MyPromoOffice

Quoting with the web-based quoting system

If you have any difficulty with following the steps outlined in this help document, please don't hesitate to contact our help team by calling (02) 4302 0160 or via email at help@gunwebsystems.com.au

Document Overview

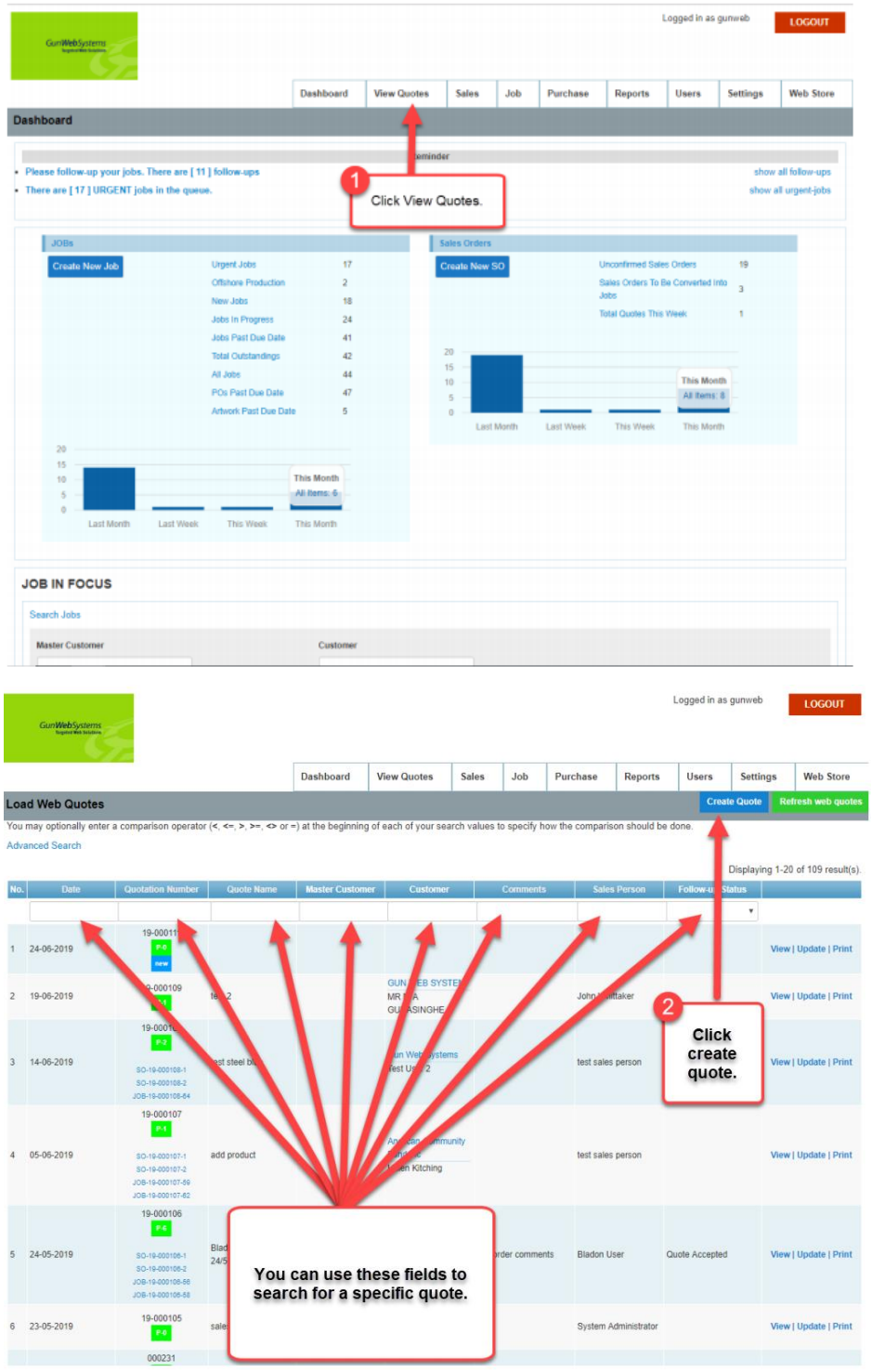
This document outlines and explains the process of creating a quote through the MyPromoOffice web based quoting system:

Contents

Step 1.0 – View quotes 3
Step 2.0 – Enter quote information 4
Step 3.0 – CRM 5
Step 4.0 – Adding quote comments 6
Step 5.0 – View quotation details 7
Step 6.0 – Select products 8
Step 7.0 – Add decorations 9
Step 8.0 – Adding additional products 11
Step 9.0 – Attaching a file and adding details 12
Step 10.0 – Sign off terms 13
Step 11.0 – Check information 14
Step 12.0 – Confirm order 16
Step 13.0 – Check information 17
Step 14.0 – Review and send quote 18

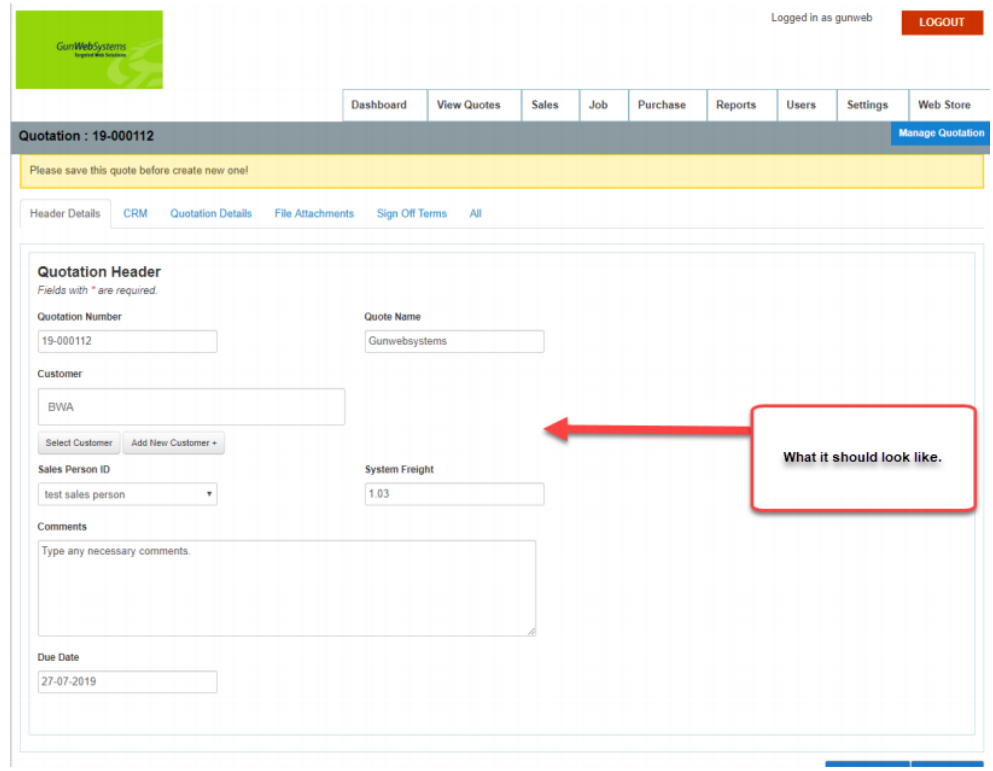
Step 1.0 – View quotes

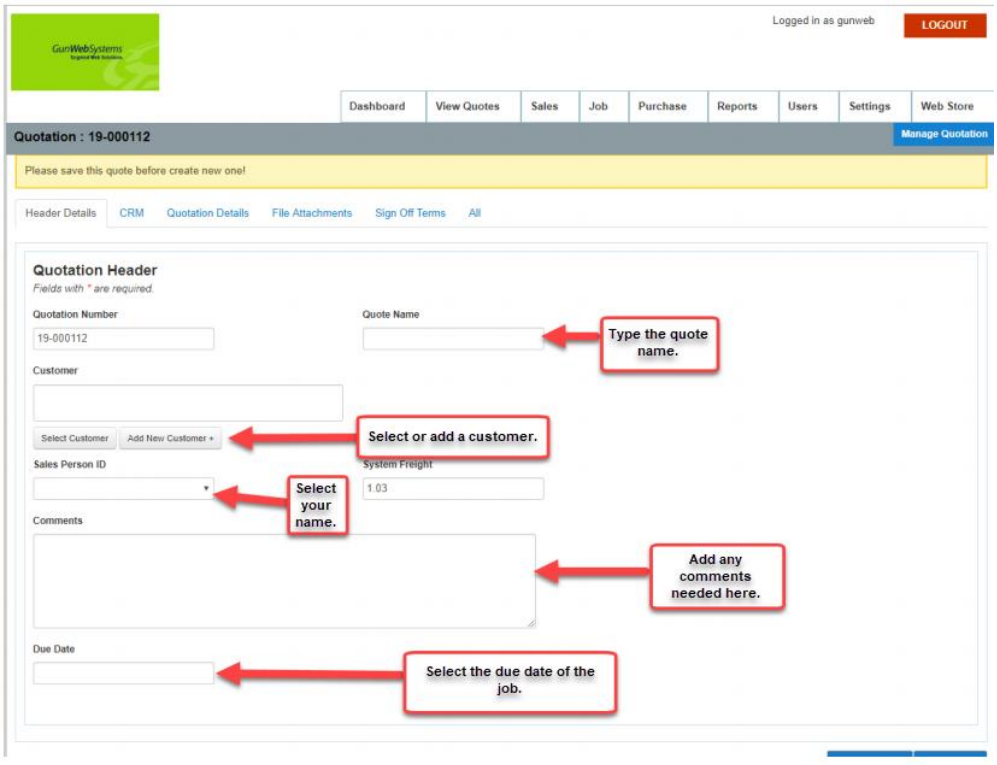
Once a client has accepted a quote, you are able to initiate a sales order by following the process in the following steps.



Step 2.0 – Enter quote information

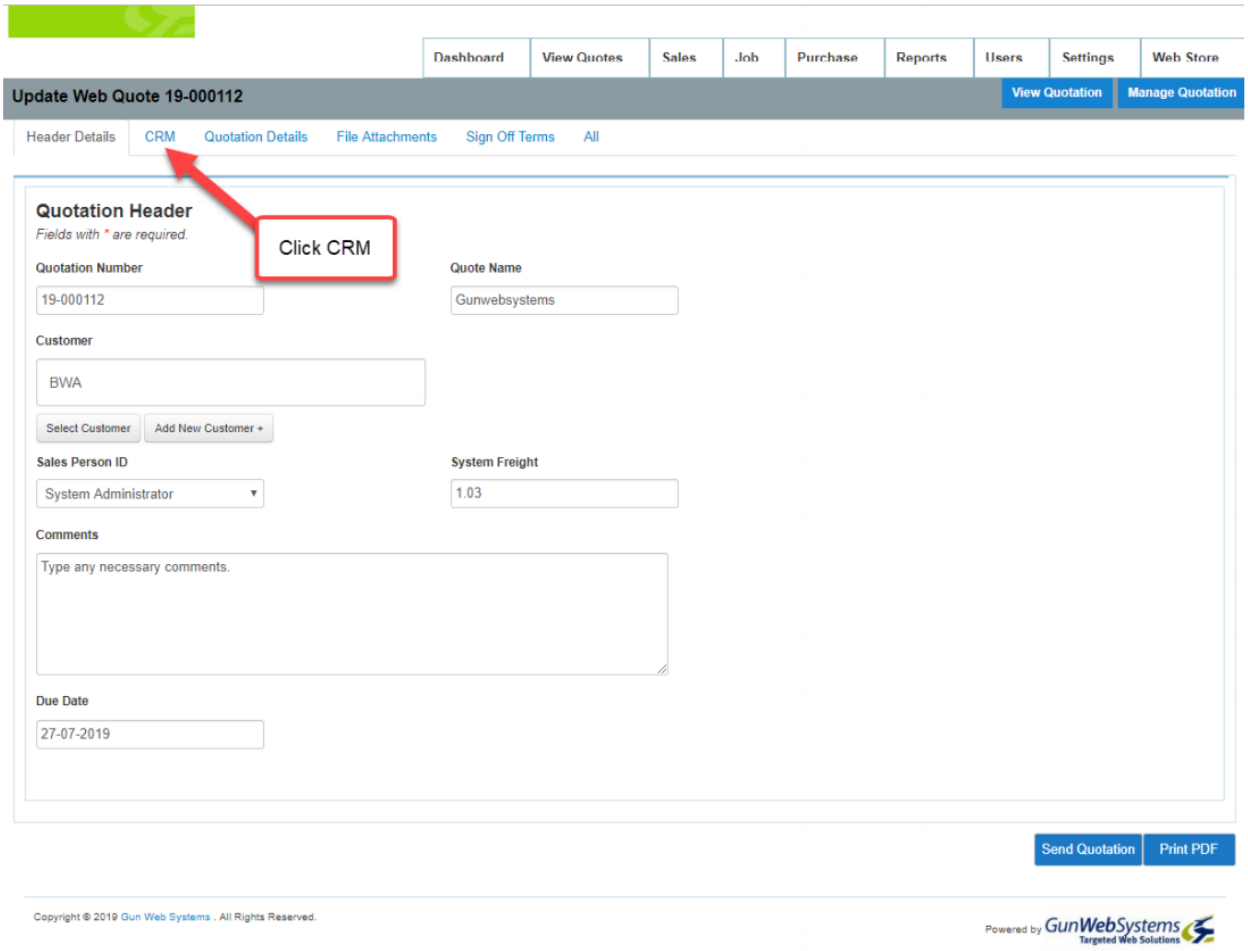
Enter a name for the quote, then select or add a customer, select your name, add any required comments.





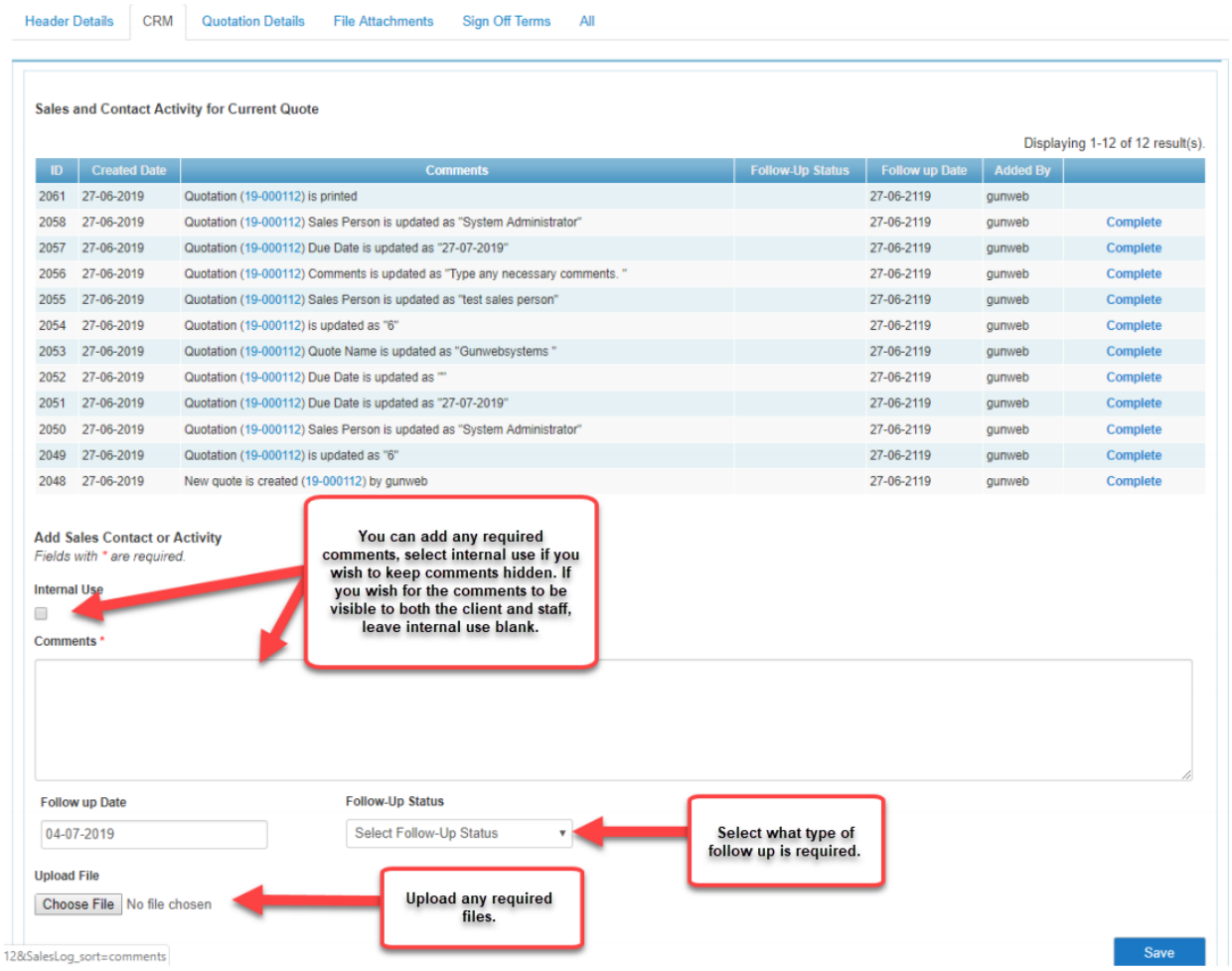
Step 3.0 – CRM

To add an additional product, press select product and proceed to search for the desired product by using the products ID number, product code, description or supplier name.



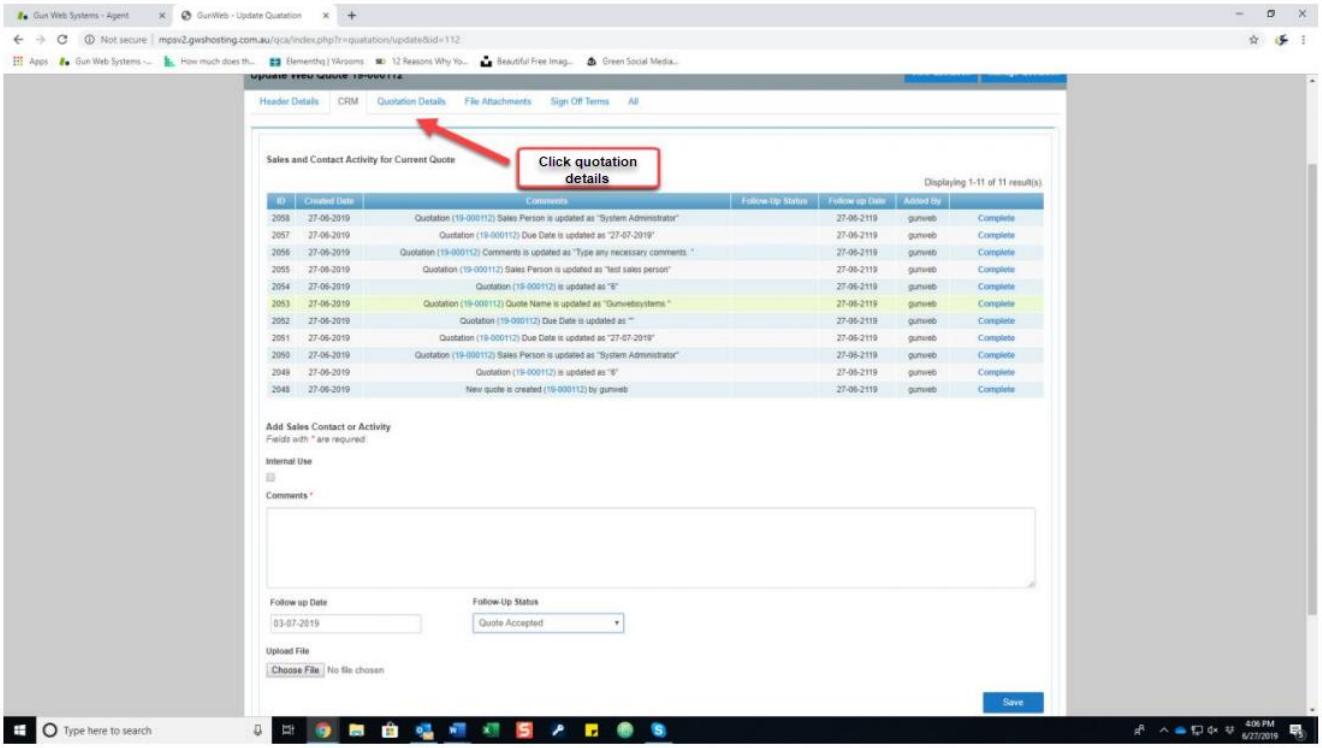
Step 4.0 – Adding quote comments

Add any required comments and click internal use if you wish for comments to be kept private from the customer. Select what type of follow up is required after the quote is sent. Upload any required files needed for the quote.



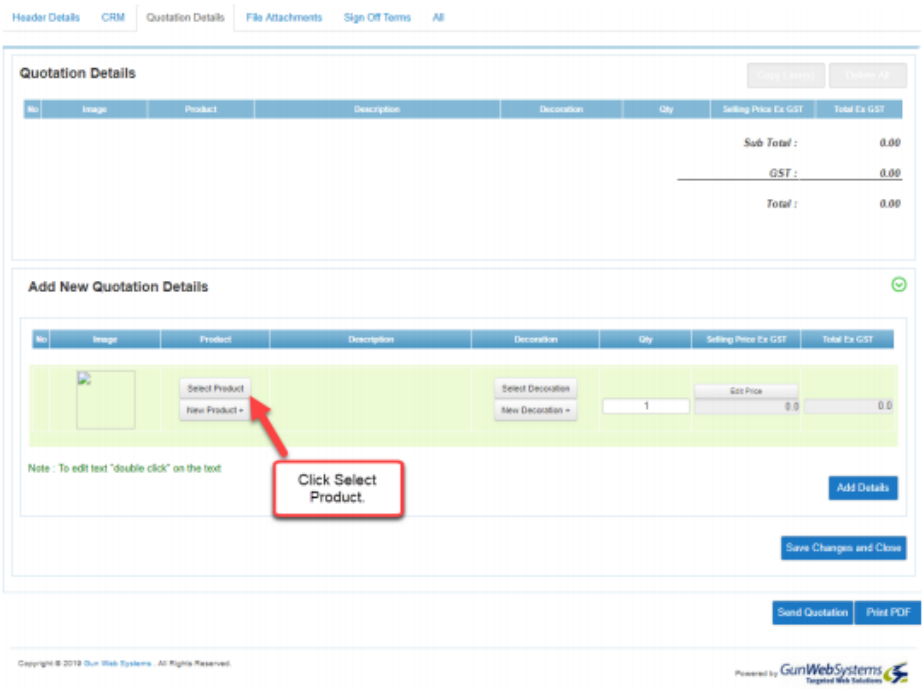
Step 5.0 – View quotation details

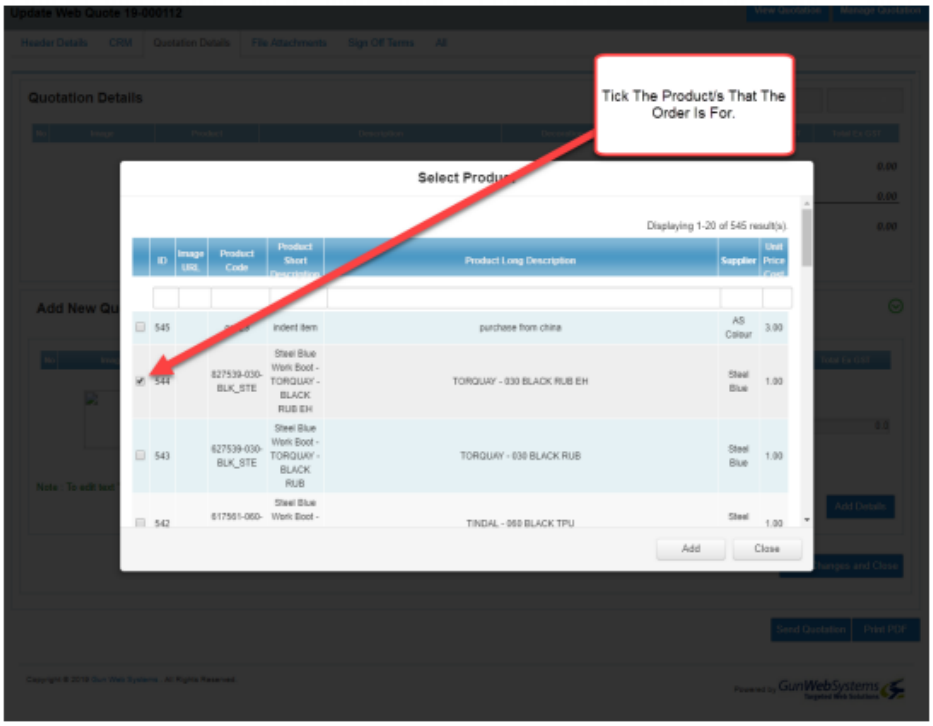
To add the required sizes and colours to a product, select the product and click on “add product details”. Follow the process outlined in the images below:



Step 6.0 – Select products

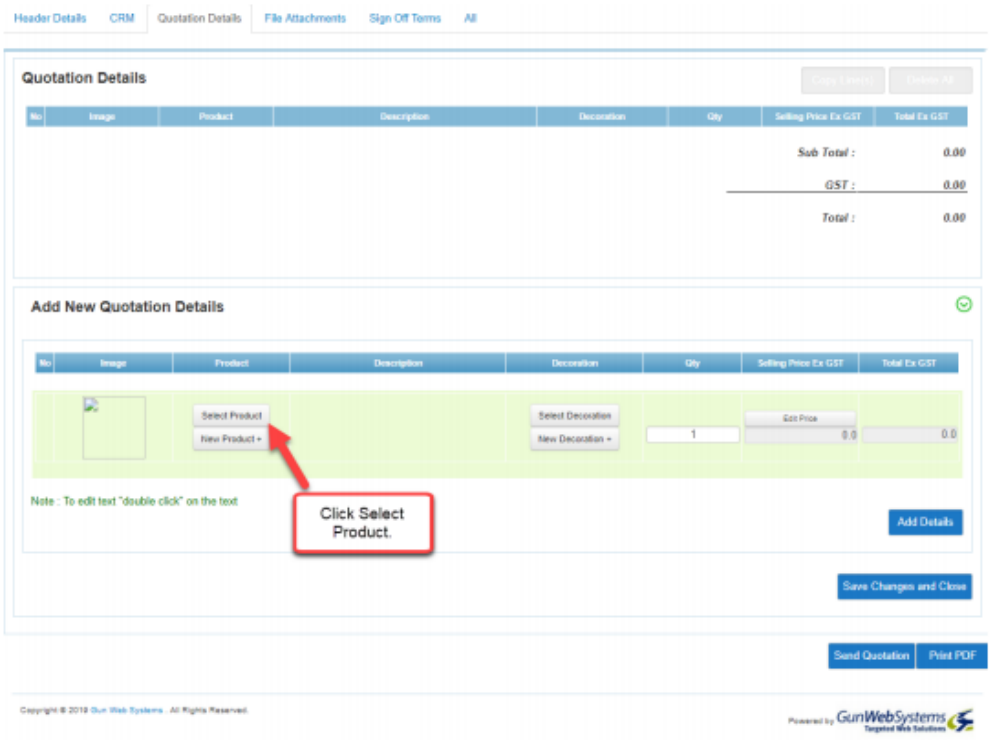
Click on select products, tick the products required for the order.

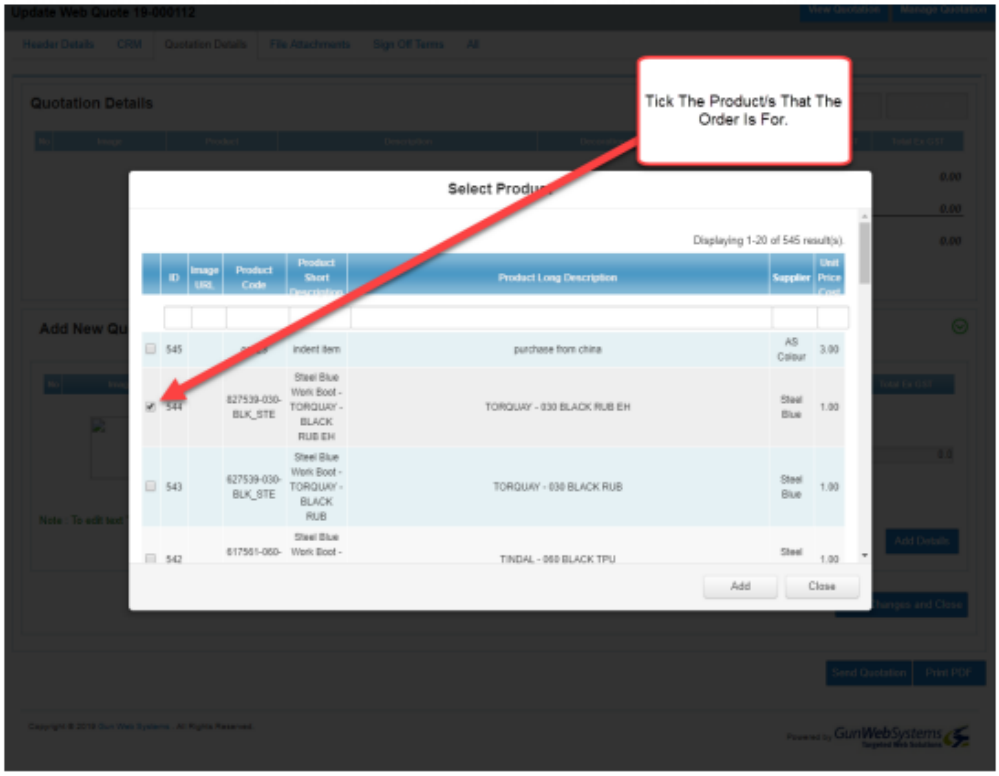


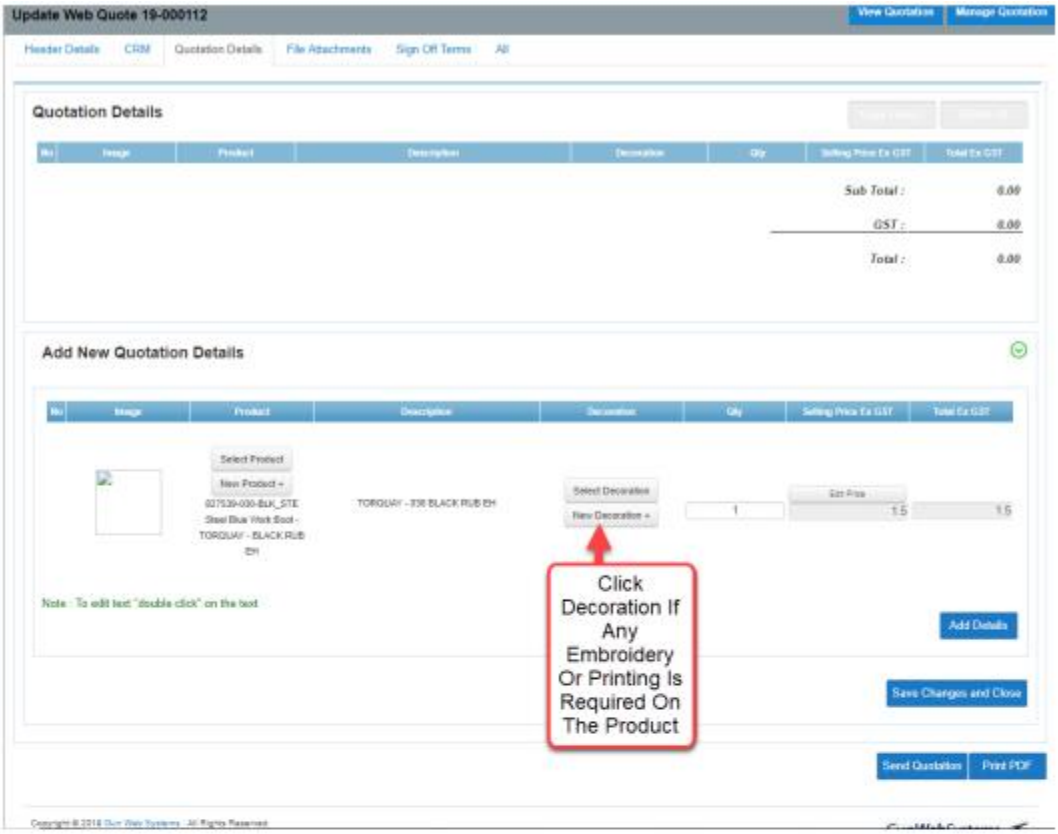


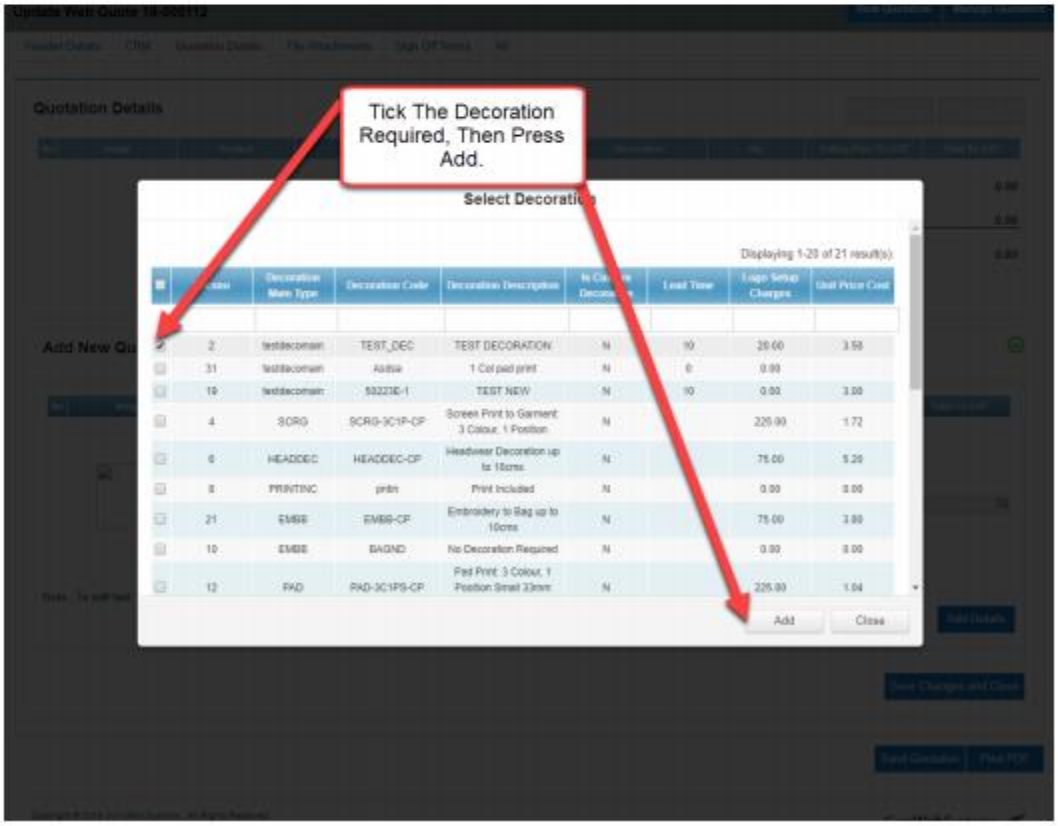
Step 7.0 – Add decorations

Click on decoration if embroidery or another decoration type is required on the product.



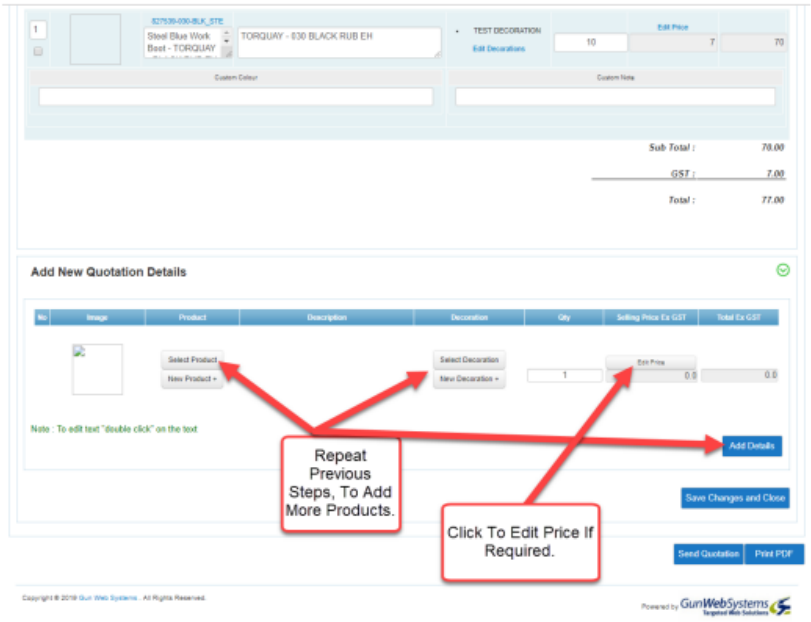


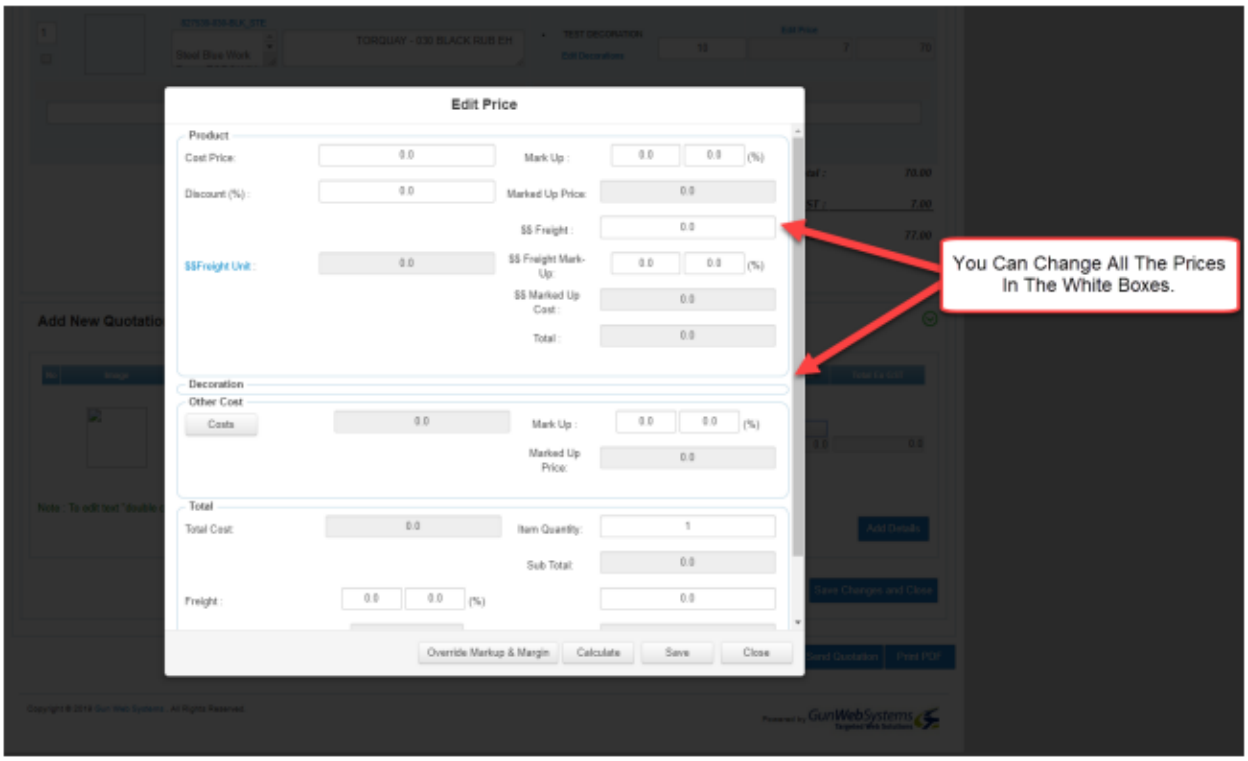

Update Web Quote 19-000112
Quotation Details
Sub Total :
GST :
Total :
Add New Quotation Details
Click Decoration If Any Embroidery Or Printing Is Required On The Product
Add Details
Save Changes and Close
Send Quotation
Print PDF


Tick The Decoration Required, Then Press Add.
Select Decoration
Add
Close

Step 8.0 – Adding additional products

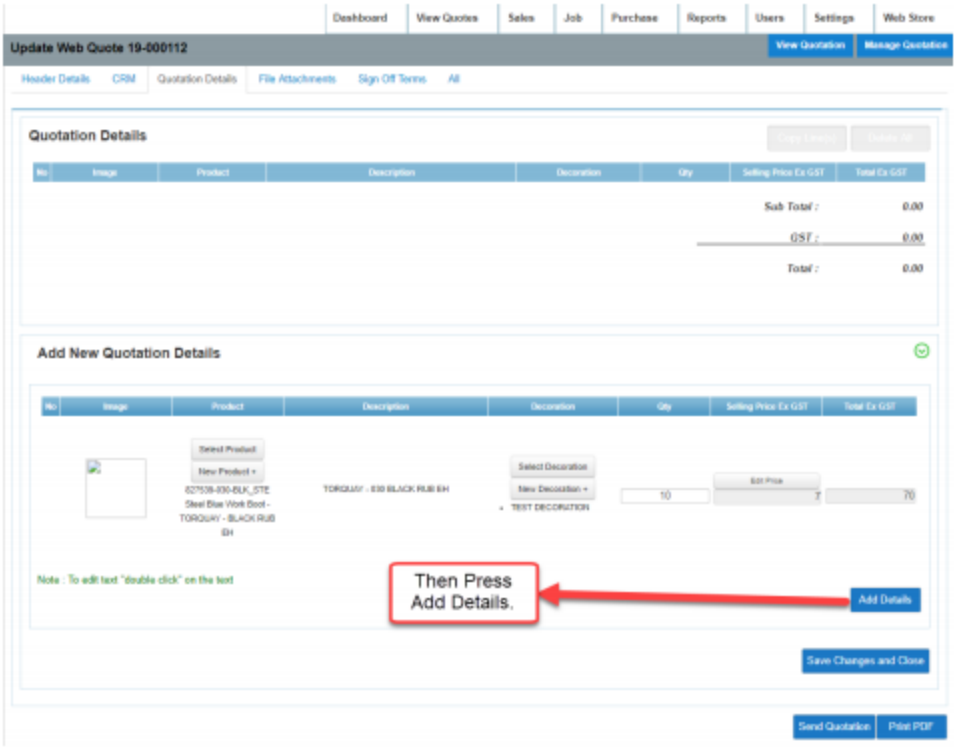
You will need to update the date the client needs to be followed up on and add any further relevant information.

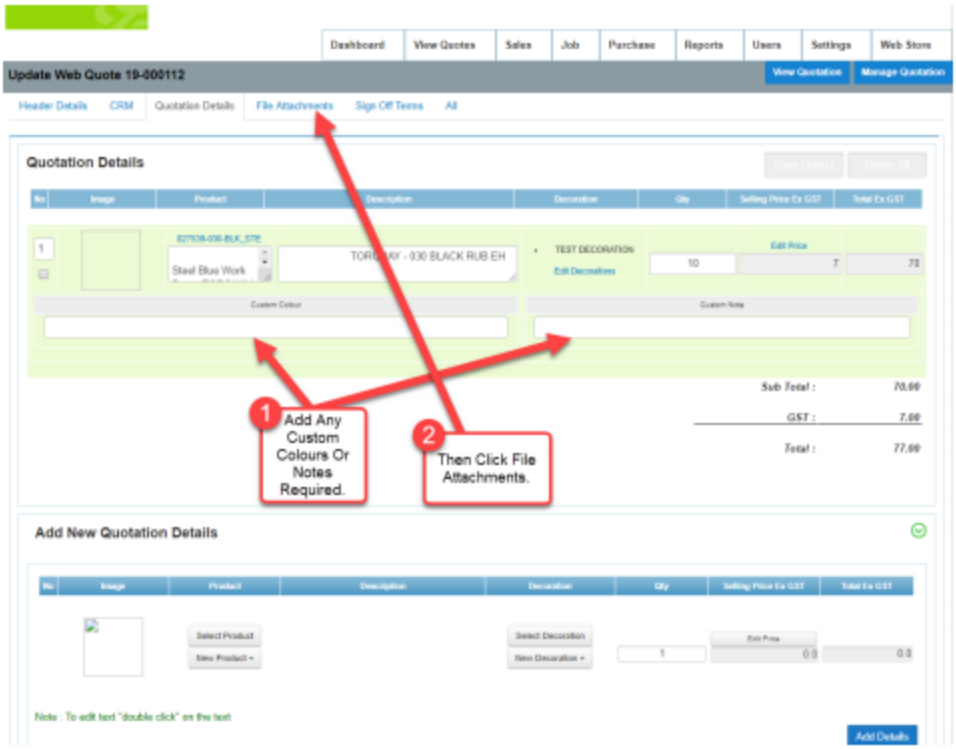




Step 9.0 – Attaching a file and adding details

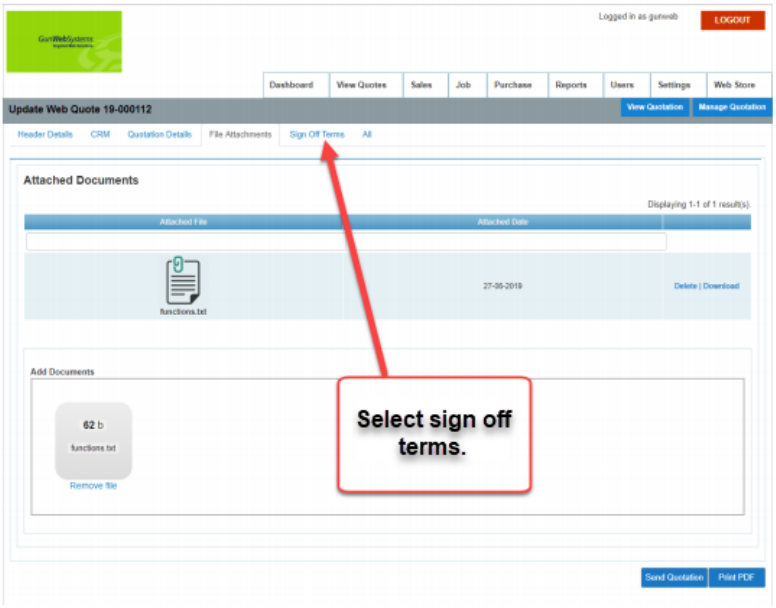
You can add details and files to the quote by following the below steps.

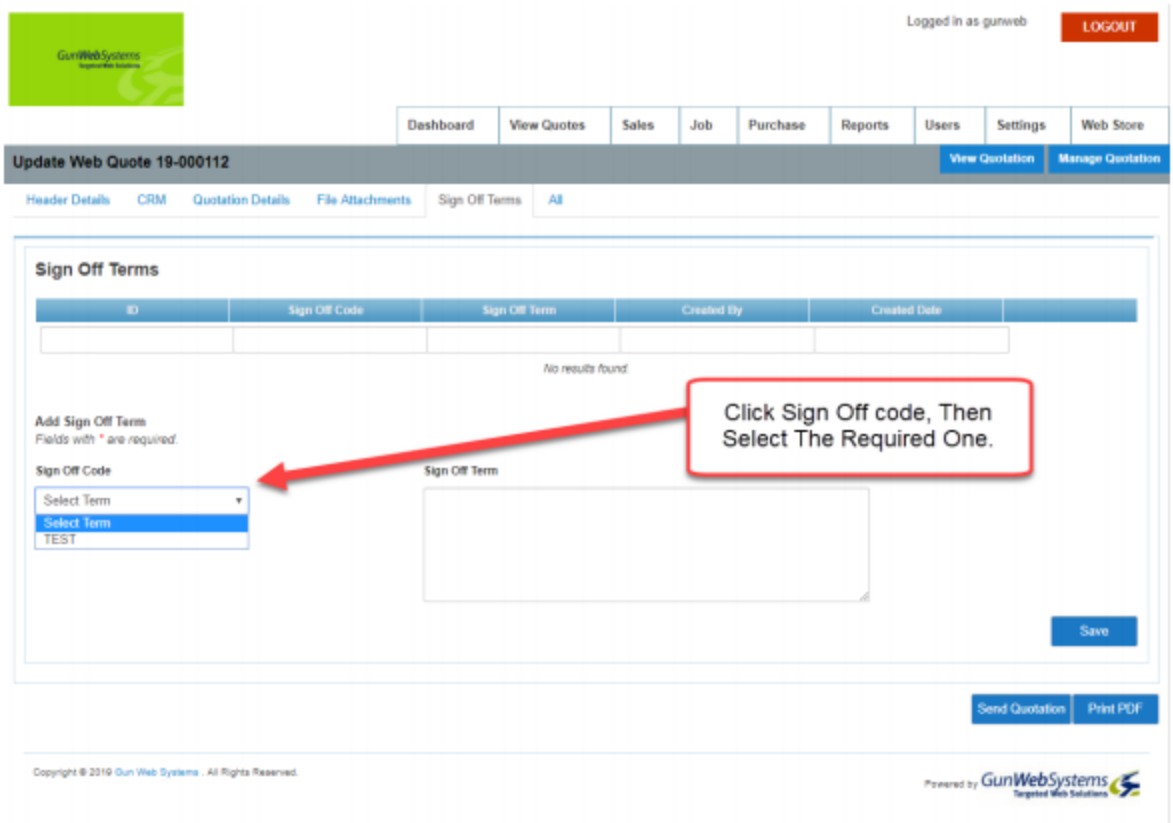




Step 10.0 – Sign off terms

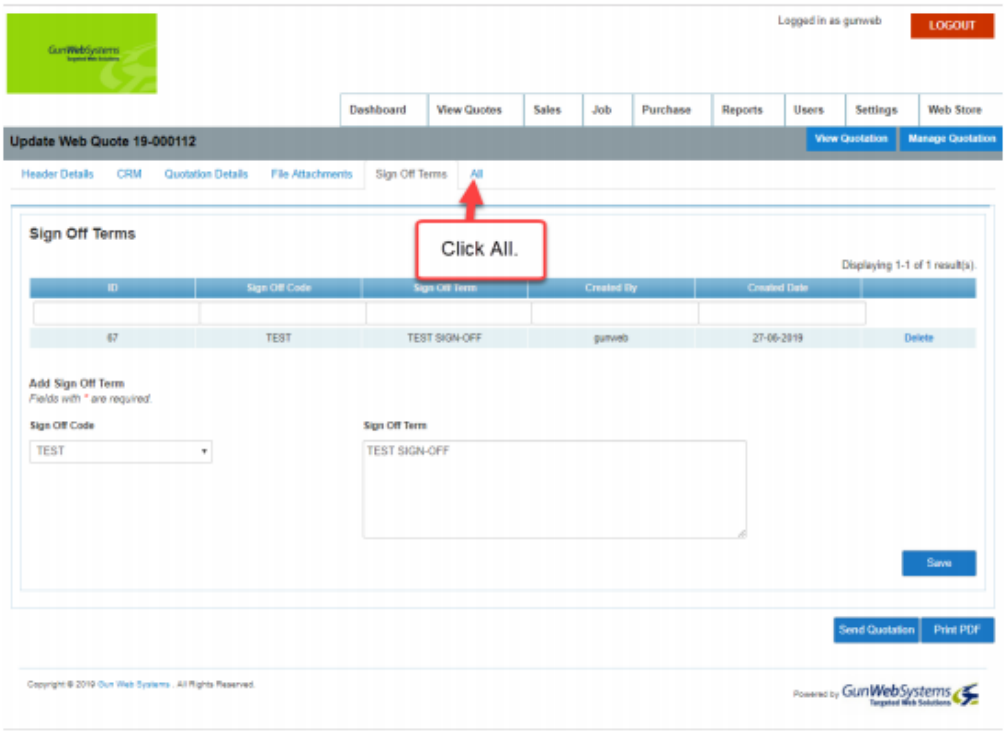
Enter any required sign off terms, select save. After selecting save proceed to the “All” tab.

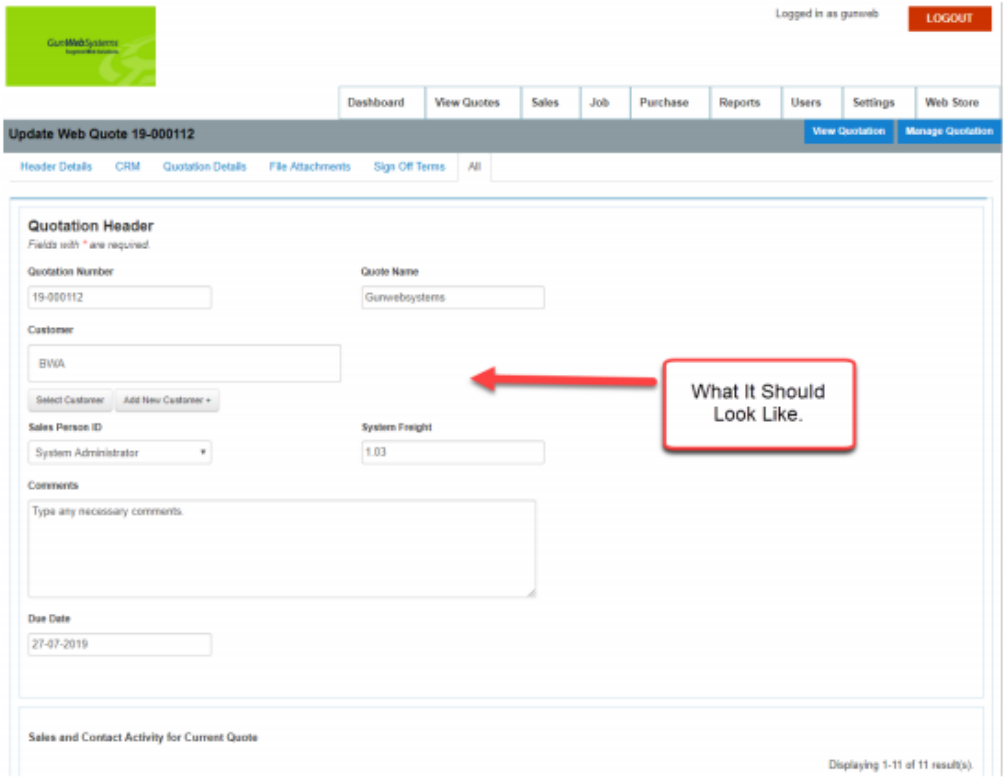


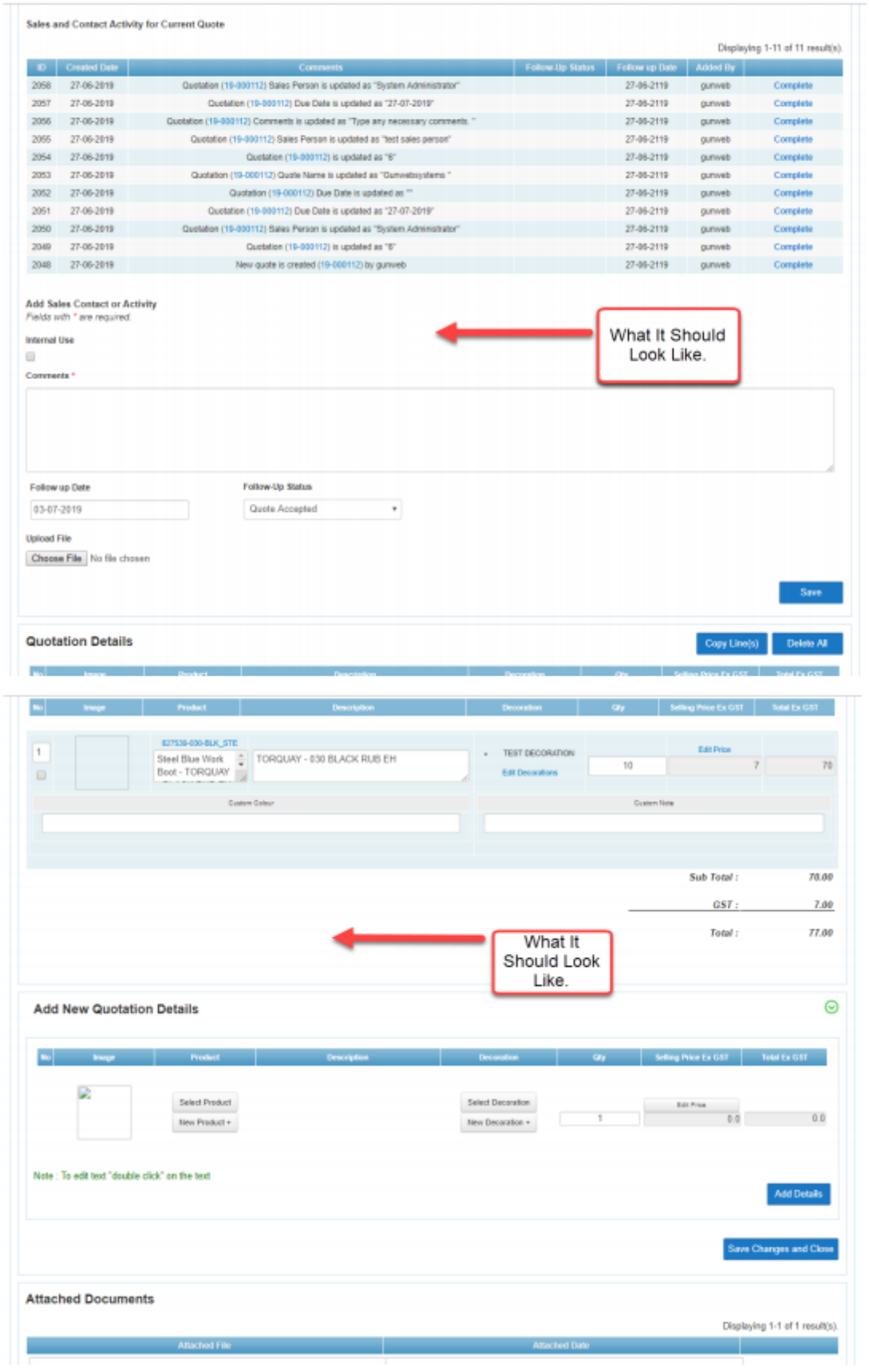


Step 11.0 – Check information

Go through all information that you have entered in order to ensure that the information is correct.

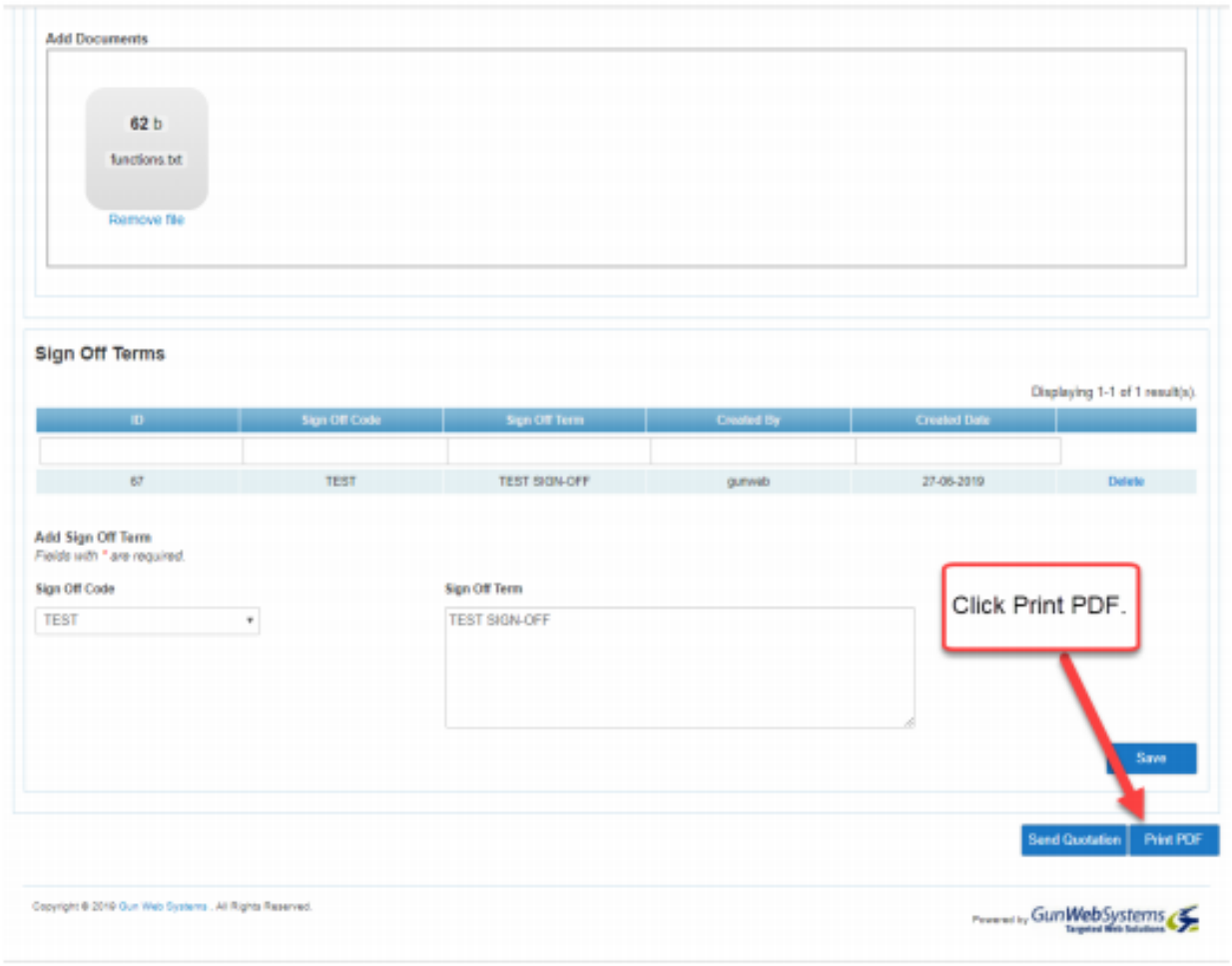





Sales and Contact Activity for Current Quote
Displaying 1-11 of 11 result(s).
ID
Created Date
Comments
Follow-Up Status
Follow up Date
Added By
2058 27-06-2019 Quotation (19-000112) Sales Person is updated as "System Administrator" 27-06-2119 gunweb Complete
2057 27-06-2019 Quotation (19-000112) Due Date is updated as "27-07-2019" 27-06-2119 gunweb Complete
2056 27-06-2019 Quotation (19-000112) Comments is updated as "Type any necessary comments. " 27-06-2119 gunweb Complete
2055 27-06-2019 Quotation (19-000112) Sales Person is updated as "test sales person" 27-06-2119 gunweb Complete
2054 27-06-2019 Quotation (19-000112) is updated as "6" 27-06-2119 gunweb Complete
2053 27-06-2019 Quotation (19-000112) Quote Name is updated as "Gunwebsystems " 27-06-2119 gunweb Complete
2052 27-06-2019 Quotation (19-000112) Due Date is updated as "" 27-06-2119 gunweb Complete
2051 27-06-2019 Quotation (19-000112) Due Date is updated as "27-07-2019" 27-06-2119 gunweb Complete
2050 27-06-2019 Quotation (19-000112) Sales Person is updated as "System Administrator" 27-06-2119 gunweb Complete
2049 27-06-2019 Quotation (19-000112) is updated as "6" 27-06-2119 gunweb Complete
2048 27-06-2019 New quote is created (19-000112) by gunweb 27-06-2119 gunweb Complete
Add Sales Contact or Activity
Fields with * are required
Internal Use
Comments *
What It Should Look Like.
Follow up Date
03-07-2019
Follow-Up Status
Quote Accepted
Upload File
Choose File No file chosen
Save
Quotation Details
Copy Line(s)
Delete All
No
Image
Product
Description
Decoration
Qty
Selling Price Ex GST
Total Ex GST
1
827539-030-BLK_STE
Steel Blue Work Boot - TORQUAY
TORQUAY - 030 BLACK RUB EH
TEST DECORATION
Edit Decorations
10
Edit Price
7
70
Custom Colour
Custom Note
Sub Total : 70.00
GST : 7.00
Total : 77.00
What It Should Look Like.
Add New Quotation Details
Select Product
New Product +
Select Decoration
New Decoration +
1
0.0
0.0
Note : To edit text "double click" on the text
Add Details
Save Changes and Close
Attached Documents
Displaying 1-1 of 1 result(s).
Attached File
Attached Date

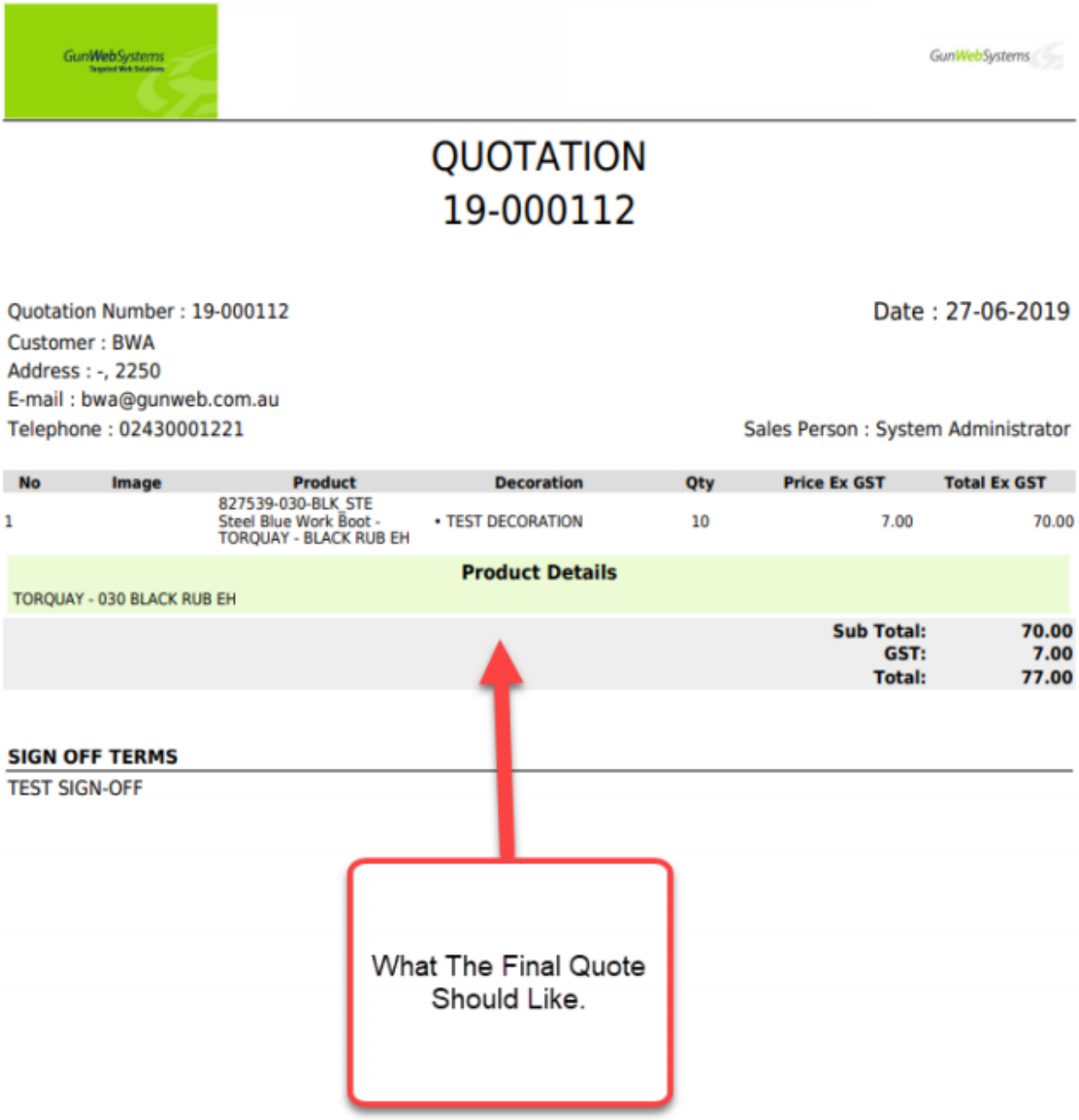
Step 12.0 – Confirm order

Once you are satisfied that all information you have entered are correct, you can click confirm order. The second picture is what it should look like after you clicked confirm order. Then you need to click view on the order you just confirmed.



Step 13.0 – Check information

Check the information on the generated quote.



QUOTATION
19-000112

Quotation Number : 19-000112
Customer : BWA
Address : -, 2250
E-mail : bwa@gunweb.com.au
Telephone : 02430001221

Date : 27-06-2019

Sales Person : System Administrator

No	Image	Product	Decoration	Qty	Price Ex GST	Total Ex GST
1		827539-030-BLK_STE Steel Blue Work Boot - TORQUAY - BLACK RUB EH	• TEST DECORATION	10	7.00	70.00

Product Details

TORQUAY - 030 BLACK RUB EH

Sub Total:	**70.00**
GST:	**7.00**
Total:	**77.00**

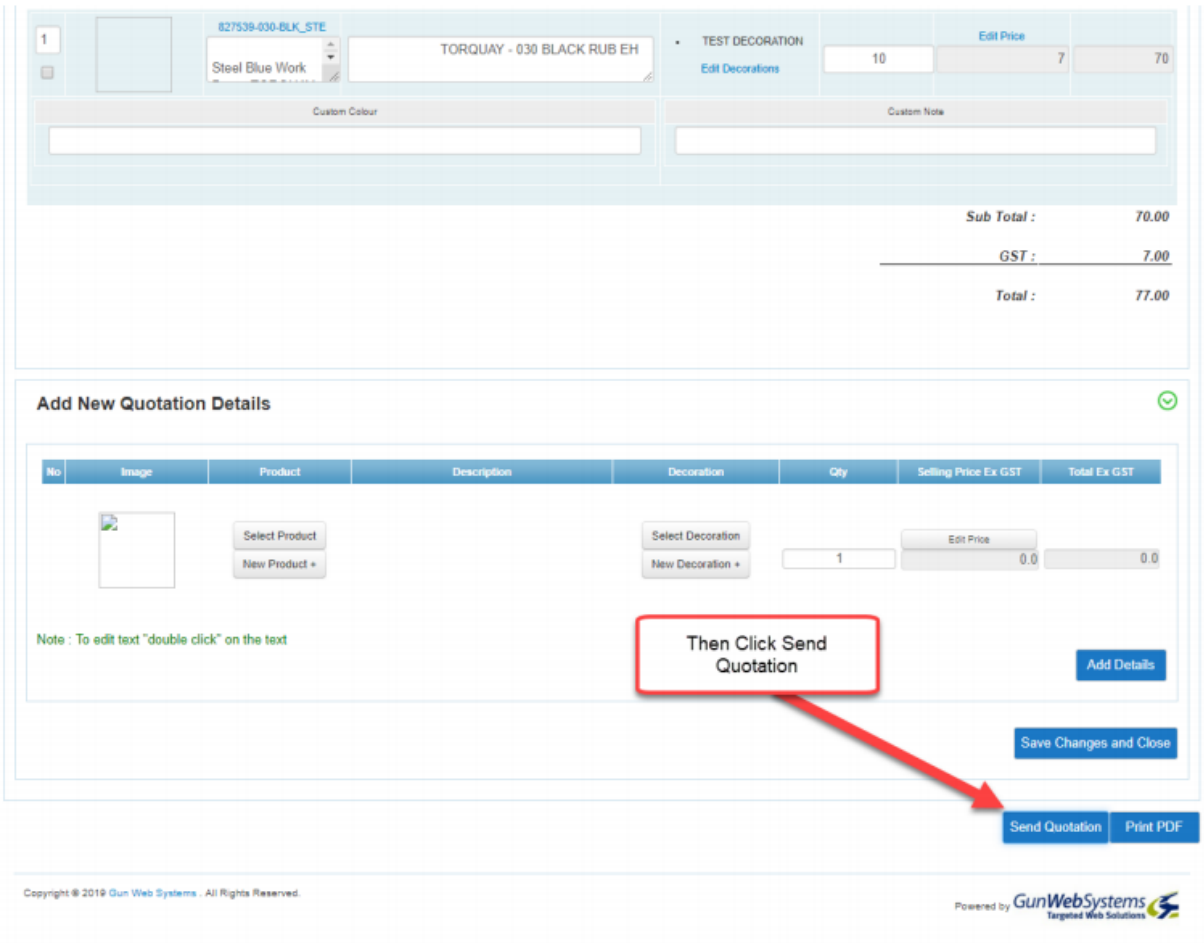
SIGN OFF TERMS

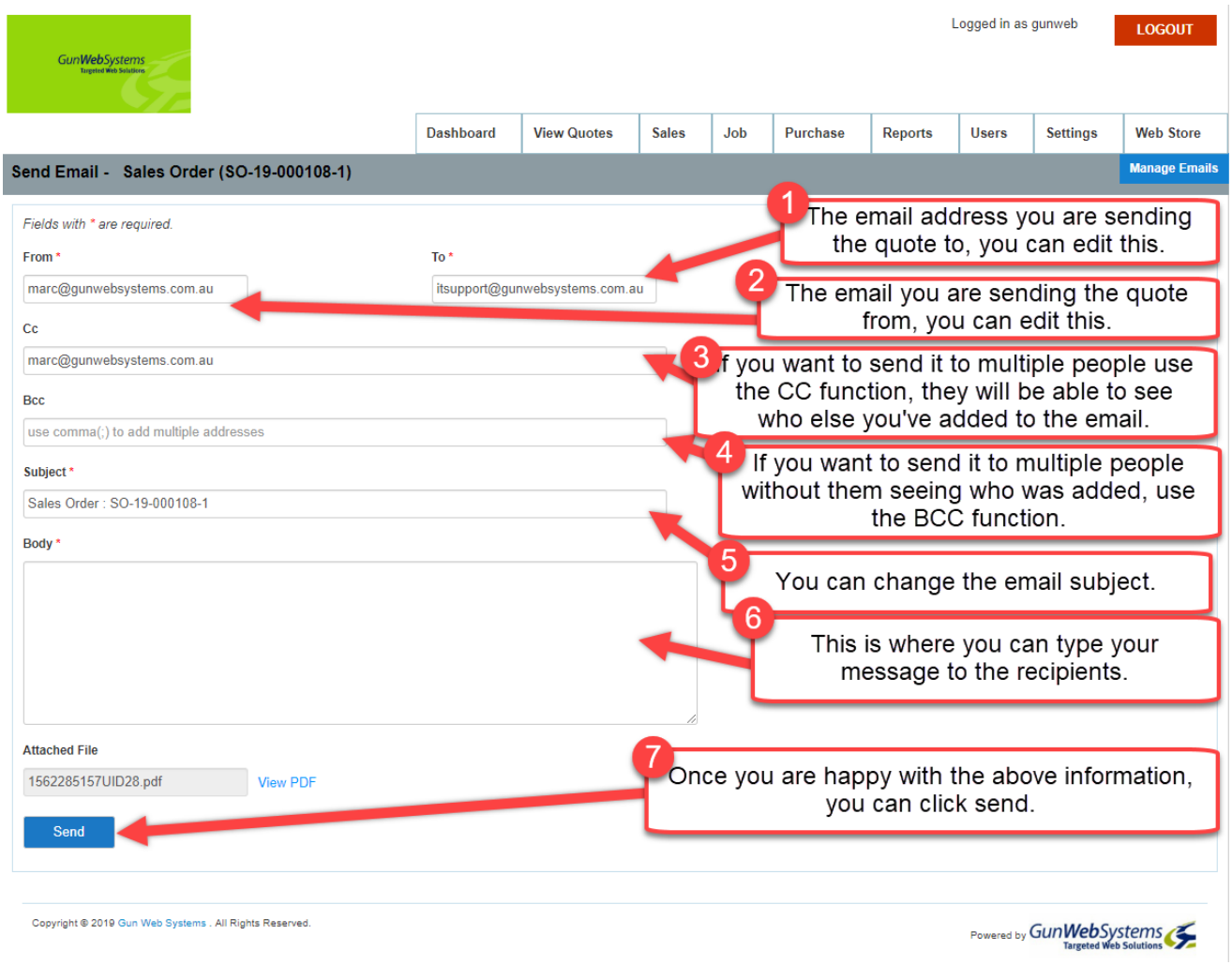
TEST SIGN-OFF

What The Final Quote Should Like.

Step 14.0 – Review and send quote

Review the PDF preview that is generated, and if happy. Follow the below steps to send the quotation.




Logged in as gunweb
LOGOUT
Dashboard
View Quotes
Sales
Job
Purchase
Reports
Users
Settings
Web Store
Send Email - Sales Order (SO-19-000108-1)
Manage Emails
Fields with * are required.
From *
marc@gunwebsystems.com.au
To *
itsupport@gunwebsystems.com.au
Cc
marc@gunwebsystems.com.au
Bcc
use comma(;) to add multiple addresses
Subject *
Sales Order : SO-19-000108-1
Body *
Attached File
1562285157UID28.pdf
View PDF
Send
1 The email address you are sending the quote to, you can edit this.
2 The email you are sending the quote from, you can edit this.
3 If you want to send it to multiple people use the CC function, they will be able to see who else you've added to the email.
4 If you want to send it to multiple people without them seeing who was added, use the BCC function.
5 You can change the email subject.
6 This is where you can type your message to the recipients.
7 Once you are happy with the above information, you can click send.
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