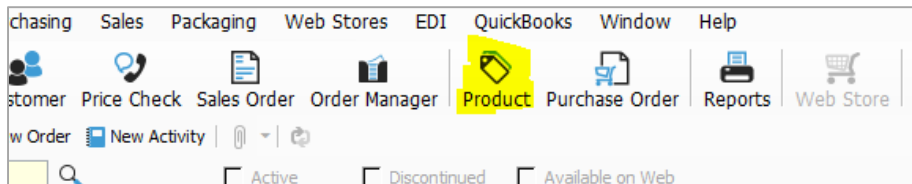
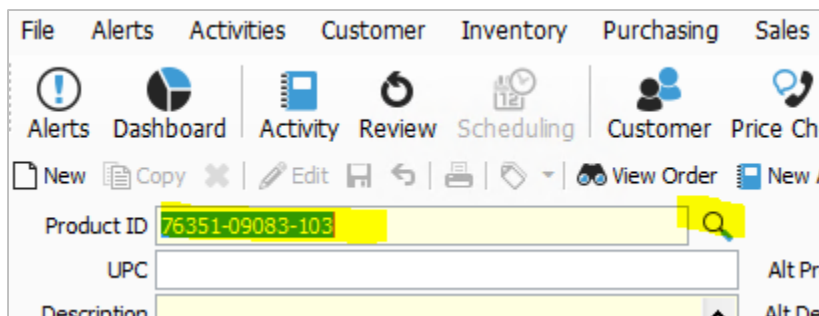


CHECK FOR PART

- Select **PRODUCT** from menu



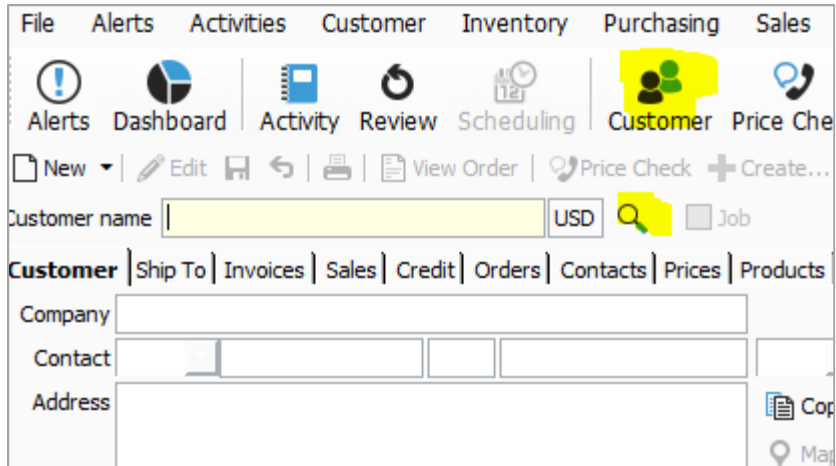
- Enter the Part # into the **Product ID** field & select magnifying glass to search. The inventory should appear. Select the required part. Note the # parts available & warehouse location.



Now check for customer (next page)

CHECK IF NEW OR EXISTING CUSTOMER

- Select **CUSTOMER** from menu + magnifying glass



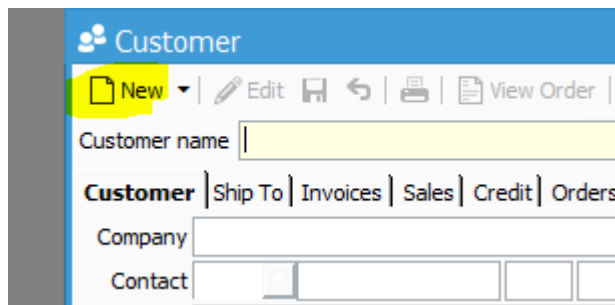
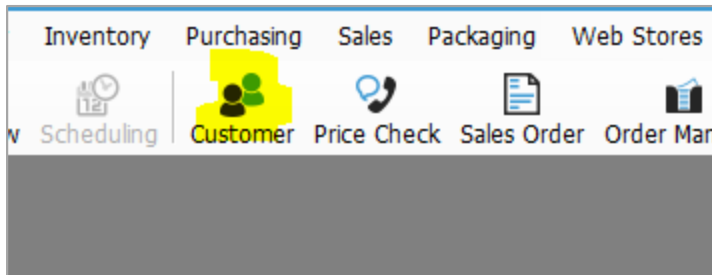
- Type all or part of the customer name in the search box and the results will populate.

Choose Customer					
Customer					
Begins with		heli			
Customer Name	Currency	Company	Company E-mail	Phone	City
HELIFIX OPERATIONS LTD.	USD	HELIFIX OPERATIONS LTD.			HELIFIX
Helijet	CAD				
Helijet International	USD				
Helivia Aero Taxi	USD	Helivia Aero Taxi			RJ

- If customer listed – **proceed to 'Prepare Quote'** (Page 5)
- If customer is NOT listed see 'Entering a new customer' (Page 3).

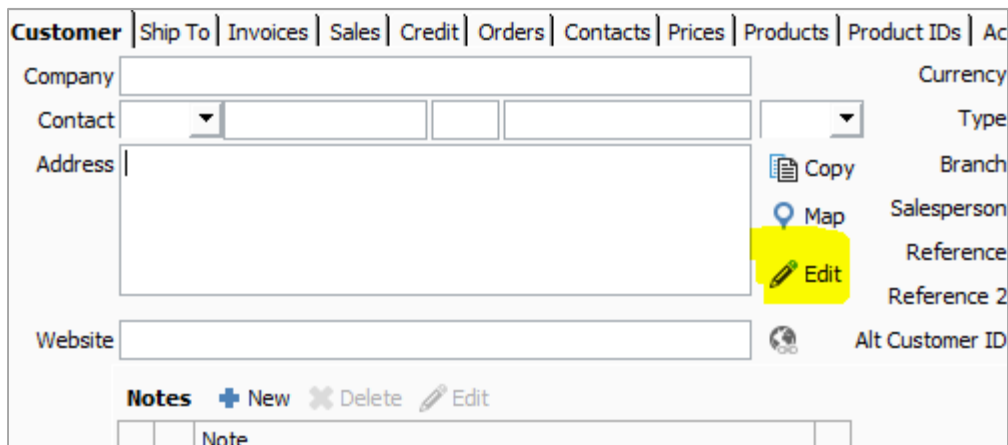
Entering a new customer

- Select **CUSTOMER** from top menu, then **CUSTOMER INFORMATION + NEW**



- Input **Customer** name in **Customer** field

IMPORTANT: To enter address – first select **EDIT** – fill out as much customer info as possible*. Scroll down to **phone** tab and input email address/tel.



***Activate Reports use line counting to populate their templates. They will not work unless the data is entered in this format.**

Contd/...

Entering a new customer contd - 2/2

Additional Fields:

	Currency	USD	<i>Always USD</i>
	Type		<i>Stays blank</i>
Copy	Branch	Global Airparts Inc	<i>Always GAP</i>
Map	Salesperson		<i>Select from menu</i>
Edit	Reference		
	Reference 2		
	Alt Customer ID		

- NEXT: When you have input all the **customer contact** data – ignore all of the fields below except for **CREDIT** – in **Terms** tab set to **PREPAID** for **NEW CUSTOMER**.

Click 'Credit' – 'Terms' directly under

Customer name		USD	<input type="checkbox"/> Job
Customer:	Ship To	Invoices	Sales Credit Orders
Company	sarah de klein	Currency	USD
Contact	Mrs.		Type

Alerts	Dashboard	Activity	Review	Scheduling	Customer
New	Edit	Save	View Order	Price Check	
Customer name		USD			
Customer:	Ship To	Invoices	Sales	Credit	Orders
Company	sarah de klein				

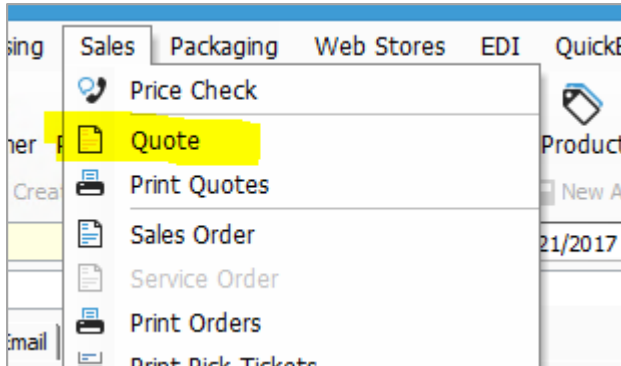
- Then Save!

Next step – Prepare Quote (Page 5)

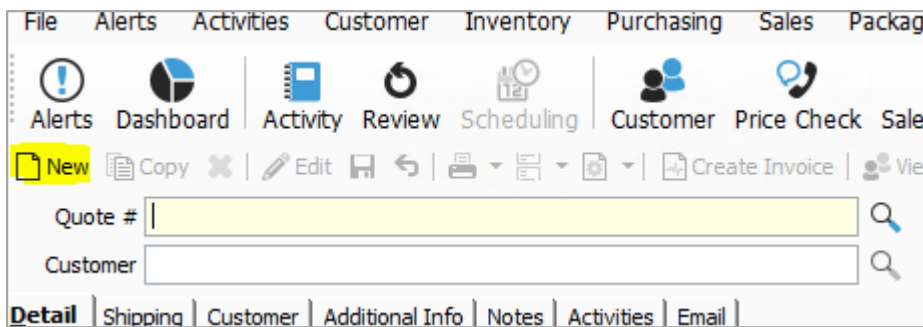
Rev. June 27, 2017

PREPARE QUOTE

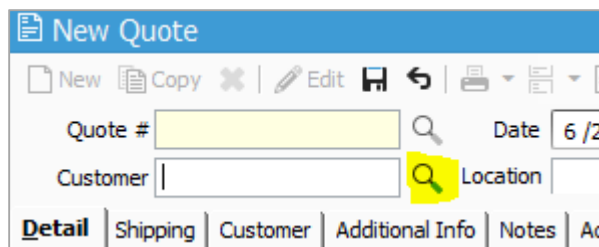
- Select **SALES**, then **QUOTE** from menu bar on top.



- Select **NEW** in the Quote box



- Select magnifying glass to search for customer



- Select customer.

Contd/...

Prepare quote contd - 2/4

- Next Identify and Pick and the part. Select **Product ID field**.

Quote #

Customer

Detail | Shipping | Customer | Additional Info | Notes | Activities | Email |

Billing Address

Aeromec S.A.
Aerodromo Municipal de Cascais - Hanger 6
Sao Domingos de Rana
2785-632
Portugal

Terms Branch

Type	Product ID
Description	
*	

- This will highlight the description data field. **Click on this field** and a small box like this will appear in that field.

	W/H	QU
		Spec
	<input type="button" value="..."/>	

- Click on this to find the part & select it.

Contd/...

Prepare quote contd – 3/4

- Select required Warehouse (W/H) from the menu by clicking on the warehouse that is visible. A dropdown menu will appear.

W/H	Quantity	U/M	Pr Cd	Price	U/M	%	Tax	Amt [USD]
	Special Instructions			Reference			Class	
GAP	1	ea	*	0.00	ea		E	0.00
							Parts	

Per diagram above as follows:

- Click on **Quantity** and the data field is highlighted. Enter # value.
- Click on **Price** field & enter value.
- Tax Class: GST is applicable for Canada.
- Lead time – this is in **Special Instructions** (under Quantity). Click on this and enter **Stock** if in stock.
- Special instructions field (bottom left of page under comment) this is for extra data, e.g. **Exchange information, handling etc.**
- Next – complete as much **additional information**, e.g. quote source as possible

Quote #

Customer

Detail | Shipping | Customer | **Additional Info** | Notes | Activities | Email

Billing Address

Aero Asahi Corp.
Tokyo Helipoint 4-7-41 Shinkiba Koto-ku
Tokyo
Japan
136-0082

Terms Branch

Prepare quote contd – 4/4

Customer: Aero Asahi Location: 1

Navigation: Home | Shipping | Customer | **Additional Info** | Notes | Activities | Email

Origin: Custom

Web Order #:

EDI Store #:

Country of Origin:

Dimensions:

Net Weight:

Gross Weight:

Import TaxID #:

Salesperson: **TM**

Sale Terms:

Freight Forwarder and Address:

HS Code:

#Packages:

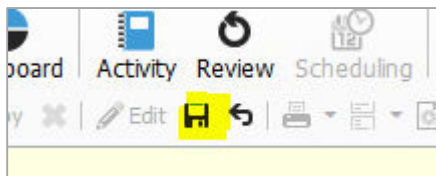
Cond:

Shipping from:

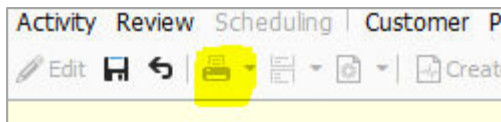
Quote Source:

Reference: Ref 2: Job:

When complete – select **SAVE** at top of page



➤ The quote can then be **PRINTED** or **EMAILED** to the customer once saved*.



*Contact details for the customer will appear for this **provided the customer details have been input correctly.**

- End -