
SMW006 Work with Quotation Contracts

Overview

Quotation contracts assists with the automation of ISA Quote processing within Bookmaster where the quote is entered into Bookmaster and can subsequently be maintained and converted into an order.

When creating the Quotation Contract, multiple accounts can be selected, listing all the current subscriptions. The Sub Lists default the price from the Item Price File allowing changes to price discount and quantity. The quotation contract includes a description of the account, the intended start date and list of subs orders. The quotation can be output to a file or a quotation invoice.

To simplify debtor reconciliations a list showing all outstanding charges and calculated pro-rata credits due on paid invoices display.

When the quotation is accepted, the contract is converted to an order in the order entry screen for review. At this stage an account number must be nominated. The order creation requires a link for each subs list into an ISBN. The order will then be processed through the system (via pending) into an invoice.

Purpose

This program displays records in the quotation contract header file and allows options to add a quotation contract, maintain the header/detail, cancel contract, export to Excel spreadsheet, and do an order entry for a quotation contract. Existing contracts can also be copied.

Examples

This section illustrates examples concerning:

[Example 1: Add a quotation contract](#)

[Example 2: Change quotation contract header](#)

[Example 3: Display quotation contract details](#)

[Example 4: Cancel quotation contract](#)

[Example 5: Export file](#)

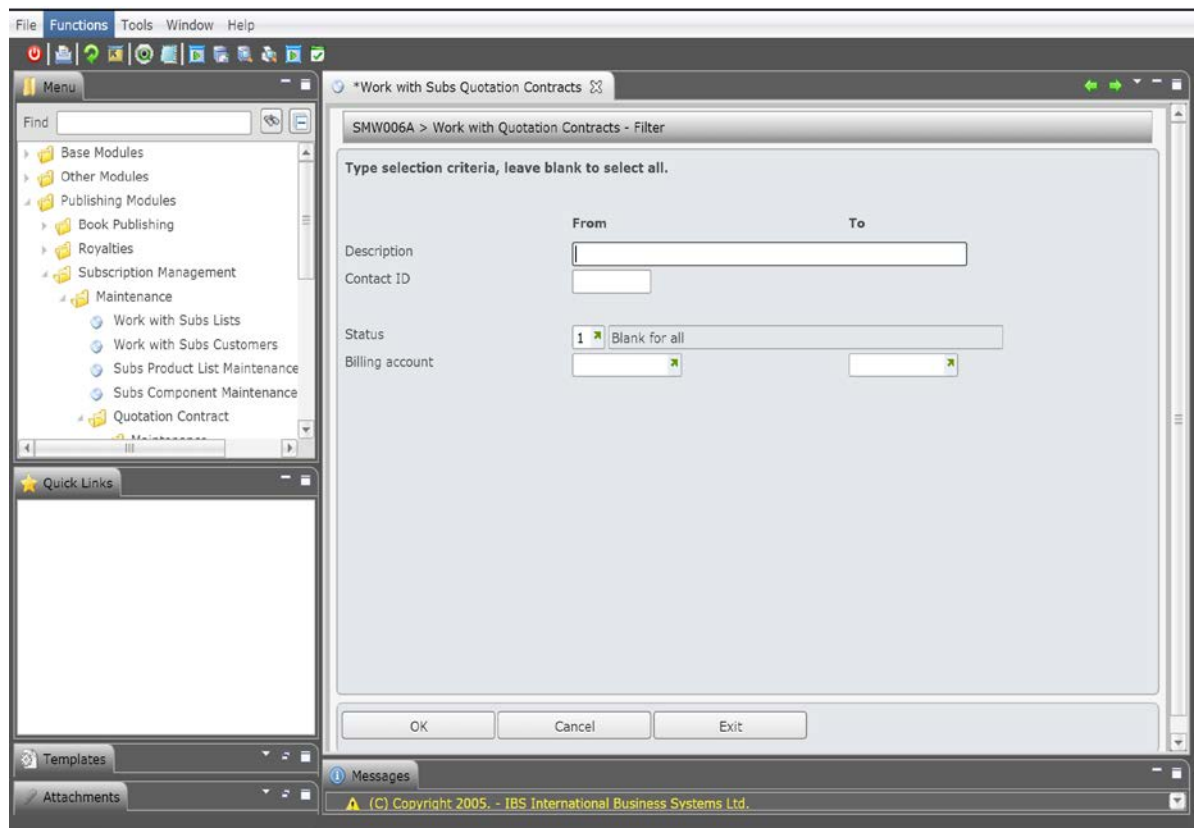
[Example 6: Order entry for quotation contract](#)

Example 1: Add a quotation contracts

This example describes how to add a quotation contract.

1. Select menu item **Work with Subs Quotation Contracts** from Publishing Modules>Subscription Management>Quotation Contract>Maintenance menu.

SMW006A Work with Quotation Contracts selection panel is displayed.



Relevant fields

Quotation
contract ID

Contract numbers are automatically generated by the system.

Description

This is a Description of the Quotation Contract.

Quotation status

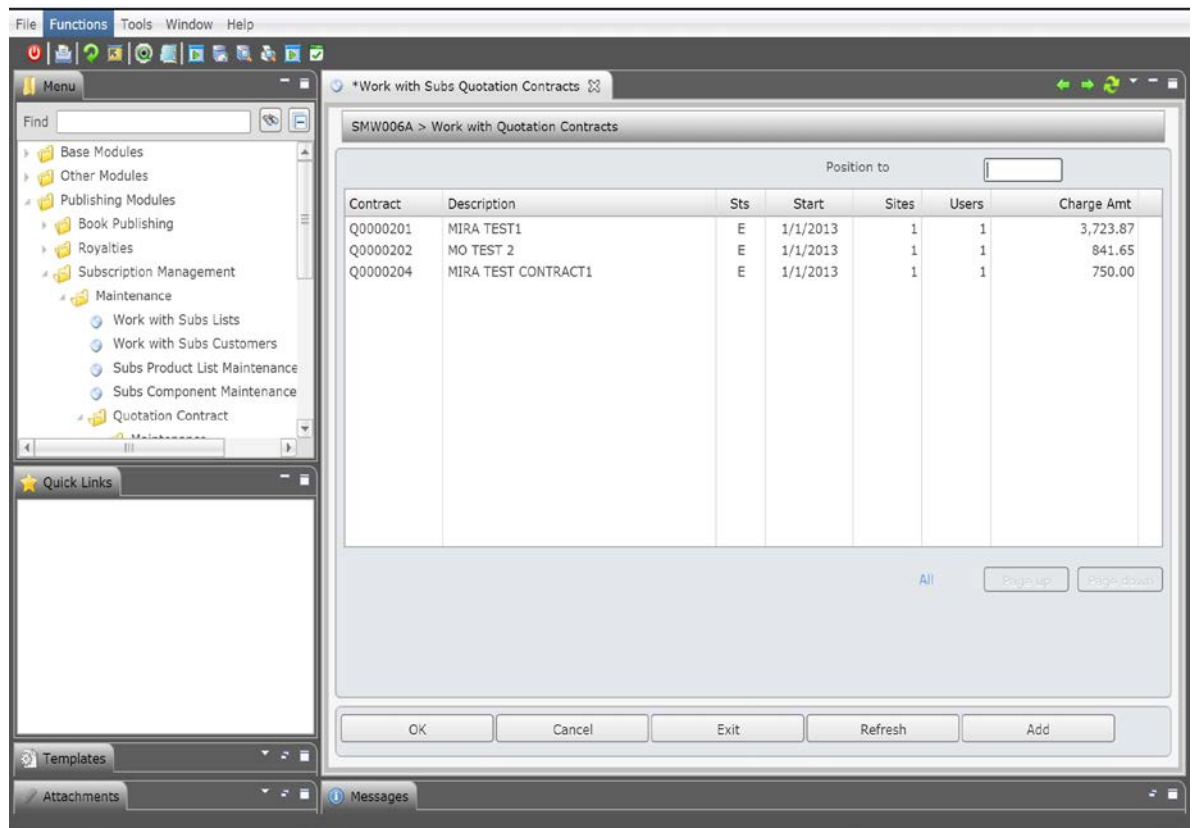
The status defaults to O for Open.

Billing Account

Billing account for the Quotation Contract.

2. Click **OK** without entering any field.

SMW006A Work with Quotation Contracts panel is displayed.



Function

Add

Access Quotation Contract Entry/Maintenance panel to add new quotation contract

Options

Debtors Trans

Access Quotation Contract Debtors Transaction Inquiry panel

Contract Header

Access Quotation Contract Entry/Maintenance panel to change quotation contract

Copy

Copy option allows copy of an existing contract.

Contract Detail

Access Quotation Contract Entry/Maintenance panel to display quotation contract

Cancel

Access Quotation Contract Entry/Maintenance panel to cancel quotation contract

File Export

Access Quotation Contract Extraction panel to export file where you need to enter an output path/name.

Order Creation

Access Order Entry via Picking Slips depending on the status of the quotation contract. Open status contract will not call order entry. **TMSSM/QC-ORDE** defines the default parameters (method of picking and format) for calling the order entry program.

Doc Inquiry

Allows document inquiry by contract.

3. Click **Add** to add new quotation contracts.

SMW007A Quotation Contract Entry/Maintenance panel is displayed in add mode

Please refer to **SMW007A Quotation Contract Entry/Maintenance** for further details.

Example 2: Change quotation contract header

This example describes how to change quotation contract header.

1. Repeat steps 1 and 2 as in [Example 1: Add a quotation contracts](#)
2. Select contract and click **Contract Header**.

SMW007A Quotation Contract Entry/Maintenance panel is displayed in change mode

Please refer to **SMW007 Quotation Contract Entry/Maintenance** for further details.

Example 3: Display quotation contract details

This example describes how to display quotation contract details.

1. Repeat steps 1 and 2 as in [Example 1: Add a quotation contracts](#)
2. Select contract and click **Contract Detail**.

SMW007 Quotation Contract Entry/Maintenance panel is displayed in change mode

Please refer to **SMW007C Quotation Contract Entry/Maintenance** for further details.

Example 4: Cancel quotation contract

This example describes how to cancel quotation contract details.

1. Repeat steps 1 and 2 as in [Example 1: Add a quotation contracts](#)
2. Select contract and click **Cancel**.

SMW007A Quotation Contract Entry/Maintenance panel is displayed in cancel mode

Please refer **SMW007 Quotation Contract Entry/Maintenance** for further details.

Example 5: Export file

This example describes how to delete discount by site.

1. Repeat steps 1 and 2 as in [Example 1: Add a quotation contracts](#)
2. Select contract and click **File Export**.

SMW011 Quotation Contract Extraction panel is displayed.

3. Enter the output path/name for the download and click **OK**.

Example 6: Order entry for quotation contract

This example describes how to enter order for quotation contract.

1. Repeat steps 1 and 2 as in [Example 1: Add a quotation contracts](#)
2. Select contract and click **Order entry**.

DSE005A Order Entry – Picking Slip panel is displayed.

Please refer to **DSE005A Order Entry – Picking Slip** for further details.