

eQuote 4.0 Training Summary

Purpose of eQuote 4.0

eQuote 4.0 is the new quotation platform being introduced to the outside sales team. The first release has been designed to closely mirror the functionality of eQuote 3.0 while introducing several enhancements and new features. Users are encouraged to provide feedback throughout the rollout process.

1. Feedback and Support Process

A built-in support section is available directly within eQuote 4.0.

How Support Works

- A support email link is available within the application.
- Clicking the link generates an email that acts as a support ticket.
- Submitted emails are sent to a shared inbox monitored by the eQuote team.

What to Submit

Users are encouraged to submit:

- Bugs
- Issues
- Feature requests
- Suggestions
- General feedback

Best Practice for Support Requests

Create one ticket per issue.

Instead of submitting multiple problems in a single email:

- Submit separate tickets for each issue.
- This helps the development team categorize and prioritize requests more efficiently.

Helpful Information to Include

When submitting a ticket:

- Use a descriptive subject line.
- Explain the issue clearly.
- Include screenshots or screen captures whenever possible.

2. Creating a New Quote

The primary function of eQuote 4.0 is generating customer quotations.

Create a New Project

1. Create a new quote.
2. Enter a project name.
3. The system automatically records:
 - Date
 - User information
 - Other quote metadata

Select the Customer

Customers can be searched using:

- SAP Number
- Company Name

After selecting the customer:

- Customer information is automatically populated into the quote.

3. Applying Discounts

Before adding products:

Verify Discount Settings

- Discounting is controlled through a radio button option.
- The discount setting is disabled by default.
- Enable discounting when applicable.

This ensures customer-specific pricing is calculated correctly.

4. Adding Products to the Quote

The quote builder allows users to add:

- Individual line items
- Configured products
- Multiple sections

A default section is created automatically when a new quote is started.

5. Configuring a Product

The demonstration uses a Gamma X pump configuration.

Product Configuration Process

1. Select the desired product.
2. Configure required options.

3. Complete all configuration fields.

Validation

As selections are completed:

- Fields turn green.
- Green fields indicate a valid configuration.

Once all required fields are completed:

- A list price is generated automatically.

Adding the Product

After configuration:

1. Select the destination section.
2. Add the configured product to the quote.

The system immediately displays:

- List Price
- Discount
- Net Price

6. Editing Product Configurations

If a configuration mistake is made:

Configuration Editing Feature

A wrench icon appears next to configured products.

Selecting the wrench:

- Reopens the configuration screen.
- Allows changes without recreating the entire product.

This simplifies quote revisions and corrections.

7. Tariff Visibility Feature

One of the enhancements introduced in eQuote 4.0 is improved pricing transparency.

Pricing Breakdown

Hovering over pricing details displays:

- Applied discount percentage
- Tariff percentage

Example shown:

- 40% discount

- 7.5% tariff

This allows sales representatives to understand how final pricing is calculated.

8. Organizing Quotes with Sections

Quotes can be divided into multiple sections.

Benefits of Sections

Sections allow users to:

- Organize products logically
- Separate equipment categories
- Improve customer readability

Example Structure

Section 1:

- Gamma X Pump

Section 2:

- Control Cable

Section 3:

- pH Sensor

Naming Sections

Users can rename sections to:

- Match customer requirements
- Group products by system
- Create cleaner proposals

Section names appear clearly in the final quotation.

9. Adding Parts and Accessories

In addition to configured products:

Parts Catalog Search

Users can:

1. Search by part number.
2. Select parts from the catalog.
3. Assign them to specific quote sections.

This allows accessories and spare parts to be included alongside configured equipment.

10. Completing the Quote

After all products and accessories have been added:

Review the Quote

Verify:

- Customer information
- Discounts
- Product configurations
- Section organization
- Pricing

Once verified, the quote is ready for document generation.

11. Repricing Existing Quotes

eQuote 4.0 includes a repricing feature.

Why Repricing Matters

Pricing data is synchronized from SAP nightly.

If a quote was created previously:

- Pricing may have changed.
- Users can refresh pricing before sending the quote.

This ensures customers receive the most current pricing available.

12. Cover Letters

Users can attach a cover letter to the quotation package.

Cover Letter Purpose

The cover letter:

- Provides a professional introduction.
- Adds context for the customer.
- Accompanies the generated quotation document.

Templates can be saved and reused.

13. Exporting the Quote

Once the quote is complete:

Export to Microsoft Word

The system generates a quotation document in Microsoft Word format.

Available Export Options

Users can choose whether to include:

- Summary Section
- Pricing Details
- Product Descriptions
- Product Details

Each section can be enabled or disabled depending on customer requirements.

14. Converting to PDF

The generated quote is initially created as a Word document.

Users can:

- Send the Word document directly.
- Convert it to PDF before sending.

PDF format is recommended for customer-facing documents.

Key New Features Highlighted in the Demo

- Integrated feedback and support system
- Ability to submit tickets directly from eQuote
- Editable product configurations via wrench icon
- Tariff visibility within pricing details
- Improved section organization
- Parts catalog integration
- Repricing functionality linked to SAP updates
- Flexible Word export options
- Easy PDF conversion
- Familiar workflow for existing eQuote 3.0 users