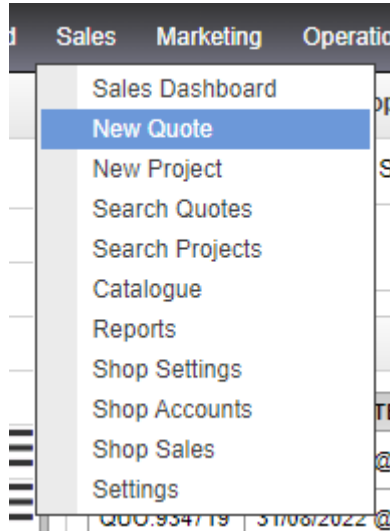


# Quotation Management

- [Quote Creation](#)

# Quote Creation

1. Log into MaticTrack
2. Go to Sales > New Quote



3. Enter the customer name in the field

New Quote

Search Customers:

Browse Customers

There are no matching companies in the system for "Customer Name" would you like to add this company? [Add New Customer](#)

4. If it is a new customer click "Add New Customer" then follow the [Customer Creation Process](#)

[Add New Customer](#)

5. If the customer already exists select the customer

New Quote

Search Customers:

Browse Customers

Below are the current customers in the database

ACCNO	NAME	OUTSTANDING BALANCE	CREDIT LIMIT	WIP TOTAL	CREATED DATE/TIME	OPTIONS
LINDENSI	Linden Signs	0.00	7000.00	194.89	2016-10-11 15:03:56	<a href="#">Select Company</a>

Add "Linden" as a new company? [Add New Customer](#)

6. Add a description in the Title Bar and its best to mention if the order is URGENT

Title*:	Banners	REQUIRED FRIDAY 3PM COLLECT
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7. Add the postcode - The delivery cost will not calculate properly is this has not been added.

Delivery Postcode:	G69 6QE
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8. Use the Quick Quote tab to build the quote

View History	Add
Quick Quote	

9. Build the quote as per the specification required and add the items as you go -

Quick Quoter

Quote instantly with our quick quote generator, just fill in the fields below.

Select Pricing Rate:

Trade Rate - Graphic Warehouse (70% Base)

Product Type:

Rigid Board Printing

Rigid Type

Direct to Board

Material

Fluted Plastic Corrugated Board

Material Thickness

4mm

Sub Category

Single Sided

Laminate

No Laminate

Shape

Rectangular / Square

Drill Holes

No Drill Holes

10. Once all of the items are added - add the delivery cost which is automatically calculated based on weight and size of the items

Add Delivery Quote					
SERVICE	COST	TURNAROUND	TYPE	SELL PRICE	OPTIONS
DX Couriers Next Day	£15.29	1	Next Day	£26.4	Select
DX Couriers Before Noon	£22.65	1	Next Day Pre Noon	£39.6	Select
DX Couriers Pre 09:30	£43.04	1	Next Day Pre 10	£16.17	Select
DX Couriers Saturday AM	£53.79	1	Saturday	£20.09	Select

11. If the value of the quote is **OVER £500** send the quote link to Adrian for approval.

12. Once the quote has been double checked, SAVE the quote - click **SEND**. There is an automatic cover letter created for the quote which you can adapt to suit, personalise etc.

date |  |

Options: ☒ Email Receipt ☒ Send Myself A Copy

Subject: Quote #966148 - Correx Ticket# 53274433

**B I U** [List Icons] Font Size... Font Family. Font Format [List Icons]

Hi Neal,

I've created your quote for "Correx Ticket# 53274433" here: You can personalise this section and send to your customer

[Click here to view your quote.](#)

You'll be able to process your order, upload artwork and download templates from this link too!

Just pop me back an email if you need anything.

*Best regards,*

13. Add any notes or any relevant information in the NOTE section. This is to make sure the Sales Team have all the detail which will help with the Quote Conversion.

|  |

Status Update  
Add Note  
Survey Request

**Add New Note**

Fill in the form below to edit the .

**1. Details**

Note\*:

14. All of the follow up notes will appear on the quote

#### Quote Notes

Below are the quotes relevant notes

NOTE	BY
Scenario: Manual Quote Cycle - Logic Success - Is the quote value greater than £500?	
Scenario: Manual Quote Cycle - ML Add to Check if Customer Received Quote List	
[Contact,32344] viewed quote on Graphic Warehouse - Wide Format Trade Print	
Status changed from **Temp Quote** to **{Active Quote}**	Frances McCorry
Quote created	Frances McCorry