

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		
Quotation#	Created	Subject	To Location	Last Sent	Last Modified	Action
3	6/9/2022 9:52:08 AM	NEW QUOTATION	BLOOMINGTON		6/9/2022 9:52:08 AM by brian	
1	1/16/2022 11:00:51 PM	TESTING ONE	ALHAMBRA		1/16/2022 11:00:51 PM by brian	

2/ Select delivery location

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

Apply Quotation to Invoice Template

CUSTOMER QUOTATION
K & K Shipping inc

Quotation#: 3
Last Modified: 6/9/2022 9:52:08 AM by brian

To copy quotation to invoice template, select delivery location you want to apply then copy button.

Quotation Subject: NEW QUOTATION
Expiration: 06/24/2022
Delivery Location: Please select delivery location...

Charges Items	Rate	Unit
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	6.00	
DETENTION	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 quotation ---

3/ Review and confirm

Click "Copy" button to confirm

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

Apply Quotation to Invoice Template

copy close

CUSTOMER QUOTATION
K & K Shipping inc
Last Modified: 6/9/2022 9:52:08 AM

To copy quotation to invoice template, select delivery location you want to apply then copy button.

Quotation Subject: NEW QUOTATION
Expiration: 06/24/2022
Delivery Location: DEMO DELIVERY LOCATION - 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	6.00
DETENTION	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 quotation ---

4/ Invoice template updated

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

Alert! This customer is having over due amount \$8,591.40

Account Type: Delivery Locations | Email List | Notes | Quotation

Delivery Location	Open Hours	Rate	Action
DEMO Delivery Location - 149		\$550.00	
DEMO Delivery Location - 251	22:00 to 23:00	\$300.00	
DEMO Delivery Location - 252	9:00-17:00	\$115.00	
DEMO Delivery Location - 258		\$535.00	
DEMO Delivery Location - 262		\$420.00	
DEMO Delivery Location - 263	07:00-17:00	\$300.00	
DEMO Delivery Location - 265		\$750.00	
DEMO Delivery Location - 266		\$785.00	
DEMO Delivery Location - 267		\$460.00	

total 9 records listed

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	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
RRFFFFR DI LIC-IN	0.00