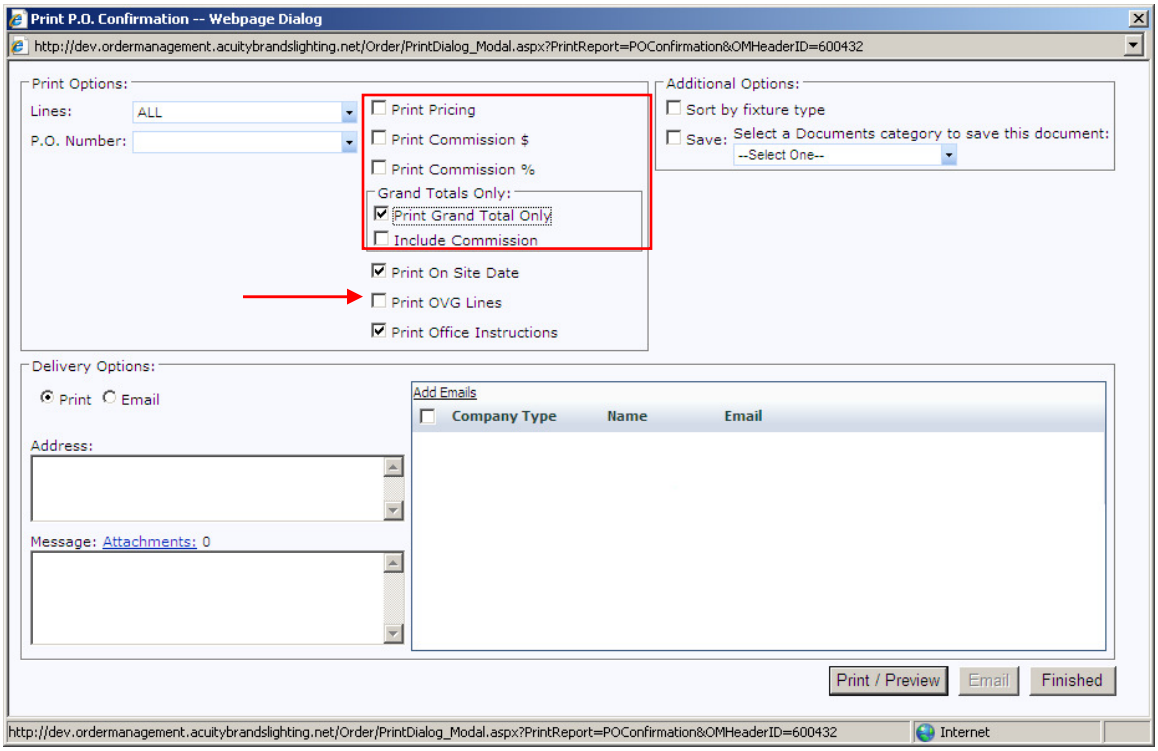
Printing-

When selecting to print the P.O. Confirmation if the hold order contains any lump OVG line the below warning will appear.



- Click OK to proceed to print options
- For hold orders containing lump OVG lines you have the ability to remove any line pricing from the print out as well as selecting to only display the Grand Total.

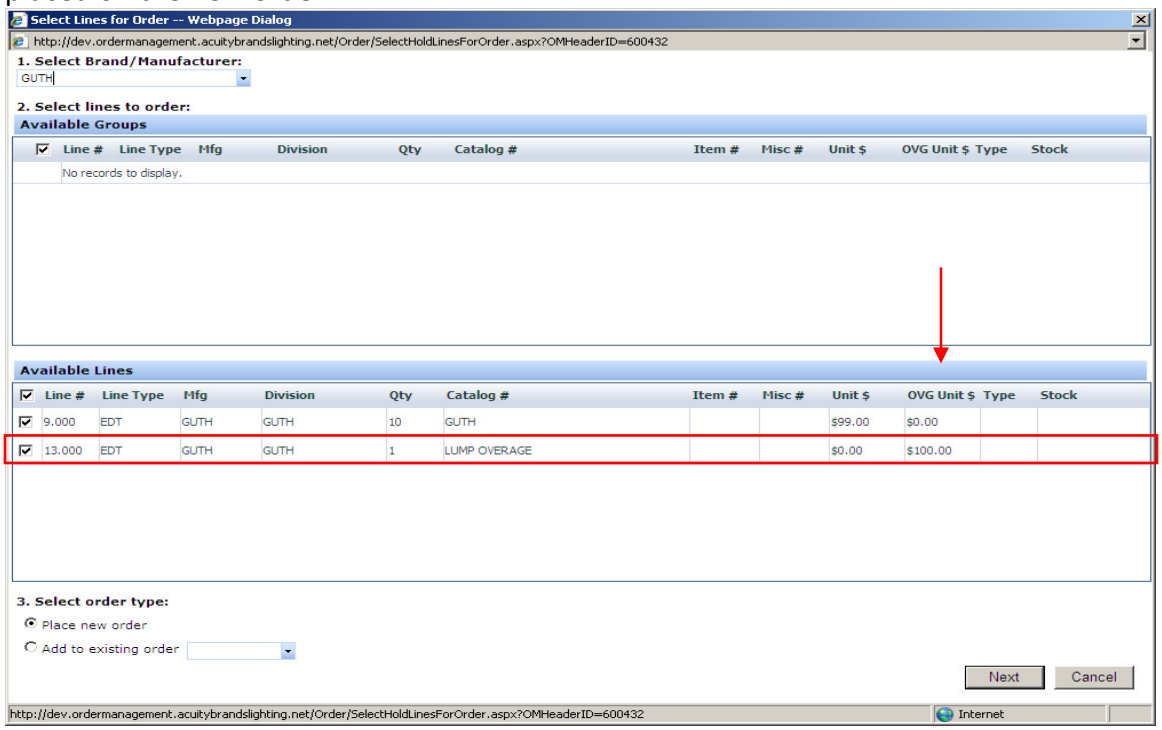
- Another print option that can be selected is Print OVG Lines. When this is selected the lump sum OVG line will be visible on the print out.



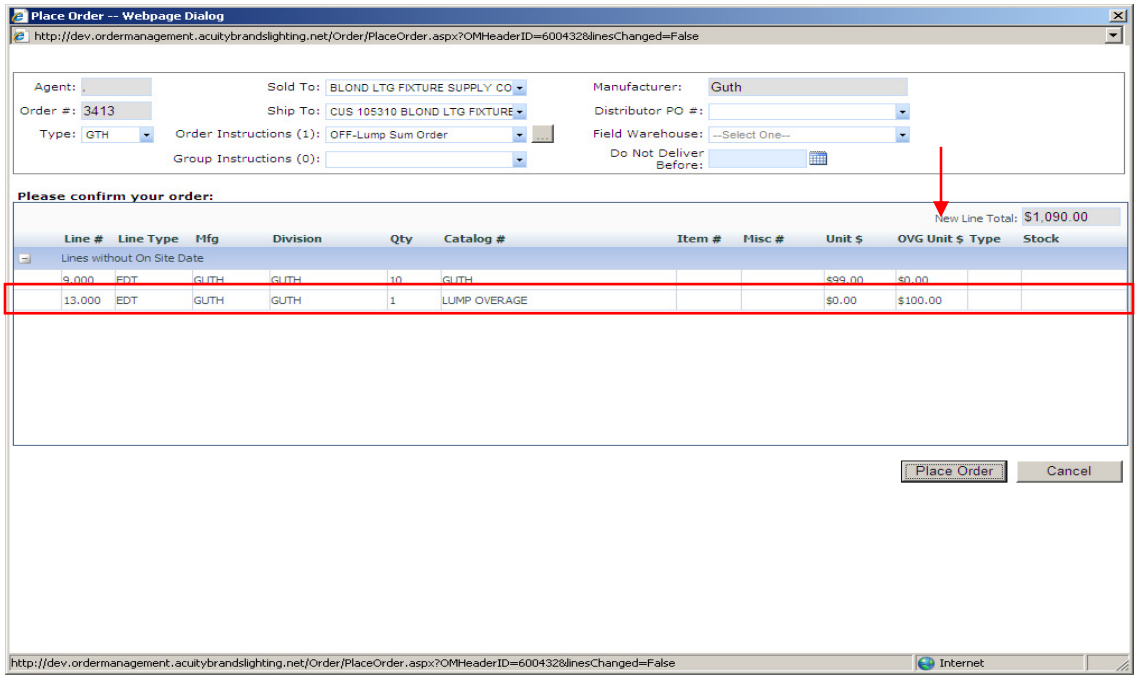
- For hold orders containing unit spread overage the print out will combine the Unit $ and OVG unit $ and display in the Unit Price column so these print options may not apply

Create Order-

The order creation process has been modified to allow for lump OVG lines to be moved from the hold order to the non-ABL order. The below screens have also been modified to provide visibility of the overage amounts that are contained on the lines that will be placed on the new order.



Once you have selected the lines for the new order click Next and confirm order details. Once confirmed click Place Order.

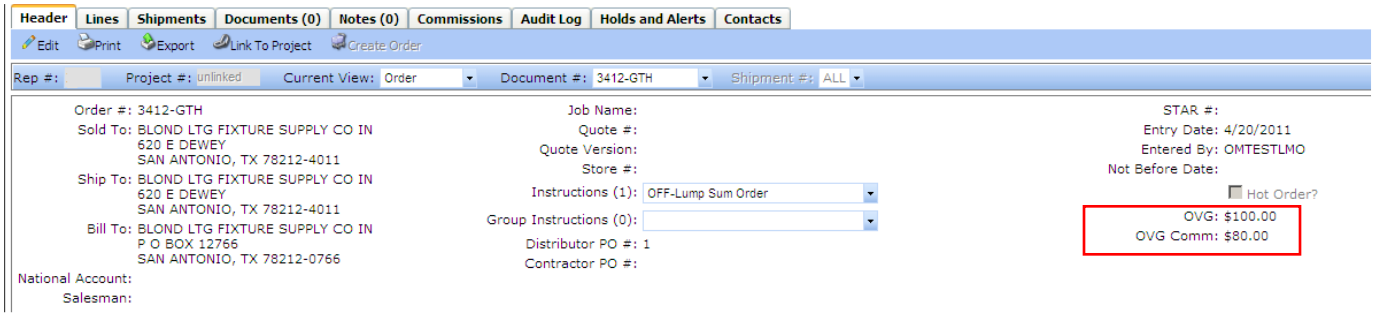


Order

The non-ABL order has also been modified to allow for the maintenance of overage as well as the entry of new lines that contain overage.

Header tab-

The Header tab allows for visibility of the overage $ and overage commission amounts contained on the order.



Lines tab-

The Lines tab supports the ability to modify and add new lines containing overage.
On the Lines Tab the following fields will be visible:

- Line Category-
  - REG=Regular line; REG lines can be used when spreading overage by line. This line category allows for product and overage fields to be populated.
  - OVG=Overage line; OVG lines can be used when applying a lump amount of overage. This line category allows for only the overage fields to be populated.
- OVG Unit $=Amount of overage $ for line
- OVG Comm %=Commission percent for overage $ on line
- OVG Comm $=Calculated as OVG Unit $ * (OVG Comm %/100)
- Total Unit Price=Calculated as Unit $ + OVG Unit $
- Total Unit Comm=Calculated as Comm $ + OVG Comm $
- Ext OVG Unit $ =Calculated as Qty * OVG Unit $
- Ext OVG Comm $=Calculated as Qty * OVG Comm $

Adding new lines with overage:

- Enter basic line information in the Add New Line section
- Add line to Order Lines grid by clicking on the
  - All lines will default to the line category of REG. You will need to edit the line to add the overage amounts to the line or to change the line from REG to OVG

- Click to put line in edit mode
- Modify the following fields as needed:
  - Line Category(REG,OVG)
    - REG- allows for product and overage fields to be populated
    - OVG-reserved for Lump Overage and only allows the OVG $ and OVG Comm % fields to be populated. Qty and Catalog # will be automatically populated and cannot be edited
  - OVG Unit $
  - OVG Comm %

Editing overage:

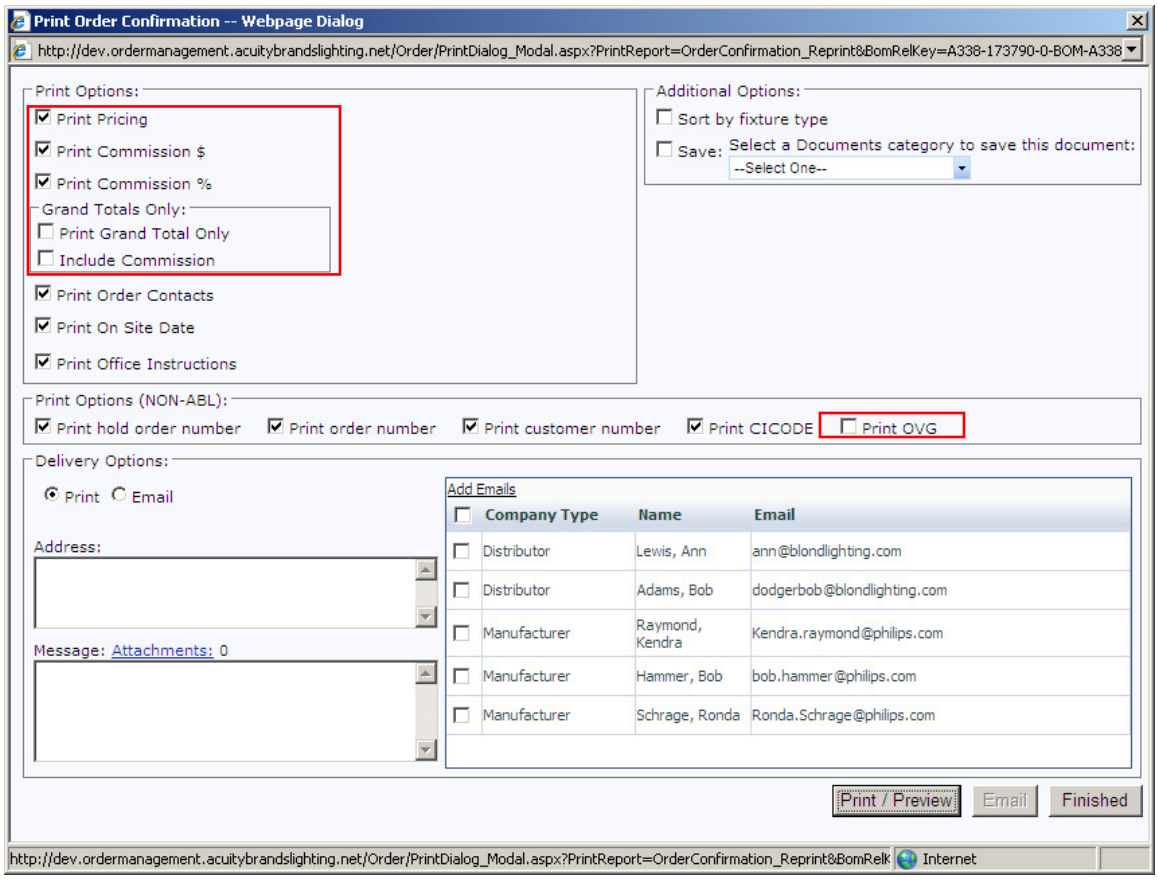
- Click to put line in edit mode
  - Line Category(REG,OVG)
    - REG- allows for product and overage fields to be populated
    - OVG-reserved for Lump Overage and only allows the OVG $ and OVG Comm % fields to be populated. Qty and Catalog # will be automatically populated and cannot be edited.
  - OVG Unit $
  - OVG Comm %
- Once complete click on to accept changes

Printing-

Order Confirmation-
When selecting to print the Order Confirmation if the order contains any overage the below warning will appear.



- Click OK to proceed to print options
- For orders containing lump OVG lines you have the ability to remove any line pricing from the print out as well as selecting to only display the Grand Total.
- Another print option that can be selected is Print OVG. When this is selected the lump sum OVG line and the header overage values will be visible on the print out.



- For non-ABL orders containing unit spread overage the print out will combine the Unit $ and OVG unit $ and display in the Unit Price column so these print options may not apply

Order Status-

The order status document will automatically filter any lump OVG lines from being visible on the print out.