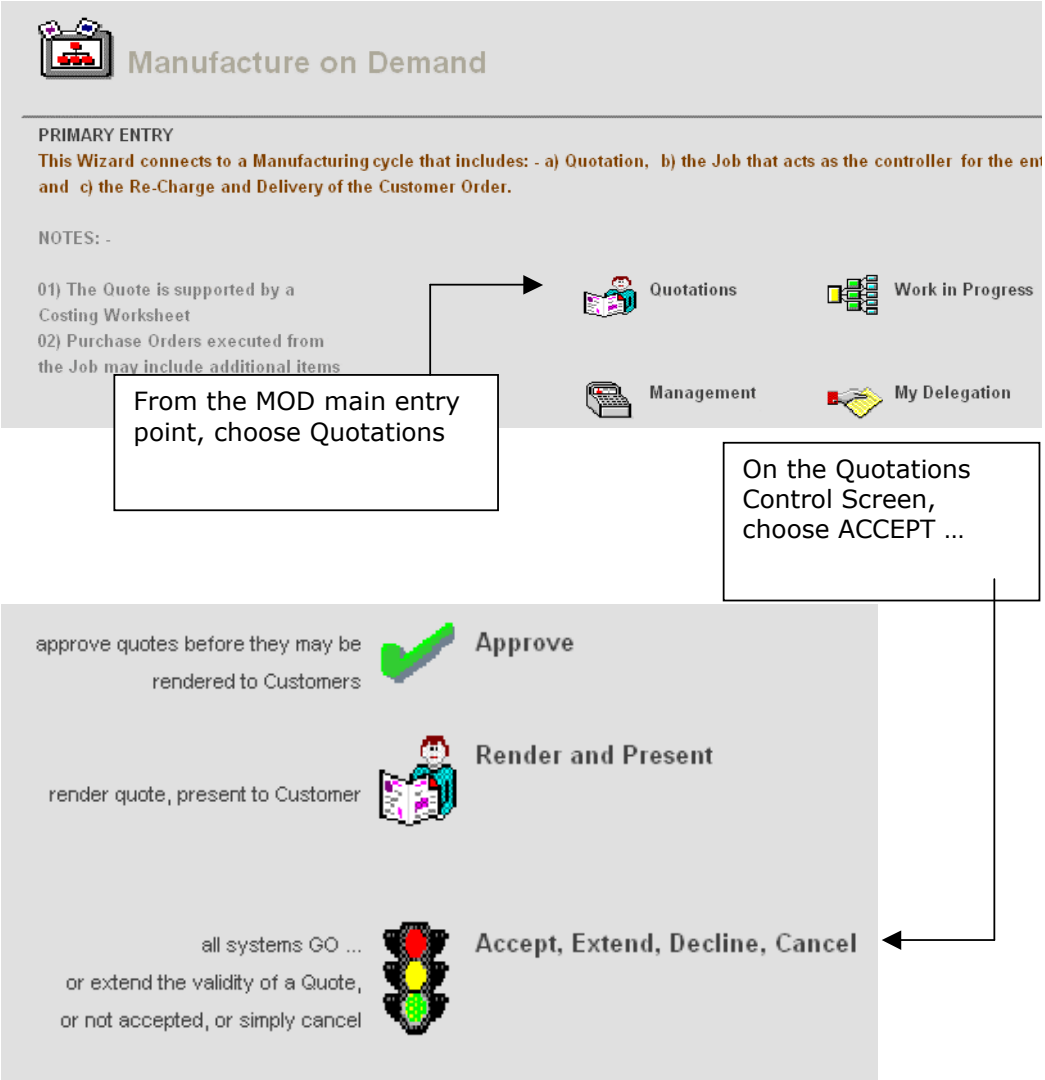
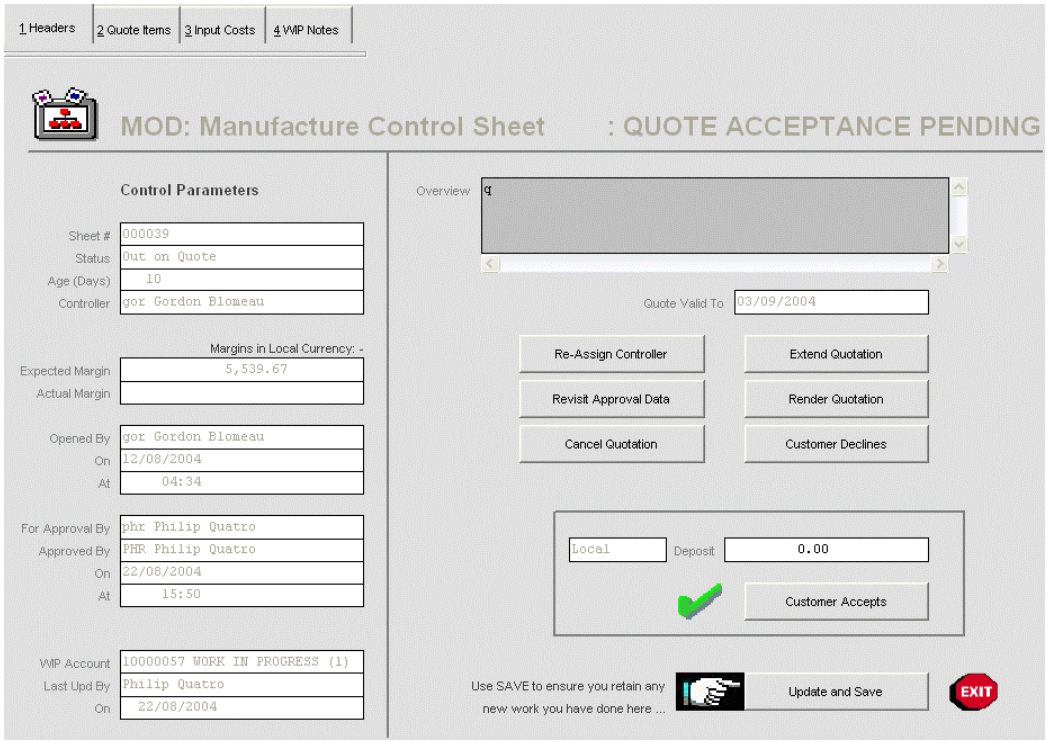
MOD: QUOTATION ACCEPT, EXTEND, DECLINE, CANCEL

Entering the Sheet to perform Accept, Extend, Decline or Cancel

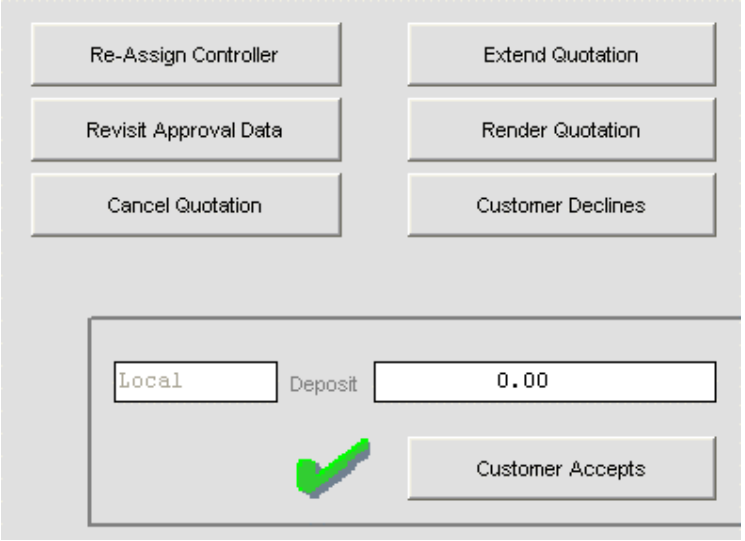
Once the Quotation has been rendered, it is in a state of 'Out on Quote, await Acceptance'. During this phase, 4 Actions may be performed: Accept, Extend, Decline, Cancel. The Sheet is entered by 1st opening the Quotations Control screen, and then choosing Accept, Extend, Decline, Cancel.





From the tabs shown in the picture above, it is clear that we now have access to the Quote Items and Input Costs again. However, permission for change is restricted to the Authorizer. In the event that the Customer requests changes to the Quote, more items, removal of some items, or other, then this can be done, and the Quotation rendered again.

We note the following functions on the Header page of the screen –



From the above, we note the following: -

Re-Assign Controller – If another person will be taking the sheet from here, after Customer acceptance, then we re-assign the Controller before choosing the 'Customer Accepts' step.

Revisit Approval Data – For necessary changes, if any.

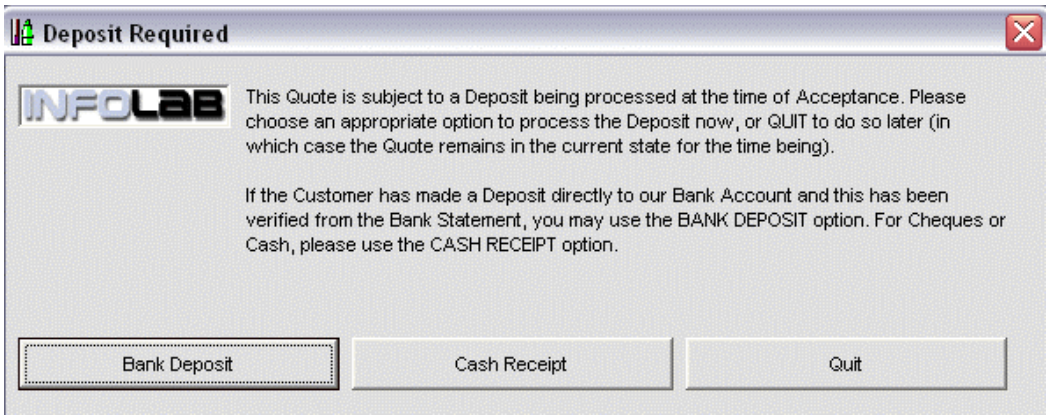
Cancel Quotation – This option is not used if the Customer declines (there is a function for that), but if for some reason it is all a mistake, or an entirely new Quotation is going to be done for the Customer.

Extend Quotation – This allows for the Validity date of the Quotation to be extended, and the Quotation can then be rendered again with the new Date.

Render Quotation – Allows the Quote to be printed again.

Customer Declines – If the Customer does not accept the Quotation, it is important to use this step rather than Cancel, because a DECLINE should show up on the CRM History for this Customer. If someone has a history of declining Quotations, this should be 'available' information when you start work on a new Quotation for such a Customer.

Customer Accepts – This is the desired step, i.e. Acceptance of the Quotation, which will lead into the processing of the Deposit (if any applies), and release of the MOD Sheet to WIP (work in progress).



If the Quotation Acceptance is subject to a Deposit, the system will prompt as above. If the Customer has made the Deposit directly to the Bank Account, then this fact should be duly verified and the 'Bank Deposit' option chosen. If the Customer is paying by Cheque / Cash now, then choose the 'Cash Receipt' option.

Both of these options are standard Journal Screens. What is worth noting is that the Customer Account is not credited with this Amount at this stage. Instead, the MOD Job Sheet is credited with the Amount, in order to control Budgets and reflect the correct status quo during the WIP phase for the Manufacture task. At the end of it all, before the Sheet is closed, the Customer Account is credited with any and all Deposits received, and Charged with any Amount still owing. The amount still owing must be within the credit limits specified for the Customer Account before Delivery of MOD Items will be accepted or allowed to be processed.

Once the acceptance procedure has been completed, the MOD Sheet becomes available at the WIP entry point, to the Authorizer, to the Controller, and to any Users so delegated to.

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