



## HP PC - Quotation Builder

HP PC Quotation Builder has been developed to help you rapidly calculate quotation figures with up-to-date product and pricing information.

This tool forms part of [HP PC Electronic Sales Tools](#).

Prices contained in this tool are local currency list prices, valid for one month.

To get more information on how to use Quotation Builder, click on any underlined topic:

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## What is Quotation Builder ?

The Quotation Builder screen is split into three areas:

- header with general information: customer name, quotation date, customer contact name, HP contact name.
- body with rows including product number, description, quantity, prices and discounts
- footer with totals for list price, customer price and dealer margin, number of parts in quotation and average discounts plus pricing month and local currency.

You can have up to 50 rows in any quotation.

Reseller information can be hidden or displayed as desired using the **Prices Show Reseller** menu or by clicking on the **Reseller...** button.

When reseller information is displayed two additional columns appear:

- **Resell. Disc. %:** is the discount percentage agreed by HP for the reseller
- **Reseller Net Margin:** is the net margin for the reseller after customer discount.

## Create a quotation

Use **File New** menu to ensure that any previous information has been cleared.

Then begin to enter data into the header fields. None of these fields are mandatory.

Tab and BackTab keys, ENTER and arrow keys allow field-to-field navigation.

There are two ways to enter a product into the quotation:

- The user can enter a correct HP P/N. If P/N exists in HP PC pricing file then description and local price are automatically displayed. If P/N doesn't exist, the user must provide description and local price him self.
- The user can retrieve prices from the price lookup window by dragging a row from it and dropping it anywhere on the quotation grid. P/N, description et unit price are now displayed on the quotation grid.

The user should then enter quantity and discounts - the system will automatically calculate row and column totals.

See also :

[Lookup price](#)

[Modify a quotation](#)

[Save a quotation](#)

## Load an existing quotation

Use **File Open** menu to load an existing quotation.

All quotation files have the extension .QUO, but the system will only load those .QUO files which are in fact quotation files.

When loading an existing quotation, the system checks to see if current pricing month matches with quotation pricing month. If the quotation was created in a previous pricing month the user will be asked if he wants to update the quotation with current prices.

If the user replies No, the system will not accept any changes to the quotation, and you can only print or copy it to clipboard. All area are frozen in their current state.

If the user replies Yes, the system will update the quotation with new pricing and allow the user to make any modifications desired. Pay attention that if a Product-No is not found in the price list, its price is not updated.

## **Modify a quotation**

At any time the user can change anything in a quotation. Changes to prices, quantities and discounts will automatically be reflected in the totals (as in a spreadsheet).

Computed columns cannot be overwritten by the user.

The Edit menu allows the possibility to clear/delete/insert rows.

## Lookup price

HPPC price list can be displayed by either: clicking on the **Prices...** button or selecting **Prices Show Prices** menu.

The list of HP PC products is displayed in a window with part description and local currency prices. The user can either browse the list using the scroll bar, or look up a specific product by entering any character string that might be contained in the P/N or description and pressing **Find**, **Next** or **Previous** buttons.

The window title shows the pricing month, country name and currency code.

The user can then drag and drop any selected product to the quotation grid, so it will be added at the end of the current quotation.

You can resize window to change the number of product rows displayed in the list, keeping it to a minimum of 4 rows.

See also

[Create a quotation](#)

## **Print a quotation**

Use **File Print** menu to print current quotation to your printer defined in Windows.

Quotation is printed as seen on screen, using Windows internal true type fonts on any printer configured for Windows.

Quotation for a large number of rows, is printed on several pages.

## **Copy a quotation**

If you need to re-use data in quotation in an other Windows software package you can use **Edit Copy** menu to copy current quotation data into the Windows clipboard, then go to your favorite package, either a word processor or a spreadsheet and paste data onto it by using its own paste menu.

Data coming from Quotation Tool include labels and are separated by tabs.



## **Save a quotation**

Use **F**ile **S**ave or **F**ile **S**ave **a**s... menus to save current quotation, and supply file name and directory in the dialog box.

The system automatically gives the extension .QUO to the file.

## **Exit Quotation Builder**

Use **F**ile **E**xit menu to exit application.

If the current quotation has never been saved, the user will be asked if he wants to save it.

## Menus structure

### File

|            |                                |
|------------|--------------------------------|
| New        | Create a new quotation         |
| Open       | Open an existing quotation     |
| Save       | Save current quotation         |
| Save As... | Save in another quotation file |
| Print      | Print current quotation        |
| Exit       | Exit application               |

### Edit

|            |  |
|------------|--|
| Copy       | Copy current quotation into Windows clipboard      |
| Clear row  | Clear current row in quotation                     |
| Insert row | Insert a new row in quotation                      |
| Delete row | Delete current row in quotation after confirmation |

### Prices

|                       |   |
|-----------------------|---|
| Show prices           | Display/hide the prices windows                             |
| Show reseller         | Display/hide reseller columns                               |
| Resellers discount... | Maintain resellers discount rates (not currently available) |

### Help

|            |  |
|------------|--|
| Content... | Show help content                            |
| About...   | Display version number and copyright mention |

## SUPPORT

If you have any comments on or problems with running this program, please contact your normal HP local support.

## **HP PC Electronic Sales Tools**

HP PC Electronic Sales Tools for Windows contains three applications:

- Product and Pricing Browser      Contains product information on all HP PC products (PCs, monitors, servers, networking products, handhelds) with links to local currency pricing
- Quotation Builder                  Allows building of a quotation on all above products incorporating customer and reseller discounts
- Price Lookup                         Price list in local currency (also accessible within the other two applications)

**HP PC Electronic Sales Tools has been developed by Executive Systems**

## **Price Lookup Window**

Supplementary window with pricing information displayed using **Prices Show Prices** menu or **Prices...** button.

**Quotation Grid**

Calculation area holding product and pricing information.



