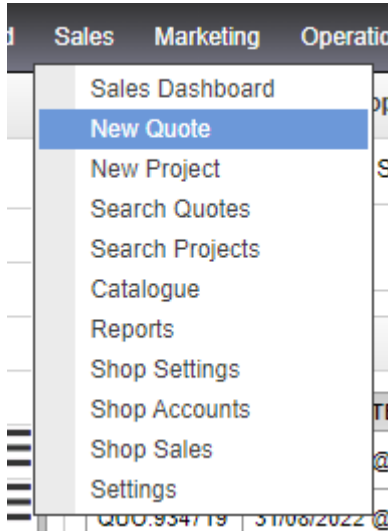


Quotation Management

- [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	Select Company

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] [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