CUSTOMER QUOTATION COPY TO TEMPLATE

This document describes how to apply/copy customer quotation to invoice template.

A/ Quotation Copy Overview

Customer quotations can be created based on delivery location city under a customer account. You can apply/copy a quotation to an invoice template of a selected delivery location.

Noted that delivery location must match with location city of the quotation.

B/ Copy to invoice template

1/ Select quotation to copy

On the customer account detail page, click "Quotation" tab.

Locate the quotation you would like to copy to template in the list box.

Click "copy" icon button as shown below.

Account Type	Delivery Locations	Email List	Notes	Quotation				
🗋 new	😂 refresh)						
Quotation#	Created	S	ubject		To Location	Last Sent	Last Modified	Action
3	6/9/2022 9:52:08 AM	N	IEW QUOTATIO	N	BLOOMINGTON		6/9/2022 9:52:08 AM by brian	
			~					· · · · · · · · · · · · · · · · · · ·

2/ Select delivery location

Choose the delivery location invoice template that you want to apply quotation to.

	Template		
сору			
USTOMER QUOTATION & K Shipping inc		Quotatio Last Modified: 6/9/2022 9:52:08 AM b	
copy quotation to invoice	template, select delivery locat	ion you want to apply then copy button.	
Quotation Subject	NEW QUOTATION		
Expiration	06/24/2022		
Delivery Location	Please select delivery location	n 🗸	
Charges Items		Rate	Unit
CHASSIS FEE		1.00	
CHASSIS SPLIT (DROP-OFF)		2.00	
CHASSIS SPLIT (PICK-UP)		3.00	
CTF CHARGE		4.00	
		5.00	
DELIVER WAITING		6.00	
DEMURRAGE		6.00	
DEMURRAGE DETENTION		7.00	
DEMURRAGE			
DEMURRAGE DETENTION DRY RUN CHARGE		7.00 8.00	
DEMURRAGE DETENTION DRY RUN CHARGE FREIGHT RATE		7.00 8.00 9.00	

3/ Review and confirm

Click "Copy" button to confirm

System will now copy the quotation to the invoice template of the selected delivery location.

ACTIVE		
Apply Quotation to Invoice	Template	
сору		
CUSTOMER QUOTATION K & K Shipping inc		Quotati Last Modified: 6/9/2022 9:52:08 AM
To copy quotation to invoice	emplate, select delivery location	you want to apply then copy button.
Quotation Subject	NEW QUOTATION	
Expiration	06/24/2022	
Delivery Location	DEMO DELIVERY LOCATION	I - 149 🗸
Charges Items		Rate
CHASSIS FEE		1.00
CHASSIS SPLIT (DROP-OFF)		2.00
CHASSIS SPLIT (PICK-UP)		3.00
CTF CHARGE		4.00
DELIVER WAITING		5.00
DEMURRAGE DETENTION		6.00 7.00
DRY RUN CHARGE		8.00
FREIGHT RATE		9.00
LIFTGATE CHARGE		10.00
OVER WEIGHT FEE		11.00
PERDIEM CHARGE		12.00
	end of quota	ation

4/ Invoice template updated

You can review the invoice template, you will see which quotation and when it is applied.

Phone Primary Email Additional Information Portal Control	diana. WEB A	Alert I This customer is	having over due a	imount \$8,591.40		
		: <mark>Locations E</mark> mail List Notes Quotation The second state of the s		1		
🗋 new	Linew Control					
Delivery Location		demo.systemonepro.com/ChargeCodeCustomer.asp?coid=57123&deliveryRecid=	:149	Open Hours	Rate	Action
DEMO Delivery Location	on - 149	save close		\$550.00		
DEMO Delivery Locatio	on - 251	CHARGE CODE TEMPLATE Input amount for charge items to create default invoice template for this customer.	22:00 to 23:00	\$300.00	T 🖥	
DEMO Delivery Location - 252		CUSTOMER: K & K Shipping inc	9:00-17:00	\$115.00	T 🖥	
DEMO Delivery Location	on - 258	DELIVERY LOCATION: DEMO Delivery Location - 149			\$535.00	T 🖥
DEMO Delivery Location - 262		QUOTATION APPLIED: NEW QUOTATION APPLIED ON: 6/9/2022 10:16:01 AM			\$420.00	T B
DEMO Delivery Location - 263				07:00-17:00	\$300.00	T 🖥
DEMO Delivery Location	on - 265	CHASSIS FEE	1.00		\$750.00	T 🖥
DEMO Delivery Locatio	on - 266	CHASSIS SPLIT (DROP-OFF)		\$785.00	T 🖥	
DEMO Delivery Location	on - 267	CHASSIS SPLIT (PICK-UP)	3.00		\$560.00	🚍 B
total 9 records listed		CTF CHARGE				
		DELIVER WAITING	5.00			
		DEMURRAGE	6.00		-	
		DETENTION	7.00			
		DRY RUN CHARGE	8.00			
		LIFTGATE CHARGE	10.00			
		OVER WEIGHT FEE	11.00			
		PERDIEM CHARGE	12.00			
		PICKUP WAITING	0.00			
		PIER PASS	0.00			
		PREPULL	0.00			
		REFER PLUG-IN	0.00			